

Supported and Specialist Housing and Accommodation Needs Assessment

For Essex County Council

Final version

4th August 2025

Contents

Executive summary.....	5
1. Introduction.....	8
Context.....	8
Purpose of the research	9
Structure of the research report.....	10
Methodology and terminology	11
2. Summary of findings	17
3. People with a learning disability and/or people with learning disability who are Autistic ...	49
Introduction.....	49
Baseline population and population projections	50
Where people with learning disability and/or people with learning disability who are Autistic are living.....	55
Estimated need for specialist and supported accommodation for people with learning disability and/or people with learning disability who are Autistic who draw on adult social care from Essex County Council by 2039.....	58
4. Autistic people.....	77
Introduction.....	77
Population of autistic people in Essex	77
Use of housing support and other support services	78
Estimated need for housing and specialist/supported accommodation for autistic people by 2039	79
5. Vulnerable young people and Children in Care	81
Introduction.....	81
Need for supported housing that is designated for young people	81
Context: Baseline population and projections	82
Current supply of supported housing for young people.....	84
The type of supported accommodation needed: Local context and stakeholder insights	86
Estimated future need for supported housing and move-on housing	87
Children in Care who require a residential placement.....	94
Context.....	94
Current use of residential home provision for children.....	95

The type of supported accommodation needed: Local policy and stakeholder insights..	96
Estimated future need for residential provision for children	96
6. People with mental health needs.....	98
Introduction.....	98
Baseline population and population projections	98
Where people with mental health needs are living.....	101
Local policy context and Essex County Council commissioner perspectives.....	106
Estimated need for specialist/supported accommodation by 2039.....	107
7. People with physical disabilities	132
Introduction.....	132
Baseline population of people with physical disabilities	134
Estimated need for fully wheelchair accessible housing to 2044.....	137
Need for wheelchair accessible homes: Contextual evidence.....	145
Baseline population and population projections	147
Where people with physical disabilities and/or sensory impairment needs are living	149
Local policy context	151
Estimated need for specialist/supported accommodation for people with physical disabilities and/or sensory impairments	151
8. Victims and survivors of domestic abuse	169
Introduction.....	169
Baseline population and projections	169
Current provision of safe accommodation (March 2025)	175
The mix and range of accommodation needed to meet victim/survivor's needs: Council perspectives and policy intentions	177
Estimated need for accommodation that safely supports victims and survivors of domestic abuse by 2039	178
Practice examples from other local authorities and potential benefits of accommodating perpetrators.....	181
9. Older people.....	184
Introduction.....	184
Baseline population and population projections	185
Current supply of specialist housing for older people	191
Local policy context	197

Estimated need for retirement/sheltered housing and extra care housing	198
Supply of care homes in Essex	211
Estimated future care home capacity need in Essex.....	214
10. People with support needs	229
Introduction.....	229
Approach.....	229
Application to Essex district, borough and city councils	231
11. Prevention.....	247
Introduction.....	247
Early help services.....	247
Technology: care enabled technology and assistive technology	249
Home adaptations, including through the use of Disabled Facilities Grants (DFGs)	249
Public health funded supported housing and floating support services.....	256
12. Providers of Supported and Specialist Housing and Accommodation	257
Annexe 1. Demographic evidence	260
Annexe 2 Long Term Housing Requirements in Emerging Plans	266
Annexe 3 Glossary	268

Acknowledgements

The assessment of need for supported and specialist housing and accommodation in Essex was produced with guidance and expert advice from staff from Essex County Council, including from Adult Social Care, Children's Services, Housing Growth and Planning and Public Health, and from staff from the District, Borough and City Councils in Essex including from Planning and Housing teams.

The assessment was produced with input from the Integrated Care Boards in Essex, housing providers, and care and support providers.

The assessment was directly produced by the following team:

Essex County Council:

- Lead: Dr. Theonie Woodley
- Data and analytics: David Hagan

Housing Learning & Improvement Network:

- Lois Beech
- Cicily Biju
- Ian Copeman

Executive summary

The purpose of this research is to provide an evidence base that provides estimates of future need for supported and specialist housing and accommodation for the administrative area of Essex County Council. It does not include the unitary authorities of Southend-on-Sea and Thurrock.

The assessment covers population groups who draw on adult social care support funded by Essex County Council and others with lower-level needs who may not draw on adult social care from Essex County Council but who have support needs that affect their ability to maintain their housing and/or accommodation.

A range of sources of data and evidence have been used as part of the methodology including:

- Demographic data and projections produced by the Office for National Statistics and data from the Department of Health and Social Care, Department for Education, and Ministry of Housing Communities and Local Government
- Data produced by Essex County Council in relation to the size and characteristics of many of the population groups listed in the table below
- Data produced by the 12 Essex district, borough and city councils
- Expertise and insights from a wide range of stakeholders

The estimates of the need for supported and specialist housing and accommodation are produced in five-year intervals from a base year of 2024. In general, the larger the size of the population groups the longer the time period into the future the estimates of need for supported and specialist housing and accommodation cover. For example, estimates of need for specialised and supported housing for older people are estimated to 2044 whereas estimates of need for short term supported housing for vulnerable young people are estimated to 2029.

The table below shows estimated need for supported and specialist housing and accommodation for the population groups covered by this research in Essex over the period to 2044.

These estimates are further disaggregated by the 12 Essex district, borough and city council areas and by Essex quadrants.

It is recommended that these estimates are reviewed and refreshed at least every 5 years. However, the evidence base used to produce these estimates of need for supported and specialist housing and accommodation is available using Power BI tools so can be amended as often as is necessary.

Estimated need for supported and specialist housing and accommodation for the population groups covered by this research in Essex over the period to 2044 (units/dwellings)

Population groups	2029	2034	2039	2044
People with learning disability/people with learning disability who are Autistic				
Supported housing	107	211	319	-
Shared Lives* accommodation	27	56	87	-
Vulnerable young people including care leavers				
Supported housing	77	-	-	-
Move on housing**	128	-	-	-
Children in Care who need residential care				
Number of residential care placements required	200	-	-	-
People with mental health needs				
Supported housing	35	70	105	-
Move on housing**	90	-	-	-
People with a physical/sensory disability, including wheelchair users and people with other long-term conditions				
Wheelchair accessible housing ¹	2,109	2,228	2,315	2,416
Supported housing	45	90	135	-
Victims, survivors and perpetrators of domestic abuse				
Safe accommodation	68	81	95	-
Older people	-	-	-	-
Retirement/sheltered housing	4,941	8,254	11,531	14,690
Extra care housing***	3,411	5,165	6,900	8,573
Residential care home (beds)	23	1,072	1,357	1,625
Nursing care home (beds)	814	1,805	2,532	3,329
People with lower-level needs who may not draw on adult social care from Essex County Council but have support needs that affect their housing and/or accommodation				
Supported housing	1,039	1,072	1,096	-

Estimated need is non-cumulative.

* Shared Lives. This is not new provision/new build but the number of people who require host families to support them in the host families' home

** Move on housing. This refers to the estimated need for general needs housing (in the social housing sector and private sector) that people will need when they move on from shorter term supported housing. Estimates are shown as the annual requirement at the specified time period. The need for move-on housing is not modelled beyond 2029 as need beyond this timeframe will depend on operational factors such as length of stay in supported housing as well as whether the estimated need for future supported housing is met.

*** Extra care housing. Essex County Council commissioned extra care is also for adults with a disability, mental health need both over and under the age of 55 where extra care is suitable to meet their needs

¹ https://www.architecture.com/knowledge-and-resources/knowledge-landing-page/accessible-housing-in-england?srsltid=AfmBOop1hUIFx8-0f60zU3AUIEULGCP2dJxpubh7EljyGI554CJzu_V

The evidence base produced showing estimated need for supported and specialist housing and accommodation is designed to enable the current local authorities in Essex and future unitary local authorities and future Greater Essex Mayor to produce the following:

- Commissioning intentions for supported and specialist housing and accommodation
- Market position statements, for example, in relation to housing and for supported and specialist housing and accommodation for older people or to cover the supported and specialist housing and accommodation requirements of working age adults with Care Act eligible needs
- Other local housing plans and strategies, for example, identifying the potential need for supported and specialist housing and accommodation that can be delivered and accommodated in the proposed new towns/garden villages in Essex
- Supplementary Planning Documents, local housing need assessments, and other planning guidance for housing developers in relation to, for example, the proportion of affordable homes that could potentially be delivered as supported and specialised housing and accommodation

The evidence produced showing estimated need for supported and specialist housing and accommodation is intended to provide a part of the evidence base for the next iteration of Local Plans, and future Unitary Local Plans and the Spatial Development Strategy to be produced by the Greater Essex Mayor.

The evidence of the need for supported and specialist housing and accommodation provides a baseline for both the current local authorities in Essex and the future unitary local authorities in Essex to meet statutory responsibilities placed on local authorities under Supported Housing (Regulatory Oversight) Act (2023)².

A key challenge in addressing the identified estimated need for a range of supported and specialist housing and accommodation is developing additional supply of affordable housing, particularly general needs social housing at social and affordable rents.

The evidence of estimated need for supported and specialist housing and accommodation highlights the need for supported housing for a range of people who have low level support needs or who are unlikely to have Care Act eligible needs, but may need support to maintain a tenancy, for example from a floating housing support service.

Proposals for Local Government Reorganisation in Greater Essex are currently being prepared with the new unitary local authorities planned to be in place by 2028. To be able to use this evidence fully by any future unitary local authorities in Essex and the future Greater Essex Mayor, it would be necessary to undertake equivalent research for Southend-on-Sea and Thurrock.

² <https://www.legislation.gov.uk/ukpga/2023/26>

1. Introduction

Context

1.01 Essex is one of the largest two-tier authorities in England with a population of 1.5 million residents living in urban, rural and coastal communities. There are 12 district, borough and city councils in the Essex County Council geographic footprint.

1.02 Essex has an older population than the England average with the fastest levels of population growth being amongst the 70-74 years age group which has grown by 44% over the past decade and nearly twice as fast as the working age population. Approximately 21% of the Essex population (323,138 people) are over the age of 65, about 21,000 have a learning disability, and a further 12,000 have autism³.

1.03 The percentage of the Essex population living in the 20% most deprived neighbourhoods in England has doubled resulting in Essex County Council prioritising the improvement of physical and mental health and wellbeing and living conditions (housing is one of the determinants of health) to support long-term independence and reduce health inequalities⁴.

1.04 The demand for adult social care has been growing each year. At any time, Essex County Council is supporting 8,600 older people (65+), 3,800 adults with learning disabilities and autism (18+), 2,000 with physical and sensory impairments (18+) and 1,000 adults with mental health needs (18+). In relation to children and young people, as of December 2024, there were 1,131 Children in Care in Essex. Forecasts show that numbers may rise to 1,170 by March 2026. There has been an increase in the number of 17–21-year-old care leavers of 17% over the period from 2020 to 2024. The Essex County Council Adult Social Care Business Plan 2024-30⁵ sets out three priority areas of focus:

- develop community-based support and early help
- shape the care and support offer for Essex residents and
- build operational resilience and excellence

1.05 The outcomes it seeks to achieve include maximising independence and wellbeing, giving residents choice and control over health and care, access to a place called home, and helping people free themselves of neglect and abuse whilst gaining a positive experience of social care through a community-based delivery model which is preventative and localised.

1.06 In the summer of 2023 Essex County Council started compiling its supported and specialist accommodation strategy which will be sitting beneath the Essex County Council Housing Strategy. It outlines ambitions and intentions around housing and

³ Essex JSNA <https://data.essex.gov.uk/jsna-home/>

⁴ Ibid

⁵ <https://www.essex.gov.uk/sites/default/files/2024-05/ASC%20Business%20Plan%202024%20to%202030%20%28summary%29.pdf>

accommodation to contribute to the Essex County Council Adult Social Care vision to enable people to live life to the fullest. The strategy aspires to deliver against the following aims:

- New homes are designed for residents to live independent and healthy lives
- Homes are adapted and digital technologies adopted to support residents to live independently
- People can access high quality specialist, supported and safe accommodation that meets their needs and maximises their independence

Purpose of the research

1.07 The purpose of this research is to provide an evidence base that produces estimates of future need for supported and specialist housing and accommodation for the population groups listed below.

1.08 The assessment covers population groups who draw on adult social care support funded by Essex County Council and others with lower-level needs who may not draw on adult social care from Essex County Council but who have support needs that affect their housing and/or accommodation. This assessment covers the administrative area of Essex County Council, which includes the following district, borough and city councils: Basildon, Braintree, Brentwood, Castle Point, Chelmsford, Colchester, Epping Forest, Harlow, Maldon, Rochford, Tendring, and Uttlesford. It does not cover the unitary authorities of Southend-on-Sea and Thurrock.

1.09 It covers the following population groups:

- People with a learning disability, including young people with learning disability/autism going through transition to adult social care (who draw on adult social care support funded by Essex County Council)
- Autistic people (including people who draw on adult social care support funded by Essex County Council and people who do not)
- Vulnerable young people including care leavers (including young people receiving support from Essex County Council Children's Services)
- Children in Care who need residential care (children receiving support from Essex County Council Children's Services)
- People with mental health needs (who draw on adult social care support funded by Essex County Council)
- People with a physical/sensory disability, including wheelchair users and people with other long-term conditions (including people who draw on adult social care support funded by Essex County Council and people who do not)
- Victims, survivors and perpetrators of domestic abuse

- Older people (65+), including older people who draw on adult social care support funded by Essex County Council and people who do not
- People with lower-level needs who may not draw on adult social care from Essex County Council but have support needs that affect their housing and/or accommodation

1.10 A summary of the estimated need for supported and specialist housing and accommodation for these population groups is shown at table 1.

1.11 A detailed assessment of the housing and accommodation needs of people who are homeless who do not have a support need/s that affects their housing or accommodation needs, is out of scope of this supported and specialist housing and accommodation assessment. However, as noted above, the assessment does include people with lower-level needs who may not draw on adult social care from Essex County Council but have support needs that affect their housing and/or accommodation, which may be a result of homelessness or risk of homelessness.

1.12 Estimates of the need for supported and specialist housing and accommodation are:

- Shown at Essex level (the Essex County Council geographic footprint covering the district, borough and city councils: Basildon, Braintree, Brentwood, Castle Point, Chelmsford, Colchester, Epping Forest, Harlow, Maldon, Rochford, Tendring, and Uttlesford)
- Disaggregated to the 12 Essex district, borough and city councils (Basildon, Braintree, Brentwood, Castle Point, Chelmsford, Colchester, Epping Forest, Harlow, Maldon, Rochford, Tendring, and Uttlesford)
- Disaggregated to quadrants in Essex containing the 12 district, borough and city Councils. (The North Essex quadrant includes Colchester and Tendring. Mid Essex includes Braintree, Chelmsford and Maldon. South Essex includes Brentwood, Basildon, Castlepoint and Rochford; West Essex includes Epping Forest, Harlow and Uttlesford)

1.13 As the data are disaggregated by district, borough and city councils, the findings will apply to any Essex Social Care Commissioning Authority that would come into existence because of planned Local Government Reorganisation. To be able to use this evidence fully by any future unitary local authorities in Essex and the future Greater Essex Mayor, it would be necessary to undertake equivalent research for Southend-on-Sea and Thurrock.

Structure of the research report

1.14 This assessment of need for supported and specialist housing and accommodation contains:

- Introduction: context, purpose of the research, methodology and terminology

- Summary of findings: The key findings in relation to the estimates of the need for supported and specialist housing and accommodation are summarised at:
 - Essex level (covering the Essex County Council geographic footprint)
 - Disaggregated by the 12 Essex district, borough and city councils
 - Disaggregated by quadrants in Essex containing the 12 district, borough and city councils
- Detail in relation to the estimates of the need for supported and specialist housing and accommodation for each population group are provided in chapters 3 to 10. Estimates of the need for supported and specialist housing and accommodation are produced in five-year intervals from a base year of 2024. In general, the larger the size of population groups listed above the longer the time period into the future the estimates of need for supported and specialist housing and accommodation cover
- Annexe 1: Supporting demographic evidence
- Annexe 2: Long Term Housing Requirements in Emerging Plans
- Annexe 3: Glossary

Methodology and terminology

Methodology

1.15 A similar methodological approach has been taken to creating the evidence base to produce estimates of future need for supported and specialist housing and accommodation for the population groups listed above. This consistent methodological approach has the following components:

- The current baseline population for each population group
- Evidence in relation to likely trends in each population group in the future
- The current supply of supported and specialist housing and accommodation for each population group
- Stakeholder expertise and insights in relation to each population group
- Evidence of the views of people with lived experience, where this is available
- Using these sources of evidence to produce estimates of likely need in the future for supported and specialist housing and accommodation for each population group

1.16 A range of sources of data and evidence have been used as part of this consistent methodological approach including:

- Demographic data and projections produced by the Office for National Statistics

- Data from the Department of Health and Social Care, Department for Education, and Ministry of Housing Communities and Local Government
- Data produced by Essex County Council in relation to the size and characteristics of many of the population groups listed above at paragraph 1.09, specifically those population groups who draw on adult social care or children's social care from Essex County Council
- Data produced by the 12 Essex district, borough and city councils in relation to the size and characteristics of some of the population groups listed above
- Expertise and insights from a wide range of stakeholders including:
 - Essex County Council Officers from adult services, children's services, public health, housing and planning
 - Essex district, borough and city council staff from housing and planning
 - NHS staff from Integrated Care Boards in Essex
 - A sample of providers of supported and specialist housing and accommodation for the population groups listed above

1.17 Whilst a consistent methodological approach has been used, given the different sizes of the population groups and their different characteristics, the most appropriate and relevant sources of evidence and data have been used to estimate the need for supported and specialist housing and accommodation. This is set out in chapters 3 to 10.

1.18 Estimates of the need for supported and specialist housing and accommodation are produced in five-year intervals from a base year of 2024. In general, the larger the size of the population groups listed above the longer the time period into the future the estimates of need for supported and specialist housing and accommodation cover. It would be prudent to update estimates at least every 5 years.

1.19 For the following population groups the need for supported and specialist housing and accommodation has been estimated until 2044:

- Older people
- People with a physical/sensory disability who are wheelchair users

1.20 For the following population groups, where the population sizes are significantly lower than for the population groups above, the need for supported and specialist housing and accommodation has been estimated until 2039:

- People with a learning disability, including young people with learning disability/autism going through transition to adult social care
- Autistic people
- People with mental health related needs

- People with a physical/sensory disability and people with other long-term conditions
- Victims, survivors and perpetrators of domestic abuse

1.21 For the following population groups the need for supported and specialist housing and accommodation has been estimated until 2029 (as the population sizes are either significantly lower than the population groups above and/or the need is for short term/temporary supported and specialist housing and accommodation):

- Care leavers, including young people with emotional/behavioural difficulties
- Children in Care who need residential care

1.22 Estimates of the need for supported and specialist housing and accommodation are:

- Shown at Essex level (covering the Essex County Council geographic footprint)
- Disaggregated to the 12 Essex district, borough and city councils
- Disaggregated to quadrants in Essex covering the 12 district, borough and city councils

1.23 Estimates of need for supported and specialist housing and accommodation are provided either as a specific number or as an approximate number. In practice estimates of need for supported and specialist housing and accommodation should be treated as a guide, and it is prudent to consider that actual need may be in an approximate range based on the estimates provided in this assessment.

1.24 It is important to recognise that many of the District, Borough and City Councils in Essex have previously commissioned Strategic Housing Market Assessments and similar assessments of need for housing that have contained estimates of future need for some types of supported and specialist housing and accommodation, particularly in relation to specialist housing and accommodation for older people.

1.25 These previous assessments have been based on a range of methodologies and evidence. It is anticipated that, as this assessment of need for supported and specialist housing and accommodation is the most recent version in Essex using the most up to date evidence available, it will be used by the District, Borough and City Councils as well as Essex County Council and their successor unitary local authorities in preference to earlier assessments of need for supported and specialist housing and accommodation.

1.26 However, decisions in relation to which source of evidence of need for supported and specialist housing and accommodation will ultimately be taken by District, Borough and City Councils and their successor unitary local authorities should be based on their local circumstances.

Terminology and definitions

1.27 This assessment uses the term *supported and specialist housing and accommodation* to refer to a range of types of supported housing that are used and needed by the population groups covered by this assessment.

1.28 The chapters that cover each population group provide further detail about the types of supported and specialist housing and accommodation that are used and needed by each population group.

1.29 In practice, supported housing includes both schemes that offer long term accommodation where individuals can receive care and/or support, and short term accommodation that provide housing for people in urgent need who, without sufficient on-site support, would be unable to manage in other types of housing.

1.30 The National Planning Policy Framework⁶ (2024) at paragraph 63 states:

Within this context of establishing need, the size, type and tenure of housing needed for different groups in the community should be assessed and reflected in planning policies. These groups should include (but are not limited to) those who require affordable housing (including Social Rent); families with children; looked after children; older people (including those who require retirement housing, housing-with-care and care homes); students; people with disabilities; service families; travellers; people who rent their homes and people wishing to commission or build their own homes.

1.31 This assessment meets these requirements as follows:

- Chapter 5 covers the supported housing and housing needs of Children in Care and care leavers
- Chapter 9 covers the specialist housing and accommodation needs of older people including retirement/sheltered housing, extra care housing and care homes
- Chapters 3, 6 and 7 cover the supported housing and housing needs of people with disabilities (learning disability, physical disability, and mental health needs)

1.32 Essex County Council has produced a Housing with Care Planning Note that defines Essex County Council's areas of responsibility and provides further definitions of types of supported and specialist housing and accommodation and uses the term Supported and Specialist Housing (SSH) to describe these.

1.33 SSH means homes which are specifically designed and or designated for occupation by residents who benefit from accommodation-based support. SSH provision takes several different forms, responding to different levels of support need, and includes extra care housing schemes (also known as independent living or assisted living), and residential care homes (including nursing homes). Often such housing schemes are restricted to adults aged 55 and over. Specialist provision also includes supported housing schemes designed for, and restricted to, people with learning disabilities, physical and/or sensory impairments, support needs related to mental health, and

⁶https://assets.publishing.service.gov.uk/media/67aafe8f3b41f783cca46251/NPPF_December_2024.pdf

complex needs that often require specialist support. Residents within specialist provision include adults of all ages.

1.34 The UK Government has defined supported housing in the Supported Housing (Regulatory Oversight) Act (2023). The Act uses the current definition of supported housing that is used as part of the Housing Benefit regulations in relation to 'specified accommodation'. The definition used in the Act is:

(1) *In this Act "supported exempt accommodation" means—*

- (a) *accommodation within subsection (2),*
- (b) *managed properties in England,*
- (c) *refuges in England, or*
- (d) *local authority hostels in England.*

(2) *The accommodation within this subsection is accommodation in England—*

(a) *which is a resettlement place provided by persons to whom the Secretary of State has given assistance by way of grant pursuant to section 30 of the Jobseekers Act 1995 (grants for resettlement places), or*

(b) *which is provided by—*

- (i) *a non-metropolitan county council in England,*
- (ii) *a housing association,*
- (iii) *a registered charity, or*
- (iv) *a voluntary organisation,*

where that body, or a person acting on its behalf, also provides a person resident in the accommodation with care, support or supervision.

(3) *A "managed property" is accommodation—*

- (a) *which is provided by a relevant body,*
- (b) *into which a person has been admitted in order to meet a need for care, support or supervision, and*
- (c) *where that person receives care, support or supervision.*

(4) *A "refuge" is accommodation which—*

- (a) *is provided by a relevant authority or a relevant body to a person because the person has left their home as a result of domestic violence, and*

(b) consists of a building, or part of a building, which is used wholly or mainly for the non-permanent accommodation of persons who have left their homes as a result of domestic violence.

(5)A "local authority hostel" is accommodation—

(a) which would be a hostel within the meaning given by paragraph 29(10) of Schedule 4 to the Universal Credit Regulations 2013 ([S.I. 2013/376](#)) (renters excepted from shared accommodation) but for it being owned or managed by a relevant authority, and

(b) where a person resident in the accommodation receives care, support or supervision.

1.35 Within the context of this assessment, supported and specialised housing and accommodation for the following population groups is likely to fall within the definition of 'supported exempt accommodation':

- People with a learning disability, including young people with learning disability/autism going through transition to adult social care
- Vulnerable young people including care leavers
- People with mental health needs
- Victims, survivors and perpetrators of domestic abuse
- Older people (in relation to extra care housing)

1.36 Some, but not all, supported and specialised housing and accommodation for the following population groups is likely to fall within the definition of 'supported exempt accommodation':

- People with a physical/sensory disability, including wheelchair users and people with other long-term conditions
- Autistic people
- Older people (typically sheltered housing and retirement housing)

1.37 The following population group is outside the definition of 'supported exempt accommodation' (because they are under 18 years).

- Children in Care who need residential care

2. Summary of findings

2.01 The key findings in relation to the estimates of the need for supported and specialist housing and accommodation are summarised at:

- Essex level (covering the Essex County Council geographic footprint)
- Disaggregated by the 12 Essex district, borough and city councils
- Disaggregated by quadrants in Essex containing the 12 district, borough and city councils

2.02 Further detail in relation to the estimates of the need for supported and specialist housing and accommodation for each population group are provided in chapters 3 to 10.

Essex level summary of estimated need for supported and specialist housing and accommodation

2.03 The table below shows the estimated need for supported and specialist housing and accommodation for the population groups covered by this research in Essex over the period to 2044.

2.04 As set out in the previous section, estimates of the need for supported and specialist housing and accommodation are produced in five-year intervals from a base year of 2024. In general, the larger the size of the population groups listed above the longer the time period into the future the estimates of need for supported and specialist housing and accommodation cover (a 'dash' in table 1 indicates that estimated need has not been calculated for this time period, based on the explanation below), specifically:

- For the following population groups the need for supported and specialist housing and accommodation has been estimated until 2044:
 - Older people
 - People with a physical/sensory disability who are wheelchair users
- For the following population groups, where the population sizes are significantly lower than for the population groups above, the need for supported and specialist housing and accommodation has been estimated until 2039:
 - People with a learning disability, including young people with learning disability/autism going through transition to adult social care
 - Autistic people
 - People with mental health needs
 - People with a physical/sensory disability and people with other long-term conditions
 - Victims, survivors and perpetrators of domestic abuse

- For the following population groups the need for supported and specialist housing and accommodation has been estimated until 2029 (as the population sizes are either significantly lower than the population groups above and/or the need is for short term/temporary supported and specialist housing and accommodation):
 - Care leavers, including young people with emotional/behavioural difficulties
 - Children in Care who need residential care

Table 1. Estimated need for supported and specialist housing and accommodation for the population groups covered by this research in Essex over the period to 2044 (units/dwellings)

Population groups	2029	2034	2039	2044
People with learning disability/people with learning disability who are Autistic				
Supported housing	107	211	319	-
Shared Lives* accommodation	27	56	87	-
Vulnerable young people including care leavers				
Supported housing	77	-	-	-
Move on housing**	128	-	-	-
Children in Care who need residential care				
Number of residential care placements required	200	-	-	-
People with mental health needs				
Supported housing	35	70	105	-
Move on housing**	90	-	-	-
People with a physical/sensory disability, including wheelchair users and people with other long-term conditions				
Wheelchair accessible housing ⁷	2,109	2,228	2,315	2,416
Supported housing	45	90	135	-
Victims, survivors and perpetrators of domestic abuse				
Safe accommodation	68	81	95	-
Older people				
Retirement/sheltered housing	4,941	8,254	11,531	14,690
Market housing	3,813	5,652	7,893	10,052
Affordable/social housing	1,128	2,602	3,638	4,637
Extra care housing***	3,411	5,165	6,900	8,573
Market housing	2,277	3,265	4,365	5,424
Affordable/social housing	1,134	1,900	2,536	3,148
Residential care home (beds)	23	1,072	1,357	1,625
Nursing care home (beds)	814	1,805	2,532	3,329
People with lower-level needs who may not draw on adult social care from Essex County Council but have support needs that affect their housing and/or accommodation				
Supported housing	1,039	1,072	1,096	-

Estimated need is non-cumulative. Figures may not sum exactly due to rounding.

N.B: The totals for individual Essex districts will not sum to the overall Essex figure for learning disability move-on housing requirements, as the district level estimate also includes out-of-county placements and demand not allocated to a specific district.

* Shared Lives. This is not new provision/new build but the number of people who require host families to support them in the host families' home

** Move on housing. This refers to the estimated need for general needs housing (in the social housing sector and private sector) that people will need when they move on from shorter term supported housing. Estimates are shown

⁷ https://www.architecture.com/knowledge-and-resources/knowledge-landing-page/accessible-housing-in-england?srsltid=AfmBOop1hUIFx8-0f60zU3AUIEULGCP2dJxpubh7EljyGI554CJzu_V

as the annual requirement at the specified time period. The need for move-on housing is not modelled beyond 2029 as need beyond this timeframe will depend on operational factors such as length of stay in supported housing as well as whether the estimated need for future supported housing is met.

*** Extra care housing. Essex County Council commissioned extra care is also for adults with a disability, mental health need both over and under the age of 55 where extra care is suitable to meet their needs

2.05 The estimated need for supported and specialist housing and accommodation disaggregated for the 12 Essex district, borough and city councils is set out below.

Implications and considerations

2.06 The implications and considerations of the estimates of the need for supported and specialist housing and accommodation (Table 1 above) are summarised below.

Summary: Overall implications and considerations

2.07 The evidence base produced showing estimated need for supported and specialist housing and accommodation is designed to enable the current local authorities in Essex and future unitary local authorities and Mayor in Essex to produce the following:

- Commissioning intentions for supported and specialist housing and accommodation. The way in which the evidence base has been produced enables current and future local authorities to produce commissioning intentions for individual population groups or combined population groups over the current Essex County Council footprint and for each of the 12 district, borough and city council footprints
- Market position statements, for example, in relation to housing and for supported and specialist housing and accommodation for older people or to cover the supported and specialist housing and accommodation requirements of working age adults with Care Act eligible needs. The way in which the evidence base has been produced enables current and future local authorities to produce market position statements over the current Essex County Council footprint and for each of the 12 district, borough and city council footprints
- Other local housing plans and strategies, for example identifying the potential need for supported and specialist housing and accommodation that can be delivered and accommodated in the proposed new towns/garden villages in Essex; the way that supported and specialist housing and accommodation can reduce the need for care home provision (e.g. for people with learning disabilities and people with serious mental ill health); the role of additional supported housing in alleviating demand for, or the use of, temporary accommodation
- Supplementary Planning Documents, local housing need assessments, and other planning guidance for housing developers in relation to, for example, the proportion of affordable homes that could potentially be delivered as supported and specialised housing and accommodation; the number of homes that should be

delivered across all tenures designed to accommodate full time wheelchair user households

2.08 The evidence produced showing estimated need for supported and specialist housing and accommodation is intended to provide a part of the evidence base for the next iteration of Local Plans, and future Unitary Local Plans in Essex. The evidence should be a key data input to the preparation of Strategic Housing Market Assessments to inform Local Plans (and their policies) and future Local Plans of the housing needs of different groups and needs of older and disabled people, along with providing detailed responses to planning applications. The evidence produced will also help inform the Strategic Housing Market Assessment to inform the Mayor's Spatial Development Strategy. The estimated requirements for supported and specialist housing is shown as a percentage of the overall housing supply requirements in emerging plans for Essex and the 12 district, borough and city councils at Annex 2.

2.09 The evidence of the need for supported and specialist housing and accommodation provides a baseline for both the current local authorities in Essex and the future unitary local authorities in Essex to meet a number of statutory responsibilities placed on local authorities under Supported Housing (Regulatory Oversight) Act (2023)⁸, including:

- Undertaking an assessment of the supply of supported housing
- Understanding the need for supported housing
- Using this evidence as a basis for a 5-year supported housing strategy
- Using the evidence of the supply of supported and specialist housing and accommodation to undertake a more detailed analysis of local authority housing benefit records of "supported exempt accommodation" (as supported housing is defined in the Act) as the basis for a licensing system for supported housing providers and to then audit the quality of supported housing services

2.10 The supported and specialist housing and accommodation need assessment provides a basis for both the current local authorities in Essex and the future unitary local authorities in Essex to build on the existing specialised accommodation design guides (for example the Extra Care Housing design guide⁹, the Mental Health Recovery design guidance¹⁰ and the design guide for Supported Living Accommodation for Adults with Complex Needs¹¹) that have been developed by Essex County Council, by developing similar guides for other types of supported housing to influence the design and quality of the supported and specialist housing and accommodation that is required to meet identified need.

⁸ <https://www.legislation.gov.uk/ukpga/2023/26>

⁹ <https://www.essexproviderhub.org/media/hetbmbej/Essex County Council-extra-care-design-guide-2023-accessible.pdf>

¹⁰ https://www.essex.gov.uk/sites/default/files/2023-12/Design%20Guidance%20-%20Mental%20Health%20Recovery_1.pdf

¹¹ <https://www.essexproviderhub.org/media/1021a10j/essex-dg-complex-needs.pdf>

- 2.11 A key challenge in addressing the identified estimated need for a range of supported and specialist housing and accommodation is developing additional supply of affordable housing, particularly general needs social housing at social and affordable rents. This is a huge challenge generally for the local authorities in Essex in order to meet the growing demand for affordable housing from a wide range of population groups especially for the growing number of households in temporary accommodation, a large proportion of which are families; it is specifically important in relation to the functioning of short term supported housing, such as for vulnerable young people and people with serious mental ill health, who need to move on from supported housing to general needs housing.
- 2.12 To some extent these needs will be competing against each other whether for use of existing stock or new build and so there should be agreement as to how need is to be managed more widely and new supply prioritised.
- 2.13 The evidence of estimated need for supported and specialist housing and accommodation highlights the need for supported housing for a range of people who have low level support needs or who are unlikely to have Care Act eligible needs, but may need support to maintain a tenancy, for example some autistic people and some people with learning disability. In these circumstances people may benefit from a floating housing support service or accommodation based supported housing with a low level of support provided.
- 2.14 A key message from some providers of supported and specialist housing and accommodation was that there needs to be a partnership with Essex County Council, the district/borough/city council and other referrers in relation to addressing and managing voids in some supported housing, particularly in relation to the timely filling of voids.
- 2.15 It would be prudent to regularly update the supply evidence (including the type of provider) and to consider updating the data and evidence that has been used to create the estimates of need for supported and specialist housing and accommodation on a regular basis, at least every 5 years, to ensure that the estimates of need are kept up to date and to support work to produce and keep up to date a comprehensive list of the supply of supported housing in Essex (as required by the Supported Housing (Regulatory Oversight) Act (2023)).
- 2.16 Proposals for Local Government Reorganisation in Greater Essex are currently being prepared. To be able to use this evidence fully by any future unitary local authorities in Essex, it would be necessary to undertake equivalent research for Southend-on-Sea and Thurrock. These new unitary local authorities are planned to be in place by 2028.
- 2.17 In relation to people who are eligible for a care and support package from Essex County Council who are currently living in Southend-on-Sea and Thurrock:
 - There are 33 supported living placements in Southend-on-Sea and 6 supported living placements in Thurrock for people with learning disability

- There are 13 supported living placements in Southend-on-Sea and 13 supported living placements in Thurrock for people with mental health needs
- There is 1 supported living placement in Southend-on-Sea for people with physical disability and/or sensory impairment

People with a learning disability and/or people with learning disability who are autistic, including young people with learning disability/autism going through transition to adult social care

2.18 The Essex County Council Supported Living Demand Bulletin from October 2024 identified that of the 122 people with learning disability or autism seeking supported living (i.e. supported housing), 29% were people with complex support needs and 71% were people with non-complex support needs. Applying these percentages to the estimated need for supported living (supported housing) shown at Table 23, suggests that:

- Of the additional c.110 units of supported living needed by 2029, 32 are estimated to be required for people with complex support needs, 78 are estimated be required for people with non-complex support needs
- Of the additional c.220 units of supported living needed by 2034, 64 are estimated to be required for people with complex support needs, 156 are estimated be required for people with non-complex support needs
- Of the additional c.320 units of supported living needed by 2039, 93 are estimated to be required for people with complex support needs, 227 are estimated be required for people with non-complex support needs

2.19 There is a requirement to expand the capacity of the current Shared Lives scheme to recruit additional hosts to accommodate an additional c.90 people with a learning disability and/or people with learning disability who are autistic over the period to 2039.

2.20 Over the period to 2039 it is estimated that approximately 110 people with a learning disability and/or people with learning disability who are autistic will need to live in mainstream housing (most likely general needs social housing) with a package of care/support funded by Essex County Council.

2.21 The evidence indicates a need for 56 units of housing related support for people with learning disability by 2039, an increase of 15 units (compared with 2024). This is separate and in addition to the estimated additional need for supported living (supported housing). There is need for additional capacity in the North-East and West Quadrants (where there is currently no housing related support provision for people with learning disability).

2.22 To meet this identified need for supported and specialist housing and accommodation, there is likely to be a need to develop commissioning intentions that set out this evidence base to stimulate responses from housing and support providers.

2.23 Essex County Council's commissioners note that:

- Essex County Council provides regular Supported Living demand information to the market to enable them to make decisions on where to develop new services, and works closely with providers, landlords and developers on their development proposals to ensure the proposal meets local demand, are of good quality and are sustainable in the long term
- The need identified in the report will feed through to Essex County Council's regular demand information communications with the market to ensure that any areas of need or gaps are identified
- Also, in conjunction with Essex Housing, Essex County Council continues to develop a small amount of new, purpose-built Supported Living schemes; the report will also inform the planning decisions for these

Autistic people

2.24 It is likely that a majority of the estimated population of autistic people in Essex are unlikely to draw on adult social care support from Essex County Council.

2.25 It is anticipated that the majority of this population are unlikely to require supported and specialist housing and accommodation. Where autistic people with complex needs who also have learning disability do have a need for supported and specialist housing and accommodation, this need is included in table 1. Additionally, based on the evidence summarised above where autistic people may experience housing need, this may include:

- Where income is limited (including those autistic people who employment is limited by their condition), access to predominantly affordable housing to rent, i.e. social housing from a housing association or local authority to rent
- Potentially, support to access social housing, particularly in relation to using choice-based lettings systems
- In some instances, 'sensitive' lets to ensure that people are not housed in locations where they may be vulnerable to abuse and/or hate crime

2.26 In circumstances where people do not have Care Act eligible needs, some people may benefit from a floating housing support service.

Vulnerable young people

2.27 There is a need for supported housing that is designated for young people including care experienced young people (care leavers) for whom Essex County Council has corporate parenting responsibilities including Separated Migrant Children, young people aged 16-17 at risk of homelessness, vulnerable young parents and other vulnerable 18-21-year-olds.

- 2.28 Essex County Council commissions a housing related support service for young people with support needs in Essex. The commissioned housing related support service is called the 'Essex Nacro Education Support and Transition (NEST)' service.
- 2.29 The estimated additional need for supported housing at 2025/26 is 63 units. By 2029/30 the estimated additional need for supported housing is 77 units.
- 2.30 It should be noted that this estimated additional need for 77 supported housing units (in addition to the currently available 199 units of supported housing) could be met within the scope of the existing NEST contract, which has an upper capacity of 270 units (compared to the 199 units currently being provided).
- 2.31 The majority of young people leaving supported housing will require move-on housing. There is a need for 117 units of general needs housing (a mix of general needs social housing and private rented sector housing) for move on from supported housing per annum (at 2024/25) increasing to 128 units of general needs housing (by 2029/30).
- 2.32 It is a particular challenge for the housing providers delivering supported housing for young people to be able to access sufficient general needs housing, both in the social housing sector and in the private rented sector, to assist young people to move on from supported housing. This is likely to require further growth in the development of housing for social and affordable rent in Essex and in its successor unitary councils. However, social rent is currently a challenge for Registered Providers and council house building in terms of viability. Most new schemes are affordable rent (80% of the market rent) which may not be affordable for this population group.
- 2.33 Essex County Council commissioners note that the NEST contract runs until 2027 with the option to extend for up to 2 years. There is provision within the contract to increase the number of accommodation units should this be required. Essex County Council is currently working with the NEST provider to identify additional accommodation units in the areas where there are currently waiting lists for the scheme. Commissioners will continue to closely monitor referrals into the service and occupancy levels.

Children in Care who need residential care

- 2.34 There is likely to be a requirement for 200 residential placements for Children in Care by September 2029, compared to 135 residential placements in September 2024.
- 2.35 Essex County Council has a policy of proactively developing and using residential care capacity in Essex for Children in Care. Between September 2020 and September 2024, the use of out of county placements as a percentage of total placements decreased from 70% to 57%.
- 2.36 If this policy results in at least the same level of reduction in the use of out of county placements, by 2029 it is anticipated that no more than 41% of placements would be out of county, i.e. at least 59% of residential placements would be in Essex.
- 2.37 This suggests that by 2029, of a projected 200 residential placements being required, a minimum of 118 placements would be in Essex.

2.38 Table 49 gives a summary of the estimated potential need for residential placements by 2029/30 by district, based on the distribution of placements by district in September 2024.

2.39 To meet this identified need, it is suggested that that Essex County Council and its successor unitary councils will need to maintain a policy of proactively developing and using residential care capacity in Essex for Children in Care from Essex.

People with mental health needs

2.40 The intention of this assessment is to identify the need for specialist/supported and move on accommodation for people with mental health care and support needs who are eligible for mental health community-based accommodation from Essex County Council and Essex Partnership University NHS Foundation Trust

2.41 It is estimated for Essex overall that:

- An additional c.35 units of mental health specialist and supported housing and accommodation will be needed by 2029
- An additional c.70 units of mental health specialist and supported housing and accommodation will be needed by 2034
- An additional c.105 units of mental health specialist and supported housing and accommodation will be needed by 2039

2.42 Based on the geographic distribution of the current mental health supported and specialist housing and accommodation, it is assumed that in relation to the estimated need for 105 additional places by 2039:

- At least 4 additional units would be for Intensive Assessment Beds (IAB).
- At least 5 additional units would be for complex provision (supported accommodation with 24/7 onsite support)
- Provision of intensive assessment beds and complex places would be required in Mid and South Essex
- The remaining estimated need for c.95 specialist and supported housing and accommodation units would be for a mix of high support and medium/low support

2.43 Based on the assessment of need for specialist and supported housing and accommodation provision, there is an estimated annual requirement for 84 units of general needs housing per annum (typically general needs social housing), specifically to meet the needs of people moving on from the high-level support and medium/low support tiers of specialist and supported housing and accommodation.

2.44 To meet this identified need for supported and specialist housing and accommodation, there is likely to be a need to develop commissioning intentions that set out this evidence base to stimulate responses from housing and support providers.

2.45 It is a particular challenge for the housing providers delivering supported housing for people with mental illness to be able to access sufficient general needs housing, both in the social housing sector and in the private rented sector, to assist people to move on from supported housing. This is likely to require further growth in the development of housing for social and affordable rent in Essex and in its successor unitary councils.

2.46 Essex County Council commissioners note that:

- Essex County Council commissions a Mental Health Supported Accommodation provision which has mobilised in North-East, Mid and West Essex and continues to mobilise in South Essex in 2025. Essex County Council has commenced a review of mental health residential and nursing accommodation provision countywide including a review of all individuals care and support needs in provision both in and out of the county. This also includes those in high-cost placements. Reviews will inform Essex County Council's need and demand and the commissioning and procurement of an offer to meet the care and support needs of Essex residents
- Essex County Council has commissioned a transformational Mental Health Supported Accommodation pathway. As part of this work, a review of people's care and support needs was undertaken to inform Mental Health Supported Accommodation need and demand and led to the commissioning of a new Mental Health Supported Accommodation pathway. Essex County Council will use need identified in this need assessment to support commissioning intentions and category plans used to inform commissioning and procurement activity
- There are no individuals residing in Mental Health Supported Accommodation out of county. 13 individuals reside in spot purchased Mental Health Supported Accommodation in Southend on Sea and 13 individuals reside in spot purchase Mental Health Supported Accommodation in Thurrock. Work is ongoing to move people into the new Mental Health Supported Accommodation pathway commissioned. Care and support reviews are being undertaken of all individuals residing in Mental Health Residential and Nursing provision to inform need and demand and support commissioning and procurement activity. This includes 227 individuals in Essex and individuals residing out of county

People with a physical/sensory disability, including wheelchair users, and people with other long-term conditions

2.47 There is an estimated requirement for an additional 2,400 wheelchair accessible homes (M4(3) standard)¹² in Essex by 2044.

¹² https://www.architecture.com/knowledge-and-resources/knowledge-landing-page/accessible-housing-in-england?srsltid=AfmBOop1hUIFx8-0f60zU3AUIEULGCP2dJxpubh7EljyGI554CJzu_V

2.48 This is wheelchair accessible housing both for people with physical disabilities who draw on adult social care support from Essex County Council and people with physical disabilities who don't.

2.49 Approximately 910 of these wheelchair accessible homes are required by households headed by a person aged under 65, and approximately 1,500 of these wheelchair accessible homes are required by households headed by a person aged over 65.

2.50 It is estimated that approximately 34% of the need for wheelchair accessible home is for households living in social housing (in local authority or housing association homes), 58% for households who are owner-occupiers and 8% for households living in the private rented sector.

2.51 In addition to the need for fully wheelchair homes, there is estimated additional need for specialist and supported housing and accommodation for people with physical and sensory impairment (PSI) who draw on adult social care support from Essex County Council of:

- c.45 units by 2029,
- c.90 units by 2034 and
- c.135 units by 2039

2.52 Essex County Council commissioners note that currently, when an adult with PSI requires Supported Living, their allocated worker completes an Accommodation Needs Assessment (ANA) and submits it to the Specialist Accommodation Leads (SALs). The SALs review the ANA and, if deemed appropriate, schedule the worker to attend the next monthly Living Options Forum (LOF), where a decision is made regarding Supported Living provision. If the adult is not considered suitable for Supported Living, the forum will provide recommendations for alternative arrangements.

2.53 In 2020/21, the PSI Commissioning Team conducted a data analysis to quantify the number of individuals currently in Supported Living and to assess future demand. While this analysis remains valid, Essex County Council is committed to regularly reviewing the data in response to changing demand, working closely with internal colleagues and external stakeholders. At present, the PSI Commissioning Team is undertaking a review of individuals with PSI who have been placed in residential settings over recent years. The aim of this review is to identify whether some of these individuals might benefit from Supported Living as a more appropriate alternative. This analysis is expected to conclude in September 2025 and will inform the ongoing assessment of the accommodation needs of individuals with PSI.

2.54 The need for more accessible homes, specifically for wheelchair using households, will need to be met through a mix of new build homes in the social housing sector and market housing sector that are designed to be accessible to wheelchair users, as well as adaptations to existing homes. This is consistent with Essex district, borough and city councils that adopt specific targets, for example for M4(3) standard homes, and planning policies in relation to the delivery of wheelchair accessible homes.

2.55 The evidence presented in relation to the use of disabled facilities grants, indicates an increasing likely need over the next 10 to 20 years for adaptations to people's homes to make them sufficiently accessible to enable a range of people (who are not necessarily wheelchair users or eligible for social care support) to remain living in their existing homes. These adaptations are often typically level access showers, stair lifts and entrance ramps.

Victims, survivors and perpetrators of domestic abuse

2.56 The estimated need for additional accommodation that safely supports victims and survivors of domestic abuse is estimated to be 58 units in 2024/25 and 95 units by 2039/40.

2.57 This is in addition to the current supply of 95 units of safe accommodation in Essex for victims and survivors of domestic abuse.

2.58 This estimated additional need could be met through the provision of additional safe accommodation, i.e. to accommodate victims and survivors of domestic abuse.

2.59 However, it is the intention of Essex County Council to consider whether a proportion of this is provided as accommodation for perpetrators, to enable victims to safely stay in their own home.

2.60 Essex County Council commissioners note that:

- Refuge and dispersed accommodation for victims will increase in the next 5 years through the recently joint commissioned domestic abuse offer with Southend-on-Sea and Thurrock. This will provide opportunities for victims to move to areas within Greater Essex to be safe, whilst still maintaining their local connections. This offer includes developing safe accommodation for underserved groups such as young people, men, LGBTQ+, large families. The domestic abuse providers will also continue to support victims to stay in their own home where it is safe, the perpetrator does not reside, and additional security measures are in place
- To support victims to safely stay in their own home (where appropriate), we need to identify how we support perpetrators with their housing options. We will be working with partners, including domestic abuse perpetrator services, housing authorities and private landlords to deliver a perpetrator housing pilot, which will include accommodation alongside support to engage with behaviour change programmes. The pilot will be funded from the Police Fire and Crime Commissioner for Essex's perpetrator Home Office grant and will be evaluated

Older people

2.61 The estimated additional need for retirement/sheltered housing by 2034 is c.8,250 homes of which c.5,650 homes are estimated to be required as market housing and c.2,600 are estimated to be required as affordable/social housing.

- 2.62 The estimated additional need for retirement/sheltered housing by 2044 is c.14,690 homes of which c.10,050 are estimated to be required as market housing and c.4,640 are estimated to be required as affordable/social housing.
- 2.63 The estimated additional need for extra care housing by 2034 is c.5,165 homes of which c.3,265 are estimated to be required as market housing, and c.1,900 are estimated to be required as affordable/social housing.
- 2.64 The estimated additional need for extra care housing by 2044 is c.8,575 homes of which c.5,425 are estimated to be required as market housing, and c.3,150 are estimated to be required as affordable/social housing.
- 2.65 There is a requirement for additional extra care housing for social/affordable rent in all Essex Districts over the next 20 years. There is presently no provision in Maldon and Castle Point. Essex County Council's extra care housing development programme aims to provide for approximately 50% of extra care housing need over the next 5+ years. Essex County Council-commissioned extra care housing is also available to adults with a disability, mental health need, both over and under the age of 55, where extra care is suitable to meet their needs.
- 2.66 There is a need for market extra care housing with care and support provided on site 24/7 to be promoted and developed in all Essex Districts; there is relatively little available currently for older people who are seeking extra care housing for market sale or market rent.
- 2.67 There is an ongoing need for market retirement housing in all Essex Districts over the next 20 years.
- 2.68 There is a need for social/affordable sheltered housing to rent for older people. Some of this need may be met through refurbishment and upgrading of existing social/affordable 'sheltered' housing.
- 2.69 Additional care home bed capacity is required over the period to 2044, particularly nursing care bed capacity. Notably, a negligible amount of residential care beds is estimated to be needed until the 2030s, reflecting current adequacy of supply and occupancy. The focus for the care home market will increasingly be on meeting the needs of older people with higher acuity and complex care and health needs.
- 2.70 The development of supported and specialist housing and accommodation designated for older people should be seen in the context of evidence that the majority of older people either wanting to 'stay put' or to move to 'mainstream' housing to better meet their needs as they age (rather than move to supported and specialist housing and accommodation). The recent Ipsos/Housing LIN primary research¹³ with a representative sample of approximately 6,000 people aged 50+ in the UK suggests that it is necessary to consider and develop a range of responses to meet the diverse housing needs of older people including:

¹³ https://www.housinglin.org.uk/assets/Resources/Housing/Support_materials/Reports/HLIN_Ipsos-Older-Peoples-Housing-Preferences_Report.pdf

Staying put: Supporting older people to age in place in their existing homes

- Maximise access to adaptations for people to remain living in their existing homes, for older people eligible for local authority funded through Disabled Facilities Grant and other grants, as well increasing the availability of information and advice for self-funders in relation to home adaptations
- Provide practical housing-related support as well as domiciliary care to enable people to remain living in their existing homes
- Use housing related support and adaptations services to address any housing related barriers that delay hospital discharges
- Provide and strengthen local reablement service offers to support people to return to their own home after a hospital stay
- Provide and make use of social prescribing and other support services as part of the local preventative offer to sustain older people in housing settings and minimise moves to care homes
- Maximise the use of care enabling technology to support people to remain in their existing homes

New build general needs housing that better suits ageing in place

- Promote and encourage the development of new mainstream housing designed to be 'care ready' and better suited to suit ageing in place. This goes beyond housing built to M4/2 standards and is the application of some/all of the Housing our Ageing Population Panel for Innovation (HAPPI)¹⁴ design standards to new general needs homes for social/affordable rent, shared ownership and market sale
- Encourage and enable a mix of housing types: small houses, bungalows, dormer bungalows as well as flats, that are likely to be attractive to older people
- Use local authority planning policy and joint Council/NHS market position statements to encourage the development of general needs housing of all tenures that is better designed to suit the needs of older people and to better facilitate ageing in place

Making best use of existing sheltered and retirement housing

- Work with social housing providers to encourage the upgrading and refurbishment of existing sheltered housing (and with private companies that provide/manage market

¹⁴ <https://www.housinglin.org.uk/Topics/browse/Design-building/HAPPI/>

retirement housing) where feasible to extend its useful life and reduce the amount of voids by making it a more attractive housing option for older people, including consideration of:

- Some sheltered housing may be suitable for adaptation to provide accommodation for older people with significant care/support needs; this will require working closely with Registered Providers in relation to the type and scale of adaptations required
- Some sheltered housing may be suitable for use as 'step down' accommodation from hospital
- Maximise the use of care enabling technology to be available to support people living in specialist housing including sheltered/retirement housing; this may include reviewing the district councils' housing assistance policies to enable investment in assistive technology, including Disabled Facilities Grant investment

Supported housing for people with support needs (who may or may not draw on adult social care)

2.71 The estimated need for supported housing for households with support needs who may or may not draw on adult social care (for the purpose of this assessment based on households living in temporary accommodation) in Essex is projected to increase from 1,008 households in 2024/25 to 1,039 households by 2029/30, based on adult population growth projections.

2.72 The greatest future pressures are expected in Basildon, Chelmsford, Colchester, and Harlow, where needs remain consistently high.

Summary of estimated need for supported and specialist housing and accommodation for each of the 12 Essex district, borough and city councils.

2.73 The table below shows the estimated need for supported and specialist housing and accommodation for the population groups covered by this research in Essex disaggregated by the 12 Essex district, borough and city councils, over the period to 2044 (subject to the guidance in the methodology section above regarding differing time frames for estimated need for different population groups). The footnotes under table 1 apply to tables 2 – 13.

Table 2. Basildon: Estimated need for supported and specialist housing and accommodation for the population groups covered over the period to 2044 (units/dwellings)

Population groups	2029	2034	2039	2044
People with a learning disability/people with learning disability who are Autistic				
Supported housing	11	21	32	-
Shared Lives accommodation	2	5	8	-
Vulnerable young people including care leavers				
Supported housing (This figure represents the total predicted need for the relevant quadrant and is not specific to this district solely)	16	-	-	-
Move on housing (This figure represents the total predicted need for the relevant quadrant and is not specific to this district solely)	26	-	-	-
Children in Care who need residential care				
Number of residential care placements required	10	-	-	-
People with mental health needs				
Supported housing	3	6	8	-
Move on housing	5	-	-	-
People with a physical/sensory disability, including wheelchair users and people with other long-term conditions				
Wheelchair accessible housing	242	255	265	277
Supported housing	5	11	16	-
Victims, survivors and perpetrators of domestic abuse				
Safe accommodation (Estimates shown at county level)	-	-	-	-
Older people				
Retirement/sheltered housing	402	713	1,018	1,310
<i>Market housing</i>	287	448	640	823
<i>Affordable/social housing</i>	115	265	378	487
Extra care housing	330	495	656	811
<i>Market housing</i>	202	285	379	468
<i>Affordable/social housing</i>	128	209	277	343
Residential care home (beds)	63	153	173	191
Nursing care home (beds)	127	199	250	305
People with lower-level needs who may not draw on adult social care from Essex County Council but have support needs that affect their housing and/or accommodation				
Supported housing	291	300	306	-

Estimated need is non-cumulative. Figures may not sum exactly due to rounding.

Table 3. Braintree: Estimated need for supported and specialist housing and accommodation for the population groups covered over the period to 2044 (units/dwellings)

Population groups	2029	2034	2039	2044
People with a learning disability/people with learning disability who are Autistic				
Supported housing	12	24	37	-
Shared Lives accommodation	2	5	8	-
Vulnerable young people including care leavers				
Supported housing (This figure represents the total predicted need for the relevant quadrant and is not specific to this district solely)	21	-	-	-
Move on housing (This figure represents the total predicted need for the relevant quadrant and is not specific to this district solely)	35	-	-	-
Children in Care who need residential care				
Number of residential care placements required	8	-	-	-
People with mental health needs				
Supported housing	3	6	9	-
Move on housing	10	-	-	-
People with a physical/sensory disability, including wheelchair users and people with other long-term conditions				
Wheelchair accessible housing	217	229	238	248
Supported housing	5	10	16	-
Victims, survivors and perpetrators of domestic abuse				
Safe accommodation (Estimates shown at county level)	-	-	-	-
Older people				
Retirement/sheltered housing	537	885	1,230	1,559
<i>Market housing</i>	393	587	815	1,034
<i>Affordable/social housing</i>	143	298	414	525
Extra care housing	346	530	713	887
<i>Market housing</i>	218	324	436	543
<i>Affordable/social housing</i>	128	206	277	344
Residential care home (beds)	4	145	184	229
Nursing care home (beds)	64	198	297	410
People with lower-level needs who may not draw on adult social care from Essex County Council but have support needs that affect their housing and/or accommodation				
Supported housing	14	14	14	-

Estimated need is non-cumulative. Figures may not sum exactly due to rounding.

Table 4: Brentwood: Estimated need for supported and specialist housing and accommodation for the population groups covered over the period to 2044 (units/dwellings)

Population groups	2029	2034	2039	2044
People with a learning disability/people with learning disability who are Autistic				
Supported housing	4	8	13	-
Shared Lives accommodation	1	1	2	-
Vulnerable young people including care leavers				
Supported housing (This figure represents the total predicted need for the relevant quadrant and is not specific to this district solely)	22	-	-	-
Move on housing (This figure represents the total predicted need for the relevant quadrant and is not specific to this district solely)	35	-	-	-
Children in Care who need residential care				
Number of residential care placements required	3	-	-	-
People with mental health needs				
Supported housing	1	2	2	-
Move on housing	-	-	-	-
People with a physical/sensory disability, including wheelchair users and people with other long-term conditions				
Wheelchair accessible housing	107	113	118	123
Supported housing	2	4	6	-
Victims, survivors and perpetrators of domestic abuse				
Safe accommodation (Estimates shown at county level)	-	-	-	-
Older people				
Retirement/sheltered housing	239	396	548	692
<i>Market housing</i>	189	269	371	469
<i>Affordable/social housing</i>	50	128	176	223
Extra care housing	171	255	335	411
<i>Market housing</i>	118	159	210	258
<i>Affordable/social housing</i>	53	95	125	153
Residential care home (beds)	-16	64	80	90
Nursing care home (beds)	28	103	155	208
People with lower-level needs who may not draw on adult social care from Essex County Council but have support needs that affect their housing and/or accommodation				
Supported housing	12	12	12	-

Estimated need is non-cumulative. Figures may not sum exactly due to rounding.

Table 5: Castle Point: Estimated need for supported and specialist housing and accommodation for the population groups covered over the period to 2044 (units/dwellings)

Population groups	2029	2034	2039	2044
People with a learning disability/people with learning disability who are Autistic				
Supported housing	4	7	11	-
Shared Lives accommodation	1	3	4	-
Vulnerable young people including care leavers				
Supported housing (This figure represents the total predicted need for the relevant quadrant and is not specific to this district solely)	16	-	-	-
Move on housing (This figure represents the total predicted need for the relevant quadrant and is not specific to this district solely)	26	-	-	-
Children in Care who need residential care				
Number of residential care placements required	15	-	-	-
People with mental health needs				
Supported housing	2	5	7	-
Move on housing	-	-	-	-
People with a physical/sensory disability, including wheelchair users and people with other long-term conditions				
Wheelchair accessible housing	138	146	151	158
Supported housing	3	7	10	-
Victims, survivors and perpetrators of domestic abuse				
Safe accommodation (Estimates shown at county level)	-	-	-	-
Older people				
Retirement/sheltered housing	413	638	854	1,056
<i>Market housing</i>	351	485	649	802
<i>Affordable/social housing</i>	62	153	205	253
Extra care housing	253	372	487	594
<i>Market housing</i>	189	264	345	421
<i>Affordable/social housing</i>	64	109	142	173
Residential care home (beds)	66	119	127	139
Nursing care home (beds)	17	65	99	138
People with lower-level needs who may not draw on adult social care from Essex County Council but have support needs that affect their housing and/or accommodation				
Supported housing	53	54	55	-

Estimated need is non-cumulative. Figures may not sum exactly due to rounding.

Table 6: Chelmsford: Estimated need for supported and specialist housing and accommodation for the population groups covered over the period to 2044 (units/dwellings)

Population groups	2029	2034	2039	2044
People with a learning disability/people with learning disability who are Autistic				
Supported housing	13	25	38	-
Shared Lives accommodation	1	3	4	-
Vulnerable young people including care leavers				
Supported housing (This figure represents the total predicted need for the relevant quadrant and is not specific to this district solely)	21	-	-	-
Move on housing (This figure represents the total predicted need for the relevant quadrant and is not specific to this district solely)	35	-	-	-
Children in Care who need residential care				
Number of residential care placements required	13	-	-	-
People with mental health needs				
Supported housing	4	7	11	-
Move on housing	14	-	-	-
People with a physical/sensory disability, including wheelchair users and people with other long-term conditions				
Wheelchair accessible housing	247	261	272	283
Supported housing	5	10	14	-
Victims, survivors and perpetrators of domestic abuse				
Safe accommodation (Estimates shown at county level)	-	-	-	-
Older people				
Retirement/sheltered housing	561	941	1,316	1,681
<i>Market housing</i>	442	638	893	1,140
<i>Affordable/social housing</i>	119	303	424	541
Extra care housing	390	591	790	983
<i>Market housing</i>	267	370	495	616
<i>Affordable/social housing</i>	123	221	295	367
Residential care home (beds)	-79	11	33	56
Nursing care home (beds)	20	137	221	315
People with lower-level needs who may not draw on adult social care from Essex County Council but have support needs that affect their housing and/or accommodation				
Supported housing	199	206	211	-

Estimated need is non-cumulative. Figures may not sum exactly due to rounding.

Table 7: Colchester: Estimated need for supported and specialist housing and accommodation for the population groups covered over the period to 2044 (units/dwellings)

Population groups	2029	2034	2039	2044
People with a learning disability/people with learning disability who are Autistic				
Supported housing	23	45	68	-
Shared Lives accommodation	1	1	2	-
Vulnerable young people including care leavers				
Supported housing (This figure represents the total predicted need for the relevant quadrant and is not specific to this district solely)	18	-	-	-
Move on housing (This figure represents the total predicted need for the relevant quadrant and is not specific to this district solely)	32	-	-	-
Children in Care who need residential care				
Number of residential care placements required	15	-	-	-
People with mental health needs				
Supported housing	8	16	24	-
Move on housing	14	-	-	-
People with a physical/sensory disability, including wheelchair users and people with other long-term conditions				
Wheelchair accessible housing	253	267	278	290
Supported housing	6	13	19	-
Victims, survivors and perpetrators of domestic abuse				
Safe accommodation (Estimates shown at county level)	-	-	-	-
Older people				
Retirement/sheltered housing	598	970	1,339	1,695
<i>Market housing</i>	465	658	908	1,149
<i>Affordable/social housing</i>	134	312	431	546
Extra care housing	381	578	773	962
<i>Market housing</i>	257	362	485	603
<i>Affordable/social housing</i>	125	216	289	359
Residential care home (beds)	5	110	140	169
Nursing care home (beds)	61	182	272	372
People with lower-level needs who may not draw on adult social care from Essex County Council but have support needs that affect their housing and/or accommodation				
Supported housing	160	166	170	-

Estimated need is non-cumulative. Figures may not sum exactly due to rounding.

Table 8: Epping Forest: Estimated need for supported and specialist housing and accommodation for the population groups covered over the period to 2044 (units/dwellings)

Population groups	2029	2034	2039	2044
People with a learning disability/people with learning disability who are Autistic				
Supported housing	5	9	14	-
Shared Lives accommodation	1	3	4	-
Vulnerable young people including care leavers				
Supported housing (This figure represents the total predicted need for the relevant quadrant and is not specific to this district solely)	22	-	-	-
Move on housing (This figure represents the total predicted need for the relevant quadrant and is not specific to this district solely)	35	-	-	-
Children in Care who need residential care				
Number of residential care placements required	3	-	-	-
People with mental health needs				
Supported housing	2	4	7	-
Move on housing	5	-	-	-
People with a physical/sensory disability, including wheelchair users and people with other long-term conditions				
Wheelchair accessible housing	181	191	198	207
Supported housing	4	7	11	-
Victims, survivors and perpetrators of domestic abuse				
Safe accommodation (Estimates shown at county level)	-	-	-	-
Older people				
Retirement/sheltered housing	431	712	994	1,269
<i>Market housing</i>	327	483	674	860
<i>Affordable/social housing</i>	103	229	320	409
Extra care housing	286	435	584	730
<i>Market housing</i>	188	273	366	458
<i>Affordable/social housing</i>	98	163	218	272
Residential care home (beds)	-16	85	115	138
Nursing care home (beds)	54	188	287	391
People with lower-level needs who may not draw on adult social care from Essex County Council but have support needs that affect their housing and/or accommodation				
Supported housing	50	52	53	-

Estimated need is non-cumulative. Figures may not sum exactly due to rounding.

Table 9: Harlow: Estimated need for supported and specialist housing and accommodation for the population groups covered over the period to 2044 (units/dwellings)

Population groups	2029	2034	2039	2044
People with a learning disability/people with learning disability who are Autistic				
Supported housing	3	6	9	-
Shared Lives accommodation	2	5	8	-
Vulnerable young people including care leavers				
Supported housing (This figure represents the total predicted need for the relevant quadrant and is not specific to this district solely)	22	-	-	-
Move on housing (This figure represents the total predicted need for the relevant quadrant and is not specific to this district solely)	35	-	-	-
Children in Care who need residential care				
Number of residential care placements required	8	-	-	-
People with mental health needs				
Supported housing	2	4	6	-
Move on housing	5	-	-	-
People with a physical/sensory disability, including wheelchair users and people with other long-term conditions				
Wheelchair accessible housing	114	120	125	130
Supported housing	3	5	8	-
Victims, survivors and perpetrators of domestic abuse				
Safe accommodation (Estimates shown at county level)	-	-	-	-
Older people				
Retirement/sheltered housing	179	303	426	543
<i>Market housing</i>	108	164	230	294
<i>Affordable/social housing</i>	70	139	196	250
Extra care housing	128	194	259	321
<i>Market housing</i>	65	95	127	157
<i>Affordable/social housing</i>	64	99	132	164
Residential care home (beds)	120	166	178	186
Nursing care home (beds)	46	102	141	182
People with lower-level needs who may not draw on adult social care from Essex County Council but have support needs that affect their housing and/or accommodation				
Supported housing	138	141	143	-

Estimated need is non-cumulative. Figures may not sum exactly due to rounding.

Table 10: Maldon: Estimated need for supported and specialist housing and accommodation for the population groups covered over the period to 2044 (units/dwellings)

Population groups	2029	2034	2039	2044
People with a learning disability/people with learning disability who are Autistic				
Supported housing	2	4	6	-
Shared Lives accommodation	1	3	4	-
Vulnerable young people including care leavers				
Supported housing (This figure represents the total predicted need for the relevant quadrant and is not specific to this district solely)	21	-	-	-
Move on housing (This figure represents the total predicted need for the relevant quadrant and is not specific to this district solely)	35	-	-	-
Children in Care who need residential care				
Number of residential care placements required	5	-	-	-
People with mental health needs				
Supported housing	1	1	2	-
Move on housing	-	-	-	-
People with a physical/sensory disability, including wheelchair users and people with other long-term conditions				
Wheelchair accessible housing	101	106	111	115
Supported housing	2	3	5	-
Victims, survivors and perpetrators of domestic abuse				
Safe accommodation (Estimates shown at county level)	-	-	-	-
Older people				
Retirement/sheltered housing	262	455	646	828
<i>Market housing</i>	208	336	477	612
<i>Affordable/social housing</i>	54	119	168	216
Extra care housing	200	302	403	500
<i>Market housing</i>	138	208	277	344
<i>Affordable/social housing</i>	62	94	126	156
Residential care home (beds)	-27	23	36	54
Nursing care home (beds)	55	91	117	148
People with lower-level needs who may not draw on adult social care from Essex County Council but have support needs that affect their housing and/or accommodation				
Supported housing	14	14	14	-

Estimated need is non-cumulative. Figures may not sum exactly due to rounding.

Table 11: Rochford: Estimated need for supported and specialist housing and accommodation for the population groups covered over the period to 2044 (units/dwellings)

Population groups	2029	2034	2039	2044
People with a learning disability/people with learning disability who are Autistic				
Supported housing	4	8	12	-
Shared Lives accommodation	-	-	-	-
Vulnerable young people including care leavers				
Supported housing (This figure represents the total predicted need for the relevant quadrant and is not specific to this district solely)	16	-	-	-
Move on housing (This figure represents the total predicted need for the relevant quadrant and is not specific to this district solely)	26	-	-	-
Children in Care who need residential care				
Number of residential care placements required	5	-	-	-
People with mental health needs				
Supported housing	1	1	2	-
Move on housing	-	-	-	-
People with a physical/sensory disability, including wheelchair users and people with other long-term conditions				
Wheelchair accessible housing	127	134	139	145
Supported housing	2	4	6	-
Victims, survivors and perpetrators of domestic abuse				
Safe accommodation (Estimates shown at county level)	-	-	-	-
Older people				
Retirement/sheltered housing	322	541	757	963
<i>Market housing</i>	266	422	591	753
<i>Affordable/social housing</i>	56	118	165	211
Extra care housing	229	345	460	569
<i>Market housing</i>	166	252	335	416
<i>Affordable/social housing</i>	63	93	124	154
Residential care home (beds)	15	59	70	81
Nursing care home (beds)	58	94	119	148
People with lower-level needs who may not draw on adult social care from Essex County Council but have support needs that affect their housing and/or accommodation				
Supported housing	22	23	24	-

Estimated need is non-cumulative. Figures may not sum exactly due to rounding.

Table 12: Tendring: Estimated need for supported and specialist housing and accommodation for the population groups covered over the period to 2044 (units/dwellings)

Population groups	2029	2034	2039	2044
People with a learning disability/people with learning disability who are Autistic				
Supported housing	14	28	42	-
Shared Lives accommodation	7	14	22	-
Vulnerable young people including care leavers				
Supported housing (This figure represents the total predicted need for the relevant quadrant and is not specific to this district solely)	18	-	-	-
Move on housing (This figure represents the total predicted need for the relevant quadrant and is not specific to this district solely)	32	-	-	-
Children in Care who need residential care				
Number of residential care placements required	28	-	-	-
People with mental health needs				
Supported housing	8	16	24	-
Move on housing	37	-	-	-
People with a physical/sensory disability, including wheelchair users and people with other long-term conditions				
Wheelchair accessible housing	260	275	286	298
Supported housing	7	13	20	-
Victims, survivors and perpetrators of domestic abuse				
Safe accommodation (Estimates shown at county level)	-	-	-	-
Older people				
Retirement/sheltered housing	659	1,130	1,601	2,056
<i>Market housing</i>	523	759	1,075	1,380
<i>Affordable/social housing</i>	136	371	526	676
Extra care housing	476	726	975	1,216
<i>Market housing</i>	329	450	604	754
<i>Affordable/social housing</i>	147	276	371	462
Residential care home (beds)	- 83	81	132	176
Nursing care home (beds)	206	319	404	496
People with lower-level needs who may not draw on adult social care from Essex County Council but have support needs that affect their housing and/or accommodation				
Supported housing	70	73	76	-

Estimated need is non-cumulative. Figures may not sum exactly due to rounding.

Table 13: Uttlesford: Estimated need for supported and specialist housing and accommodation for the population groups covered over the period to 2044 (units/dwellings)

Population groups	2029	2034	2039	2044
People with a learning disability/people with learning disability who are Autistic				
Supported housing	4	9	13	-
Shared Lives accommodation	-	-	-	-
Vulnerable young people including care leavers				
Supported housing (This figure represents the total predicted need for the relevant quadrant and is not specific to this district solely)	22	-	-	-
Move on housing (This figure represents the total predicted need for the relevant quadrant and is not specific to this district solely)	35	-	-	-
Children in Care who need residential care				
Number of residential care placements required	8	-	-	-
People with mental health needs				
Supported housing	1	2	2	-
Move on housing	-	-	-	-
People with a physical/sensory disability, including wheelchair users and people with other long-term conditions				
Wheelchair accessible housing	123	130	135	141
Supported housing	2	4	6	-
Victims, survivors and perpetrators of domestic abuse				
Safe accommodation (Estimates shown at county level)	-	-	-	-
Older people				
Retirement/sheltered housing	338	569	805	1,037
<i>Market housing</i>	253	403	570	735
<i>Affordable/social housing</i>	86	166	234	302
Extra care housing	220	342	467	589
<i>Market housing</i>	141	225	307	388
<i>Affordable/social housing</i>	78	117	160	202
Residential care home (beds)	-28	57	89	117
Nursing care home (beds)	78	130	170	214
People with lower-level needs who may not draw on adult social care from Essex County Council but have support needs that affect their housing and/or accommodation				
Supported housing	16	17	17	-

Estimated need is non-cumulative. Figures may not sum exactly due to rounding.

Summary of estimated need for supported and specialist housing and accommodation disaggregated by quadrants in Essex containing the 12 district, borough and city councils

2.74 The table below shows the estimated need for supported and specialist housing and accommodation for the population groups covered by this research in Essex disaggregated by quadrants in Essex covering the 12 district, borough and city councils (subject to the guidance in the methodology section above regarding differing time frames for estimated need for different population groups). The footnotes under table 1 apply to tables 14 – 17.

Table 14: Mid Essex quadrant (Braintree, Chelmsford and Maldon): Estimated need for supported and specialist housing and accommodation for the population groups covered over the period to 2044 (units/dwellings)

Population groups	2029	2034	2039	2044
People with a learning disability/people with a learning disability who are autistic				
Supported housing	27	54	81	-
Shared Lives accommodation	5	10	16	-
Vulnerable young people including care leavers				
Supported housing	21	-	-	-
Move on housing	35	-	-	-
Children in Care who need residential care				
Number of residential care placements required	25	-	-	-
People with mental health needs				
Supported housing	7	15	22	-
Move on housing	24	-	-	-
People with a physical/sensory disability, including wheelchair users and people with other long-term conditions				
Fully wheelchair accessible housing	565	597	620	647
Supported housing	12	23	35	-
Victims, survivors and perpetrators of domestic abuse				
Safe accommodation (Estimates shown at county level)	-	-	-	-
Older people				
Retirement/sheltered housing (units)	1,360	2,281	3,192	4,069
<i>Market housing</i>	1,044	1,561	2,185	2,786
<i>Affordable/social housing</i>	316	720	1,006	1,282
Extra care housing (units)	936	1,423	1,905	2,370
<i>Market housing</i>	623	902	1,208	1,503
<i>Affordable/social housing</i>	313	521	697	867
Residential care home beds	-103	179	253	338
Nursing care home beds	139	425	635	874
People with lower-level needs who may not draw on adult social care from Essex County Council but have support needs that affect their housing and/or accommodation				
Supported housing	227	234	240	-

Estimated need is non-cumulative. Figures may not sum exactly due to rounding.

Table 15: North Essex quadrant (Colchester and Tendring): Estimated need for supported and specialist housing and accommodation for the population groups covered over the period to 2044 (units/dwellings)

Population groups	2029	2034	2039	2044
People with a learning disability/people with a learning disability who are autistic				
Supported housing	37	73	110	-
Shared Lives accommodation	7	15	24	-
Vulnerable young people including care leavers				
Supported housing	18	-	-	-
Move on housing	32	-	-	-
Children in Care who need residential care				
Number of residential care placements required	43	-	-	-
People with mental health needs				
Supported housing	16	32	48	-
Move on housing	51	-	-	-
People with a physical/sensory disability, including wheelchair users and people with other long-term conditions				
Fully wheelchair accessible housing	513	542	563	588
Supported housing	13	26	38	-
Victims, survivors and perpetrators of domestic abuse				
Safe accommodation (Estimates shown at county level)				
Older people				
Retirement/sheltered housing (units)	1,258	2,100	2,939	3,751
<i>Market housing</i>	988	1,416	1,982	2,530
<i>Affordable/social housing</i>	270	684	957	1,222
Extra care housing (units)	858	1,304	1,748	2,178
<i>Market housing</i>	586	811	1,089	1,357
<i>Affordable/social housing</i>	272	492	659	821
Residential care home beds	- 78	191	272	345
Nursing care home beds	267	501	676	868
People with lower-level needs who may not draw on adult social care from Essex County Council but have support needs that affect their housing and/or accommodation				
Supported housing	230	239	246	-

Estimated need is non-cumulative. Figures may not sum exactly due to rounding.

Table 16: South Essex quadrant (Brentwood, Basildon, Castlepoint and Rochford): Estimated need for supported and specialist housing and accommodation for the population groups covered over the period to 2044 (units/dwellings)

Population groups	2029	2034	2039	2044
People with a learning disability/people with a learning disability who are autistic				
Supported housing	23	45	68	-
Shared Lives accommodation	4	9	14	-
Vulnerable young people including care leavers				
Supported housing	16	-	-	-
Move on housing	26	-	-	-
Children in Care who need residential care				
Number of residential care placements required	30	-	-	-
People with mental health needs				
Supported housing	7	13	20	-
Move on housing	4	-	-	-
People with a physical/sensory disability, including wheelchair users and people with other long-term conditions				
Fully wheelchair accessible housing	614	648	674	703
Supported housing	12	25	37	-
Victims, survivors and perpetrators of domestic abuse				
Safe accommodation (Estimates shown at county level)				
Older people				
Retirement/sheltered housing (units)	1,375	2,288	3,176	4,021
<i>Market housing</i>	1,093	1,624	2,251	2,848
<i>Affordable/social housing</i>	283	664	925	1,173
Extra care housing (units)	984	1,467	1,937	2,384
<i>Market housing</i>	674	960	1,268	1,562
<i>Affordable/social housing</i>	309	507	669	823
Residential care home beds	128	395	450	501
Nursing care home beds	230	460	623	799
People with lower-level needs who may not draw on adult social care from Essex County Council but have support needs that affect their housing and/or accommodation				
Supported housing	378	388	396	-

Estimated need is non-cumulative. Figures may not sum exactly due to rounding.

Table 17: West Essex quadrant (Epping Forest, Harlow and Uttlesford): Estimated need for supported and specialist housing and accommodation for the population groups covered over the period to 2044 (units/dwellings)

Population groups	2029	2034	2039	2044
People with a learning disability/people with a learning disability who are autistic				
Supported housing	12	24	36	-
Shared Lives accommodation	4	8	12	-
Vulnerable young people including care leavers				
Supported housing	22	-	-	-
Move on housing	35	-	-	-
Children in Care who need residential care				
Number of residential care placements required	20	-	-	-
People with mental health needs				
Supported housing	5	10	15	-
Move on housing	10	-	-	-
People with a physical/sensory disability, including wheelchair users and people with other long-term conditions				
Fully wheelchair accessible housing	417	441	458	478
Supported housing	8	17	25	-
Victims, survivors and perpetrators of domestic abuse				
Safe accommodation (Estimates shown at county level)				
Older people				
Retirement/sheltered housing (units)	948	1,585	2,224	2,849
<i>Market housing</i>	689	1,050	1,474	1,889
<i>Affordable/social housing</i>	259	535	750	960
Extra care housing (units)	634	972	1,310	1,641
<i>Market housing</i>	394	592	800	1,002
<i>Affordable/social housing</i>	240	379	510	638
Residential care home beds	75	308	382	441
Nursing care home beds	178	419	599	788
People with lower-level needs who may not draw on adult social care from Essex County Council but have support needs that affect their housing and/or accommodation				
Supported housing	204	209	213	-

Estimated need is non-cumulative. Figures may not sum exactly due to rounding.

3. People with a learning disability and/or people with learning disability who are Autistic

Introduction

3.01 This component of the needs assessment relates to people with a learning disability and/or people with learning disability who are Autistic who draw on adult social care support from Essex County Council.

3.02 The assessment of need for specialist/supported accommodation draws on a range of evidence, including:

- Demographic context: current population and projected population of people with learning disability and/or people with learning disability who are Autistic who draw on adult social care support from Essex County Council
- Current provision of specialist/supported accommodation
- Local commissioner perspectives and intelligence

3.03 Table 18 summarises the estimated need for supported and specialist accommodation for people with learning disability and/or people with learning disability who are Autistic who draw on adult social care support from Essex County Council. Estimated need for supported and specialist accommodation is based on assumptions set out at paragraph 3.07. This shows:

- The projected population of people with learning disability and/or people with learning disability who are Autistic will increase from 3,852 in 2024 to 4,236 in 2039.
- The estimated need for:
 - Supported living: approximately 300 units by 2039
 - Shared Lives: approximately 85 places by 2039

Table 18. Summary of the estimated need for supported and specialist accommodation for people with learning disability and/or people with learning disability who are Autistic who draw on adult social care support from Essex County Council

	Current provision and population (2024)	Adult pop. by 2029 and estimated need for housing & accomm.	Adult pop. by 2034 and estimated need for housing & accomm.	Adult pop. by 2039 and estimated need for housing & accomm.
Population	3,852	3,996	4,116	4,236
Housing & accommodation types				
Residential/nursing care	886	877	860	841
Shared Lives (adult placement)	44	71	100	131
Supported living	1,094	1,201	1,305	1,413
Living with family / friends	877	855	824	790
Mainstream housing	951	991	1,026	1,061
Totals	3,852	3,996	4,116	4,236
Additional need for Shared Lives placements		27	56	87
Additional need for Supported living		107	211	319

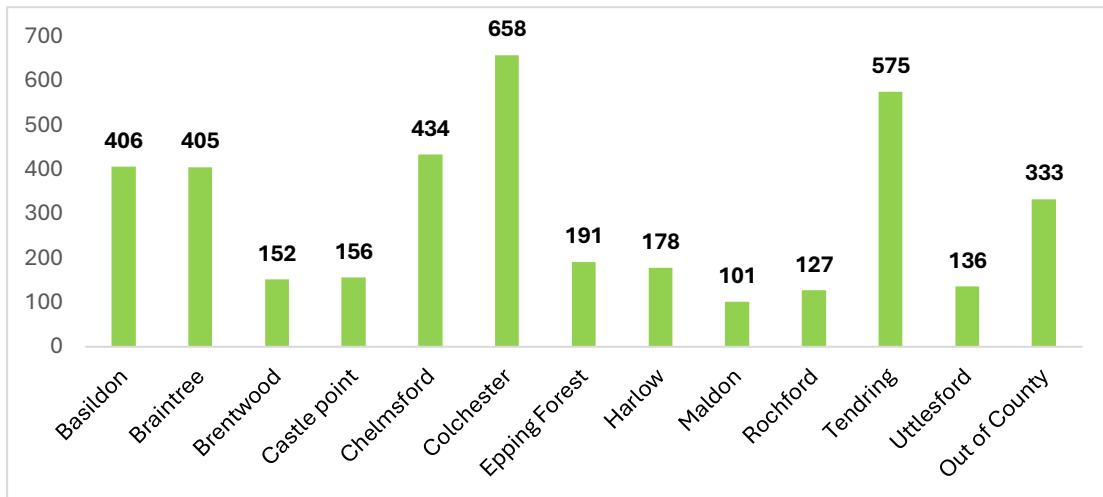
Estimated need is non-cumulative.

Baseline population and population projections

People with learning disability and/or people with learning disability who are Autistic

- 3.04 The data from MOSAIC (the adult social care data recording system used by Essex County Council) has been used to calculate the population of people aged 18+ who draw on adult social care support from Essex County Council. This calculation is based on data that includes individuals living in various types of accommodation, such as specialist/supported accommodation, residential care, and those receiving care in their own homes.
- 3.05 The total population of people with learning disabilities and/or people with learning disability who are Autistic for all 12 districts, including the ones in out of county category, has been taken as the Essex population.
- 3.06 There is currently c.3,850 people with learning disabilities and/or people with learning disability who are Autistic receiving a care/support service from Essex County Council (from latest MOSAIC snapshot in September 2024).

Figure 1. Population of people with a learning disability and/or people with learning disability who are Autistic who draw on adult social care support from Essex County Council by district, borough and city in 2024



Source: Essex County Council (MOSAIC)

Population as at September 2024

3.07 In order to project forward the population of people with learning disability and/or people with learning disability who are Autistic aged 18+ who draw on adult social care support from Essex County Council to 2039, the following method has been used:

- The baseline population has been calculated as the number of people who draw on adult social care support, using the MOSAIC dataset. This is used to calculate the baseline population for each future year. This population has been used as these individuals are most likely to be eligible for a care/support package from Essex County Council
- The average annual number of children with learning disability and/or children with learning disability who are Autistic likely to transition to Adult Social Care at 18 years. This is estimated by taking the average of the number of children expected to 'transition' from the Resource Co-ordinator registers to require specialist/supported accommodation for 2022/23 to 2025/26 (i.e. 40 children per annum on average)

Table 19. Annual number of children with learning disability and/or children with learning disability who are Autistic estimated to transition to Adult Social Care and require specialist/supported accommodation

Year	2022/23	2023/24	2024/25	2025/26
Number of young people turning 18	34	43	27	57

Source: Essex County Council

- The average annual number of deaths among people with learning disability and/or people with learning disability who are Autistic was calculated using the Learning Disabilities Mortality Review (LeDeR) Programme¹⁵ data from 2018 to 2022. To estimate the number of deaths amongst the population eligible for social care in

¹⁵ NHS: [LeDeR – learning from lives and deaths](#)

Essex, the proportion of Essex's 18+ population with a learning disability, some of whom were also autistic was applied to the national total. This figure was then adjusted using the national percentage of adults eligible for social care. Based on these calculations, it is estimated that there are 16 deaths per year of people with learning disability and/or people with learning disability who are Autistic eligible for social care in Essex

- To estimate the projected growth of the 18+ years population of people with learning disability and/or people with learning disability who are Autistic, the average annual number of transitions into Adult Social Care eligibility and the average annual number of deaths are added and subtracted respectively, to the baseline population. These adjustments are applied each year and their cumulative impact over time results in a net population change projected through to 2039

3.08 Based on this approach there are an estimated to be c.3,850 people with learning disability and/or people with learning disability who are Autistic aged 18+ years living in Essex, who draw on adult social care support from Essex County Council as of 2024/25.

Table 20. Population projection of people with learning disability and/or people with learning disability who are Autistic aged 18+ years in Essex drawing on adult social care support provided by Essex County Council

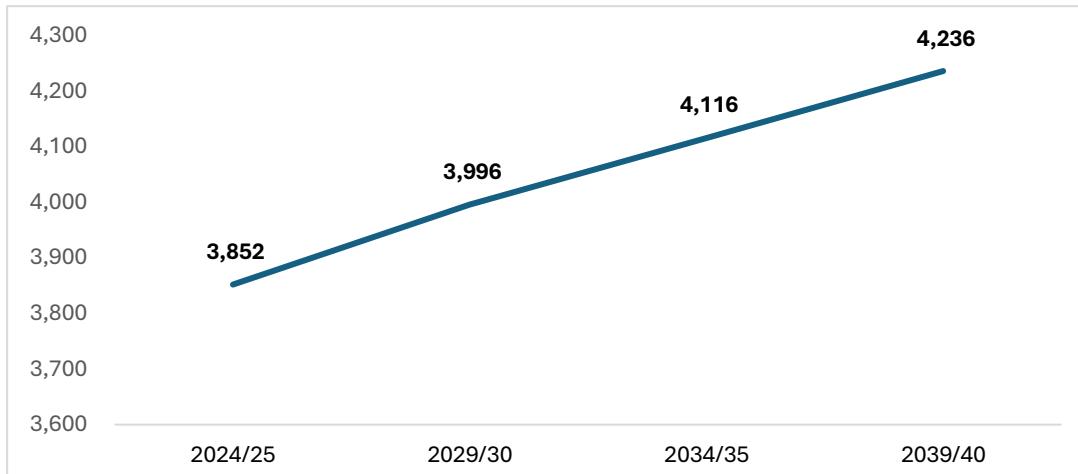
Year	2024/25	2029/30	2034/35	2039/40
Baseline population of people who draw on adult social care support*	3,852	3,852	3,852	3,852
Number of children with learning disability and children with learning disability who are Autistic likely to transition to Adult Social Care at 18	40	242	443	644
Estimated number of deaths among the population of people with learning disability and people with learning disability who are Autistic who draw on adult social care support	16	97	179	260
Estimated population of people with learning disability and people with learning disability who are Autistic who draw on adult social care support		3,996	4,116	4,236
% change (relative to 2024)		3.7%	6.9%	10.0%

Source: Essex County Council (MOSAIC and Resource Co-ordinator Registers), LeDeR and HLIN

*Population as at September 2024

3.09 The 18+ population of people with learning disability and/or people with learning disability who are Autistic who draw on adult social care support from Essex County Council is estimated to increase to 3,996 people by 2029/30; 4,116 people by 2034/35; and 4,236 people by 2039/40.

Figure 2. Estimated population of people with learning disability and/or people with learning disability who are Autistic with Care Act eligible needs projected to 2039/40



Source: Essex County Council (MOSAIC and Resource Co-ordinator Registers), LeDeR and Housing LIN

3.10 The same methodology (see 3.07) is applied to each of the districts to project the estimated number of people with learning disability and/or people with learning disability who are Autistic who draw on adult social care support from Essex County Council to 2039 by district.

3.11 The data used are:

- The baseline population which has been calculated as the number of people who draw on adult social care support for each district, using the MOSAIC dataset
- The average of the number of children expected to 'transition' to Adult Social Care and require supported/specialist housing from the Resource Co-ordinator registers, an average of 40 per annum for Essex. Since this figure is not disaggregated by district, it is assumed that this is proportionate to the percentage of the overall people with learning disability and/or people with learning disability who are Autistic population for Essex living in each district
- The average annual number of deaths among people with learning disability and/or people with learning disability who are Autistic who draw on adult social care is calculated from the LeDeR data for each district

3.12 The data indicates an increase in estimated population of people with learning disability and/or people with learning disability who are Autistic who draw on adult social care support across all districts from 2024 to 2039.

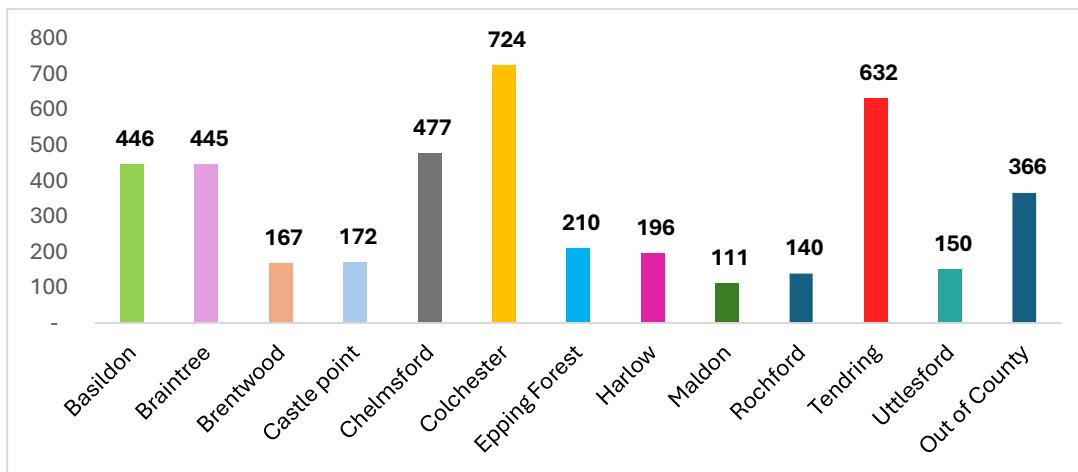
Table 21. Estimated population of people with learning disability and/or people with learning disability who are Autistic who draw on adult social care support from Essex County Council by district, borough and city projected to 2039

Districts	2024	2029	2034	2039
Basildon	406	421	434	446
Braintree	405	420	433	445
Brentwood	152	158	162	167
Castle Point	156	162	167	172
Chelmsford	434	450	464	477
Colchester	658	683	703	724
Epping Forest	191	198	204	210
Harlow	178	185	190	196
Maldon	101	105	108	111
Rochford	127	132	136	140
Tendring	575	596	614	632
Uttlesford	136	141	145	150
<i>Out of County</i>	333	345	356	366
Essex	3,852	3,996	4,116	4,236

Source: Essex County Council, LeDeR and HLIN. Out of county placements reflect the number of people with learning disability and people with learning disability who are Autistic who draw on adult social care support from Essex County Council who are living in services outside of Essex.

3.13 Figure 3 shows the number of people with learning disability and/or people with learning disability who are Autistic who draw on adult social care support from Essex County Council for each district in Essex projected to 2039.

Figure 3. The number of people with learning disability and/or people with learning disability who are Autistic who draw on adult social care support from Essex County Council for each district in Essex projected to 2039



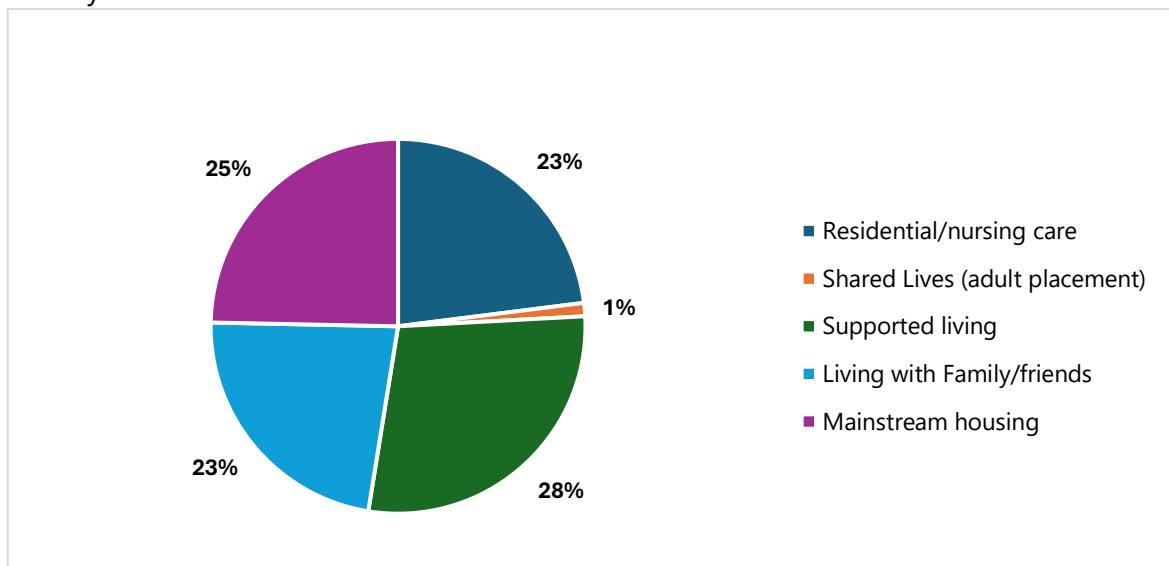
Source: Essex County Council and HLIN

Where people with learning disability and/or people with learning disability who are Autistic are living

3.14 The data from Essex County Council indicates that most people with learning disability and/or people with learning disability who are Autistic (51%) who draw on adult social care from Essex County Council are living in ordinary housing, either in mainstream housing with support or with family/friends.

3.15 Just over a quarter of people are living in supported living and just under a quarter are living in a care home. A minority are living in a Shared Lives placement.

Figure 4. Accommodation status of people with learning disability and/or people with learning disability who are Autistic who draw on adult social care support from Essex County Council



Source: Essex County Council. NB: The total number of individuals living at home has been categorised into mainstream housing and living with family based on the proportions derived from the SALT 2021/22 data.

3.16 The accommodation status data demonstrates that the highest percentage of people are living in supported living (28%) and 25% of people are living in mainstream housing.

Table 22. Accommodation status of people with learning disability and/or people with learning disability who are Autistic who draw on adult social care support from Essex County Council by district in 2024

Districts	Living at home	Supported living	Care home	Shared Lives	Total
Basildon	229	124	49	4	406
Braintree	147	134	120	4	405
Brentwood	80	64	7	1	152
Castle Point	113	27	14	2	156
Chelmsford	251	136	45	2	434
Colchester	259	249	149	1	658
Epping Forest	130	50	9	2	191
Harlow	122	36	16	4	178
Maldon	78	7	14	2	101
Rochford	89	29	9	0	127
Tendring	193	206	165	11	575
Uttlesford	91	31	14	0	136
<i>Out of County</i>	46	1	275	11	333
Essex	1,828	1,094	886	44	3,852

Source: Essex County Council. NB: It should also be noted that domiciliary care data for the "out of area" category has been excluded from living at home

- 3.17 Of the out of county placements, there are 33 supported living placements in Southend-on-Sea and 6 supported living placements in Thurrock.
- 3.18 Essex County Council also commissions Housing Related Support (HRS) services to provide short term, focused, accommodation-based support to prepare adults (18-65) with learning disabilities/and autism (LDA) or adults (18-65) with an acquired Brain Injury (ABI) to progress to live as independently as possible.
- 3.19 HRS services are not the same as supported living; adults who enter HRS schemes would not generally have Care Act eligible needs for Supported Living or will have very low needs and great potential to live independently in the near future.
- 3.20 Referrals into the service come from Essex County Council Adult Social care, but also District Joint Referral Panels, Hospital Neuro Teams, District, Borough and City Housing Services, rehabilitation providers.
- 3.21 In relation to people with learning disabilities, Essex County Council commissions 3 HRS services:
 - Chelmsford. Shared houses. 21 units
 - Chelmsford. Self-contained flats. 8 units
 - Basildon. Self-contained flats. 12 units

Trends in accommodation status for people with learning disability and/or people with learning disability who are Autistic who draw on adult social care from Essex County Council 2021–2023

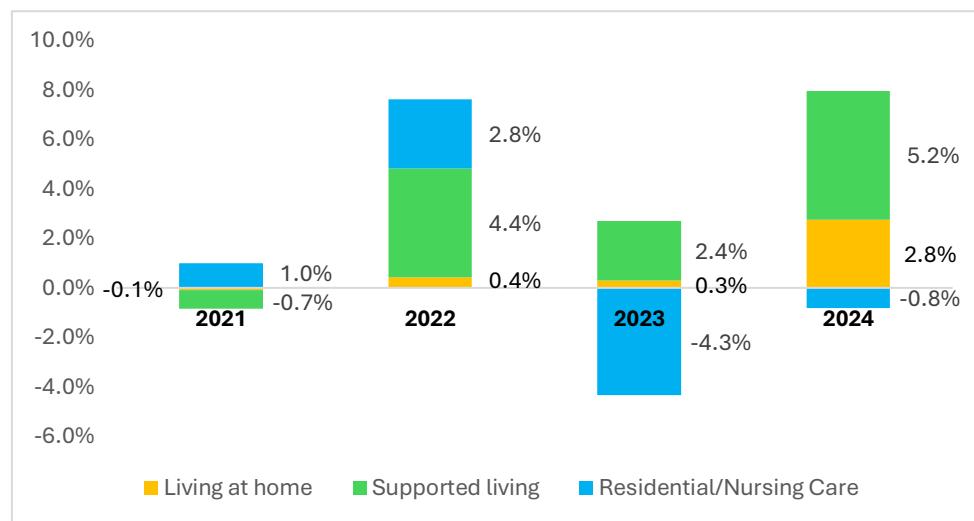
3.22 Based on the trend data for 2021–2024, the 'Living at Home' (i.e. people accessing support to live at home, which is likely to include people receiving significant support in some instances) category shows a gradual upward trend. It started with a small decline of 0.1% in 2021, stabilised with an increase of 0.4% in 2022, and then increased steadily by 0.3% in 2023 and 2.8% in 2024.

3.23 For supported living, the percentage change showed an increase overall. There was a slight decrease in 2021 (-0.7%), increased significantly by 4.4% in 2022, increased slightly to 2.4% in 2023, and then by 5.2% in 2024.

3.24 Residential/nursing care demonstrated a greater fluctuating trend. Use increased slightly by 1% in 2021, further by 2.8% in 2022, then consistently decreased by 4.3% in 2023, and by 0.3% in 2024.

3.25 Overall, the trends highlight a gradual upward trend for people living at home with an average annual increase of 0.8%. Supported living also shows an upward trend, averaging an annual increase of 2.8%. Residential/nursing care shows a declining trend, with an average annual decrease of 0.3%. This reflects Essex County Council's policy objectives to reduce the number of people living in residential care and increase supported living options.

Figure 5. Trends in accommodation status for people with learning disability and/or people with learning disability who are Autistic who draw on adult social care from Essex County Council 2021–2024



Source: Essex County Council: MOSAIC

Estimated need for specialist and supported accommodation for people with learning disability and/or people with learning disability who are Autistic who draw on adult social care from Essex County Council by 2039

3.26 The estimate of need for specialist/supported accommodation for people with learning disability and/or people with learning disability who are Autistic who draw on adult social care from Essex County Council is based on the following approach.

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

- There are 3,852 people with learning disability and/or people with learning disability who are Autistic aged 18+ years who draw on adult social care support from Essex County Council (2024/25)
- The population of people with learning disability and/or people with learning disability who are Autistic in Essex changes in line with the average number of deaths per year amongst the population of people with learning disability and/or people with learning disability who are Autistic and the number of 18-year-olds transitioning to eligibility for Adult Social Care with Essex County Council
- On this basis the population of people with learning disability and/or people with learning disability who are Autistic is projected to increase to 3,996 people by 2029/30; 4,116 people by 2034/35; and 4,236 people by 2039
- Based on the trends seen (paragraphs 3.22-3.25) in the population of people with learning disability and/or people with learning disability who are Autistic from 2020 to 2024 (based on MOSAIC data):
 - The need for residential care is estimated to decrease by 0.3% per year. It is anticipated to decrease from c.23% of the population living in care homes in 2024 to c.18% by 2039
 - The percentage of the population living in supported living is estimated to increase by 2.8% per year to c.38% by 2039 due to the increasing overall population, the anticipated reduction in the need for residential care and from people no longer able to live with older and ageing carers
- Based on discussion with Essex County Council Officers it is assumed that:
 - Living with family/informal carers: based on similar assessments for other local authorities it is assumed that the percentage of people living with family carers, specifically the balance between people living with older carers who may no longer be in a position to provide care/support to their family member and young adults remaining living with family carers, is assumed to decrease by c.10% by 2039
 - Need for mainstream housing with a care/support package (such as domiciliary care) is estimated to increase 0.8% per year due to the increase in the overall population of adults with a learning disability

- Based on the proposed Shared Lives recruitment plan by Essex County Council, it has been proposed to recruit at least 8 new Shared Lives Hosts per year. Currently, there are 44 people using Shared Lives services supported by 61 hosts, resulting in a people-to-host ratio of approximately 0.72. Applying this ratio to the additional 120 hosts expected to be recruited over the next 15 years (2024–2039) results in an increase of approximately 87 people living in Shared Lives. When added to the existing 44 people, the total projected number of people using Shared Lives services by 2039 is estimated to be 131 individuals. This growth has been assumed for Shared Lives over the period to 2039

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

3.29 The estimated need for specialist and supported accommodation for people with learning disability and/or people with learning disability who are Autistic is shown in Table 23. This shows the number of additional homes required to meet estimated unmet need by 2029, 2034, and 2039.

Supported and Specialist Housing and Accommodation Needs Assessment

Table 23. Essex: Estimated need for specialist/supported accommodation for people with learning disability and/or people with learning disability who are Autistic who draw on adult social care from Essex County Council to 2039.

	Current provision and population (2024)	Existing supply of housing & accomm. types (%)	Adult pop. by 2029 and estimated need for housing & accomm.	Estimated need for housing & accomm. types (%)	Adult pop. by 2034 and estimated need for housing & accomm.	Estimated need for housing & accomm. types (%)	Adult pop. by 2039 and estimated need for housing & accomm.	Estimated need for housing & accomm. types (%)
Population	3,852		3,996		4,116		4,236	
Housing & accommodation types								
Residential/nursing care	886	23%	877	22%	860	21%	841	20%
Shared Lives (adult placement)	44	1%	71	2%	100	2%	131	3%
Supported living	1,094	28%	1,201	30%	1,305	32%	1,413	33%
Living with family / friends	877	23%	855	21%	824	20%	790	19%
Mainstream housing	951	25%	991	25%	1,026	25%	1,061	25%
Totals	3,852	100%	3,996	100%	4,116	100%	4,236	100%
Total additional specialist/supported accommodation requirements			134		267		406	
Of which additional need for Shared Lives placements			27		56		87	
Of which additional need for Supported living			107		211		319	

Source: Essex County Council and HLIN

Estimated need is non-cumulative.

3.30 In summary, the need for specialist and supported accommodation for people with learning disability and/or people with learning disability who are Autistic who draw on adult social care from Essex County Council is:

- an additional c.110 units of supported living and c.30 shared lives places are needed by 2029
- an additional c.220 units of supported living and c.55 shared lives places are needed by 2034
- an additional c.320 units of supported living and c.90 shared lives places are needed by 2039

3.31 The Essex County Council Supported Living Demand Bulletin from October 2024 identified that of the 122 people with learning disability or autism seeking supported living, 29% were people with complex support needs and 71% were people with non-complex support needs. Applying these percentages to the estimated need for supported living shown at Table 23, suggests that:

- Of the additional c.110 units of supported living needed by 2029, 32 are estimated to be required for people with complex support needs, 78 are estimated be required for people with non-complex support needs
- Of the additional c.220 units of supported living needed by 2034, 64 are estimated to be required for people with complex support needs, 156 are estimated be required for people with non-complex support needs
- Of the additional c.320 units of supported living needed by 2039, 93 are estimated to be required for people with complex support needs, 227 are estimated be required for people with non-complex support needs

3.32 The same methodology is used to estimate specialist and supported accommodation need by district to 2039. These estimates are shown in the following tables.

3.33 There is a requirement to expand the capacity of the current Shared Lives scheme to recruit additional hosts to accommodate an additional c.90 people with a learning disability and/or people with learning disability who are autistic over the period to 2039.

3.34 Over the period to 2039 it is estimated that approximately 110 people with a learning disability and/or people with learning disability who are autistic will need to live in mainstream housing (most likely general needs social housing) with a package of care/support funded by Essex County Council.

3.35 The evidence indicates a need for 56 units of housing related support for people with learning disability by 2039, an increase of 15 units (compared with 2024). This is separate and in addition to the estimated additional need for supported living (supported housing). There is need for additional capacity in the North-East and West Quadrants (where there is currently no housing related support provision for people with learning disability).

- 3.36 To meet this identified need for supported and specialist housing and accommodation, there is likely to be a need to develop commissioning intentions that set out this evidence base to stimulate responses from housing and support providers.
- 3.37 It should be noted that there are 33 people with learning disability placed in Southend-on-Sea and 6 placed in Thurrock.
- 3.38 Essex County Councils commissioners note that:
- 3.39 Essex County Council provides regular Supported Living demand information to the market to enable them to make decisions on where to develop new services, and works closely with providers, landlords and developers on their development proposals to ensure the proposal meets local demand, are of good quality and are sustainable in the long term.
- 3.40 The need identified in the report will feed through to Essex County Councils regular demand information communications with the market to ensure that any areas of need or gaps are identified.
- 3.41 Also, in conjunction with Essex Housing, Essex County Council continues to develop a small amount of new, purpose-built Supported Living schemes; the report will also inform the planning decisions for these.

Table 24. Basildon: Estimated need for specialist/supported accommodation for people with learning disability and/or people with learning disability who are Autistic who draw on adult social care from Essex County Council to 2039.

	Current provision and population (2024)	Existing supply of housing & accomm. types (%)	Adult pop. by 2029 and estimated need for housing & accomm. types	Estimated need for housing & accomm. types (%)	Adult pop. by 2034 and estimated need for housing & accomm. types	Estimated need for housing & accomm. types (%)	Adult pop. by 2039 and estimated need for housing & accomm. types	Estimated need for housing & accomm. types (%)
Population	406		421		434		446	
Housing & accommodation types								
Residential/nursing care	49	12%	49	12%	48	11%	47	10%
Shared Lives (adult placement)	4	1%	6	2%	9	2%	12	3%
Supported living	124	31%	135	32%	145	34%	156	35%
Living with family/friends	110	27%	107	25%	103	24%	99	22%
Mainstream housing	119	29%	124	29%	129	30%	133	30%
Totals	406	100%	421	100%	434	100%	446	100%
Total additional specialist/supported accommodation requirements			13		26		40	
Of which additional need for Shared Lives placements			2		5		8	
Of which additional need for Supported living			11		21		32	

Source: Essex County Council and HLIN

Estimated need is non-cumulative.

Table 25. Braintree: Estimated need for specialist/supported accommodation for people with learning disability and/or people with learning disability who are Autistic who draw on adult social care from Essex County Council to 2039.

	Current provision and population (2024)	Existing supply of housing & accomm. types (%)	Adult pop. by 2029 and estimated need for housing & accomm.	Estimated need for housing & accomm. types (%)	Adult pop. by 2034 and estimated need for housing & accomm.	Estimated need for housing & accomm. types (%)	Adult pop. by 2039 and estimated need for housing & accomm.	Estimated need for housing & accomm. types (%)
Population	405		420		433		445	
Housing & accommodation types								
Residential/nursing care	120	30%	119	28%	117	27%	114	26%
Shared Lives (adult placement)	4	1%	6	2%	9	2%	12	3%
Supported living	134	33%	146	35%	158	37%	171	38%
Living with family/friends	71	17%	69	16%	66	15%	64	14%
Mainstream housing	76	19%	80	19%	83	19%	85	19%
Totals	405	100%	420	100%	433	100%	445	100%
Total additional specialist/supported accommodation requirements			15		29		45	
Of which additional need for Shared Lives placements			2		5		8	
Of which additional need for Supported living			12		24		37	

Source: Essex County Council and HLIN

Estimated need is non-cumulative.

Table 26. Brentwood: Estimated need for specialist/supported accommodation for people with learning disability and/or people with learning disability who are Autistic who draw on adult social care from Essex County Council to 2039.

	Current provision and population (2024)	Existing supply of housing & accomm. types (%)	Adult pop. by 2029 and estimated need for housing & accomm.	Estimated need for housing & accomm. types (%)	Adult pop. by 2034 and estimated need for housing & accomm.	Estimated need for housing & accomm. types (%)	Adult pop. by 2039 and estimated need for housing & accomm.	Estimated need for housing & accomm. types (%)
Population	152		158		162		167	
Housing & accommodation types								
Residential/nursing care	7	5%	7	4%	7	4%	7	4%
Shared Lives (adult placement)	1	1%	2	1%	2	1%	3	2%
Supported living	64	42%	68	43%	72	45%	77	46%
Living with family/friends	38	25%	37	24%	36	22%	35	21%
Mainstream housing	42	27%	43	28%	45	28%	46	28%
Totals	152	100%	158	100%	162	100%	167	100%
Total additional specialist/supported accommodation requirements			5		10		14	
Of which additional need for Shared Lives placements			1		1		2	
Of which additional need for Supported living			4		8		13	

Source: Essex County Council and HLIN

Estimated need is non-cumulative.

Table 27. Castle Point: Estimated need for specialist/supported accommodation for people with learning disability and/or people with learning disability who are Autistic who draw on adult social care from Essex County Council to 2039.

	Current provision and population (2024)	Existing supply of housing & accomm. types (%)	Adult pop. by 2029 and estimated need for housing & accomm.	Estimated need for housing & accomm. types (%)	Adult pop. by 2034 and estimated need for housing & accomm.	Estimated need for housing & accomm. types (%)	Adult pop. by 2039 and estimated need for housing & accomm.	Estimated need for housing & accomm. types (%)
Population	156		162		167		172	
Housing & accommodation types								
Residential/nursing care	14	9%	14	9%	14	8%	13	8%
Shared Lives (adult placement)	2	1%	3	2%	5	3%	6	3%
Supported living	27	17%	31	19%	34	20%	38	22%
Living with family/friends	54	35%	53	33%	51	31%	49	28%
Mainstream housing	59	38%	61	38%	63	38%	66	38%
Totals	156	100%	162	100%	167	100%	172	100%
Total additional specialist/supported accommodation requirements			5		10		15	
Of which additional need for Shared Lives placements			1		3		4	
Of which additional need for Supported living			4		7		11	

Source: Essex County Council and HLIN

Estimated need is non-cumulative.

Table 28. Chelmsford: Estimated need for specialist/supported accommodation for people with learning disability and/or people with learning disability who are Autistic who draw on adult social care from Essex County Council to 2039.

	Current provision and population (2024)	Existing supply of housing & accomm. types (%)	Adult pop. by 2029 and estimated need for housing & accomm.	Estimated need for housing & accomm. types (%)	Adult pop. by 2034 and estimated need for housing & accomm.	Estimated need for housing & accomm. types (%)	Adult pop. by 2039 and estimated need for housing & accomm.	Estimated need for housing & accomm. types (%)
Population	434		450		464		477	
Housing & accommodation types								
Residential/nursing care	45	10%	45	10%	44	9%	43	9%
Shared Lives (adult placement)	2	0%	3	1%	5	1%	6	1%
Supported living	136	31%	149	33%	161	35%	174	37%
Living with family/friends	120	28%	117	26%	113	24%	108	23%
Mainstream housing	131	30%	136	30%	141	30%	146	31%
Totals	434	100%	450	100%	464	100%	477	100%
Total additional specialist/supported accommodation requirements			14		28		42	
Of which additional need for Shared Lives placements			1		3		4	
Of which additional need for Supported living			13		25		38	

Source: Essex County Council and HLIN

Estimated need is non-cumulative.

Table 29. Colchester: Estimated need for specialist/supported accommodation for people with learning disability and/or people with learning disability who are Autistic who draw on adult social care from Essex County Council to 2039.

	Current provision and population (2024)	Existing supply of housing & accomm. types (%)	Adult pop. by 2029 and estimated need for housing & accomm.	Estimated need for housing & accomm. types (%)	Adult pop. by 2034 and estimated need for housing & accomm.	Estimated need for housing & accomm. types (%)	Adult pop. by 2039 and estimated need for housing & accomm.	Estimated need for housing & accomm. types (%)
Population	658		683		703		724	
Housing & accommodation types								
Residential/nursing care	149	23%	148	22%	145	21%	141	20%
Shared Lives (adult placement)	1	0%	2	0%	2	0%	3	0%
Supported living	249	38%	272	40%	294	42%	317	44%
Living with family/friends	124	19%	121	18%	117	17%	112	15%
Mainstream housing	135	20%	140	21%	145	21%	150	21%
Totals	658	100%	683	100%	703	100%	724	100%
Total additional specialist/supported accommodation requirements			23		46		70	
Of which additional need for Shared Lives placements			1		1		2	
Of which additional need for Supported living			23		45		68	

Source: Essex County Council and HLIN

Estimated need is non-cumulative.

Table 30. Epping Forest: Estimated need for specialist/supported accommodation for people with learning disability and/or people with learning disability who are Autistic who draw on adult social care from Essex County Council to 2039.

	Current provision and population (2024)	Existing supply of housing & accomm. types (%)	Adult pop. by 2029 and estimated need for housing & accomm.	Estimated need for housing & accomm. types (%)	Adult pop. by 2034 and estimated need for housing & accomm.	Estimated need for housing & accomm. types (%)	Adult pop. by 2039 and estimated need for housing & accomm.	Estimated need for housing & accomm. types (%)
Population	191		198		204		210	
Housing & accommodation types								
Residential/nursing care	9	5%	9	4%	9	4%	9	4%
Shared Lives (adult placement)	2	1%	3	2%	5	2%	6	3%
Supported living	50	26%	55	28%	59	29%	64	30%
Living with family/friends	62	33%	61	31%	59	29%	56	27%
Mainstream housing	68	35%	70	36%	73	36%	75	36%
Totals	191	100%	198	100%	204	100%	210	100%
Total additional specialist/supported accommodation requirements			6		12		18	
Of which additional need for Shared Lives placements			1		3		4	
Of which additional need for Supported living			5		9		14	

Source: Essex County Council and HLIN

Estimated need is non-cumulative.

Table 31. Harlow: Estimated need for specialist/supported accommodation for people with learning disability and/or people with learning disability who are Autistic who draw on adult social care from Essex County Council to 2039.

	Current provision and population (2024)	Existing supply of housing & accomm. types (%)	Adult pop. by 2029 and estimated need for housing & accomm.	Estimated need for housing & accomm. types (%)	Adult pop. by 2034 and estimated need for housing & accomm.	Estimated need for housing & accomm. types (%)	Adult pop. by 2039 and estimated need for housing & accomm.	Estimated need for housing & accomm. types (%)
Population	178		185		190		196	
Housing & accommodation types								
Residential/nursing care	16	9%	16	9%	16	8%	15	8%
Shared Lives (adult placement)	4	2%	6	4%	9	5%	12	6%
Supported living	36	20%	39	21%	42	22%	45	23%
Living with family/friends	59	33%	57	31%	55	29%	53	27%
Mainstream housing	63	36%	66	36%	68	36%	71	36%
Totals	178	100%	185	100%	190	100%	196	100%
Total additional specialist/supported accommodation requirements			6		11		17	
Of which additional need for Shared Lives placements			2		5		8	
Of which additional need for Supported living			3		6		9	

Source: Essex County Council and HLIN

Estimated need is non-cumulative.

Table 32. Maldon: Estimated need for specialist/supported accommodation for people with learning disability and/or people with learning disability who are Autistic who draw on adult social care from Essex County Council to 2039.

	Current provision and population (2024)	Existing supply of housing & accomm. types (%)	Adult pop. by 2029 and estimated need for housing & accomm.	Estimated need for housing & accomm. types (%)	Adult pop. by 2034 and estimated need for housing & accomm.	Estimated need for housing & accomm. types (%)	Adult pop. by 2039 and estimated need for housing & accomm.	Estimated need for housing & accomm. types (%)
Population	101		105		108		111	
Housing & accommodation types								
Residential/nursing care	14	14%	14	13%	14	13%	13	12%
Shared Lives (adult placement)	2	2%	3	3%	5	4%	6	5%
Supported living	7	7%	9	8%	11	10%	13	12%
Living with family/friends	37	37%	36	35%	35	33%	34	30%
Mainstream housing	41	40%	42	40%	44	41%	45	41%
Totals	101	100%	105	100%	108	100%	111	100%
Total additional specialist/supported accommodation requirements			3		6		10	
Of which additional need for Shared Lives placements			1		3		4	
Of which additional need for Supported living			2		4		6	

Source: Essex County Council and HLIN

Estimated need is non-cumulative.

Table 33. Rochford: Estimated need for specialist/supported accommodation for people with learning disability and/or people with learning disability who are Autistic who draw on adult social care from Essex County Council to 2039.

	Current provision and population (2024)	Existing supply of housing & accomm. types (%)	Adult pop. by 2029 and estimated need for housing & accomm.	Estimated need for housing & accomm. types (%)	Adult pop. by 2034 and estimated need for housing & accomm.	Estimated need for housing & accomm. types (%)	Adult pop. by 2039 and estimated need for housing & accomm.	Estimated need for housing & accomm. types (%)
Population	127		132		136		140	
Housing & accommodation types								
Residential/nursing care	9	7%	9	7%	9	6%	9	6%
Shared Lives (adult placement)	0	0%	0	0%	0	0%	0	0%
Supported living	29	23%	33	25%	37	27%	41	29%
Living with family/friends	43	34%	42	32%	40	30%	38	28%
Mainstream housing	46	36%	48	37%	50	37%	52	37%
Totals	127	100%	132	100%	136	100%	140	100%
Total additional specialist/supported accommodation requirements			4		8		12	
Of which additional need for Shared Lives placements			0		0		0	
Of which additional need for Supported living			4		8		12	

Source: Essex County Council and HLIN

Rochford has zero projected need for Shared Lives placements. This should be reviewed by 2029 to assess whether the evidence of need has changed.
 Estimated need is non-cumulative.

Table 34. Tendring: Estimated need for specialist/supported accommodation for people with learning disability and/or people with learning disability who are Autistic who draw on adult social care from Essex County Council to 2039.

	Current provision and population (2024)	Existing supply of housing & accomm. types (%)	Adult pop. by 2029 and estimated need for housing & accomm.	Estimated need for housing & accomm. types (%)	Adult pop. by 2034 and estimated need for housing & accomm.	Estimated need for housing & accomm. types (%)	Adult pop. by 2039 and estimated need for housing & accomm.	Estimated need for housing & accomm. types (%)
Population	575		596		614		632	
Housing & accommodation types								
Residential/nursing care	165	29%	163	27%	160	26%	157	25%
Shared Lives (adult placement)	11	2%	18	3%	25	4%	33	5%
Supported living	206	36%	220	37%	234	38%	248	39%
Living with family/friends	93	16%	90	15%	87	14%	83	13%
Mainstream housing	100	17%	105	18%	108	18%	112	18%
Totals	575	100%	596	100%	614	100%	632	100%
Total additional specialist/supported accommodation requirements			21		42		63	
Of which additional need for Shared Lives placements			7		14		22	
Of which additional need for Supported living			14		28		42	

Source: Essex County Council and HLIN

Estimated need is non-cumulative.

Table 35. Uttlesford: Estimated need for specialist/supported accommodation for people with learning disability and/or people with learning disability who are Autistic who draw on adult social care from Essex County Council to 2039.

	Current provision and population (2024)	Existing supply of housing & accomm. types (%)	Adult pop. by 2029 and estimated need for housing & accomm.	Estimated need for housing & accomm. types (%)	Adult pop. by 2034 and estimated need for housing & accomm.	Estimated need for housing & accomm. types (%)	Adult pop. by 2039 and estimated need for housing & accomm.	Estimated need for housing & accomm. types (%)
Population	136		141		145		150	
Housing & accommodation types								
Residential/nursing care	14	10%	14	10%	14	9%	13	9%
Shared Lives (adult placement)	0	0%	0	0%	0	0%	0	0%
Supported living	31	23%	35	25%	40	27%	44	29%
Living with family/friends	44	32%	43	30%	41	28%	39	26%
Mainstream housing	47	35%	49	35%	51	35%	53	35%
Totals	136	100%	141	100%	145	100%	150	100%
Total additional specialist/supported accommodation requirements			4		9		13	
Of which additional need for Shared Lives placements			0		0		0	
Of which additional need for Supported living			4		9		13	

Source: Essex County Council and HLIN

Uttlesford has zero projected need for Shared Lives placements. This should be reviewed by 2029 to assess whether the evidence of need has changed.
 Estimated need is non-cumulative.

3.42 The summary of estimated need for specialist/supported accommodation for people with learning disability and/or people with learning disability who are Autistic across all district/borough/city councils and for Essex is shown in the table below.

Table 36. Estimated need for specialist/supported accommodation for people with learning disability and/or people with learning disability who are Autistic who draw on adult social care from Essex County Council by district

District/Borough/ City Council	Supported living (units)			Shared Lives (placements)		
	By 2029	By 2034	By 2039	By 2029	By 2034	By 2039
Basildon	11	21	32	2	5	8
Braintree	12	24	37	2	5	8
Brentwood	4	8	13	1	1	2
Castle Point	4	7	11	1	3	4
Chelmsford	13	25	38	1	3	4
Colchester	23	45	68	1	1	2
Epping Forest	5	9	14	1	3	4
Harlow	3	6	9	2	5	8
Maldon	2	4	6	1	3	4
Rochford	4	8	12	0	0	0
Tendring	14	28	42	7	14	22
Uttlesford	4	9	13	0	0	0
<i>Out of County</i>	8	16	25	7	14	22
Essex	107	211	319	27	56	87

Source: Essex County Council and HLIN

Rochford and Uttlesford have zero projected need for Shared Lives placements. This should be reviewed by 2029 to assess whether the evidence of need has changed.

Estimated need is non-cumulative.

3.43 Evidence in relation to people with learning disability who draw on adult social care from Essex County Council, indicates that between 2022-2025, 25 people moved into extra care housing, on average approximately 8 people with learning disability aged 45+ moved into extra care housing per annum. It is anticipated that this trend will continue; this need is in addition to the estimated need for supported housing/supported living shown in table 36.

3.44 In relation to Housing Related Support services, evidence from Essex County Council commissioners indicates that in addition to the current HRS capacity in Chelmsford and Basildon, there is need for additional HRS capacity in the North-East and West Quadrants (where there is currently no HRS provision).

3.45 To attempt to quantify this qualitative assessment of need for additional HRS capacity, the growth in need for specialised accommodation (supported living and Shared Lives) from 2024 to 2039, as set out in Table 23, has been applied to the current baseline HRS service capacity.

3.46 The evidence set out in Table 23 indicates that estimated need for specialised accommodation (supported living and Shared Lives) is 406 additional units over the period from 2024 to 2039. Current supply of specialised accommodation (supported

living and Shared Lives) is 1,138 units. The estimated additional need to 2039 represents a 36% increase in supply over the period to 2039.

- 3.47 Applying an equivalent increase in the estimated capacity of HRS to 2039 suggests a need for 56 units of HRS by 2039, an increase of 15 units of HRS.
- 3.48 In addition to the estimated need for supported and specialist housing and accommodation identified above, the Learning Disability & Autism Health Equalities Team is seeking to find supported accommodation for people with learning disability, autistic people and people with mental health needs who have been placed in inpatient hospital beds.
- 3.49 There were 39 adults with learning disability and/or autism and mental health needs (as of May 2024) such that they require detention under the Mental Health act and are admitted into:
 - a) A local LD Assessment and Treatment unit (12)
 - b) An IPT commissioned bed (12)
 - c) Provider Collaborative Secure or Locked Rehab Bed (14)
- 3.50 These individuals will require housing solutions to enable them to move from inpatient settings and into community settings. Some of this need will be for supported and specialist housing and accommodation.
- 3.51 There is also a small but significant number of children and young people with learning disability and/or autism and mental health needs such that they require detention under the Mental Health act and are admitted to Tier 4 mental health beds.
- 3.52 There is a need for specific accommodation for young people to help avoid inpatient hospital admission and for accommodation to enable young people who have been admitted to hospital settings to be discharged to community settings.

4. Autistic people

Introduction

4.01 The focus of this part of the housing need assessment is autistic people who do not draw or are not likely to draw on adult social care support from Essex County Council.

Population of autistic people in Essex

4.02 The estimated number of autistic people in Essex is derived from the national prevalence rate of autism, which, according to the National Institute for Health and Care Excellence (NICE) Clinical Knowledge Summaries, is 1.1% for adults. The rate among men (1.8%) is higher than that among women (0.2%)¹⁶

4.03 The 1.1% prevalence rate is applied to the total 18+ population of Essex to estimate the number of autistic people in Essex.

4.04 The current (2024) estimated autistic population aged 18+ in Essex is c.13,300.

4.05 Based on the 2021 Census, 48% of the 18+ population in Essex is male, and 52% is female. Applying the commonly accepted male-to-female autism diagnosis ratio of 4:1, it is estimated that approximately 9,840 of these individuals are men and approximately 2,460 are women.

4.06 The population of autistic people is estimated to rise in line with the average growth in the adult population; that is 2.6% average annual growth rate (SNPP 2018), a linear projection method has been applied to estimate the future population to 2039.

Table 37. Population projection of people aged 18+ in Essex

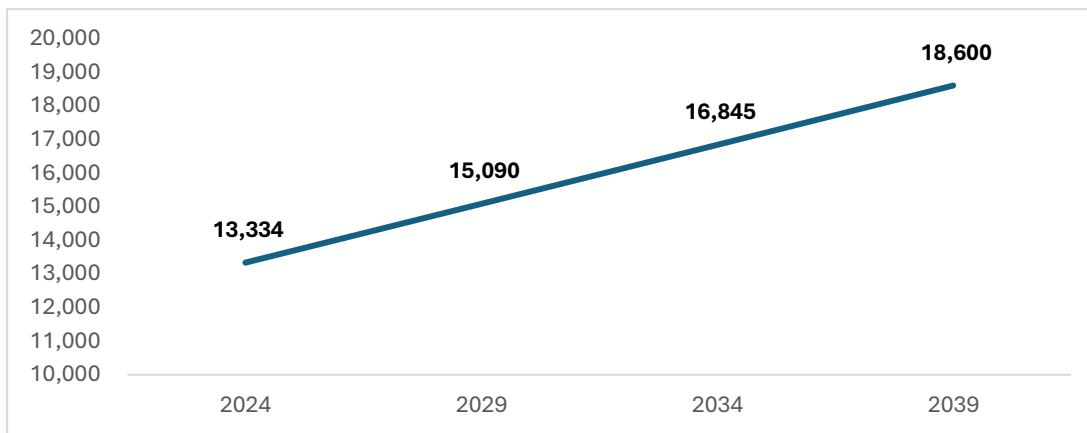
2021	2024	2029	2034	2039
1,190,238	1,212,212	1,251,292	1,290,428	1,320,545

Source: ONS 2021 and sub national population projections

4.07 The figure below shows the population projection of people aged 18+ who are autistic in Essex. The number of autistic people is estimated to increase 39% to c.18,600 by 2039.

¹⁶ National Institute for Health and Care Excellence (NICE) Autism prevalence (last revised in April 2025). Available at: <https://cks.nice.org.uk/topics/autism-in-adults/background-information/prevalence/>

Figure 6. The projected population of autistic people aged 18+ in Essex to 2039



Source: Autism prevalence UK, ONS 2021, SNPP 2018

4.08 This projection is based on an assumed average annual increase of 2.6% of the 2024 population. This approach assumes that the prevalence of autism remains constant over time and reflects the broader demographic trends in population growth.

Use of housing support and other support services

4.09 The Autism Navigation Service supports adults without a learning disability to seek an assessment of autism and provides support pre/mid/post diagnosis. People receive housing-related support such as liaising with landlords to resolve issues, support to register on the housing list, disputes with neighbours (generally noise), unlawful eviction, breakdown of family relationships resulting in homelessness.

4.10 Data from SUMMIT, an Autism Navigation Support Service in Essex indicated that between 1st December 2023 and 31st August 2024 there were 31 autistic people receiving housing support from the service such as, liaising with landlords to resolve issues, support to register on the housing list, disputes with neighbours (generally noise), unlawful eviction, breakdown of family relationships resulting in homelessness (this is separate to the accommodation-based housing related support service commissioned by Essex County Council adult social care for people with learning disability).

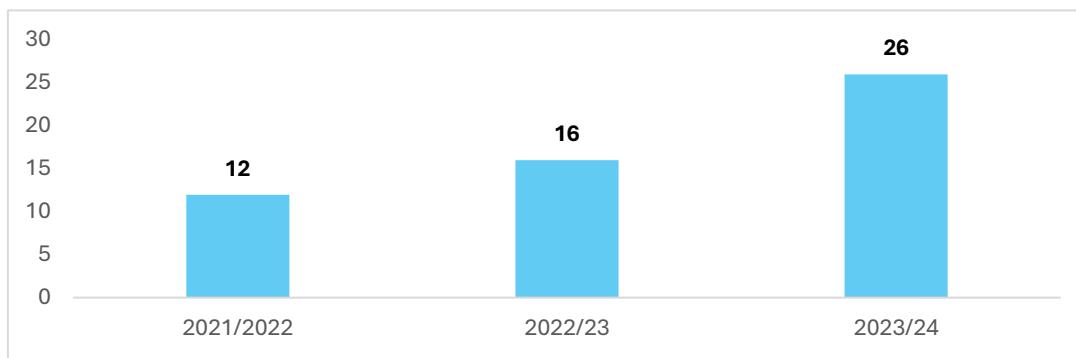
4.11 The evidence from SUMMIT is that the requests for housing-related support are increasing.

4.12 Essex Local Linked Support (LLS) provides a range of services that support autistic adults, adults with learning disabilities who are not receiving funded care or supported through Adult Social Care, and their carers. In 2023/24 LLS recorded a total of 26 referrals for housing-related support, it was the most accessed service of those services provided.

4.13 The data from LLS for April 2021 to March 2024 shows an increase in referral activity for housing-related support. The main requests that LLS get relate to occupational therapy housing needs reports which highlight the person's sensory processing issues.

This indicates that there is potentially a demand for support services that enable people to remain living in mainstream housing with support.

Figure 7. Number of referrals for housing-related support from 2021/22 to 2023/24



Source: LLS (2024)

Estimated need for housing and specialist/supported accommodation for autistic people by 2039

4.14 This section focuses on the estimated need for housing and specialist/supported accommodation for autistic people. It should be noted that it is likely that a majority of the estimated population of autistic people in Essex are unlikely to draw on adult social care support from Essex County Council.

4.15 Evidence from local commissioners and the Essex All Age Autism Strategy¹⁷ suggests the following:

- There is limited evidence available about the housing needs of autistic people who are not eligible for local authority Adult Social Care
- Evidence from Essex LLS indicates that many autistic adults are cared for by their ageing parents who are then unprepared for looking after themselves once their parents are no longer able to support them
- There is evidence that people in this population group may need support to access mainstream general needs housing in the social housing sector, e.g. support to be able to use choice-based lettings systems
- There is an awareness that some people may need support to maintain a tenancy and to prevent their needs from escalating towards eligibility for Adult Social Care services

4.16 The Essex All Age Autism Strategy identified the following housing related objectives, (however it should be noted that this strategy expires in 2025, and it is not yet confirmed whether housing objectives will be part of the next iteration):

- A range of suitable housing options are required

¹⁷ Essex County Council (2020). All Age Autism Strategy 2020-2025. Available at: essex autism strategy april-2020-final.pdf

- Support for people with autism to understand their housing options
- Support for people to develop the life skills needed to live independently through developing increased confidence and independence in home-management skills

4.17 Evidence from UK wide research undertaken by University of York¹⁸ (NB this was not research specific to Essex) in relation to the housing needs and requirements of people with learning disabilities and autistic people not eligible for social care support suggests:

- The majority of people tend to not require 'specialist housing' but are able to live in 'mainstream' housing (i.e. non-specialist housing) with the right practical and housing related support to maintain their tenancy
- Support to maintain tenancies tends to be provided by families or community organisations and in some cases landlords
- In some cases, there are people that better suit a supported housing option
- People are seeking homes where they can feel safe and secure. The research identified that social landlords may sometimes need to make 'management' lets outside of choice-based lettings systems to ensure that autistic people are housed in locations where they will be safe
- There is also a need for more accessible mainstream housing, and better access to aids and adaptations, particularly as people get older and their needs change

4.18 It is anticipated that the majority of this population are unlikely to require specialist/supported accommodation. Based on the evidence summarised above the housing needs of this population group may include:

- Access to predominantly affordable housing to rent, i.e. social housing from a housing association or local authority to rent
- Potentially, support to access social housing, particularly in relation to using choice-based lettings systems
- In some instances, 'sensitive' let's to ensure that people are not housed in locations where they may be vulnerable to abuse and/or hate crime

4.19 Based on the local and national evidence summarised above, some autistic people may need access to practical and housing related support in a range of mainstream housing settings rather than specialist/supported accommodation.

¹⁸ York University, Bristol University, and Housing LIN (2023). Supporting people with learning disabilities at the edges of social care in social housing and the private rented sector:

<https://www.york.ac.uk/chp/housing-health-wellbeing/learning-disabilities>

<https://www.housinglin.org.uk/Topics/type/Supporting-people-with-learning-disabilities-at-the-edges-of-social-care-in-social-housing-and-the-private-rented-sector/>

5. Vulnerable young people and Children in Care

Introduction

5.01 This section of the supported housing and accommodation need assessment covers:

- The need for supported housing that is designated for young people including care experienced young people (care leavers) for whom Essex County Council has corporate parenting responsibilities including Separated Migrant Children, 16-17 young people at risk of homelessness, vulnerable young parents and other vulnerable 18-21-year-olds. (NB the supported accommodation needs of looked after children/care leavers with learning disability or with learning disability and autism, are included as part of the supported and specialised accommodation need assessment for people with learning disability)
- Children in Care who require a residential placement
- Supported Accommodation (formerly called Semi Independent Accommodation) offers housing with support for 16 and 17-year-old Children in Care and care leavers, helping them to live semi-independently. As children mature and approach adulthood, they naturally gain more independence from their parents. The care system aims to mirror this transition to independence. From the age of 16, a looked after child can leave care (becoming a 'care leaver') and/or move to Supported Accommodation if they are ready. This option can be suitable for some older children who desire it and where it meets their needs and ensures their safety as part of a carefully managed transition to independence. Supported Accommodation aims to help young people develop their independence in preparation for adult life while keeping them safe in a nurturing and homely environment. Essex County Council currently operates a Framework for this type of Supported Accommodation and there is sufficient capacity at the present time. Therefore, Supported Accommodation for Children in Care and care leavers has not been included in this need assessment.

Need for supported housing that is designated for young people

5.02 This section of the supported housing need assessment covers the need for supported housing that is designated for young people including care experienced young people (care leavers) for whom Essex County Council has corporate parenting responsibilities including Separated Migrant Children, 16-17 young people at risk of homelessness, vulnerable young parents and other vulnerable 18-21-year-olds.

5.03 Within this population group there will be young people with high support needs (for example linked with poor mental health) who may require 24/7 support as well as young people who have lower-level support needs.

5.04 Currently a supported housing need assessment tool is used, and providers use the outcome star or equivalent to assess levels of support required for young people using the Essex Nacro Education support and Transition (NEST) service.

Context: Baseline population and projections

5.05 Evidence from Essex County Council's Sufficiency Strategy for Children in Care and Care Leavers in Essex 2023 – 2026¹⁹ (updated 2025) provides the following contextual evidence.

- As of December 2024, there were 1,131 Children in Care in Essex. Forecasts show that numbers may rise to 1,170 by March 2026 considering pressures from increased separated migrant children, court delays and increased referrals into the system
- Of the 1,131 Children in Care as of December 2024, 1,012 were from Essex while 119 were Separated Migrant Children (SMC), 33% down from the 178 SMC Children in Care in December 2023
- The number of Children in Care in Essex has remained below England, East of England, and Statistical Neighbour averages since 2012/13. As shown in Graph 2, since 2017/18 Essex has risen slightly from 33 Children in Care per 10,000 to 36 Children in Care per 10,000

5.06 Data from the Department for Education²⁰ and from Essex County Council indicates that the number of care leavers aged 17 – 21 years in Essex was 935 young people in 2024/25, 252 of whom were young people aged 17-18 years and 683 of whom were young people aged 19-21 years.

5.07 The equivalent figures for care leavers in 2020/21 was that the number of care leavers aged 17 – 21 years in Essex was 798 young people, of whom 221 were young people aged 17-18 years and 577 of whom were young people aged 19-21 years.

5.08 This indicates an increase in the number of 17-21-year-old care leavers of 17% over the period from 2020 to 2024, equivalent to an approximate 4% increase per annum.

5.09 On the basis of this evidence, i.e. evidence of an increase in the number of care leavers over the period of 2020 to 2024 and qualitative evidence from Council Officers that the number of care leavers is increasing, it has been assumed that over the next 5 years the care leaver population will increase at an average annual growth rate of c.4% per annum.

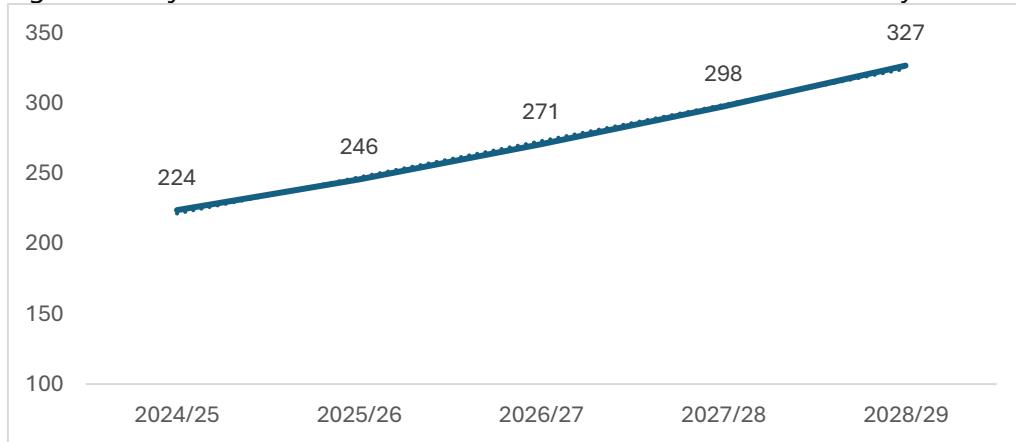
5.10 Projected over the next five years, the number of care leavers is estimated to be c.1,135 by 2029/2030, assuming the current annual growth rate of 4% continues. This is

¹⁹https://www.essex.gov.uk/sites/default/files/migration_data/files/assets.ctfassets.net/knkzaf64jx5x/4gM61R56mQjZU2JzRqJCaN/7691e3095fb1463d1f2fdb277bc5d56f/DS22_7689_Sufficiency_Strategy.pdf

²⁰<https://explore-education-statistics.service.gov.uk/data-tables/children-looked-after-in-england-including-adoptions/2024?subjectId=584845e2-1abb-4425-b0b8-08dd02546655>

equivalent to an average increase of c.40 additional care leavers per annum from 2024/25 to 2029/30. This projection suggests a likely increase in need for supported housing for care leavers.

Figure 8. Projected number of care leavers in Essex over the next five years to 2029/30



Source: DfE (2025); HLIN

- 5.11 In relation to 16-17 young people at risk of homelessness, evidence from MHCLG²¹, (which is based on data returned by local authorities in relation to people presenting as homeless or at risk of homelessness), identifies that:
- 5.12 In 2022/23 there were 76 16–17-year-olds owed a prevention or relief duty by the 12 district/borough/city councils in Essex
- 5.13 In 2023/24 there were 84 16–17-year-olds owed a prevention or relief duty by the 12 district/borough/city councils in Essex.
- 5.14 This is shown in Table 38 below.

Table 38. Number of 16/17 year olds owed a prevention or relief duty in Essex for 2022/23 and 2023/24

Local authority	2022/23	2023/24
Basildon	7	5
Braintree	8	5
Brentwood	0	7
Castle Point	2	2
Chelmsford	12	11
Colchester	16	16
Epping Forest	10	11
Harlow	4	6
Maldon	3	3
Rochford	3	2
Tendring	10	16
Uttlesford	1	0
Total	76	84

Source: MHCLG data tables statutory homelessness (2025)

²¹ <https://www.gov.uk/government/statistical-data-sets/live-tables-on-homelessness>

5.15 This evidence shows that the number of 16–17-year-olds owed a prevention or relief duty in Essex has increased over the period from 2022/23 to 2023/24. This is corroborated by qualitative evidence from stakeholders.

Current supply of supported housing for young people

5.16 Essex County Council commissions a housing related support service for young people with support needs in Essex. The commissioned housing related support service is called the 'Essex Nacro Education Support and Transition (NEST)' service.

5.17 The Essex NEST service provides a range of practical and emotional support to enable young people to live in supported housing. Essex County Council funds the support service within supported housing that is delivered by housing providers. Young people using the supported housing are responsible for meeting the rent and service charges (funded by housing benefit for young people who are eligible). NEST provides supported housing and associated support for young people with a range of needs and circumstances including:

- 16–17-year-olds at risk of homelessness
- Care leavers, including Separated Migrant Children
- Vulnerable young parents
- Other vulnerable 18–21-year-olds

5.18 The Essex NEST service covers all 12 city, borough and district councils within 4 quadrants:

- Mid Essex: Braintree, Chelmsford and Maldon
- North Essex: Colchester and Tendring
- South Essex: Basildon, Castlepoint, Rochford
- West Essex: Brentwood, Epping Forest, Harlow, Uttlesford

5.19 The Essex NEST service specification includes that the providers must deliver the following:

- A flexible support service for up to a maximum of 270 young people at any one time
- The service to be available to accept all new clients allocated via the Essex County Council-run Gateway Service
- All young people in the service to have access to between 1-10 hours of support per week, depending on assessed need
- All young people to have access to support through transition (both into and out of the service), depending on assessed need

5.20 In terms of accommodation units (of supported housing) provided, the service consists of the following:

- North Quadrant: 46 units
- Mid Quadrant: 51 units
- South Quadrant: 39 units
- West Quadrant: 53 units

5.21 In addition, the supported housing providers are required to make provision for the following emergency accommodation to be available at any given time:

- North Quadrant: 3 units
- Mid Quadrant: 3 units
- South Quadrant: 2 units
- West Quadrant: 2 units

5.22 The total number of accommodation units (of supported housing) provided is 199 units. This is shown in Table 39. Approximately one third of these accommodation units (of supported housing) is intended to be provided with 24/7 support, equally distributed for each quadrant.

Table 39. Essex NEST service accommodation units (of supported housing) by quadrant

Quadrant/Districts	Number of accommodation units (of supported housing) including emergency access units
South Basildon Castle Point Rochford	41
Mid Braintree Chelmsford Maldon	54
North Colchester Tendring	49
West Brentwood Harlow Epping Forest Uttlesford	55
Total	199

Source: Essex County Council (2025)

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

5.23 As part of the qualitative evidence for this needs assessment, we spoke with Council Officers to gain insight and context about the current housing provision and the changing needs of care experienced young people and 16/17 years olds at risk of homelessness across the county. The key themes are summarised below:

Changes in needs and trends

5.24 Demand for supported housing: There is increasing need for additional supported accommodation for care leavers and other vulnerable young people.

5.25 Provider capacity: There may be a need for contracted providers to deliver additional supported accommodation in response to evidence of increasing need for supported accommodation up to contracted service capacity of 270 units.

5.26 There is work in progress to review and finalise the existing Joint Protocol (between the 12 housing authorities and Children's Services at Essex County Council) and associated arrangements for homeless 16/17-year-olds. This protocol sets out the roles and responsibilities on the 12 housing authorities and Children's Services at Essex County Council in relation to meeting the housing and support needs of for homeless 16/17-year-olds.

Effectiveness of the current Essex NEST service and the associated accommodation units (supported housing)

5.27 Location and accessibility: The contract for the Essex NEST service requires that supported housing is distributed across all four quadrants. This is consistent with young people typically wishing to live in locations that have access to public transport, colleges, training and employment opportunities, and leisure facilities.

5.28 Ongoing support: The contract for the Essex NEST service requires that support is provided to all young people who have a planned entry to or exit from accommodation-based support. This reflects that the transition from living in supported accommodation to more independent living can be a challenging period for young people.

5.29 Affordability of housing: There are issues in relation to rent levels in independent general needs housing and balancing this with young people seeking/securing employment. Young people face paying rents in general needs housing (once they are 18 years) after leaving supported accommodation, where rent levels can be higher than they can afford, which can deter them from moving on from supported accommodation. It should be noted that young people using the supported housing are responsible for meeting the rent and service charges (funded by housing benefit for young people who are eligible).

5.30 Housing models: The supported housing delivered by housing providers includes shared supported accommodation and self-contained accommodation. Whilst shared supported housing has merits in terms of assisting young people to learn to live with others, for some young people there is a need for self-contained supported accommodation to avoid conflict with other residents/tenants.

Move on opportunities

5.31 Barriers to move-on readiness: Young people can face barriers in not being deemed 'tenancy ready' by some providers of general needs housing which can hinder their ability to move on from supported accommodation.

5.32 Disparities in access to move on housing between Essex housing authorities: there are differing rules in relation to qualifying for inclusion on housing registers and in relation to young people who move between housing authority areas.

5.33 There are differences in length of stay that are caused by variation in housing nominations and access to district council housing registers which can effectively close down move-on housing opportunities. However, nominations from housing authorities are discretionary and therefore probably based on demand in each area.

5.34 Limited availability of move-on properties: There is significant competition for 1 bed social housing dwellings and equivalent housing stock in the private rented sector that is affordable. This can make it challenging to support young people to move on from supported accommodation in a timely way when an individual no longer needs supported accommodation.

5.35 Impact on employment and skills development: The lack of available housing for move on from supported accommodation can adversely affect young people's employment opportunities.

5.36 Joint Protocol (between the 12 housing authorities and Children's Services at Essex County Council) development: There is work in progress to review and finalise the existing protocol and associated arrangements for homeless 16/17-year-olds and the separate protocol for care leavers to clarify what care experienced young people can expect regarding housing and move-on support.

Estimated future need for supported housing and move-on housing

5.37 Estimated future need for supported housing for young people in Essex is based on:

- the evidence of demand and the use of the Essex NEST service, and
- the contextual and qualitative evidence set out above

5.38 Table 40 shows the number of referrals to the Essex NEST service for 2022/23, 2023/24 and 2024/25 (projected for 2024/25).

Table 40. Total number of referrals to the Essex NEST service 2022/23 – 2024/25

Year	Total number of referrals
2022/23	180
2023/24	204
2024/25	199

Source: Essex County Council (2025)

5.39 This shows that there were 180 referrals in 2022/23, 204 referrals in 2023/24 and 199 referrals in 2024/25 (projected). The average number of referrals for 2023/24 and 2024/25 was 202. This is an average increase of c.6% per annum since 2022/23.

5.40 Table 41 shows the number of referrals that were accepted through the housing related support Gateway process in 2023/24 and 2024/25. This is used as a proxy for need for supported housing.

Table 41. Total number of referrals accepted or declined through the Essex NEST service Gateway process 2023/24 and 2024/25

	Number of referrals accepted	Number of referrals declined	Total
2023/24	187	17	204
2024/25	182	17	199

Source: Essex County Council (2025). N.B. Referrals declined may be for a range of reasons, for example: the person staying put; the person's needs not able to be met in supported housing; a person moving to another type of accommodation.

5.41 This shows that of 204 referrals in 2023/24, 187 were accepted as needing supported housing through the Gateway process and that of the 199 referrals in 2024/25 (projected) 182 were accepted as needing supported housing through the Gateway process. This indicates that need for supported housing as identified through Gateway acceptances of referrals is approximately 92%.

5.42 Full data in relation to move on from the Essex NEST service is available for 2023/24. Table 42 shows the total number of positive move on from supported housing (i.e. a 'positive' move-on is where a young person moves from supported housing to independent housing) and the total number of negative move-on/unknown (a 'negative' move-on is, for example where a young person has not moved on to independent housing because they may have been evicted from supported housing or abandoned their tenancy in supported housing).

Table 42. Total number of move on from supported housing 2023/24

2023/24	Mid	North	South	West	Total
Positive Move on	22	26	19	17	84
Negative move on/unknown	5	4	6	3	18
Total	27	30	25	20	102

Source: Essex County Council (2025)

5.43 This shows that there were 84 positive moves on to independent housing and 18 negative move on/unknown in 2023/24. Move on from supported housing is directly related to the length of time that a young person stays living in supported housing, i.e. the more quickly a young person moves on from supported housing to independent housing, the shorter the length of stay in supported housing.

5.44 This is a total of 102 move on from 199 units of supported housing. However, evidence from commissioners identifies that the service operates with approximately 25 voids (i.e. a total 102 move on from 174 units). This is an overall move on rate of 59% per annum. This evidence indicates that the average length of stay in housing related supported commissioned supported housing is approximately 20.5 months (i.e. at an approximate overall move on rate of 59% per annum, it takes 20.5 months to move on young people from all 199 units of supported housing).

5.45 In relation to estimated need for supported housing over the period to 2029/30 the following evidence has been used, and assumptions have been made.

5.46 The population of care leavers is assumed to be increasing by c.4% per year for the next 5 years to 2029/30 (paragraph 5.09).

5.47 The current capacity/availability of the Essex NEST service supported housing is 199 units.

5.48 The average total number of referrals for 2023/24 and 2024/25 was 202. This is an average increase of c.6% per annum since 2022/23.

5.49 The need for supported housing as identified through Gateway acceptances of referrals is approximately 92%.

5.50 The average length of stay in supported housing settings is c.20.5 months with an average of approximately 100 moves on per annum (102 of 174 available units, allowing for up to 25 voids).

5.51 The table below summarises the estimated need for additional supported housing in 2025/26.

Table 43. Summary of estimated need for supported housing for young people 2025/256

Referrals per annum	The average total number of referrals for 2023/24 and 2024/25 was 202. Applying increase of c.6% per annum = 214 estimated referrals.
Acceptances	Need for supported housing as identified through Gateway acceptances of referrals is approximately 92%. 214 estimated referrals x 92% = c.196 young people estimated to be in need of supported housing per annum (as at 2025/26).
Move on rate	The average length of stay in supported housing settings is c.20.5 months. Assuming there are no voids it takes 20.5 months for all 199 young people to move on. This is a move on rate of 9.7 people per calendar month, an equivalent of 117 young people moving on per annum.
Available supported housing capacity	c.117 units of available capacity in supported housing per annum (i.e. 199 units available – annual move on of 117 young people).

Estimated need for supported housing	c.196 young people estimated to be in need of supported housing per annum in context of c.117 units of available capacity in supported housing per annum.
Initial estimated net need for supported housing	c.79 units of additional supported housing capacity required per annum.
Adjusted estimated net need for supported housing	<p>The desired contractual length of stay is 14 months.</p> <p>If a mid-point length of stay of 18 months is used (mid-point between desired 14 months and current 20.5 months), adjusted estimated need is set out below.</p> <p>The average length of stay in supported housing settings is c.18 months,</p> <p>Assuming there are no voids it takes 18 months for all 199 young people to move on.</p> <p>This is a move on rate of 11 people per calendar month, an equivalent of 133 young people moving on per annum.</p> <p>c.196 young people are estimated to be in need of supported housing per annum in context of c.133 units of available capacity in supported housing per annum.</p> <p>c.63 units of additional supported housing capacity required per annum.</p>

5.52 In relation to the likely trend in the population of young people who may need supported housing, from the evidence above:

- The population of care leavers is assumed to be increasing by c.4% per year for the next 5 years to 2029/30
- The average number of referrals since 2022/23 has increased by c.6% per annum on average

5.53 For the purposes of estimating the population trend amongst young people in need of supported housing, it has been assumed that this population will increase by c.5% per annum to 2029/30 (the mean of 4% and 6%, above).

5.54 To estimate supported housing need for young people over the next 5 years to 2029/30, estimated net need for 2025/26 for additional supported housing, 63 units, is multiplied by 5% per annum (i.e. estimated need for 63 units of additional supported housing in 2025/26 is multiplied by 5% to identify that by 2026/27 estimated need for additional supported housing will have increased to 100 units. This calculation is repeated to identify estimated need in 2027/28, 2028/29 and 2029/30).

5.55 Table 44 summarises the estimated need for additional supported housing to 2029/30, i.e. need for supported housing in addition to the current supply.

Table 44. Estimated additional need for supported housing for young people to 2029/30

Year	Estimated additional need for supported housing (units)
2025/26	63
By 2026/27	66
By 2027/28	69
By 2028/29	73
By 2029/30	77

NB. Estimated need is not cumulative.

5.56 The evidence from Table 44 indicates that the estimated additional need for supported housing at 2025/26 is 63 units per annum. By 2029/30 the estimated additional need for supported housing will be 77 units per annum.

5.57 It should be noted that this estimated additional need for 77 supported housing units (in addition to the currently available 199 units of supported housing) could be met within the scope of the existing NEST contract, which has an upper capacity of 270 units (compared to the 199 units currently being provided).

5.58 The current commissioned supply of supported housing was based on the relative population of each quadrant. It has been assumed that estimated need for additional supported housing for young people will be distributed in the same proportions as the current supply.

5.59 Table 45 shows estimated need for supported housing for young people to 2029/30 by quadrant.

Table 45. Estimated need for supported housing for young people to 2029/30 by quadrant.

Quadrant	% of existing supply of supported housing	Estimated need for additional supported housing (units)				
		25/26	By 26/27	By 27/28	By 28/29	By 29/30
South	21%	13	14	14	15	16
Mid	27%	17	18	19	20	21
North	24%	15	16	17	18	18
West	28%	18	18	19	20	22
Total	100%	63	66	69	73	77

NB. Estimated need is not cumulative.

5.60 Evidence from stakeholders identifies that it is important that:

- Current and additional supported housing provision can cater for the full range of support needs of young people, including young people with the most complex support needs
- There is a need for additional self-contained supported housing, including smaller scale housing provision, which is better able to meet the needs of young people with higher and/or complex support needs, including multiple needs that are linked to previous trauma, mental health needs, experience of domestic violence, neuro diverse related needs

5.61 It is important to note that need for short term supported housing is affected by the level of move-on or 'throughput'. For example, if the average length of stay in young people's supported housing was reduced further, the estimated additional further supported housing capacity would decrease.

5.62 Move on housing refers to the estimated need for general needs housing (in the social housing sector and private sector) that people will need when they move on from shorter term supported housing. Estimates are shown as the annual requirement at the specified time period. The need for move-on housing is not modelled beyond 2029 as need beyond this timeframe will depend on operational factors such as length of stay in supported housing as well as whether the estimated need for future supported housing is met.

5.63 In relation to the need for move-on housing for young people leaving supported housing, the following evidence and assumptions have been used.

- The majority of young people leaving supported housing will require move-on housing. For the purposes of this assessment, it is assumed that all young people living in housing related support commissioned supported housing will require independent general needs housing to move to from supported housing
- The majority of young people needing move on housing require single person self-contained 1-bed accommodation. Move on housing includes social housing, private sector rental housing, moving on to live with friends/family, purchasing a home
- The average length of stay (LOS) in supported housing settings is c.20.5 months

5.64 The need for additional move-on housing for people leaving supported housing has been calculated in Table 46. This identifies a need for 117 units of general needs housing for move on from supported housing at 2024/25.

5.65 This evidence indicates that there is the following annual requirement amongst young people for general needs housing for move on from supported housing:

- Mid quadrant: 32 units per annum
- South quadrant: 24 units per annum
- West quadrant: 32 units per annum
- North quadrant: 29 units per annum

Table 46. Estimate of need for move-on housing for young people leaving supported housing (2024/25).

Quadrant	Districts	Population group	Type of service	Total current tenancies in supported housing	Assumptions	Move requirement - general needs housing (per annum at 2024/25)
Mid Quadrant	Braintree/Chelmsford/Maldon	Young people	Supported housing	54	Average LOS 21.5 months. Move to general needs housing	32
North Quadrant	Colchester/Tendring	Young people	Supported housing	49	Average LOS 21.5 months. Move to general needs housing	29
South Quadrant	Basildon/Castle Point/Rochford	Young people	Supported housing	41	Average LOS 21.5 months. Move to general needs housing	24
West Quadrant	Brentwood/Epping Forest/Harlow/Uttlesford	Young people	Supported housing	55	Average LOS 21.5 months. Move to general needs housing	32
					Total	117

Source: Essex County Council and HLIN

5.66 Based on a projected 10% increase in the 18–24-year-old population, the estimated annual need for move-on general needs housing for young people leaving supported housing is expected to rise by 2029/30 to approximately 26 units in the South quadrant, 35 in the Mid quadrant, 32 in the North quadrant, and 35 in the West quadrant. This results in a total projected need of 128 units across Essex. These figures represent quadrant-level estimates and have not been disaggregated to individual districts.

5.67 Essex County Council commissioners note that the NEST contract runs until 2027 with the option to extend for up to 2 years. There is provision within the contract to increase the number of accommodation units should this be required. Essex County Council is currently working with the NEST provider to identify additional accommodation units in the areas where they currently have waiting lists for the scheme. They will continue to closely monitor referrals into the service and occupancy levels.

Children in Care who require a residential placement

Context

5.68 Evidence from Essex County Council's Sufficiency Strategy for Children in Care and Care Leavers in Essex 2023 – 2026²² (updated 2025) provides the following contextual evidence.

- As of May 2025, there were 1,151 Children in Care in Essex
- The historic trend of Children in Care shows a steady, gradual increase from 2021 to date
- The forecasted trend suggests a continuation of this stable trend with a slight increase over time
- Over the next 2 years Essex County Council expects Children in Care numbers to increase to 1,170 by the end of March 2026
- 12.5% of Children in Care are placed in residential children's homes
- Essex County Council is experiencing a trend of a greater number of children with higher needs which means they need a short-term solo or dual placement. The vast majority of Essex provision is 4 bed care homes, although private providers are beginning to respond to this need by opening smaller homes

²²https://www.essex.gov.uk/sites/default/files/migration_data/files/assets.ctfassets.net/knkzaf64jx5x/4gM61R56mQjZU2JzRqJCaN/7691e3095fb1463d1f2fdb277bc5d56f/DS22_7689_Sufficiency_Strategy.pdf

Current use of residential home provision for children

5.69 As of May 2025, there were 72 registered children's homes providing a total of 286 placements in Essex. Almost all of these homes are provided by the private sector.

5.70 Only 20% of registered children's homes capacity in Essex is being used by Essex Children in Care.

5.71 The use of residential placements for Children in Care by Essex County Council is shown in Table 47.

Table 47. Residential placements of Children in Care by Essex County Council, September 2020 to September 2024.

Placement District	2020	2021	2022	2023	2024
	September	September	September	September	September
Basildon			1		4
Braintree	2	3	4	3	3
Brentwood		1			1
Castle Point	2	4	2	2	6
Chelmsford	4	3	4	3	5
Colchester	7	3	4	7	6
Epping Forest	2	2	2	1	1
Harlow	2	1	2		3
Maldon	3		2	2	2
Rochford					2
Tendring	5	6	6	8	11
Uttlesford	3	4	4	3	3
<i>Out of County</i>	71	67	63	80	88
Total	101	94	94	109	135

Source: Essex County Council (2025)

5.72 Evidence from Essex County Council in relation to placements of Children in Care in residential home placements between September 2020 and September 2024 indicates:

- Between September 2020 and September 2024, the use of residential placements for Children in Care declined in 2021 and 2022 and then increased in 2023 and 2024
- Between September 2020 and September 2024, the use of residential placements for Children in Care has increased by c.34%. This is the equivalent of a c.8% increase per annum between September 2020 and September 2024
- The use of out of county residential placements was c.70% of all placements in September 2020; this had decreased to 57% of all placements by May 2025

The type of supported accommodation needed: Local policy and stakeholder insights

5.73 Essex County Council launched in 2022 its residential programme for Children in Care in response to:

- Sufficiency pressures
- Out of county placements and
- Uncontrollable cost increases

5.74 This is intended to be an ambitious programme which includes opening Essex County Council's own homes. It includes the following provision:

- In house group homes
- In house solo/dual placement homes
- A solo home which has a commissioned provider delivering care.

5.75 Essex County Council's Sufficiency Strategy for Children in Care and Care Leavers in Essex 2023 – 2026 (updated 2025) sets out Essex County Council's intention in relation to residential care for children, specifically to improve sufficiency through:

- Strengthening and brokering closer relationships with Essex providers to increase access to local placements
- Creating more placement capacity by providing buildings from which providers can deliver the care and support
- Creating emergency/crisis placement capacity
- Capitalising on collaborations with other regional and likeminded Local Authority Partners to address specific gaps in provision
- Working with providers to create a sustainable market
- Work with the District/Borough/City local planning authorities to increase their understanding of the need for children's homes
- Being a strong leader with the market, sharing intelligence on existing and emerging trends and co-producing new innovative models
- Ensuring there is an even spread of placements across the county, so that we can offer placements in all our localities

Estimated future need for residential provision for children

5.76 Essex County Council's Sufficiency Strategy for Children in Care and Care Leavers in Essex 2023 – 2026 (updated 2025) identifies that in the next two years, Essex County Council anticipates requiring:

- 19 additional residential placements between December 2024 and October 2026 (equivalent to an additional 9-10 residential placements per annum)

5.77 The evidence from Table 47 indicates that there has been the equivalent of an c.8% increase in use of residential placements for Children in Care between September 2020 and September 2024. If this trend were to continue for the next 5 years to 2029, there would be a requirement for 200 residential placements by September 2029.

Table 48. Estimated requirement for residential placement capacity for Children in Care by 2029

Date	September 2024	September 2025	September 2026	September 2027	September 2028	September 2029
Number of residential placements required	135	146	158	171	185	200

5.78 Essex County Council is proactively developing and using residential care capacity in Essex for Children in Care. Between September 2020 and May 2025, the use of out of county placements as a percentage of total placements decreased from 70% to 57%.

5.79 If this policy results in at least the same level of reduction in the use of out of county placements, by 2029 it is anticipated that no more than 41% of placements would be out of county, i.e. approximately 59% of residential placements would be in Essex.

5.80 This suggests that by 2029, of a projected 200 residential placements being required, approximately a minimum of 118 placements would be in Essex.

5.81 The table below provides a summary of the estimated potential need for residential placements by 2029/30 by district, based on the distribution of placements by district in September 2024.

Table 49. Residential placements of Children in Care by Essex County Council, estimated need by September 2029

Placement District	2024	2029
Basildon	4	10
Braintree	3	8
Brentwood	1	3
Castle Point	6	15
Chelmsford	5	13
Colchester	6	15
Epping Forest	1	3
Harlow	3	8
Maldon	2	5
Rochford	2	5
Tendring	11	28
Uttlesford	3	8
<i>Out of County</i>	88	82
Total	135	200

Source: Essex County Council (2025)/Housing LIN

6. People with mental health needs

Introduction

6.01 The intention of this assessment is to identify the need for specialist/supported and move on accommodation for people with mental health care and support needs who are eligible for mental health community-based accommodation from Essex County Council and Essex Partnership University NHS Foundation Trust (EPUT).

6.02 The assessment of need for specialist/supported accommodation and move on accommodation for people with mental health needs draws on a range of evidence, including:

- Demographic context: current population and projected population of people with mental health needs
- Current provision of specialist/supported accommodation
- Local policy context
- Local commissioner perspectives and intelligence
- Evidence from people with mental health needs

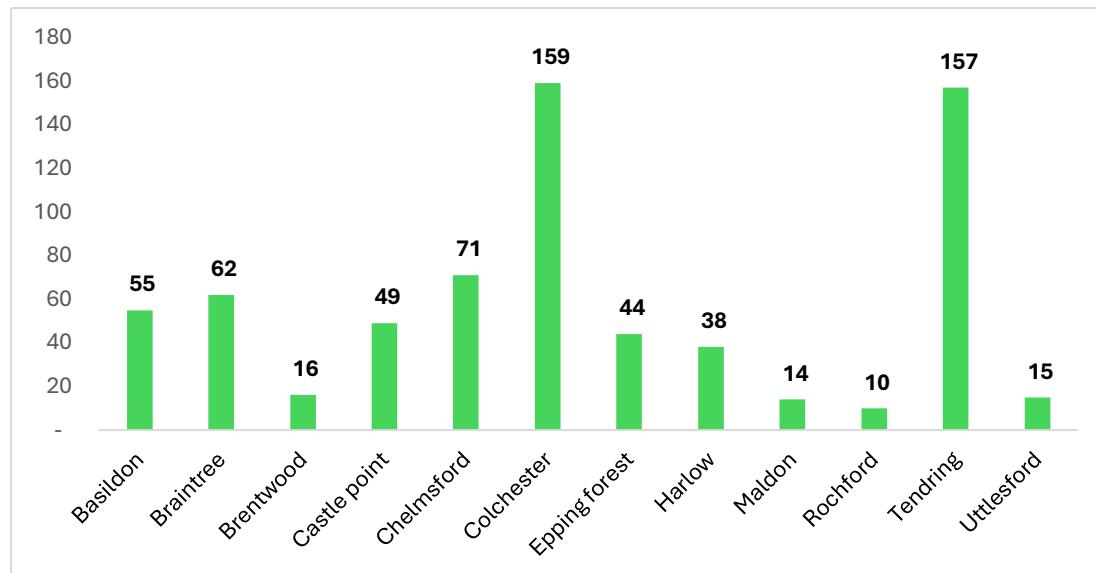
Baseline population and population projections

6.03 The data from MOSAIC has been used to calculate the population of people aged 18+ who draw on adult social care support provided by Essex County Council. This calculation is based on data that includes individuals living in different types of accommodation, including specialist/supported accommodation, residential care, and those receiving care in their own homes.

6.04 The sum of the population of people with mental health care and support needs aged 18+ who draw on adult social care support provided by Essex County Council across all 12 districts has been taken as the Essex total.

6.05 There are currently c.690 people with mental health care and support needs across Essex receiving a mental health care/support package from Essex County Council (from latest MOSAIC snapshot in September 2024).

Figure 9. Population of people with mental health care and support needs eligible for Adult Social Care, provided by Essex County Council by district in 2024



Source: Essex County Council (MOSAIC)

Population as of September 2024

6.06 To project forward to 2039 the population aged 18+ years with mental health care and support needs, the following data sources have been used:

- Population of people with mental health needs from 2020 to 2024 who draw on adult social care mental health support provided by Essex County Council (from MOSAIC)
- Mental health conditions prevalence - Quality Outcomes Framework (QOF)²³ prevalence trends (average annual growth: 2013/14-2023/24)
- ONS 2018 sub national population projection of people aged 18+ in Essex

6.07 To project forward the population of people with mental health needs who draw on adult social care support provided by Essex County Council to 2039, the following method has been used:

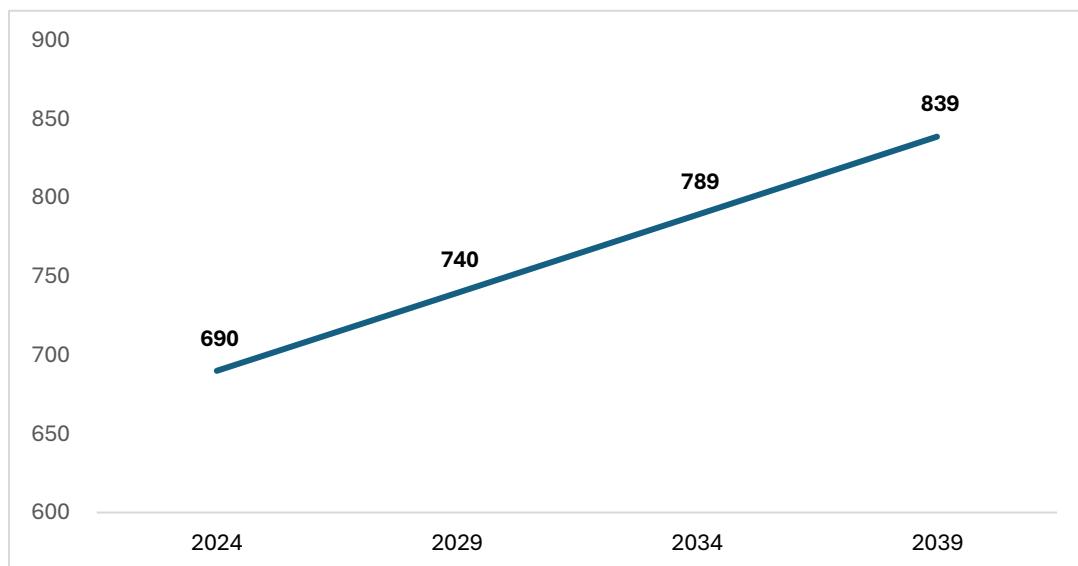
- The baseline population has been calculated as the number of people who draw on adult social care support, using the MOSAIC dataset
- The trends in the population of people with mental health care and support needs from the MOSAIC dataset from 2020 to 2024 has been analysed, and the average annual growth rate has been used for population projections
- In relation to changes in the population of adults with mental health care and support needs, evidence from the Quality Outcomes Frameworks (QOF) data indicates that there has been a c.26% increase in the population over the period from 2013 to 2024 with average annual growth of 2%

²³ [QOF-Essex](#) : the percentage of patients with schizophrenia, bipolar affective disorder and other psychoses as recorded on practice disease registers (2013-2024)

- However, it is more likely that the overall population with mental health care and support needs may reflect changes in the population of people aged 18+ for Essex. The anticipated trend in the population of people aged 18+ is projected to be an increase of 2% per annum²⁴ to 2039
- An average of trends in the MOSAIC data, the QOF population of people with mental health care and support needs, and the overall population of people aged 18+ in Essex indicates a projected annual increase of 1.4% in the population of people with mental health care and support needs. This equates to an approximate increase of 7% by 2029, 14% by 2034, and 21% by 2039

6.08 Based on this evidence, the population of people with mental health care and support needs aged 18+ who draw on adult social care mental health support provided by Essex County Council is projected to increase to 740 people by 2029/30; 789 people by 2034/35; and 839 people by 2039.

Figure 10. Projected population of people with mental health needs aged 18+ who draw on adult social care support provided by Essex County Council to 2039



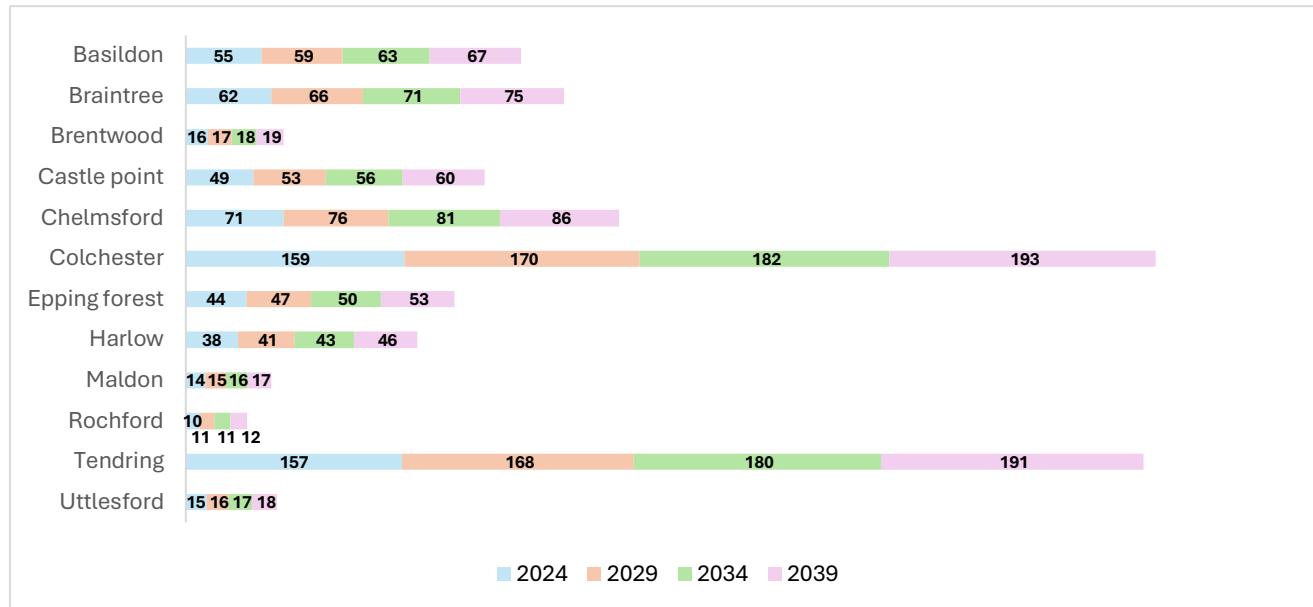
Source: Essex County Council (MOSAIC and Resource Co-ordinator Registers), QOF and SNPP 2018

6.09 The same methodology (see 6.07) is applied to each of the districts to project the estimated number of people with mental health care and support needs to 2039.

6.10 This evidence indicates an increase in the estimated population of people with mental health care and support needs across all districts from 2024 to 2039.

²⁴ ONS 2018-based Subnational Population Projections for England; released in 2020

Figure 11. Estimated population of people with mental health needs aged 18+ who draw on adult social care support provided by Essex County Council by district projected to 2039

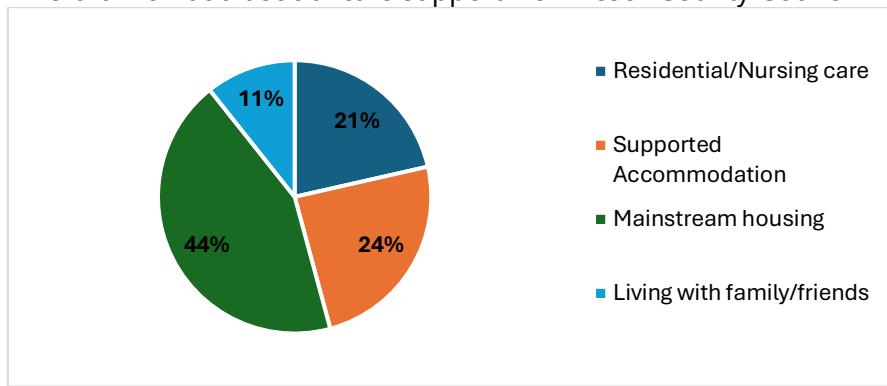


Source: Essex County Council, QOF, SNPP 2018

Where people with mental health needs are living

- 6.11 The data from Essex County Council indicates that most people (55%) that are who draw on adult social care support from Essex County Council are living in ordinary housing, either in mainstream housing with support or with family/friends.
- 6.12 Approximately 25% of people are living in supported housing and just over 20% of people are living in a care home.

Figure 12. Accommodation status of people with mental health needs that are who draw on adult social care support from Essex County Council



Source: Essex County Council

NB: The total number of individuals living at home has been categorised into mainstream housing and living with family based on the proportions derived from MHSDS data.

- 6.13 Essex County Council has commissioned specialist supported community-based accommodation that forms the Mental Health Recovery Model and Pathway with referrals to this accommodation open to mental health services only. The pathway

delivers a range of supported accommodation offering different levels of care and support enabling people to move through the pathway as they recover. The aim of the pathway is for people to be supported with their mental health in a community-based accommodation setting to maximise their recovery, ability to self-manage and to move towards living independently.

6.14 The Mental Health Supported Accommodation Pathway is county-wide model consisting of 5 levels of supported provision:

- Intensive Assessment Beds (IAB) - Maximum 6 week stay for assessment and referral. CQC registered and managed as a residential model. 6 units for North and West quadrants only
- Complex - Maximum 6 month stay. CQC registered. 6 units for people from North Essex and 6 units for people from West Essex only
- High - Not CQC registered. County-wide provision where people live in supported housing subject to Assured Shorthold Tenancies (ASTs). The intention is for people to step down to medium/low level supported accommodation in the recovery pathway towards move on to independence. Overall recovery to move on anticipated to take on average 2 - 3 years
- Medium and Low - Not CQC registered. Offers lower-level mental health care and support but increasing levels of support for independence, move on and resettlement

6.15 In addition to the commissioned mental health supported accommodation recovery pathway, some people are supported in 'intensive enablement plus'²⁵ and some people are living in Mental Health Residential and Nursing accommodation receiving care and support appropriate to their needs.

6.16 This is summarised in Table 50.

²⁵ The Council also spot purchases Intensive Enablement Plus provision providing higher-level, bespoke packages to the most complex individuals.

Table 50. Essex County Council commissioned/funded specialist/supported accommodation in Essex for people aged 18+ who draw on adult social care support provided by Essex County Council

Quadrant	District	Mental health recovery pathway specialist/supported accommodation (units)	Intensive Enablement Plus (IE+) (units)	Residential and Nursing Care (beds)
Mid Quadrant	Braintree	19	0	2
	Chelmsford	20	0	0
	Maldon	0	0	0
North Quadrant	Colchester	38	0	2
	Tendring	60	5	17
South Quadrant	Basildon	10	42	0
	Brentwood	0	0	0
	Castle Point	0	26	0
	Rochford	0	5	0
West Quadrant	Epping Forest	8	0	4
	Harlow	13	0	1
	Uttlesford	0	8	0
Total		168	86	26

Source: Essex County Council (2024)

6.17 Table 51 shows the accommodation status of people aged 18+ who draw on adult social care support provided by Essex County Council by district in 2024, including those people living in the Essex County Council commissioned mental health recovery pathway specialist/supported accommodation.

6.18 In addition, there are 13 supported living placements in Southend-on-Sea and 13 supported living placements in Thurrock for people with mental health needs.

Table 51. Accommodation status of people aged 18+ who draw on adult social care support provided by Essex County Council by district in 2024

District	Mainstream housing	%	Living with family/friends	%	Mental health recovery pathway specialist/supported accommodation	%	Residential/ Nursing Accommodation	%	Total
Basildon	27	9%	7	9%	10	6%	11	7%	55
Braintree	29	10%	7	10%	19	11%	7	5%	62
Brentwood	11	4%	3	4%	0	0%	2	1%	16
Castle Point	39	13%	9	13%	0	0%	1	1%	49
Chelmsford	35	11%	8	11%	20	12%	8	5%	71
Colchester	59	20%	15	20%	38	23%	47	32%	159
Epping forest	22	7%	6	7%	8	5%	8	5%	44
Harlow	18	6%	4	6%	13	8%	3	2%	38
Maldon	10	3%	3	3%	0	0%	1	1%	14
Rochford	7	2%	2	2%	0	0%	1	1%	10
Tendring	32	11%	8	11%	60	36%	57	39%	157
Uttlesford	10	3%	3	3%	0	0%	2	1%	15
Essex (total)	300	100%	74	100%	168	100%	148	100%	690

Source: Essex County Council (2024)

NB: The total number of individuals living at home has been categorised into mainstream housing and living with family based on the proportions derived from MHSDS data.

Trends in the accommodation status of people with mental health needs (2021–2023)

6.19 Based on the trend data for 2021–2024 for the population of people with mental health care and support needs aged 18+ who draw on adult social care support provided by Essex County Council, the 'living at home' category shows a gradual upward trend. It started with a small decline of 0.5% in 2022, followed by an increase of 3% in 2023 and 2024.

6.20 For supported accommodation (the mental health recovery pathway specialist/supported accommodation), the percentage change showed an increase overall. There was a 14% increase in 2021, followed by a slight decrease of 4% in 2022. In 2023, the percentage dropped significantly by 12%, but it increased by 13% in 2024. Due to the high variability in district-level data, an overall average over the period 2021–2023 has been used to project likely future need.

6.21 Mental Health Residential and Nursing care demonstrated a greater fluctuating trend. Use decreased 13% in 2021, increased by 9% in 2022, then increased by 6% in 2023 but decreased by 10% in 2024.

6.22 Overall, the trends highlight people living at home shows a gradual upward trend with an average annual increase of 0.3%. Supported accommodation also shows an upward trend, averaging an annual increase of 4%. Use of residential and nursing accommodation shows a declining trend, with an average annual decrease of 2%.

Figure 13. Trends in accommodation status for people with mental health care and support needs 2021–2024



Source: Essex County Council MOSAIC (2024)

Local policy context and Essex County Council commissioner perspectives

6.23 Southend Essex and Thurrock (SET) Mental Health Strategy 2023-2028²⁶ sets out the strategic intentions of health and care leaders across Essex, Southend and Thurrock.

6.24 The key priorities include:

Prevention & Early Intervention

6.25 Ensure people have access to local community-based support for their mental health throughout their lives. This should include integrated therapies, especially for people who have complex needs and/or are particularly vulnerable.

Acute and Crisis Services

6.26 Improve pathways and access to community-based support during a mental health crisis to avoid escalation and/or inpatient admission.

6.27 Reduce hospital admissions for mental health conditions, including emergency admissions for self-harm, through improved community support.

6.28 Reduce time spent in inappropriate out-of-area placements by adults needing non-specialist mental health inpatient care.

Supporting Recovery

6.29 Develop specialist/supported accommodation in the community to support timely discharge from hospital settings.

6.30 Improve and embed integrated pathways to access housing, education, employment, self-directed support and skills, particularly for people with severe mental illness.

Essex County Council commissioner perspectives

6.31 Essex County Council commissioners have commissioned specialist/supported accommodation services for people aged 18+ with mental health care and support needs. This is referred to as the Mental Health Supported Accommodation pathway.

6.32 The model is designed to achieve the following outcomes:

- Adults have good mental health
- Adults with mental health needs recover
- Adults are supported to maximise their potential in education and employment
- Adults are able to access social networks and feel a connection to their local community or the community they want to be part of
- Adults live as independently as possible in accommodation that is suitable for their needs

²⁶ Southend Essex and Thurrock Mental Health Strategy 2023-2028. Available at:

<https://democracy.thurrock.gov.uk/documents/s40432/Item%207.%20SET%20MH%20strategy%20-%20for%20HWB%20310823.pdf>

- Adults are supported to determine and achieve their individual outcomes

6.33 The new model implements a tiered service, comprising the following elements:

- Intensive Assessment Beds (IAB)
 - Complex Provision
 - High Needs Provision
 - Medium and Low Needs Provision

6.34 Commissioners note that the service is generally operating at full capacity with referrals from Essex Partnership University NHS Foundation Trust (EPUT), primarily for people at the point of discharge from inpatient beds. However, people in the community at risk of inpatient admission are also referred to the mental health recovery pathway by EPUT.

6.35 Commissioners note that there is future potential for additional need for specialist/supported accommodation within the mental health recovery pathway particularly in districts that do not currently have accommodation within the pathway.

6.36 However, commissioners note that the primary need is for sufficient 'move on' accommodation to enable individuals to move through the pathway into independent housing as part of their recovery.

Estimated need for specialist/supported accommodation by 2039

6.37 The estimated need for specialist/supported accommodation and move on accommodation or people with mental health care and support needs is based on the following approach.

6.38 Projections in relation to population growth and specialist/supported accommodation need are based on the following assumptions and considerations:

- There is currently (2024/25) c.690 people aged 18+ with mental health care and support needs living in Essex who draw on adult social care support from Essex County Council
- The population change for people with mental health care and support needs in Essex is estimated by taking the average of trends in the MOSAIC data, the QOF population of people with serious mental health needs, and the population aged 18+ in Essex to give a 1.4% increase per annum (see para. 6.07)
- On this basis the population of people with mental health care and support needs aged 18+ living in Essex who draw on adult social care support from Essex County Council, is projected to increase to 740 people by 2029; 789 people by 2034; and 839 people by 2039
- Based on the trends seen (see Figure 13) in the population of people with mental health care and support needs from 2020 to 2024 (based on MOSAIC data):
 - The need for residential care is estimated to decrease by 2% per year to 2039

- The percentage of the population living in specialist/supported accommodation is estimated to increase by 4% per year to 2039 due to the increasing overall population, the anticipated reduction in the need for residential care and from evidence of demand for the Essex County Council commissioned supported accommodation pathway
- People living at home (mainstream housing and people living with family/friends) is estimated to increase 0.3% per year due to the increase in the overall population of adults with mental health care and support needs

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

6.40 The estimated need for specialist/supported accommodation for people with mental health care and support needs is shown in Table 52. This shows the number of additional accommodation units required to meet estimated need by 2029, 2034, and 2039.

Table 52. Essex: Estimated need for specialist/supported accommodation for people with mental health care and support needs to 2039.

	Current provision and population 2024	Existing supply of housing & accommodation types (%)	Adult pop and estimated need for housing & accommodation by 2029	Estimated need for housing & accommodation types (%)	Adult pop and estimated need for housing & accommodation by 2034	Estimated need for housing & accommodation types (%)	Adult pop and estimated need for housing & accommodation by 2039	Estimated need for housing & accommodation types (%)
Population	690		740		789		839	
Housing & accommodation types								
Mainstream housing	300	44%	330	45%	360	46%	390	47%
Mental health recovery pathway specialist/supported accommodation	168	24%	203	27%	238	30%	273	33%
Residential/nursing care	148	21%	132	18%	116	15%	99	12%
Living with family/informal carers	74	11%	75	10%	76	10%	77	9%
Totals	690	100%	740	100%	789	100%	839	100%
Additional need: Mental health recovery pathway specialist/supported accommodation			35		70		105	

Source: Essex County Council and HLIN. NB. Estimated need is non-cumulative

6.41 In summary, it is estimated for Essex overall that:

- An additional c.35 units of mental health specialist/supported accommodation will be needed by 2029
- An additional c.70 units of mental health specialist/supported accommodation will be needed by 2034
- An additional c.105 units of mental health specialist/supported accommodation will be needed by 2039

6.42 The same methodology (see 6.38) is used to estimate mental health specialist/supported accommodation need by district to 2039.

6.43 The total estimated additional need for mental health specialist/supported accommodation in Essex (35 units in 2029, 70 units in 2034, and 105 units in 2039) has been disaggregated by district based on the percentage of people with mental health needs in each district (see Table 53). This ensures that need in each district is proportionate to its population, addressing current gaps in service provision from the overall estimated need for additional need for mental health recovery pathway specialist/supported accommodation.

Table 53. Percentage of the population of people with mental health care and support needs who draw on adult social care support provided by Essex County Council by district

Quadrant	Districts	Percentage (%)
Mid Quadrant	Braintree	9%
	Chelmsford	10%
	Maldon	2%
North Quadrant	Colchester	23%
	Tendring	23%
South Quadrant	Basildon	8%
	Brentwood	2%
	Castle Point	7%
	Rochford	1%
West Quadrant	Epping Forest	6%
	Harlow	6%
	Uttlesford	2%
Essex		100%

Source: Essex County Council (2024)

6.44 Estimated additional need for mental health specialist/supported accommodation by district/borough/city councils is shown in the following tables.

Table 54. Basildon: Estimated need for specialist/supported accommodation for people with mental health care and support needs to 2039.

	Current provision and population 2024	Existing supply of housing & accommodation types (%)	Adult pop and estimated need for housing & accommodation by 2029	Estimated need for housing & accommodation types (%)	Adult pop and estimated need for housing & accommodation by 2034	Estimated need for housing & accommodation types (%)	Adult pop and estimated need for housing & accommodation by 2039	Estimated need for housing & accommodation types (%)
Population	55		59		63		67	
Housing & accommodation types								
Mainstream housing	27	50%	30	50%	32	51%	34	51%
Mental health recovery pathway specialist/supported accommodation	10	18%	13	22%	16	25%	18	27%
Residential/nursing care	11	20%	10	17%	9	14%	7	11%
Living with family/informal carers	7	12%	7	12%	7	11%	7	10%
Totals	55	100%	59	100%	63	100%	67	100%
Additional need: Mental health recovery pathway specialist/supported accommodation			3		6		8	

Source: Essex County Council and HLIN. NB. Estimated need is non-cumulative

Supported and Specialist Housing and Accommodation Needs Assessment

Table 55. Braintree: Estimated need for specialist/supported accommodation for people with mental health care and support needs to 2039.

	Current provision and population 2024	Existing supply of housing & accommodation types (%)	Adult pop and estimated need for housing & accommodation by 2029	Estimated need for housing & accommodation types (%)	Adult pop and estimated need for housing & accommodation by 2034	Estimated need for housing & accommodation types (%)	Adult pop and estimated need for housing & accommodation by 2039	Estimated need for housing & accommodation types (%)
Population	62		67		71		76	
Housing & accommodation types								
Mainstream housing	29	47%	31	47%	33	46%	35	46%
Mental health recovery pathway specialist/supported accommodation	19	31%	22	33%	25	36%	28	38%
Residential/nursing care	7	11%	6	9%	5	8%	5	6%
Living with family/informal carers	7	11%	7	11%	7	10%	7	10%
Totals	62	100%	67	100%	71	100%	76	100%
Additional need: Mental health recovery pathway specialist/supported accommodation			3		6		9	

Source: Essex County Council and HLIN. NB. Estimated need is non-cumulative

Table 56. Brentwood: Estimated need for specialist/supported accommodation for people with mental health care and support needs to 2039.

	Current provision and population 2024	Existing supply of housing & accommodation types (%)	Adult pop and estimated need for housing & accommodation by 2029	Estimated need for housing & accommodation types (%)	Adult pop and estimated need for housing & accommodation by 2034	Estimated need for housing & accommodation types (%)	Adult pop and estimated need for housing & accommodation by 2039	Estimated need for housing & accommodation types (%)
Population	16		17		18		20	
Housing & accommodation types								
Mainstream housing	11	70%	12	69%	12	67%	13	66%
Mental health recovery pathway specialist/supported accommodation	0	0%	1	5%	2	9%	2	12%
Residential/nursing care	2	13%	2	10%	2	9%	1	7%
Living with family/informal carers	3	17%	3	16%	3	15%	3	15%
Totals	16	100%	17	100%	18	100%	20	100%
Additional need: Mental health recovery pathway specialist/supported accommodation			1		2		2	

Source: Essex County Council and HLIN. NB. Estimated need is non-cumulative

Table 57. Castle Point: Estimated need for specialist/supported accommodation for people with mental health care and support needs to 2039.

	Current provision and population 2024	Existing supply of housing & accommodation types (%)	Adult pop and estimated need for housing & accommodation by 2029	Estimated need for housing & accommodation types (%)	Adult pop and estimated need for housing & accommodation by 2034	Estimated need for housing & accommodation types (%)	Adult pop and estimated need for housing & accommodation by 2039	Estimated need for housing & accommodation types (%)
Population	49		53		56		60	
Housing & accommodation types								
Mainstream housing	39	79%	40	75%	41	72%	42	70%
Mental health recovery pathway specialist/supported accommodation	0	0%	2	5%	5	9%	7	12%
Residential/nursing care	1	2%	1	2%	1	1%	1	1%
Living with family/informal carers	9	19%	10	18%	10	17%	10	16%
Totals	49	100%	53	100%	56	100%	60	100%
Additional need: Mental health recovery pathway specialist/supported accommodation			2		5		7	

Source: Essex County Council and HLIN. NB. Estimated need is non-cumulative

Table 58. Chelmsford: Estimated need for specialist/supported accommodation for people with mental health care and support needs to 2039.

	Current provision and population 2024	Existing supply of housing & accommodation types (%)	Adult pop and estimated need for housing & accommodation by 2029	Estimated need for housing & accommodation types (%)	Adult pop and estimated need for housing & accommodation by 2034	Estimated need for housing & accommodation types (%)	Adult pop and estimated need for housing & accommodation by 2039	Estimated need for housing & accommodation types (%)
Population	71		76		81		87	
Housing & accommodation types								
Mainstream housing	35	49%	37	48%	39	48%	42	48%
Mental health recovery pathway specialist/supported accommodation	20	28%	24	31%	27	33%	31	36%
Residential/nursing care	8	11%	7	9%	6	8%	5	6%
Living with family/informal carers	8	12%	9	11%	9	11%	9	10%
Totals	71	100%	76	100%	81	100%	87	100%
Additional need: Mental health recovery pathway specialist/supported accommodation			4		7		11	

Source: Essex County Council and HLIN. NB. Estimated need is non-cumulative

Table 59. Colchester: Estimated need for specialist/supported accommodation for people with mental health care and support needs to 2039.

	Current provision and population 2024	Existing supply of housing & accommodation types (%)	Adult pop and estimated need for housing & accommodation by 2029	Estimated need for housing & accommodation types (%)	Adult pop and estimated need for housing & accommodation by 2034	Estimated need for housing & accommodation types (%)	Adult pop and estimated need for housing & accommodation by 2039	Estimated need for housing & accommodation types (%)
Population	159		171		182		194	
Housing & accommodation types								
Mainstream housing	59	37%	68	40%	76	42%	85	44%
Mental health recovery pathway specialist/supported accommodation	38	24%	46	27%	54	30%	62	32%
Residential/nursing care	47	30%	42	25%	37	20%	32	16%
Living with family/informal carers	15	9%	15	9%	15	8%	15	8%
Totals	159	100%	171	100%	182	100%	194	100%
Additional need: Mental health recovery pathway specialist/supported accommodation			8		16		24	

Source: Essex County Council and HLIN. NB. Estimated need is non-cumulative

Table 60. Epping Forest: Estimated need for specialist/supported accommodation for people with mental health care and support needs to 2039.

	Current provision and population 2024	Existing supply of housing & accommodation types (%)	Adult pop and estimated need for housing & accommodation by 2029	Estimated need for housing & accommodation types (%)	Adult pop and estimated need for housing & accommodation by 2034	Estimated need for housing & accommodation types (%)	Adult pop and estimated need for housing & accommodation by 2039	Estimated need for housing & accommodation types (%)
Population	44		47		50		54	
Housing & accommodation types								
Mainstream housing	22	51%	24	51%	26	52%	28	52%
Mental health recovery pathway specialist/supported accommodation	8	18%	10	22%	12	25%	15	27%
Residential/nursing care	8	18%	7	15%	6	12%	5	10%
Living with family/informal carers	6	13%	6	12%	6	11%	6	11%
Totals	44	100%	47	100%	50	100%	54	100%
Additional need: Mental health recovery pathway specialist/supported accommodation			2		4		7	

Source: Essex County Council and HLIN. NB. Estimated need is non-cumulative

Table 61. Harlow: Estimated need for specialist/supported accommodation for people with mental health care and support needs to 2039.

	Current provision and population 2024	Existing supply of housing & accommodation types (%)	Adult pop and estimated need for housing & accommodation by 2029	Estimated need for housing & accommodation types (%)	Adult pop and estimated need for housing & accommodation by 2034	Estimated need for housing & accommodation types (%)	Adult pop and estimated need for housing & accommodation by 2039	Estimated need for housing & accommodation types (%)
Population	38		41		44		46	
Housing & accommodation types								
Mainstream housing	18	46%	19	46%	20	46%	21	45%
Mental health recovery pathway specialist/supported accommodation	13	34%	15	37%	17	39%	19	41%
Residential/nursing care	3	8%	3	7%	2	5%	2	4%
Living with family/informal carers	4	11%	4	11%	4	10%	5	10%
Totals	38	100%	41	100%	44	100%	46	100%
Additional need: Mental health recovery pathway specialist/supported accommodation			2		4		6	

Source: Essex County Council and HLIN. NB. Estimated need is non-cumulative

Table 62. Maldon: Estimated need for specialist/supported accommodation for people with mental health care and support needs to 2039.

	Current provision and population 2024	Existing supply of housing & accommodation types (%)	Adult pop and estimated need for housing & accommodation by 2029	Estimated need for housing & accommodation types (%)	Adult pop and estimated need for housing & accommodation by 2034	Estimated need for housing & accommodation types (%)	Adult pop and estimated need for housing & accommodation by 2039	Estimated need for housing & accommodation types (%)
Population	14		15		16		17	
Housing & accommodation types								
Mainstream housing	10	75%	11	72%	11	70%	12	68%
Mental health recovery pathway specialist/supported accommodation	0	0%	1	5%	1	9%	2	12%
Residential/nursing care	1	7%	1	6%	1	5%	1	4%
Living with family/informal carers	3	18%	3	17%	3	16%	3	16%
Totals	14	100%	15	100%	16	100%	17	100%
Additional need: Mental health recovery pathway specialist/supported accommodation			1		1		2	

Source: Essex County Council and HLIN. NB. Estimated need is non-cumulative

Table 63. Rochford: Estimated need for specialist/supported accommodation for people with mental health needs care and support to 2039.

	Current provision and population 2024	Existing supply of housing & accommodation types (%)	Adult pop and estimated need for housing & accommodation by 2029	Estimated need for housing & accommodation types (%)	Adult pop and estimated need for housing & accommodation by 2034	Estimated need for housing & accommodation types (%)	Adult pop and estimated need for housing & accommodation by 2039	Estimated need for housing & accommodation types (%)
Population	10		11		11		12	
Housing & accommodation types								
Mainstream housing	7	72%	8	70%	8	68%	8	67%
Mental health recovery pathway specialist/supported accommodation	0	0%	1	5%	1	9%	2	12%
Residential/nursing care	1	10%	1	8%	1	7%	1	6%
Living with family/informal carers	2	18%	2	17%	2	16%	2	15%
Totals	10	100%	11	100%	11	100%	12	100%
Additional need: Mental health recovery pathway specialist/supported accommodation			1		1		2	

Source: Essex County Council and HLIN. NB. Estimated need is non-cumulative

Table 64. Tendring: Estimated need for specialist/supported accommodation for people with mental health care and support needs to 2039.

	Current provision and population 2024	Existing supply of housing & accommodation types (%)	Adult pop and estimated need for housing & accommodation by 2029	Estimated need for housing & accommodation types (%)	Adult pop and estimated need for housing & accommodation by 2034	Estimated need for housing & accommodation types (%)	Adult pop and estimated need for housing & accommodation by 2039	Estimated need for housing & accommodation types (%)
Population	157		168		180		191	
Housing & accommodation types								
Mainstream housing	32	20%	42	25%	51	29%	61	32%
Mental health recovery pathway specialist/supported accommodation	60	38%	68	40%	76	42%	84	44%
Residential/nursing care	57	36%	51	30%	44	25%	38	20%
Living with family/informal carers	8	5%	8	5%	8	4%	8	4%
Totals	157	100%	168	100%	180	100%	191	100%
Additional need: Mental health recovery pathway specialist/supported accommodation			8		16		24	

Source: Essex County Council and HLIN. NB. Estimated need is non-cumulative

Supported and Specialist Housing and Accommodation Needs Assessment

Table 65. Uttlesford: Estimated need for specialist/supported accommodation for people with mental health care and support needs to 2039.

	Current provision and population 2024	Existing supply of housing & accommodation types (%)	Adult pop and estimated need for housing & accommodation by 2029	Estimated need for housing & accommodation types (%)	Adult pop and estimated need for housing & accommodation by 2034	Estimated need for housing & accommodation types (%)	Adult pop and estimated need for housing & accommodation by 2039	Estimated need for housing & accommodation types (%)
Population	15		16		17		18	
Housing & accommodation types								
Mainstream housing	10	70%	11	68%	11	67%	12	66%
Mental health recovery pathway specialist/supported accommodation	0	0%	1	5%	2	9%	2	12%
Residential/nursing care	2	13%	2	11%	2	9%	1	7%
Living with family/informal carers	3	17%	3	16%	3	15%	3	15%
Totals	15	100%	16	100%	17	100%	18	100%
Additional need: Mental health recovery pathway specialist/supported accommodation			1		2		2	

Source: Essex County Council and HLIN. NB. Estimated need is non-cumulative

Table 66. Estimated additional need for mental health specialist/supported accommodation for people with mental health care and support needs by district

Estimated need for supported accommodation				
Quadrant	District	By 2029	By 2034	By 2039
Mid Quadrant	Braintree	3	6	9
	Chelmsford	4	7	11
	Maldon	1	1	2
North Quadrant	Colchester	8	16	24
	Tendring	8	16	24
South Quadrant	Basildon	3	6	8
	Brentwood	1	2	2
	Castle Point	2	5	7
	Rochford	1	1	2
West Quadrant	Epping Forest	2	4	7
	Harlow	2	4	6
	Uttlesford	1	2	2
Essex		35	70	105

6.45 Based on the geographic distribution of the current mental health specialist/supported accommodation, it is assumed that in relation to the estimated need for 105 additional places by 2039:

- At least 4 additional units would be for Intensive Assessment Beds (IAB)
- At least 5 additional units would be for Complex provision
- Provision of intensive assessment beds and complex places would be required in Mid and South Essex
- The remaining estimated need for c.95 supported accommodation units would be for a mix of high support and medium/low support

6.46 Essex County Council commissioners note that:

- Essex County Council commissions a Mental Health Supported Accommodation provision which has mobilised in North-East, Mid and West Essex and continues to mobilise in South Essex in 2025. Essex County Council has commenced a review of mental health residential and nursing accommodation provision countywide including a review of all individuals care and support needs in provision both in and out of the county. This also includes those in high-cost placements. Reviews will inform Essex County Council's need and demand and the commissioning and procurement of an offer to meet the care and support needs of our residents
- Essex County Council has commissioned a transformational Mental Health Supported Accommodation pathway. As part of this work, a review of people's care and support needs was undertaken to inform Mental Health Supported Accommodation need and demand and led to the commissioning of a new Mental

Health Supported Accommodation pathway. Essex County Council will use need identified in this need assessment to support commissioning intentions and category plans used to inform commissioning and procurement activity

- There are no individuals residing in Mental Health Supported Accommodation out of county. 13 individuals reside in spot purchase Mental Health Supported Accommodation in Southend on Sea and 13 individuals reside in spot purchase MH Supported Accommodation in Thurrock. Work is ongoing to move people into the new MH Supported Accommodation pathway commissioned. Care and support reviews are being undertaken of all individuals residing in Mental Health Residential and Nursing provision to inform need and demand and support commissioning and procurement activity. This includes 227 individuals in Essex and individuals residing out of county

Move on housing requirements

6.47 The estimated requirement for general needs housing for move on is considered in relation to the number of units within the commissioned mental health specialist/supported accommodation pathway.

6.48 The model of commissioned mental health specialist/supported accommodation pathway consists of the following 'tiers' of specialist/supported accommodation, each with a proposed typical length of stay (LOS):

- Intensive Assessment Beds (IAB). Maximum 6 week stay for assessment and referral. CQC registered and managed as residential model. 6 units for North and West quadrants only. Average length of stay of 6 weeks assumed
- Complex needs. Maximum 6 month stay, CQC registered, 6 units for north referrals 6 for West and 1 spot purchase therefore 13 units in total. Average length of stay of 0.5 years assumed
- High needs specialist/supported accommodation. Not registered and county-wide. Likely that people needing high support services will step down to other support levels on the recovery pathway to move on. Overall recovery to move on takes on average 2-3 years. Average length of stay of 2.5 years assumed
- Medium and low specialist/supported accommodation. Offering less mental health support but increasing levels of support for independence, move on and resettlement. Move on, on average 1-2 years. Average length of stay of 1.5 years assumed

6.49 Table 67 shows the estimated move on accommodation/housing requirements:

- Overall move on requirements per annum through the pathway based on the average length of stay for each 'tier' within the pathway (above)

- The move on requirements for general needs housing per annum for people moving on from the commissioned specialist/supported accommodation in the pathway

Table 67. Estimated annual move on accommodation/housing requirements

Quadrant	District	Town	Population group	Specialism	Type of contract	Total Tenancies	Assumptions	Move on housing requirements (p. a) in 2024/25
Mid Quadrant	Braintree	Braintree	Mental Health	Medium support	Contracted provision	6	Average LOS 1.5 years. Move to general needs housing ²⁷	4
	Braintree	Braintree	Mental Health	High support	Contracted provision	13	Average LOS 2.5 years. Move to general needs housing ²⁸	5
	Chelmsford	Chelmsford	Mental Health	Medium support	Contracted provision	12	Average LOS 1.5 years. Move to general needs housing	8
	Chelmsford	Chelmsford	Mental Health	Medium support	Contracted provision	8	Average LOS 1.5 years. Move to general needs housing	5
							Sub total	22

²⁷ Total number of tenancies divided by 1.5²⁸ Total number of tenancies divided by 2.5

Supported and Specialist Housing and Accommodation Needs Assessment

Quadrant	District	Town	Population group	Specialism	Type of contract	Total Tenancies	Assumptions	Move on housing requirements (p. a) in 2024/25
North Quadrant	Colchester	Colchester	Mental Health	Complex	Contracted provision	12	Average LOS 6 months. Move to other options in recovery pathway ²⁹	N/A
	Colchester	Colchester	Mental Health	Intensive Assessment Beds	Contracted provision	6	Average LOS 6 weeks. Move to other options in recovery pathway ³⁰	N/A
	Colchester	Colchester	Mental Health	Medium support	Contracted provision	20	Average LOS 1.5 years. Move to general needs housing	13
	Tendring	Clacton On Sea	Mental Health	High support	Contracted provision	22	Average LOS 2.5 years. Move to general needs housing	9
	Tendring	Clacton On Sea	Mental Health	Long term Low**	Contracted provision	10	Average LOS 1.5 years. Move to	7

²⁹ Total number of tenancies multiplied by 2

³⁰ 52 weeks divided by 6 places multiplied by 6

Supported and Specialist Housing and Accommodation Needs Assessment

Quadrant	District	Town	Population group	Specialism	Type of contract	Total Tenancies	Assumptions	Move on housing requirements (p. a) in 2024/25
							general needs housing	
	Tendring	Clacton On Sea	Mental Health	Low support	Contracted provision	10	Average LOS 1.5 years. Move to general needs housing	7
	Tendring	Clacton On Sea	Mental Health	Medium support	Contracted provision	4	Average LOS 1.5 years. Move to general needs housing	3
	Tendring	Clacton On Sea	Mental Health	Medium support	Contracted provision	5	Average LOS 1.5 years. Move to general needs housing	3
	Tendring	Clacton On Sea	Mental Health	Medium support	Contracted provision	9	Average LOS 1.5 years. Move to general needs housing	6
							Sub total	48
South Quadrant	Basildon	Basildon	Mental Health	High support	Contracted provision	10	Average LOS 2.5 years. Move to general needs housing	4

Supported and Specialist Housing and Accommodation Needs Assessment

Quadrant	District	Town	Population group	Specialism	Type of contract	Total Tenancies	Assumptions	Move on housing requirements (p. a) in 2024/25
							Sub total	4
West Quadrant	Epping Forest	Waltham Abbey	Mental Health	Medium support	Contracted provision	8	Average LOS 1.5 years. Move to general needs housing	5
	Harlow	Harlow	Mental Health	High support	Contracted provision	13	Average LOS 2.5 years. Move to general needs housing	5
							Sub total	10
							Total	84

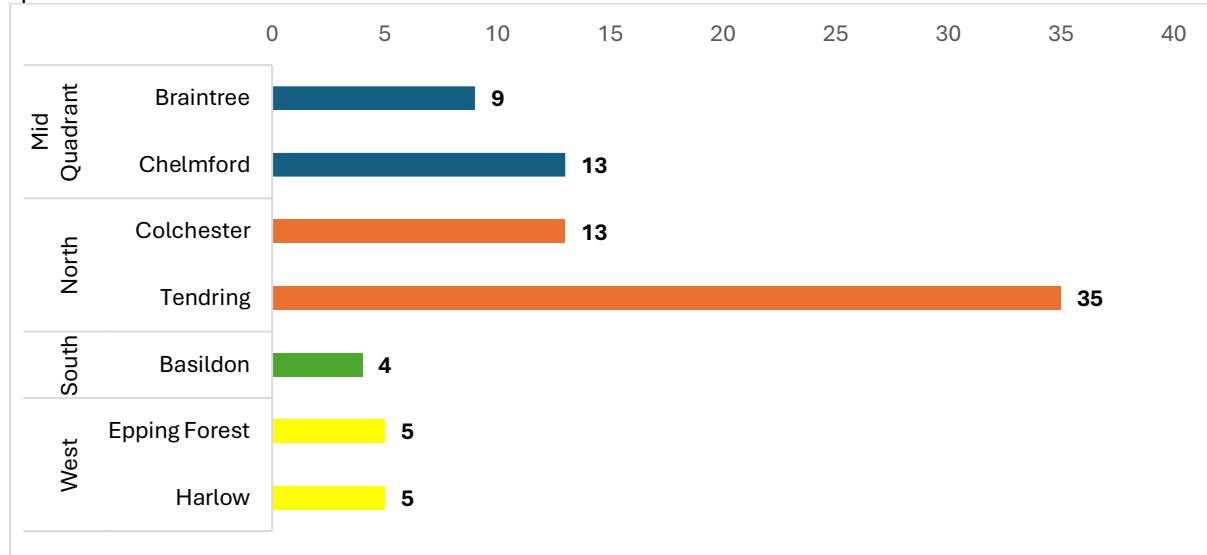
Source: Essex County Council (2024)

6.50 Based on the assessment set out in Table 67 there is an estimated annual requirement for 84 units of general needs housing per annum, specifically to meet the needs of people moving on from the high-level support and medium/low support tiers.

6.51 The estimated annual requirement for general needs housing disaggregated by quadrant and district/borough/city councils is:

- Mid Quadrant: 22 move on general needs housing units per annum
 - Braintree. 9 units required per annum
 - Chelmsford. 13 units required per annum
- North Quadrant: 48 move on general needs housing units per annum
 - Colchester. 13 units required per annum
 - Tendring. 35 units required per annum
- South Quadrant: 4 move on general needs housing units per annum
 - Basildon. 4 units required per annum
- West Quadrant: 10 move on general needs housing units per annum
 - Epping Forest. 5 units required per annum
 - Harlow. 5 units required per annum

Figure 14. Estimated annual requirement for general needs housing disaggregated by quadrant and district



Source: Essex County Council and HLIN

6.52 The 2029 projections for move-on housing requirements have been calculated by assuming that the annual demand observed in 2024/25 remains steady over time. To estimate the cumulative need over a five-year period, the annual figures for each

district is projected taking the average of trends in the MOSAIC data, the QOF population of people with serious mental health needs, and the population aged 18+ in Essex to give a 1.4% increase per annum as per 6.38.

Table 68. Estimated requirement for general needs move on housing disaggregated by quadrant and district

Quadrant	Districts	2024	2029
Mid	Braintree	9	10
	Chelmsford	13	14
North	Colchester	13	14
	Tendring	35	37
South	Basildon	4	5
West	Epping Forest	5	5
	Harlow	5	5
	Total	84	90

Source: Essex County Council and HLIN

7. People with physical disabilities

Introduction

7.01 This assessment covers the estimated need amongst people with a physical disability for:

- Fully wheelchair accessible housing (to M4(3) standards). It includes people with physical disabilities who draw on adult social care support from Essex County Council and people with physical disabilities who do not draw on adult social care support from Essex County Council
- Supported housing (sometimes also referred to as 'supported living') for people with physical disabilities who draw on adult social care support from Essex County Council

7.02 This assessment considers evidence in relation to:

- The baseline population of people with physical disabilities, including people with physical disabilities who draw on adult social care support from Essex County Council and people with physical disabilities who do not draw on adult social care support from Essex County Council
- Estimated need for wheelchair accessible housing, for people with physical disabilities who draw on adult social care support from Essex County Council and people with physical disabilities who do not draw on adult social care support from Essex County Council
- Contextual evidence to 'sense test' estimated need for wheelchair accessible housing, specifically:
 - The number of applicants on social housing registers who have identified a need for wheelchair accessible homes
- The need for supported housing (sometimes also referred to as 'supported living') for people with physical disabilities who draw on adult social care support from Essex County Council

Summary of estimated need for wheelchair accessible housing (Part M(4) category 3)

7.03 The summary of estimated need for fully wheelchair accessible housing is provided in the tables below.

Table 69. Estimated need for fully wheelchair accessible housing by age

Estimated need	2024	By 2029	By 2034	By 2039	By 2044
Estimated need for fully wheelchair accessible housing: M4(3)(total)	1,992	2,109	2,228	2,315	2,416
Under 65	753	797	842	875	913
65+	1,239	1,312	1,386	1,440	1,503

Source: Horizon Housing, Essex NHS wheelchair services, ONS 2018-based household projections for England, ONS 2021 census

Table 70. Estimated need for fully wheelchair accessible housing by tenure

Estimated need	2024	By 2029	By 2034	By 2039	By 2044
Estimated need for fully wheelchair accessible housing: M4(3) (total)	1,992	2,109	2,228	2,315	2,416
Owner occupier households	1,156	1,223	1,292	1,343	1,401
Social renting households	677	717	758	787	822
Private renting households	159	169	178	185	193

Source: Essex NHS wheelchair services, Horizon Housing, EHS2018/19, ONS 2018-based household projections for England, ONS 2021 census

NB: The estimates of need for fully wheelchair accessible housing have been disaggregated by tenure based on evidence from Essex NHS wheelchair services and the English Housing Survey (EHS)

Housing need assessment: Wheelchair accessible housing required by people with physical disabilities

Baseline population of people with physical disabilities

Population of wheelchair users in Essex

7.04 The baseline population of people in Essex who are wheelchair users has been supplied by the Essex NHS wheelchair service. These data have been used to project the minimum population of wheelchair users to 2044 and as the base population to apply assumptions in relation to the percentage of this population who are estimated to be likely to have an unmet need for wheelchair accessible housing.

7.05 To estimate the total number of wheelchair users in Essex, data on known users in the mid, south, and north and west quadrants were used.

7.06 Combining data from the Essex NHS Wheelchair Service, it is estimated that there are approximately 9,743 wheelchair users across Essex. It should be noted that this is a best estimate of the minimum likely population of wheelchair users in Essex; there will be other wheelchair users who do not use the Essex NHS wheelchair service, however about whom no data are collected in terms of the size of this population group.

Table 71. Wheelchair users by the quadrant in Essex 2023/24

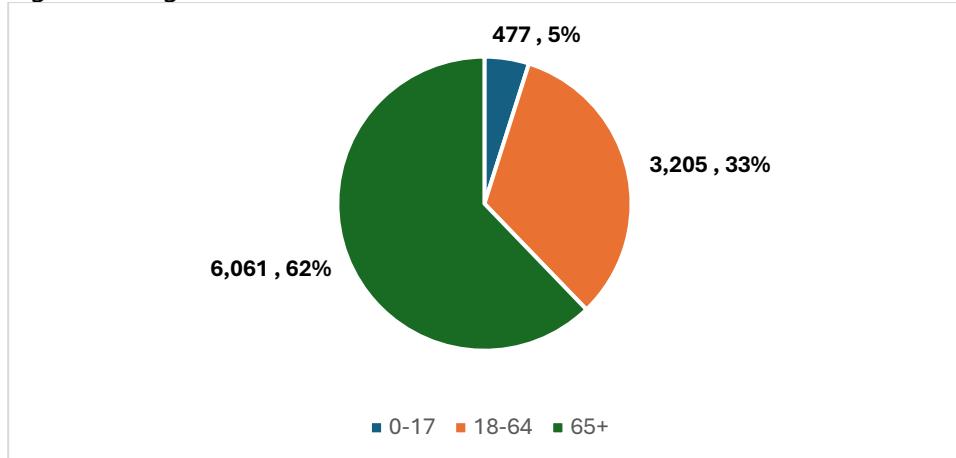
Quadrant	No. of wheelchair users	Total population of Essex ³¹	Wheelchair users as % of total population
Mid	1,559	413,562	0.4%
North	2,301	350,205	0.7%
South	3,446	446,742	0.8%
West	2,437	325,609	0.7%
Total	9,743	1,536,118	0.6%

Source: Essex NHS Wheelchair Service (2023/24), ONS 2021

7.07 Data provided by Essex NHS Wheelchair Service on the number of wheelchairs show the age distribution of wheelchair users in Essex. The majority of wheelchair users (62%) are aged 65+, wheelchair users between 18-64 years make up 33% of the wheelchair user population and 5% of wheelchair users are aged 0-17.

³¹ Total population of Essex from ONS 2021 Census data available at <https://www.ons.gov.uk/census>

Figure 15. Age distribution of the estimated 9,743 wheelchair users in Essex

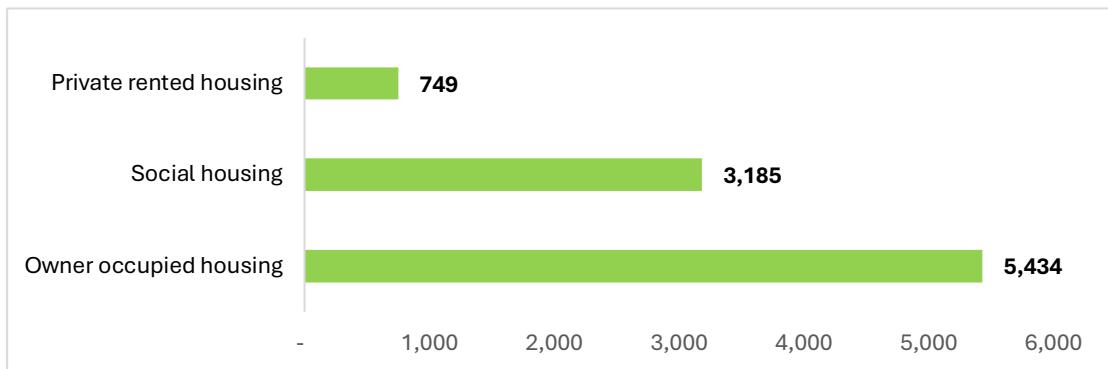


Source: Essex NHS Wheelchair Service (2024)

7.08 The 2018/19 English Housing Survey³² (EHS) has been used (as the most recent relevant data) to estimate the tenure status of wheelchair users. This suggests that 34% of wheelchair users are living in social housing (in local authority or housing association homes), 58% live in owner-occupied housing and 8% live in the private rented sector.

7.09 The estimated tenure status of wheelchair users in Essex is shown in the figure below.

Figure 16. Estimated tenure of 9,743 wheelchair users in Essex in 2024



Source: Essex NHS Wheelchair Service (2024); English Housing Survey (2018/19)

7.10 The estimated number of wheelchair users in Essex (Table 71) shows individual wheelchair users. Whilst it is possible that there will be some households that have more than one wheelchair user, the English Housing Survey (2018/19) data show that only 4% of wheelchair user households have more than one wheelchair user. This means that the number of 'wheelchair user households' is lower than the number of individual wheelchair users.

7.11 For the purposes of estimating the number of households with a wheelchair user, it is assumed that multi-wheelchair user households contain two wheelchair users. Using this assumption, the total number of wheelchair users can be represented as: Total wheelchair users = $(96\% \times H) + (4\% \times 2H) = 1.04H$ where H represents the total number of wheelchair user households. Solving for H, the total number of individual wheelchair

³² English Housing Survey 2018-19 Accessibility of English homes

users in Essex (9,743) is divided by 1.04, resulting in an estimated 9,368 households with at least one wheelchair user.

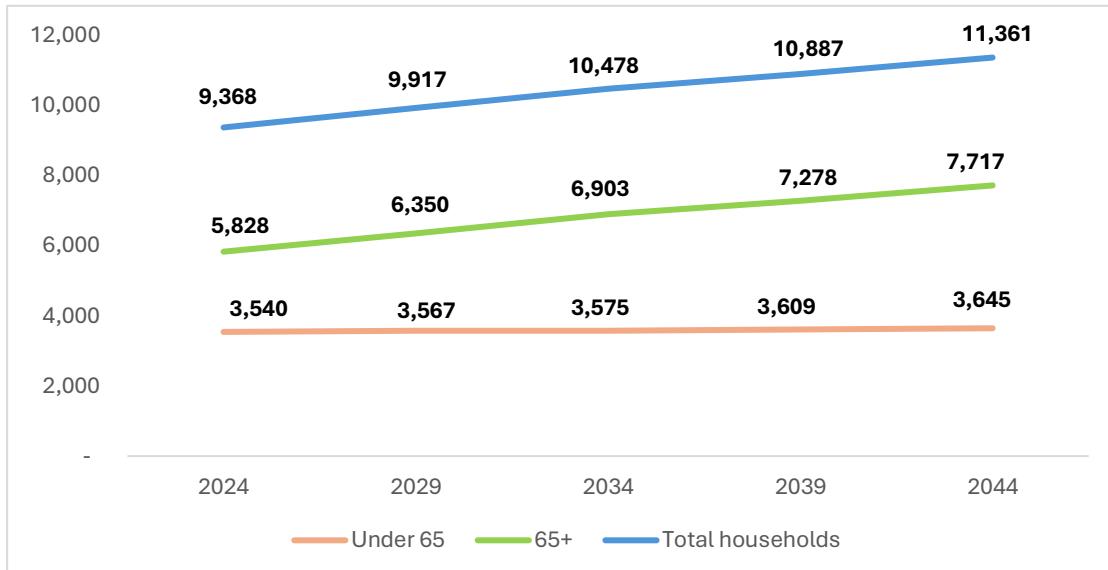
7.12 The projection of wheelchair user households in Essex for 2029, 2034, 2039 and 2044 is based on the estimated growth rate of 0-64 years households and 65+ households from the ONS 2021 Census and 2018 Sub National Population Projections (SNPP)³³. This approach projects how the overall population is likely to change over time, especially among older age groups where the need for wheelchair accessible housing is likely to be greater.

7.13 The growth rate in the number of households for each age group is determined by calculating the percentage change in the number of households from 0-64 and 65+ between 2024 and each future year.

7.14 The base for the projection is the estimated 9,368 wheelchair user households in 2024. Using data from Essex NHS Wheelchair Service on the age breakdown of wheelchair users, 62% of households (6,061) are assumed to be 65+ households and 38% are assumed to be 0-64 households (3,682). Projections of the population of wheelchair user households assume this age disaggregation in future years.

7.15 The total projected wheelchair user households for 2029, 2034, 2039 and 2044 are obtained by summing the estimates for the 0-64 and 65+ age groups. This indicates that the number of wheelchair user households will increase by 21% overall by 2044. The largest increase (32%) is in wheelchair user households aged 65+.

Figure 17. Projected number of wheelchair user households in Essex to 2044



Source: Essex NHS Wheelchair Service (2024); ONS 2021; Subnational population projection projections (SNPP) 2018

³³ Subnational population projection projections for England: 2018 – based available at <https://www.ons.gov.uk/releases/subnationalpopulationprojectionsforengland2018based>

Estimated need for fully wheelchair accessible housing to 2044

7.16 This section provides an assessment of estimated need for wheelchair accessible housing (Part M(4) Category 3)³⁴.

Estimated need for wheelchair accessible housing (Part M(4) Category 3)

7.17 The number of wheelchair user households that have an unmet housing need is estimated based on the projected number of wheelchair user households in Figure 17 (by 2044) and a model for estimating need for wheelchair accessible housing developed by Horizon Housing³⁵, a housing association that specialises in providing adapted housing for people with physical disabilities.

7.18 The Horizon Housing model estimates that 21% (see Annex 1 for more details) of wheelchair user households are likely to have an unmet need for wheelchair accessible housing³⁶.

7.19 This model is then applied to the projected number of wheelchair user households in Essex by 2044, (see Figure 17), to estimate the likely unmet need for wheelchair accessible housing.

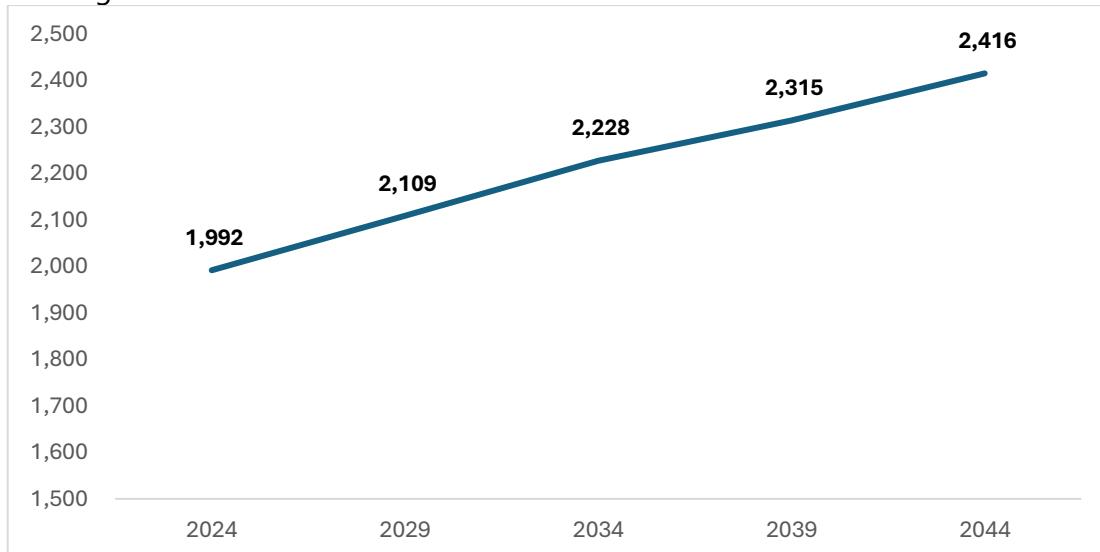
7.20 Using this model, it is estimated that there will be 2,416 wheelchair user households by 2044 that have an unmet need for wheelchair accessible housing.

³⁴ Part M(4) Category 3. Wheelchair user dwellings. A dwelling provides reasonable provisions for a wheelchair user to live in the dwelling and have the ability to use any outdoor space, parking and communal facilities

³⁵ Horizon Housing: Still Minding the step? A new estimation of the housing needs of wheelchair users in Scotland; CIH Scotland (2019)

³⁶ This is based on data from Table 4.4 in Horizon Housing: Still Minding the step?, *Calculating the unmet need* (for wheelchair accessible housing) where the average percentage has been calculated of unmet housing need amongst wheelchair user households.

Figure 18. Estimated number of wheelchair user households that have an unmet housing need from 2024 to 2044



Source: Horizon Housing; Housing LIN. NB: Estimates are rounded

7.21 The 2018/19 English Housing Survey (EHS) has been used to estimate the tenure status of wheelchair users. This suggests that 34% of wheelchair users are living in social housing (in local authority or housing association homes), 58% live in owner-occupied housing and 8% in the private rented sector.

7.22 Based on the projected unmet need of 2,416 wheelchair-accessible homes by 2044, the table below shows the estimated number of wheelchair user households with unmet need in Essex, broken down by tenure, that will require such housing by the years 2029, 2034, 2039, and 2044.

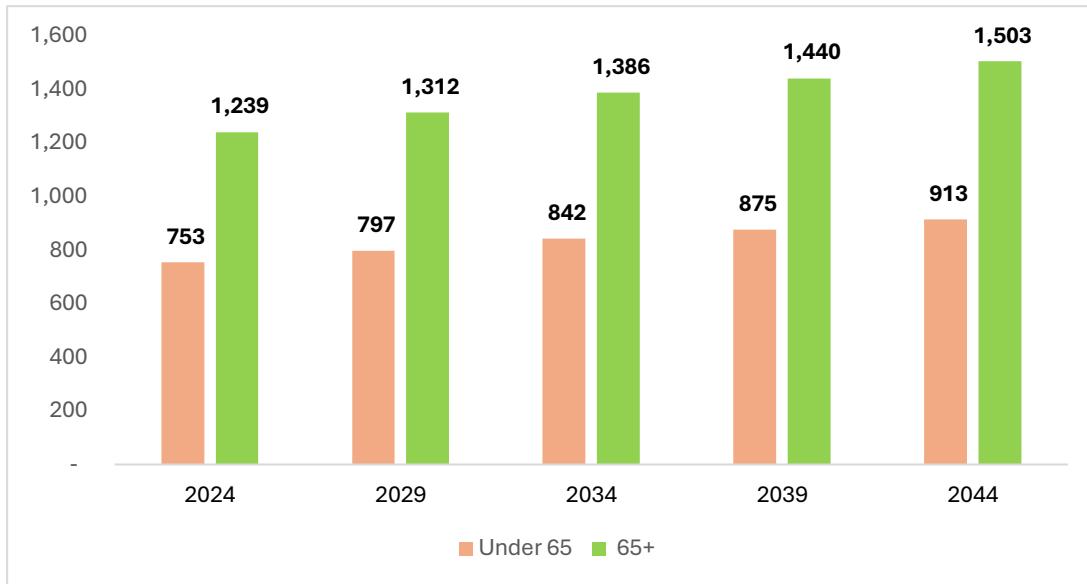
Table 72. Estimated number of wheelchair user households with unmet need, broken down by tenure in Essex by 2029, 2034, 2039 and 2044

Tenure type	2024	By 2029	By 2034	By 2039	By 2044
Owner occupier households	1,156	1,223	1,292	1,343	1,401
Social renting households	677	717	758	787	822
Private renting households	159	169	178	185	193
Total	1,992	2,109	2,228	2,315	2,416

Source: Horizon Housing, EHS 2018/19, ONS 2021 and 2018 household projections

7.23 Based on the age distribution of wheelchair users in Essex, as provided by Essex NHS Wheelchair Service, 62% are aged 65 and over, while 38% are in the 0-64 age group. Using this age distribution, the estimated need for wheelchair accessible housing for Essex has been disaggregated by age population group (Figure 19).

Figure 19. Estimated unmet need (number of households) for wheelchair accessible housing by age to 2044



Source: Horizon Housing, Essex NHS Wheelchair Service

Disaggregation of estimated unmet need for wheelchair accessible housing by Essex quadrants

- 7.24 To estimate the unmet need for wheelchair accessible housing (households) by Essex quadrants, the methodology at 7.11 is first used to estimate the number of wheelchair user households per quadrant based on the number of wheelchair users per quadrant.
- 7.25 The Horizon Housing model, drawing on evidence from the English Housing Survey (EHS 2018/19) and Scottish Household Survey (SHS), estimates that 21% of wheelchair user households are likely to have an unmet housing need for wheelchair accessible housing.
- 7.26 This model is then applied to the projected number of wheelchair user households in each quadrant, to estimate the wheelchair accessible housing need from 2024 to 2044.

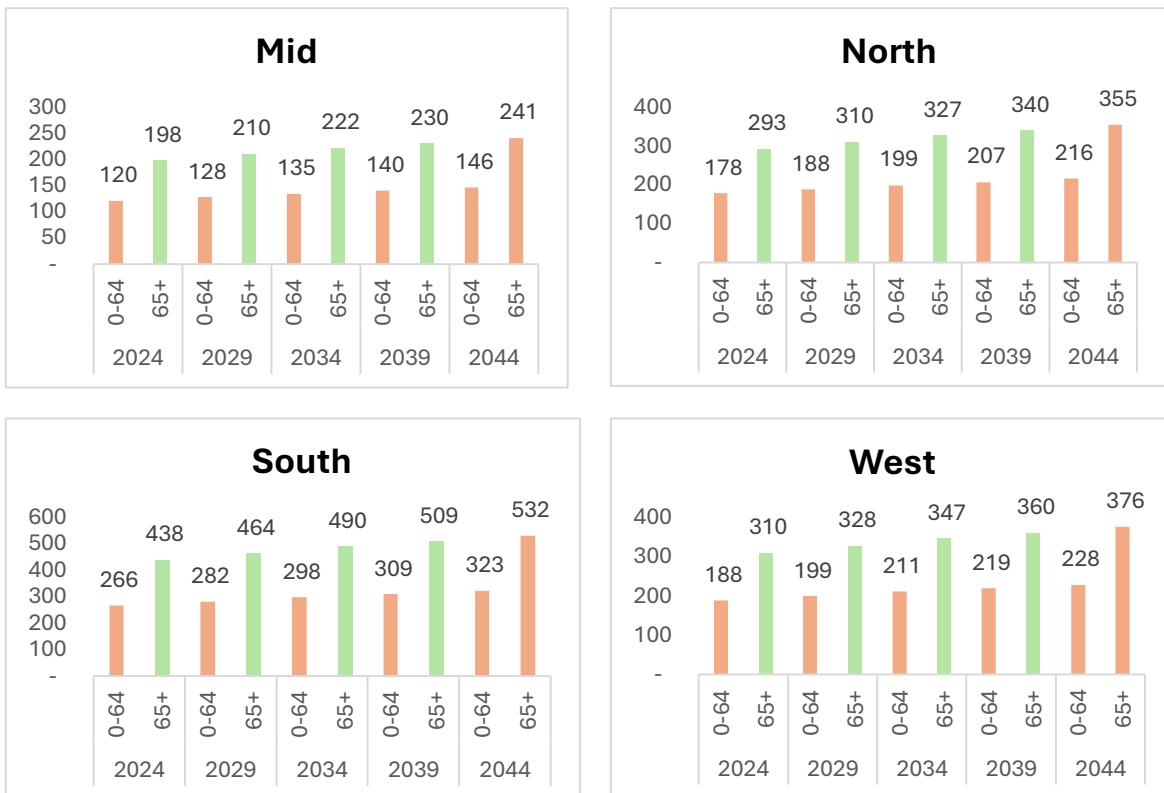
Table 73. Estimated unmet need (number of households) for wheelchair accessible housing by the quadrants in Essex to 2044

Quadrant	2024	By 2029	By 2034	By 2039	By 2044
Mid	319	337	357	370	387
North	471	498	526	547	571
South	705	746	788	819	855
West	498	528	557	579	604
Essex	1,992	2,109	2,228	2,315	2,416

Source: Horizon Housing, Essex NHS wheelchair services and HLIN. Estimated need is not cumulative.

- 7.27 Based on the age distribution of wheelchair users in Essex, as provided by Essex NHS Wheelchair Service, 62% are aged 65 and over, while 38% are in the 0-64 age group. Using this age distribution, the estimated unmet need for wheelchair accessible housing for the Essex quadrants has been disaggregated by age group.

Figure 20. Estimated unmet need (number of households) for wheelchair accessible housing by the quadrants in Essex by age to 2044



Source: Horizon Housing, Essex NHS wheelchair service
Note: Estimated need is not cumulative.

7.28 The 2018/19 English Housing Survey has been used to estimate the tenure status of wheelchair users. This suggests that 34% of wheelchair users are living in social housing (in local authority or housing association homes), 58% live in owner-occupied housing and 8% in the private rented sector.

Table 74. Estimated unmet need (number of households) for fully wheelchair accessible housing by quadrants in Essex by tenure to 2044

Tenure type	2024	2029	2034	2039	2044
Mid					
Owner occupier households	185	196	207	215	224
Social renting households	108	115	121	126	131
Private renting households	26	27	29	30	31
Total households	319	337	357	370	387
North					
Owner occupier households	273	289	305	317	331
Social renting households	160	169	179	186	194
Private renting households	38	40	42	44	46
Total households	471	498	526	547	571
South					
Owner occupier households	409	433	457	475	496
Social renting households	240	254	268	278	291
Private renting households	56	60	63	66	68
Total households	705	746	788	819	855
West					
Owner occupier households	289	306	323	336	351
Social renting households	169	179	190	197	205
Private renting households	40	42	45	46	48
Total households	498	528	557	579	604

Source: Horizon Housing, EHS 2018/19 and Essex NHS wheelchair service

Note: Estimated need is not cumulative

7.29 The proportion of each district's population within the relevant quadrant, based on 2021 census data (Annexe 1, Table 181), is used to disaggregate the overall estimated need for wheelchair accessible housing by district.

Table 75. Estimated unmet need (number of households) for fully wheelchair accessible housing by district/borough/city council in Essex to 2044

District/Borough/City councils	2024	By 2029	By 2034	By 2039	By 2044
Basildon	228	242	255	265	277
Braintree	205	217	229	238	248
Brentwood	101	107	113	118	123
Castle Point	130	138	146	151	158
Chelmsford	234	247	261	272	283
Colchester	239	253	267	278	290
Epping Forest	171	181	191	198	207
Harlow	107	114	120	125	130
Maldon	95	101	106	111	115
Rochford	120	127	134	139	145
Tendring	246	260	275	286	298
Uttlesford	116	123	130	135	141
Essex	1,992	2,109	2,228	2,315	2,416

Source: Horizon Housing, Essex NHS wheelchair service and ONS 2021. Estimated need is not cumulative

7.30 Based on the 2018/19 English Housing Survey estimates of wheelchair users' tenure status, and the age breakdown of wheelchair users in Essex provided by the Essex NHS Wheelchair Service, the estimated unmet need for fully wheelchair-accessible housing has been calculated by district, broken down by both age and tenure.

Table 76. Estimated unmet need (number of households) for wheelchair accessible housing by district broken down by age to 2044

District/Borough/ City council	Under 65					Over 65				
	2024	2029	2034	2039	2044	2024	2029	2034	2039	2044
Basildon	98	103	109	113	118	131	138	146	152	158
Braintree	79	84	88	92	96	126	133	141	146	153
Brentwood	39	42	44	46	48	62	66	69	72	75
Castle Point	40	43	45	47	49	90	95	101	104	109
Chelmsford	93	99	104	108	113	141	149	157	163	171
Colchester	102	108	114	118	123	137	145	154	160	167
Epping Forest	67	71	75	78	81	104	110	116	121	126
Harlow	51	54	57	59	61	57	60	64	66	69
Maldon	31	33	35	36	38	64	68	72	75	78
Rochford	40	42	45	46	49	80	85	89	93	97
Tendring	69	73	77	80	83	177	187	198	206	215
Uttlesford	45	48	50	52	54	71	76	80	83	87
Essex	753	797	842	875	913	1,239	1,312	1,386	1,440	1,503

Source: Horizon Housing, Essex NHS wheelchair service, ONS 2021. Estimated need is not cumulative

7.31 It is possible that a proportion of the estimated need for wheelchair accessible housing amongst people (households) aged 65+ will be met through the additional provision of specialist housing for older people (as set out in chapter 9 in relation to estimated need for sheltered/retirement housing and extra care housing). Table 111 shows that approximately 6% of the 65+ population by 2044 are estimated to be living in specialist housing for older people (sheltered/retirement housing and extra care housing).

7.32 If it is assumed that approximately 6% of the estimated need for wheelchair accessible housing amongst people (households) aged 65+ could potentially be met through the additional provision of specialist housing for older people, this would suggest a net estimated need for 1,412 wheelchair accessible homes amongst people aged 65+ by 2044 (estimated need of 1,503 wheelchair accessible homes need by people aged 65+ by 2044 from Table 76, minus 91 (6%), equals net need of 1,412 wheelchair accessible homes).

Table 77. Estimated unmet need (number of households) for fully wheelchair accessible housing by district/borough/city council broken down by tenure to 2044

Tenure	2024	2029	2034	2039	2044
Basildon					
Owner occupier households	132	140	148	154	160
Social rented households	78	82	87	90	94
Private rented households	18	19	20	21	22
Total households	228	242	255	265	277
Braintree					
Owner occupier households	119	126	133	138	144
Social rented households	70	74	78	81	84
Private rented households	16	17	18	19	20
Total households	205	217	229	238	248
Brentwood					
Owner occupier households	59	62	66	68	71
Social rented households	34	36	39	40	42
Private rented households	8	9	9	9	10
Total households	101	107	113	118	123
Castle Point					
Owner occupier households	76	80	85	88	92
Social rented households	44	47	50	51	54
Private rented households	10	11	12	12	13
Total households	130	138	146	151	158
Chelmsford					

Tenure	2024	2029	2034	2039	2044
Owner occupier households	136	143	152	158	164
Social rented households	79	84	89	92	96
Private rented households	19	20	21	22	23
Total households	234	247	261	272	283
Colchester					
Owner occupier households	139	147	155	161	168
Social rented households	81	86	91	94	99
Private rented households	19	20	21	22	23
Total households	239	253	267	278	290
Epping Forest					
Owner occupier households	99	105	111	115	120
Social rented households	58	61	65	67	70
Private rented households	14	14	15	16	17
Total households	171	181	191	198	207
Harlow					
Owner occupier households	62	66	70	72	76
Social rented households	37	39	41	42	44
Private rented households	9	9	10	10	10
Total households	107	114	120	125	130
Maldon					
Owner occupier households	55	58	62	64	67
Social rented households	32	34	36	38	39
Private rented households	8	8	9	9	9
Total households	95	101	106	111	115
Rochford					
Owner occupier households	70	74	78	81	84
Social rented households	41	43	46	47	49

Tenure	2024	2029	2034	2039	2044
Private rented households	10	10	11	11	12
Total households	120	127	134	139	145
Tendring					
Owner occupier households	143	151	159	166	173
Social rented households	84	88	93	97	101
Private rented households	20	21	22	23	24
Total households	246	260	275	286	298
Uttlesford					
Owner occupier households	67	71	75	78	82
Social rented households	40	42	44	46	48
Private rented households	9	10	10	11	11
Total households	116	123	130	135	141

Source: Horizon Housing, EHS 2018/19 and ONS 2021. Estimated need is not cumulative

Need for wheelchair accessible homes: Contextual evidence

7.33 Estimates of need for wheelchair accessible homes have been 'triangulated' against other Essex level data regarding evidence of the population of people who have physical disabilities, specifically in relation to:

- The number of applicants on social housing registers who need wheelchair accessible homes

Population needing wheelchair accessible homes on social housing registers

7.34 A total of 392 households are currently on Essex's social housing registers that have identified a need for wheelchair-accessible homes.

7.35 The highest reported need is in Epping Forest (126 households) and Colchester (34 households). In Colchester, most need is for 1-bedroom homes, while Basildon shows demand across a wider range, including 2 to 5-bedroom properties.

Table 78. The number of applicants on social housing registers who need wheelchair accessible homes (March 2024)

Quadrant	District/Borough/City Council	Number of wheelchair user households on housing register
Mid	Braintree	20
Mid	Chelmsford	28
Mid	Maldon	1
North	Colchester	34 households 24 x 1 bed 4 x 2bed 5 x 3bed 1 x 4bed
North	Tendring	73
South	Basildon	28 Households 11- 1 bedroom of which 3 are sheltered housing only 2 x 2 bedroom 13 x 3 Bedroom 1x 4 Bedroom 1 x 5 bedroom
South	Brentwood	13
South	Castle Point	16
South	Rochford	14
West	Epping Forest	126 (tbc)
West	Harlow	31
West	Uttlesford	8
Essex		392

Source: District/Borough/City Councils (2024)

7.36 This evidence indicates that where there is identified need from social housing registers for wheelchair accessible homes, this need is lower than the estimates of unmet need for wheelchair accessible homes as at 2024 (Table 75).

7.37 This is consistent with the evidence that that the majority of unmet need for wheelchair accessible homes is for people who are homeowners (Table 72). However, this evidence does indicate that a significant minority of estimated unmet need for wheelchair accessible homes is amongst people living in social housing.

Housing need assessment: supported housing required by people with physical disabilities

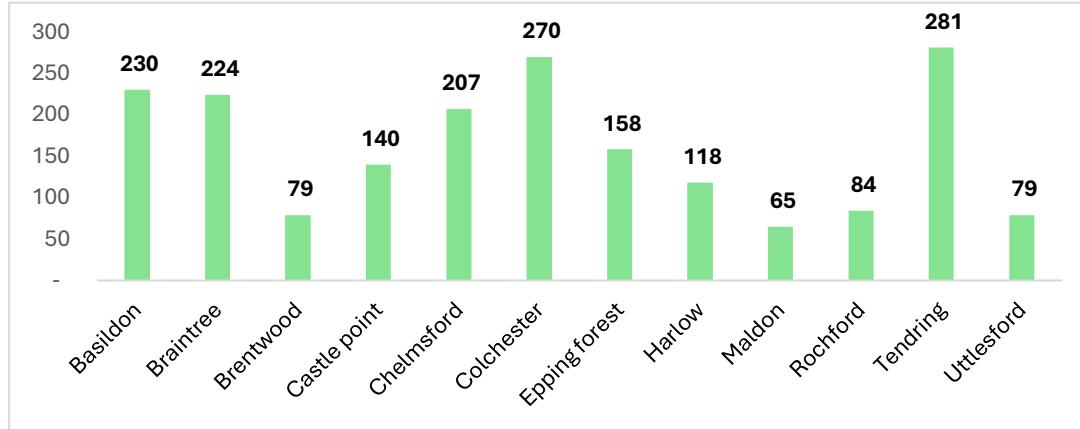
7.38 This section identifies the need for specialist and supported housing for people with physical disabilities and/or sensory impairments (PSI) who draw on adult social care support from Essex County Council.

Baseline population and population projections

7.39 Data from MOSAIC has been used to calculate the population of people aged 18+ with a physical disability and/or sensory impairment who draw on adult social care support from Essex County Council. The MOSAIC dataset identifies the number of people who draw on adult social care support from Essex County Council by their housing/accommodation status; this includes the number of people living at home, in supported living, and those in residential or nursing care.

7.40 There are currently (as of September 2024) 1,935 people aged 18+ with a physical disability and/or sensory impairment in Essex who draw on adult social care support from Essex County Council. This population is shown by district in Figure 21.

Figure 21. Population of people with a physical disability and/or sensory impairment who draw on adult social care support from Essex County Council by district



Source: Essex County Council (MOSAIC, 2024)

7.41 To project forward to 2039 the population aged 18+ years with physical disabilities and/or sensory impairments, support provided by Essex County Council, the following data sources have been used:

- Population of people with physical disabilities and/or sensory impairments from 2020 to 2024 who draw on adult social care support provided by Essex County Council (from MOSAIC)
- ONS 2021 and 2018 sub national population projection of people aged 18+ in Essex

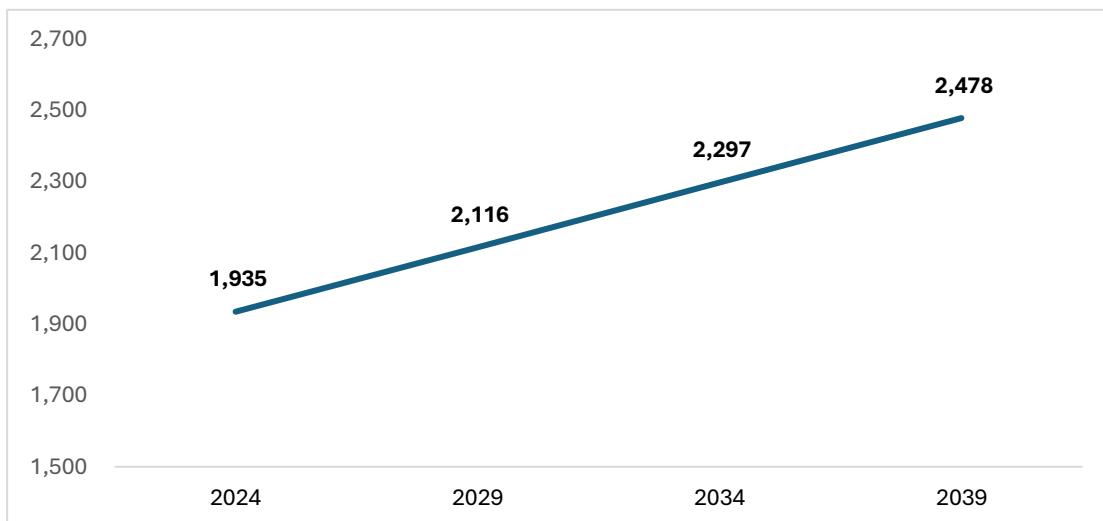
7.42 In order to project forward the population of people with physical disabilities and/or sensory impairments who draw on adult social care support provided by Essex County Council to 2039, the following method has been used:

- The baseline population has been calculated as the number of people who draw on adult social care support, using the MOSAIC dataset as at September 2024
- The population trends amongst people with a physical disability and/or sensory impairment who draw on adult social care support from the MOSAIC dataset from 2020 to 2024 has been analysed. This indicates an average annual population growth rate of 1.1% from 2020 to 2024 for the population group

- The population trends in the overall Essex 18+ population have also been considered as it is possible that the overall population with PSI may reflect changes in the population of people aged 18+ for Essex. The trend in the population of people aged 18+ is projected to be an average annual increase of 2.6% per annum to 2039
- Using this evidence, an average annual growth rate is estimated (1.87%) from the annual growth rates of the population of people with a physical disability and/or sensory impairment who draw on adult social care support from the MOSAIC dataset and the ONS 18+ population for Essex

7.43 Based on this evidence, the population of people with physical disabilities and/or sensory impairment needs aged 18+ who draw on adult social care support from Essex County Council is projected to increase to 2,116 people by 2029, to 2,297 people by 2034 and to 2,478 people by 2039.

Figure 22. Projected population of people with physical disabilities and/or sensory impairment needs aged 18+ who draw on adult social care support from Essex County Council to 2039

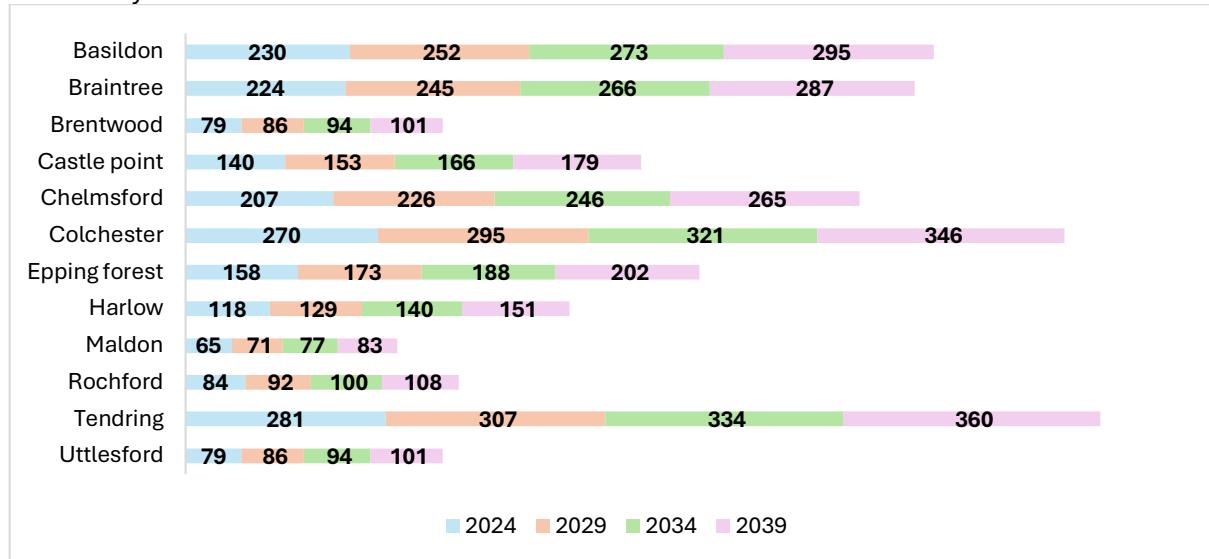


Source: Essex County Council (MOSAIC and Resource Co-ordinator Registers), QOF and SNPP 2018

7.44 The same methodology is applied to each of the districts to project the estimated number of people with physical disabilities and/or sensory impairments aged 18+ who draw on adult social care support from Essex County Council to 2039.

7.45 This evidence indicates an increase in the estimated population of people with physical disabilities and/or sensory impairments across all districts from 2024 to 2039.

Figure 23. Projected population of people with physical disabilities and/or sensory impairments aged 18+ who draw on adult social care support from Essex County Council by districts to 2039



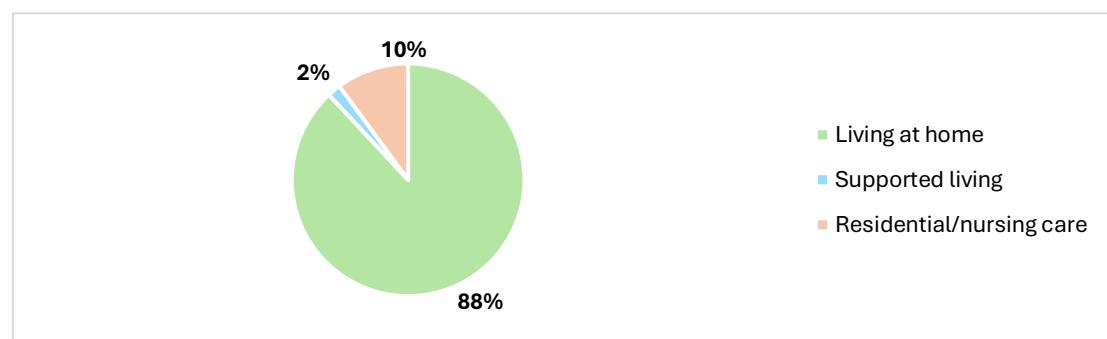
Source: Essex County Council, ONS, SNPP 2018

Where people with physical disabilities and/or sensory impairment needs are living

7.46 The MOSAIC data from Essex County Council indicates that the majority (88%) of people with physical disabilities and/or sensory impairments who draw on adult social care support from Essex County Council are living in mainstream housing with support or with living with family/friends. However, it should be noted that some of these people may be living in this situation because of a lack of alternative, potentially more suitable, housing options, such as suitably adapted housing or supported housing. A minority of people are living in supported living (2%), or a care home (10%).

7.47 There is 1 supported living placement in Southend-on-Sea for people with physical disability and/or sensory impairment.

Figure 24. Accommodation status of people with physical disabilities and/or sensory impairment needs who draw on adult social care support from Essex County Council



Source: Essex County Council: MOSAIC (2024)

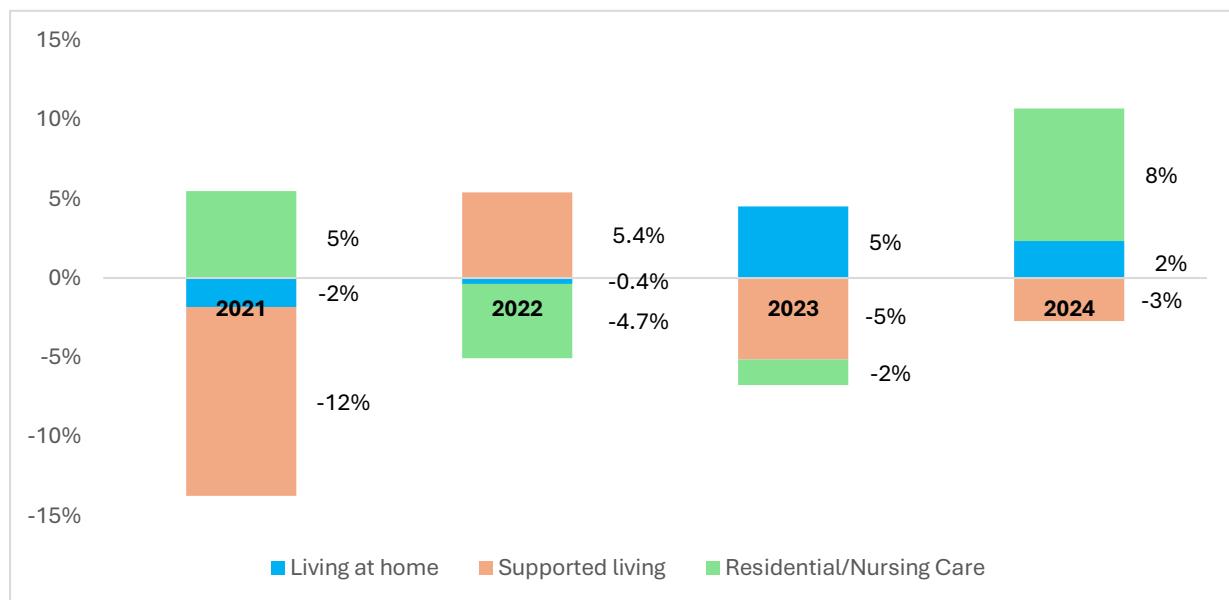
Trends in accommodation status for people with a physical disability and/or sensory impairment who draw on adult social care support from Essex County Council (2021–2023)

7.48 Based on the MOSAIC trend data for 2020–2024 (see A1.1), the 'Living at Home' category shows a gradual upward trend. It initially declined by 2% in 2021, followed by a smaller decrease of 0.4% in 2022. However, there was a significant increase of 5% in 2023, and the trend continued with a 2% increase in 2024. The average annual increase over this period is 1% for people living at home with a care/support package from Essex County Council.

7.49 In relation to the use of supported living, the trend has fluctuated over this period. There was a decline of 12% in 2021, followed by an increase of 5% in 2022. However, there was a 5% decrease in 2023 and a smaller decline of 3% in 2024. The overall average change for this category is -4%, indicating a reduction in the use of supported living over this period.

7.50 The use of residential/nursing care has shown a variable trend. There was an increase of 5% in 2021, followed by a decline of 5% in 2022 and a further 2% decrease in 2023. However, in 2024, there was an 8% increase. The average annual change is a 2% growth in the use of residential/nursing, but with significant year-on-year variations. Whilst we don't know definitively the reason for this pattern of use of residential care, it may be reasonable to assume that the decline during 2022 and 2023 has been an effect of Covid-19 and a reduced tendency to use residential care.

Figure 25. Trends in accommodation status for people with physical disability and sensory impairment who draw on adult social care support from Essex County Council



Source: Essex County Council: MOSAIC (2024)

Local policy context

7.51 In its Disability Strategy³⁷, Essex County Council has also committed to developing suitable housing options for adults with complex care and support needs. As part of this strategy, Essex County Council is aiming to reduce:

- The number of people living in residential care or supported living outside Essex
- The percentage of people with disabilities who live in a care home

7.52 Through its Housing Strategy 2020-2025³⁸, Essex County Council is seeking to:

- Commission new specialist/supported living for adults with disabilities; adults with mental health needs; and adults with physical and sensory impairments, and develop proposals for housing schemes for adults leaving hospital with very complex needs
- Promote through Local Plan requirements for a percentage of new dwellings to meet accessible, adaptable and wheelchair user dwellings standards

Estimated need for specialist/supported accommodation for people with physical disabilities and/or sensory impairments

7.53 The estimated need for specialist/supported accommodation for people with physical and sensory impairments (PSI) has been estimated using the following method:

- The number of people with PSI in Essex who draw on adult social care support from Essex County Council has been derived from the MOSAIC dataset. This dataset categorises people into: individuals living at home, those in supported living, and those in residential or nursing care. This indicates that in 2024 there were 1,935 people with PSI who draw on adult social care support from Essex County Council
- The MOSAIC data was then analysed to establish the trends in accommodation status for people with PSI from 2020 to 2024 for the categories listed above. As per para 7.48 to 7.50, this dataset indicated an overall increase in people living in residential/nursing care, a decrease in people living in supported living and an increase in people living at home between 2020 and 2024

7.54 Based on evidence from Essex County Council officers and policy intent to decrease the reliance on residential care and increase the supply of supported living, the MOSAIC dataset trends for PSI from 2020-2024 have not been used for the estimation model.

³⁷ Essex County Council. Disability Strategy. Available at:

https://www.essex.gov.uk/sites/default/files/migration_data/files/assets.ctfassets.net/knkzaf64jx5x/1FpETmG6ul0nP3xDZ79Jmz/e42e660b7f8fc9ae2ca815a94a63fa47/Essex_County_Council_Disability_Strategy - Meaningful_Lives_Matter.pdf

³⁸ Essex County Council (2021-2025). Housing Strategy. Available at:

https://www.essex.gov.uk/sites/default/files/migration_data/files/assets.ctfassets.net/knkzaf64jx5x/CNLX0klVGimmGMpErguEU/10cadaeb15c668299eea05c6dc84b55e/Housing_Strategy_2021-2025.pdf

7.55 Instead, evidence of the need for supported living has been derived from data produced in a report from 2021/22 by Essex County Council commissioners in relation to future need for specialist/supported accommodation for people with PSI in Essex who draw on adult social care support from Essex County Council³⁹.

7.56 Evidence from commissioners of need for accommodation produced in 2021/22 identified a need for supported living for 45 people across the four quadrants. It has been conservatively assumed that this requirement would need to be addressed over a 5-year period. As a comprehensive and robust local source of evidence it is appropriate to use this evidence for estimating future need for supported accommodation, however it would be prudent for Essex County Council to update the previous analysis.

7.57 Using this assumption, the estimated additional need for supported living for people with PSI would be c.45 units by 2029, c.90 units by 2034 and c.135 units by 2039.

7.58 The estimated need for supported living, care home beds and mainstream housing with care/support ('living at home') for people with PSI eligible for care/support from Essex County Council is shown in Table 79 for Essex.

7.59 Evidence in relation to people with physical and/or sensory impairment needs who draw on adult social care support from Essex County Council, indicates that between 2022-2025, 55 people moved into extra care housing, on average approximately 17 people with physical and/or sensory impairment needs aged 18+ moved into extra care housing per annum. It is anticipated that this trend will continue. Extra care housing would potentially reduce the need for supported housing/supported living, as set out in paragraph 7.54 by 17 units in 2029, 2034 and 2039.

³⁹ Accommodation Demand for people with Physical & Sensory Impairment. ESSEX COUTY COUNCIL (2021/22)

Table 79. Estimated need for supported living for people with a physical disability and sensory impairment who draw on adult social care support from Essex County Council

	Current provision and population 2024	Existing supply of housing & accommodation types (%)	Adult pop. and estimated need for accomm. by 2029	Estimated need for housing & accommodation types (%)	Adult pop. and estimated need for accomm. by 2034	Estimated need for housing & accommodation types (%)	Adult pop. and estimated need for accomm. by 2039	Estimated need for housing & accommodation types (%)
Population	1,935		2,116		2,297		2,478	
Housing & accommodation types								
Living at home	1,704	88%	1,849	87%	1,994	87%	2,140	86%
Supported living	36	2%	81	4%	126	5%	171	7%
Residential/nursing care	195	10%	186	9%	177	8%	168	7%
Totals	1,935	100%	2,116	100%	2,297	100%	2,478	100%
Additional need: Supported living			45		90		135	

Source: Essex County Council and Housing LIN. Estimated need is non-cumulative

Estimated need for supported living for people with physical disabilities and/or sensory impairment by district

7.60 The number and percentage of people with physical disabilities and/or sensory impairment needs who draw on adult social care support from Essex County Council in each district is shown in Table 80.

Table 80. The number and percentage of people with physical disabilities and/or sensory impairment needs who draw on adult social care support from Essex County Council in each district

District	2024	%
Basildon	230	12%
Braintree	224	12%
Brentwood	79	4%
Castle Point	140	7%
Chelmsford	207	11%
Colchester	270	14%
Epping Forest	158	8%
Harlow	118	6%
Maldon	65	3%
Rochford	84	4%
Tendring	281	15%
Uttlesford	79	4%
Total	1,935	100%

Source: Essex County Council (MOSAIC)

7.61 Using these base population for each district/borough/city council area, estimates of need for supported living (supported housing), care home beds and mainstream housing with care/support ('living at home') for people with a physical disability and/or sensory impairment eligible for care/support from Essex County Council is shown in Table 81 to Table 92 for the 12 Essex district/borough/city councils.

7.62 The total assumed estimated additional need for supported living for people with physical disabilities and/or sensory impairments in Essex (45 units by 2029, 90 units by 2034, and 135 units by 2039) has been disaggregated by district based on the percentage of people with physical disabilities and/or sensory impairment needs who draw on adult social care support from Essex County Council in each district.

7.63 It should be noted that currently there is one adult with physical and sensory impairment needs placed by Essex County Council in Southend-on-Sea.

7.64 Essex County Council commissioners note that, currently, when an adult with PSI requires Supported Living, their allocated worker completes an Accommodation Needs Assessment (ANA) and submits it to the Specialist Accommodation Leads (SALs). The SALs review the ANA and, if deemed appropriate, schedule the worker to attend the next monthly Living Options Forum (LOF), where a decision is made regarding Supported Living provision. If the adult is not considered suitable for Supported Living, the forum will provide recommendations for alternative arrangements.

7.65 In 2020/21, the PSI Commissioning Team conducted a data analysis to quantify the number of individuals currently in Supported Living and to assess future demand. While this analysis remains valid, Essex County Council is committed to regularly reviewing the data in response to changing demand, working closely with internal colleagues and external stakeholders. At present, the PSI Commissioning Team is undertaking a review of individuals with PSI who have been placed in residential settings over recent years. The aim of this review is to identify whether some of these individuals might benefit from Supported Living as a more appropriate alternative. This analysis is expected to conclude in September 2025 and will inform our ongoing assessment of the accommodation needs of individuals with PSI.

Supported and Specialist Housing and Accommodation Needs Assessment

Table 81. Basildon: Estimated need for supported living for people with a physical disability and/or sensory impairment who draw on adult social care support from Essex County Council

	Current provision and population 2024	Existing supply of housing & accommodation types (%)	Adult pop. and estimated need for accomm. by 2029	Estimated need for housing & accommodation types (%)	Adult pop. and estimated need for accomm. by 2034	Estimated need for housing & accommodation types (%)	Adult pop. and estimated need for accomm. by 2039	Estimated need for housing & accommodation types (%)
Population	230		252		273		295	
Housing & accommodation types								
Living at home	215	93%	232	92%	248	91%	265	90%
Supported living	4	2%	9	4%	15	5%	20	7%
Residential/nursing care	11	5%	10	4%	10	4%	9	3%
Totals	230	100%	252	100%	273	100%	295	100%
Additional need: Supported living			5		11		16	

Source: Essex County Council and Housing LIN. Estimated need is non-cumulative

Table 82. Braintree: Estimated need for supported living for people with a physical disability and/or sensory impairment who draw on adult social care support from Essex County Council

	Current provision and population 2024	Existing supply of housing & accommodation types (%)	Adult pop. and estimated need for accomm. by 2029	Estimated need for housing & accommodation types (%)	Adult pop. and estimated need for accomm. by 2034	Estimated need for housing & accommodation types (%)	Adult pop. and estimated need for accomm. by 2039	Estimated need for housing & accommodation types (%)
Population	224		245		266		287	
Housing & accommodation types								
Living at home	201	90%	218	89%	234	88%	251	87%
Supported living	4	2%	9	4%	14	5%	20	7%
Residential/nursing care	19	8%	18	7%	17	6%	16	6%
Totals	224	100%	245	100%	266	100%	287	100%
Additional need: Supported living			5		10		16	

Source: Essex County Council and Housing LIN. Estimated need is non-cumulative

Table 83. Brentwood: Estimated need for supported living for people with a physical disability and/or sensory impairment who draw on adult social care support from Essex County Council

	Current provision and population 2024	Existing supply of housing & accommodation types (%)	Adult pop. and estimated need for accomm. by 2029	Estimated need for housing & accommodation types (%)	Adult pop. and estimated need for accomm. by 2034	Estimated need for housing & accommodation types (%)	Adult pop. and estimated need for accomm. by 2039	Estimated need for housing & accommodation types (%)
Population	79		86		94		101	
Housing & accommodation types								
Living at home	74	94%	80	92%	85	91%	91	90%
Supported living	1	1%	3	3%	5	5%	7	6%
Residential/nursing care	4	5%	4	4%	4	4%	3	3%
Totals	79	100%	86	100%	94	100%	101	100%
Additional need: Supported living			2		4		6	

Source: Essex County Council and Housing LIN. Estimated need is non-cumulative

Table 84. Castle Point: Estimated need for supported living for people with a physical disability and/or sensory impairment who draw on adult social care support from Essex County Council

	Current provision and population 2024	Existing supply of housing & accommodation types (%)	Adult pop. and estimated need for accomm. by 2029	Estimated need for housing & accommodation types (%)	Adult pop. and estimated need for accomm. by 2034	Estimated need for housing & accommodation types (%)	Adult pop. and estimated need for accomm. by 2039	Estimated need for housing & accommodation types (%)
Population	140		153		166		179	
Housing & accommodation types								
Living at home	132	94%	142	93%	152	92%	162	91%
Supported living	2	1%	5	3%	9	5%	12	7%
Residential/nursing care	6	4%	6	4%	5	3%	5	3%
Totals	140	100%	153	100%	166	100%	179	100%
Additional need: Supported living			3		7		10	

Source: Essex County Council and Housing LIN. Estimated need is non-cumulative

Table 85. Chelmsford: Estimated need for supported living for people with a physical disability and/or sensory impairment who draw on adult social care support from Essex County Council

	Current provision and population 2024	Existing supply of housing & accommodation types (%)	Adult pop. and estimated need for accomm. by 2029	Estimated need for housing & accommodation types (%)	Adult pop. and estimated need for accomm. by 2034	Estimated need for housing & accommodation types (%)	Adult pop. and estimated need for accomm. by 2039	Estimated need for housing & accommodation types (%)
Population	207		226		246		265	
Housing & accommodation types								
Living at home	183	88%	199	88%	214	87%	230	87%
Supported living	3	1%	8	3%	13	5%	17	7%
Residential/nursing care	21	10%	20	9%	19	8%	18	7%
Totals	207	100%	226	100%	246	100%	265	100%
Additional need: Supported living			5		10		14	

Source: Essex County Council and Housing LIN. Estimated need is non-cumulative

Table 86. Colchester: Estimated need for supported living for people with a physical disability and/or sensory impairment who draw on adult social care support from Essex County Council

	Current provision and population 2024	Existing supply of housing & accommodation types (%)	Adult pop. and estimated need for accomm. by 2029	Estimated need for housing & accommodation types (%)	Adult pop. and estimated need for accomm. by 2034	Estimated need for housing & accommodation types (%)	Adult pop. and estimated need for accomm. by 2039	Estimated need for housing & accommodation types (%)
Population	270		295		321		346	
Housing & accommodation types								
Living at home	231	86%	251	85%	272	85%	292	85%
Supported living	7	3%	13	4%	20	6%	26	7%
Residential/nursing care	32	12%	31	10%	29	9%	28	8%
Totals	270	100%	295	100%	321	100%	346	100%
Additional need: Supported living			6		13		19	

Source: Essex County Council and Housing LIN. Estimated need is non-cumulative

Table 87. Epping Forest: Estimated need for supported living for people with a physical disability and/or sensory impairment who draw on adult social care support from Essex County Council

	Current provision and population 2024	Existing supply of housing & accommodation types (%)	Adult pop. and estimated need for accomm. by 2029	Estimated need for housing & accommodation types (%)	Adult pop. and estimated need for accomm. by 2034	Estimated need for housing & accommodation types (%)	Adult pop. and estimated need for accomm. by 2039	Estimated need for housing & accommodation types (%)
Population	158		173		188		202	
Housing & accommodation types								
Living at home	142	90%	154	89%	166	88%	177	88%
Supported living	2	1%	6	3%	9	5%	13	6%
Residential/nursing care	14	9%	13	8%	13	7%	12	6%
Totals	158	100%	173	100%	188	100%	202	100%
Additional need: Supported living			4		7		11	

Source: Essex County Council and Housing LIN. Estimated need is non-cumulative

Table 88. Harlow: Estimated need for supported living for people with a physical disability and/or sensory impairment who draw on adult social care support from Essex County Council

	Current provision and population 2024	Existing supply of housing & accommodation types (%)	Adult pop. and estimated need for accomm. by 2029	Estimated need for housing & accommodation types (%)	Adult pop. and estimated need for accomm. by 2034	Estimated need for housing & accommodation types (%)	Adult pop. and estimated need for accomm. by 2039	Estimated need for housing & accommodation types (%)
Population	118		129		140		151	
Housing & accommodation types								
Living at home	110	93%	119	92%	127	91%	136	90%
Supported living	0	0%	3	2%	5	4%	8	5%
Residential/nursing care	8	7%	8	6%	7	5%	7	5%
Totals	118	100%	129	100%	140	100%	151	100%
Additional need: Supported living			3		5		8	

Source: Essex County Council and Housing LIN. Estimated need is non-cumulative

Table 89. Maldon: Estimated need for supported living for people with a physical disability and/or sensory impairment who draw on adult social care support from Essex County Council

	Current provision and population 2024	Existing supply of housing & accommodation types (%)	Adult pop. and estimated need for accomm. by 2029	Estimated need for housing & accommodation types (%)	Adult pop. and estimated need for accomm. by 2034	Estimated need for housing & accommodation types (%)	Adult pop. and estimated need for accomm. by 2039	Estimated need for housing & accommodation types (%)
Population	65		71		77		83	
Housing & accommodation types								
Living at home	62	95%	67	94%	71	93%	76	91%
Supported living	0	0%	2	2%	3	4%	5	5%
Residential/nursing care	3	5%	3	4%	3	4%	3	3%
Totals	65	100%	71	100%	77	100%	83	100%
Additional need: Supported living			2		3		5	

Source: Essex County Council and Housing LIN. Estimated need is non-cumulative

Table 90. Rochford: Estimated need for supported living for people with a physical disability and/or sensory impairment who draw on adult social care support from Essex County Council

	Current provision and population 2024	Existing supply of housing & accommodation types (%)	Adult pop. and estimated need for accomm. by 2029	Estimated need for housing & accommodation types (%)	Adult pop. and estimated need for accomm. by 2034	Estimated need for housing & accommodation types (%)	Adult pop. and estimated need for accomm. by 2039	Estimated need for housing & accommodation types (%)
Population	84		92		100		108	
Housing & accommodation types								
Living at home	80	95%	86	94%	92	92%	98	91%
Supported living	1	1%	3	3%	5	5%	7	6%
Residential/nursing care	3	4%	3	3%	3	3%	3	2%
Totals	84	100%	92	100%	100	100%	108	100%
Additional need: Supported living			2		4		6	

Source: Essex County Council and Housing LIN. Estimated need is non-cumulative

Table 91. Tendring: Estimated need for supported living for people with a physical disability and/or sensory impairment who draw on adult social care support from Essex County Council

	Current provision and population 2024	Existing supply of housing & accommodation types (%)	Adult pop. and estimated need for accomm. by 2029	Estimated need for housing & accommodation types (%)	Adult pop. and estimated need for accomm. by 2034	Estimated need for housing & accommodation types (%)	Adult pop. and estimated need for accomm. by 2039	Estimated need for housing & accommodation types (%)
Population	281		307		334		360	
Housing & accommodation types								
Living at home	200	71%	223	73%	246	74%	269	75%
Supported living	11	4%	18	6%	24	7%	31	9%
Residential/nursing care	70	25%	67	22%	64	19%	60	17%
Totals	281	100%	307	100%	334	100%	360	100%
Additional need: Supported living			7		13		20	

Source: Essex County Council and Housing LIN. Estimated need is non-cumulative

Table 92. Uttlesford: Estimated need for supported living for people with a physical disability and/or sensory impairment who draw on adult social care support from Essex County Council

	Current provision and population 2024	Existing supply of housing & accommodation types (%)	Adult pop. and estimated need for accomm. by 2029	Estimated need for housing & accommodation types (%)	Adult pop. and estimated need for accomm. by 2034	Estimated need for housing & accommodation types (%)	Adult pop. and estimated need for accomm. by 2039	Estimated need for housing & accommodation types (%)
Population	79		86		94		101	
Housing & accommodation types								
Living at home	74	94%	80	92%	85	91%	91	90%
Supported living	1	1%	3	3%	5	5%	7	6%
Residential/nursing care	4	5%	4	4%	4	4%	3	3%
Totals	79	100%	86	100%	94	100%	101	100%
Additional need: Supported living			2		4		6	

Source: Essex County Council and Housing LIN. Estimated need is non-cumulative

Table 93. Summary of estimated need for supported living for people with a physical disability and/or sensory impairment who draw on adult social care support from Essex County Council by districts and quadrants

Quadrant	District	By 2029	By 2034	By 2039
Mid Quadrant	Braintree	5	10	16
	Chelmsford	5	10	14
	Maldon	2	3	5
North Quadrant	Colchester	6	13	19
	Tendring	7	13	20
South Quadrant	Basildon	5	11	16
	Brentwood	2	4	6
	Castle Point	3	7	10
	Rochford	2	4	6
West Quadrant	Epping Forest	4	7	11
	Harlow	3	5	8
	Uttlesford	2	4	6
Essex		45	90	135

Source: Essex County Council and Housing LIN. Estimated need is non-cumulative

8. Victims and survivors of domestic abuse

Introduction

8.01 The intention of this needs assessment is to identify the need for accommodation that safely supports victims and survivors of domestic abuse in Essex to 2039. The Council's intention is to both provide safe accommodation for victims and survivors of domestic abuse but also to explore the provision of accommodation for perpetrators of domestic abuse, as long as it enables victims and survivors to safely stay in their own homes. This intention has been considered throughout this assessment.

8.02 The assessment of need for accommodation that safely supports victims and survivors does not include district/city/borough homelessness data. The assessment draws on a range of evidence, including:

- Demographic context: current population and projected population of victims and survivors of domestic abuse and the perpetrator population
- Current provision of safe accommodation
- Local commissioner perspectives and intelligence
- Case studies from other local authorities of perpetrator accommodation

Baseline population and projections

8.03 Essex County Council's 2024 Domestic Abuse Needs Assessment⁴⁰ indicates that the number of referrals to the three domestic abuse support providers in Essex has been increasing. The number of referrals increased by 33% between 2021/22 and 2023/24.

Table 94. Number of referrals to the three domestic abuse support providers in Essex

	2021/22	2022/23	2023/24
Number of referrals*	3,123	3,363	4,164

Source: Essex County Council (2024)

* These figures include those referred specifically because they needed safe accommodation in the form of refuge, but also include victims referred for community support

8.04 The recent evidence from statutory homelessness data returns from Essex housing authorities⁴¹, where households owed a prevention or relief duty who have identified a need related to domestic abuse, indicates a higher level of incidence of domestic abuse (compared to the number of referrals to domestic abuse support providers).

8.05 The 2024 Domestic Abuse Needs Assessment also indicates that the number of victims and survivors in Refuge and Specialist Refuge has seen an increase between 2021 and

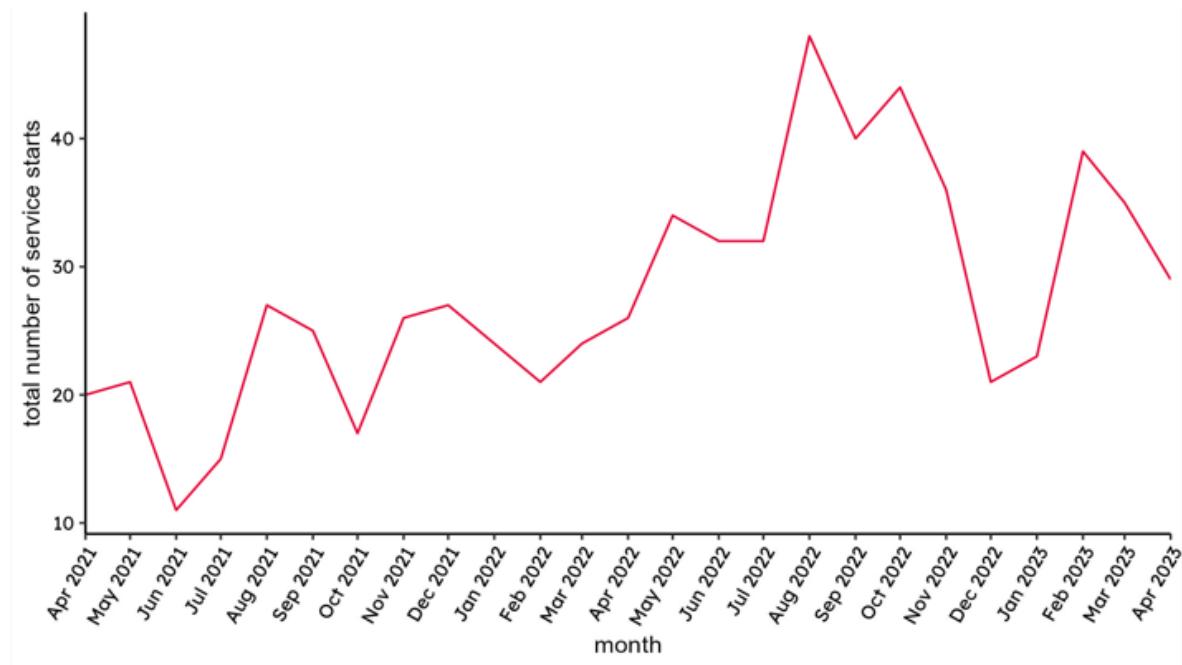
⁴⁰ Essex County Council (2024). Domestic Abuse Needs Assessment. Available at: <https://data.essex.gov.uk/dataset/e6pqw/domestic-abuse-needs-assessment-2024>

⁴¹

<https://www.gov.uk/government/statistical-data-sets/live-tables-on-homelessness>

2023. In April 2021 there were c.20 service starts, this increased to c.25 in April 2022 and c.30 in April 2023, this is an increase of 5 service starts per year. Evidence in the latter half of 2022 for the number of victims and survivors starting to be accommodated in refuge showed an increase, with 48 monthly cases in July of that year (see Figure 26).

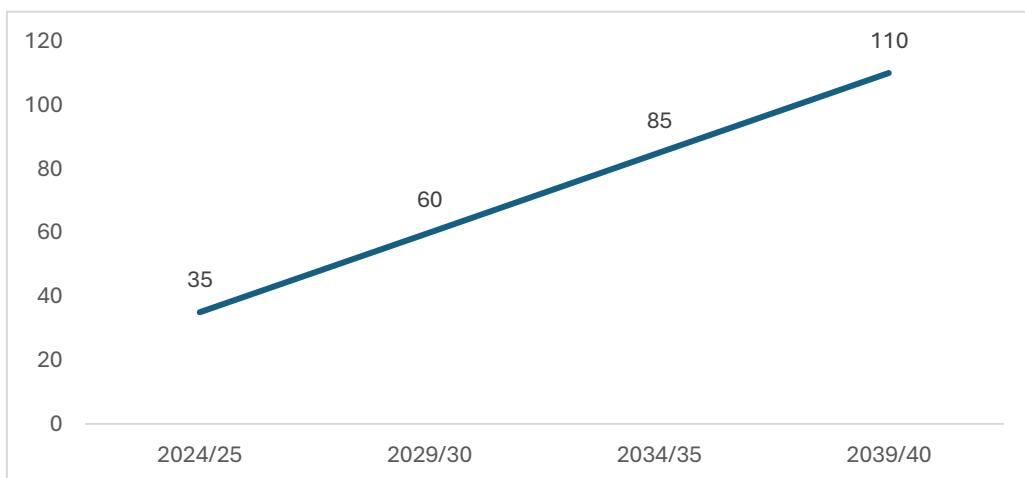
Figure 26. Monthly total of service starts for refuge between 04/2021 and 03/2023



Source: *Safer Places, Changing Pathways, The Next Chapter*

8.06 Based on the evidence in Figure 26 this indicates approximately 5 additional service starts at refuges each year; this has been projected forward to 2039/40. This is an average annual growth rate of 25% per year. By 2039/40 the projected number of service starts is estimated to be 110 (see Figure 27).

Figure 27. Estimated number of future service starts for refuge to 2039/40



Source: Essex County Council 2024 Domestic Abuse Needs Assessment / Housing LIN

8.07 Alongside an increase in the number of victims and survivors being accommodated in refuges, there has also been an increase in the number of victims and survivors unable to be accommodated in refuge or dispersed properties. The evidence from the Council's data indicates that there are a variety of reasons that a referral was unable to be accommodated in safe accommodation. The most prevalent reasons are because a client disengaged with the service, or a client rejected support.

8.08 There are two primary reasons a referral was unable to move into safe accommodation:

- The first is the number of referrals that didn't move into safe accommodation because there was a lack of space in the existing supply, this increased by 41% between 2021/22 and 2023/24
- The second is the number of referrals that didn't move into safe accommodation because the refuge provider was unable to support a client's needs. This has decreased slightly between 2021/22 and 2023/24 but has stayed at around 100 referrals per year. A refuge provider may be unable to meet the client's need for a variety of reasons, for example, the client may have older male children (16+ yrs), or it could be due to complex needs such as mental health or active addiction

8.09 Anecdotal evidence from Essex County Council indicates that more clients are refusing support as they want self-contained accommodation with their own bathroom as a priority followed by own kitchen.

Table 95. Reasons a referral didn't progress

Reasons	2021/22	2022/23	2023/24	2024/25
Client rejected support	247	Unavailable (217)	132	147
Provider lack of space/capacity	101	315** (98)	65	63
Provider unable to support clients' needs	141	81	103	28
Unknown reason*	266	0	343	204
Total	755	396	643	442

Source: Essex County Council (2024/25)

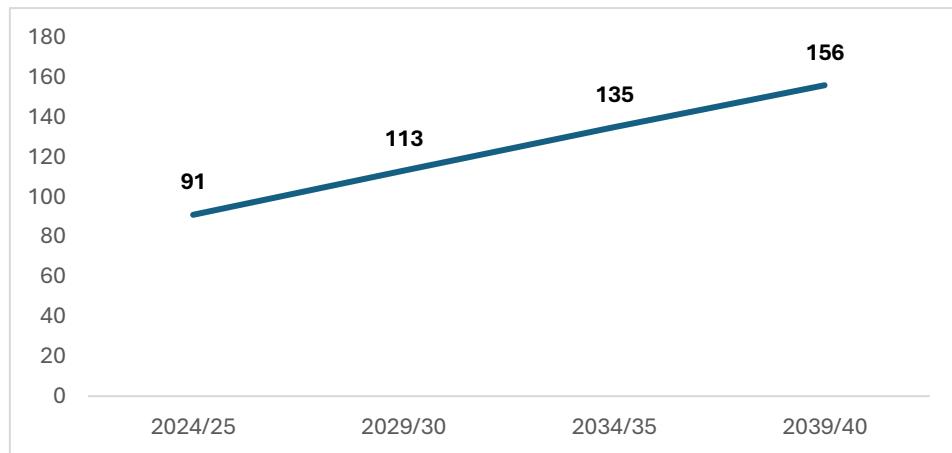
* N.B Reasons will include proximity to perpetrator, household unable to be contracted

** N.B. This data likely includes a combination of client rejected support and lack of capacity, the amount in the brackets is the estimated percentage split based on the average percentage split between client rejected support and provider lack of space/capacity from 2021/22, 2023/24 and 2024/25 (i.e. 69% vs 31%)

8.10 Table 95 demonstrates that over the period from 2020/21 to 2024/25 there were in total 680 referrals that were unable to be accommodated due to lack of capacity and/or the provider was unable to support client's needs. This is an average of 170 referrals per annum that were in need of safe accommodation but were unable to be accommodated. Based on the evidence of the total number of referrals (to safe accommodation and community support) shown at Table 94, 170 referrals per annum that were unable to be accommodated represents 4.8% of the total average number of referrals (to safe accommodation and community support). This expression of unmet need for safe accommodation has been used to project forward estimated need of safe accommodation.

8.11 Using the 4.8% annual growth rate the number of referrals expected to be unable to be accommodated due to the two reasons mentioned above is projected to be 156 referrals by 2039/40.

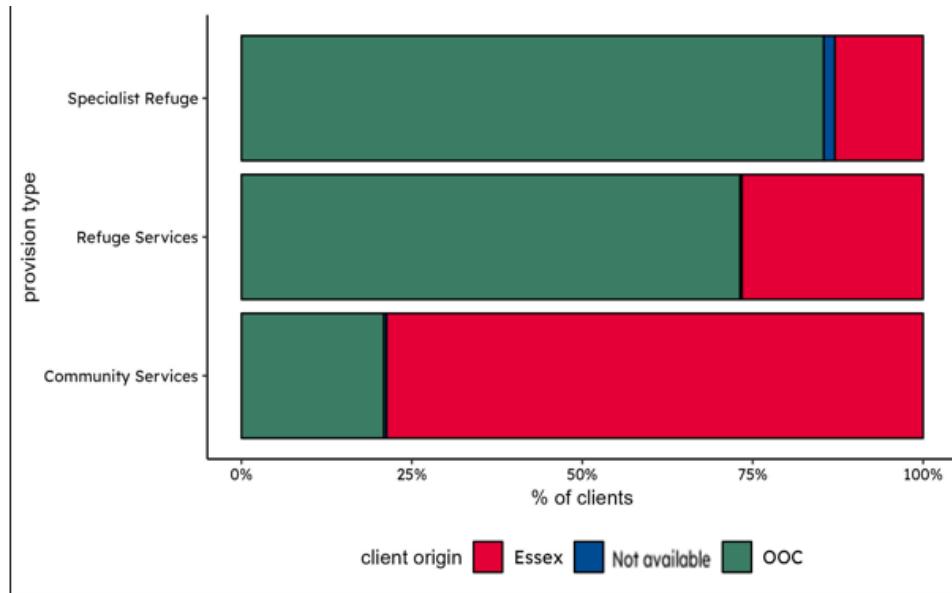
Figure 28. Current and estimated number of future referrals that are unable to be accommodated in safe accommodation due to a lack of space/capacity or because the provider was unable to meet their needs



Source: Essex County Council 2024 Domestic Abuse Needs Assessment / Housing LIN

8.12 Whilst the community services in Essex are predominantly used by clients that are originally from Essex, the refuge services predominantly accommodate people from out-of-area*.

Figure 29. Origin of clients using the provision of services in Essex



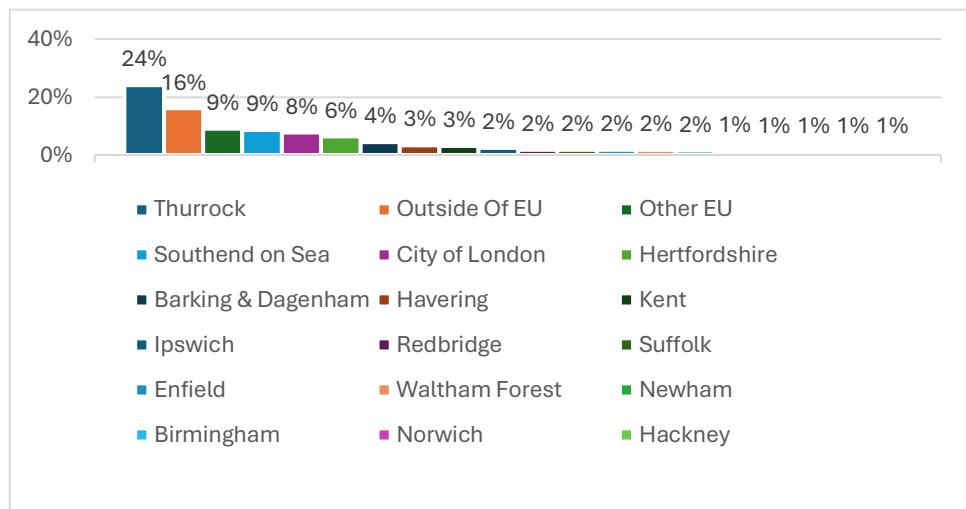
Source: Safer Places, Changing Pathways, The Next Chapter

* N.B out of area includes Southend-on-Sea and Thurrock

8.13 Figure 30 below indicates that the Council accommodates people from a range of out-of-area locations in refuge accommodation. Many clients come from neighbouring areas with nearly a quarter of referrals' area of origin listed as Thurrock and 9% listed as Barking & Dagenham or Southend on Sea.

8.14 A quarter of out-of-area referrals are not originally from the UK with 16% from outside of the EU and 9% from the EU. This indicates that there is likely to be a need for cultural considerations to be made to services to ensure they meet the needs of people from different countries.

Figure 30. Origin of clients for out of area referrals to refuge accommodation



Source: Essex County Council (2024)

8.15 The recent evidence from statutory homelessness data returns from Essex housing authorities, where households owed a prevention or relief duty who have identified a need related to domestic abuse, indicates a higher level of incidence of domestic abuse.

The profile of needs of victims and survivors of domestic abuse

- 8.16 A 2020 study, into predictors of domestic abuse in Essex, found that at a neighbourhood level, low income and anti-social behaviour were the strongest predictors of both the overall domestic abuse rate and the rate of repeat victimisation.⁴²
- 8.17 Essex County Council's 2024 Domestic Abuse Needs Assessment provides a range of data on the profile of need of victims/survivors of domestic abuse (see 8.18 to 8.22).
- 8.18 Two thirds (422) of clients in refuges and over half (753) of those supported by local authority housing teams had at least one dependent child. Although pregnant victims only account for 5% (309) of provider clients, nearly 75% (231) of these clients already had a dependent child. 20% of victims have 3 or more children, yet safe accommodation, such as refuges are not equipped to serve people with multiple children and housing for larger families is harder to source. These proportions indicate a large number of victims may require support for their children, and that most pregnant victims are likely to already be parents.

⁴² Weir, R., 2020. Individuals, Families and Neighbourhoods: Predictors of Domestic Abuse in Essex (Doctoral dissertation, University of Essex).

- 8.19 54% (338) of clients in refuges and at least 27% (332) of districts supported victims have presented mental health needs. Mental health need is one of the most prevalent needs within specialist refuge services, accounting for 75% (191) of clients seen by the service. Overall, this need is seen widely across victims of domestic abuse being supported.
- 8.20 13% (741) of provider supported victims (community and safe accommodation services) had a recorded disability and mostly went on to receive support in specialist refuge or refuge settings. Learning disability was the least common disability type, accounting for less than 10% (276) of the victim and survivor population overall.
- 8.21 1 in 2 victims/survivors (120) within specialist refuges had alcohol support needs, whilst a large proportion of those supported by drug & alcohol services had experienced domestic abuse. Similarly, over two thirds (167) of victims in specialist refuges have drug dependency needs, whilst 22% (107) of drug support service clients have experienced domestic abuse.
- 8.22 7% (408) of victims supported by providers have No Recourse to Public Funds. This proportion is over 5 times higher for victims in Refuge, where 38% (237) of accommodated victims have No Recourse to Public Funds.
- 8.23 Across victims supported by domestic abuse providers, 2% (128) of victims have an Offending History.
- 8.24 Based on the available data, 7% (381) of provider supported victims and survivors experienced sexual abuse.
- 8.25 11% (121) of victims and survivors from a global majority ethnic group are in the UK on a visa, as a refugee or asylum seeker, or with an insecure status. 31% (344) do not have English as their first language. When it comes to the services they access, most global majority victims went on to be supported by community services or outreach, but at the service level, the proportion of each group differed by service type.

The perpetrator population

- 8.26 There is limited data to accurately state the number of perpetrators of domestic abuse in Essex however some high-level assumptions have been made on the available data for this assessment.
- 8.27 According to Essex County Council's 2024 Domestic Abuse Needs Assessment, between April 2021 and March 2023, 58,875 domestic-abuse related crimes were recorded in Essex, equating to 3% of domestic abuse crimes recorded in England and Wales over the same period.
- 8.28 In England and Wales, the Crown Prosecution Service (CPS) charged 49,046 suspects in domestic abuse-related cases in the year ending March 2024.

8.29 Applying the 3% weighting to the 49,046 UK suspects in domestic abuse-related cases in 2024, it may potentially be assumed that there was an estimated c.1,470 perpetrators of domestic abuse in Essex.⁴³

8.30 In relation to the profile of perpetrators, national evidence indicates that most perpetrators are male. Refuge UK indicate that 93% of defendants in domestic abuse cases are male.⁴⁴

8.31 However, this does not mean that women aren't perpetrators of domestic abuse. In Essex, over 25% of victims recorded by the police are men which potentially indicates that the perpetrator is likely to be female, however this will not always be the case.

8.32 Crest Advisory research⁴⁵ funded by the Home Office into the offending patterns of domestic abusers in the West Midlands found that the majority of individuals listed as a domestic abuse suspect, had just one lower harm crime or incident recorded against them which generally the police had graded at the lowest risk level. A relatively small group of individuals had multiple offences listed against each of them; they were responsible for most of the harm from domestic abuse.

8.33 The Crest Advisory research found that offenders causing the greatest domestic abuse harms were much more likely to also be committing other types of offending, thus highlighting valuable opportunities for practitioners in the identification and targeting of domestic abuse perpetrators.

Current provision of safe accommodation (March 2025)

8.34 As part of Essex County Council's commitment to victims of domestic abuse, three domestic abuse safe accommodation providers in Essex have been commissioned to provide support in safe accommodation in the form of refuges, a specialist recovery refuge, move-on accommodation, and dispersed units.

8.35 The Next Chapter, Safer Places and Changing Pathways provide:

- 3 family refuges for women and their children
- 1 specialist recovery refuge for women with active addiction
- a variety of dispersed and move-on accommodation, primarily for women and, where needed, their children
- a small unit of dispersed accommodation for men

8.36 At any one time in Essex, 95 adult victims/survivors and their children can be supported in the above forms of safe accommodation.

⁴³ To note, this estimation only includes those domestic abuse incidents that were reported as crimes and also assumes because 3% of total domestic crimes in England and Wales occurred in Essex, this percentage can be applied to the number of suspects to give an Essex figure.

⁴⁴ Refuge. Facts and Statistics. Available at: <https://refuge.org.uk/what-is-domestic-abuse/the-facts/#:~:text=Fact%3A%2093%25%20of%20defendants%20in,%C2%A323%20billion%20a%20year>.

⁴⁵ <https://www.crestadvisory.com/post/who-carries-out-domestic-abuse-the-lessons-of-our-research-for-preventing-serious-violence>

Table 96. Current supply of safe accommodation in Essex (as of March 2025)

Safe accommodation type	Location	Support Provider	Characteristics supported	Total units
Refuge accommodation	South Essex	Changing Pathways	All women, including those with children	12
Refuge accommodation	West Essex	Safer Places	All women, including those with children	12
Refuge accommodation	Mid Essex	Safer Places	All women, including those with children	12
Refuge accommodation	North Essex	The Next Chapter	All women, including those with children and a 12-unit specialist refuge for women with active addiction needs	21
Dispersed accommodation	Across Essex	The Next Chapter Changing Pathways Safer Places	All women, including those with children and those where communal refuge is not appropriate. All men, including those with children	38
Total units				95

Source: Essex County Council (2024)

8.37 Essex County Council recommissioned their domestic abuse service from the 1st April 2025 through joint commissioning arrangements with Southend-on-Sea Council and Thurrock Council. The services include support for victims in the community and will incorporate more specialist supported accommodation, for example for men, people that identified as LGBTQ+, younger adults and older people over the life of the 5-year contract.

8.38 Alongside the provision of safe accommodation in the form of refuges and dispersed accommodation, Essex County Council also provides a range of support services to victims and survivors of domestic abuse within the community.

8.39 Some of the local housing authorities also deliver a Sanctuary Scheme which aims to enable victims and survivors to safely remain in their homes by providing enhanced physical security measures. Between April 2021 and March 2023, at least 173 victims/survivors have been supported via official Sanctuary Schemes across Basildon, Braintree, Castle Point, Epping Forest and Tendring.⁴⁶

8.40 In October 2023 Essex County Council introduced a Flexible Fund for victims of domestic abuse who were seeking or needing to sustain safe accommodation. The fund supports victims with accessing a variety of resources and items. Between October

⁴⁶ Please note however that the data available on this is limited and this figure is likely to be higher, as it doesn't include data from DA providers who have supported victims with additional security measures. Also, there may be overlap between victims recorded as having had a Prevention Duty owed in Local Authority data and the 173 victims recorded separately as having been supported through Sanctuary Schemes.

2023 and March 2025, 800 households were supported by the flexible fund, with 63% receiving resources and items which supported them to safely stay in their own home.

8.41 Essex County Council is keen to explore with housing authorities how to provide accommodation for perpetrators of domestic abuse that would enable the victim and survivors to remain living in their existing home. The Council would look to enable this across all tenures to provide the maximum opportunity for the victim/survivor to remain at home. This could mean accommodating a perpetrator in social, private, or supported housing if needed. The Council is keen to expand this offer across the county.

The mix and range of accommodation needed to meet victim/survivor's needs: Council perspectives and policy intentions

8.42 The Housing LIN has conducted qualitative research with Essex County Council's Policy Advisors, Children & Families Commissioning Manager and Head of Strategic Commissioning and Policy and reviewed local policies and Domestic Abuse Needs Assessments.

8.43 As part of the Southend, Essex & Thurrock Domestic Abuse Board, Essex County Council's policy objective is to develop and embed the Whole Housing Approach (WHA)⁴⁷ (see Figure 31) to improve and provide a range of housing options (not limited to those in refuge) for those affected by domestic abuse through a whole system approach which is trauma informed.

8.44 Trauma-informed refers to an approach that recognises the widespread impact of trauma on survivors and integrates this understanding into policies, practices, and interactions. It aims to avoid re-traumatisation, provide a sense of safety, and empower individuals to regain control over their lives.

8.45 A key policy direction as part of this approach shared by Council officers is to explore the delivery of housing options and support for perpetrators of domestic abuse rather than delivering additional safe accommodation for survivors of domestic abuse.

8.46 The evidence from Council Officers is that the majority of survivors of domestic abuse would rather be supported to safely remain in their existing homes than move to refuge or dispersed accommodation. Moving can be particularly challenging for survivors with children, and the majority of survivors have children.

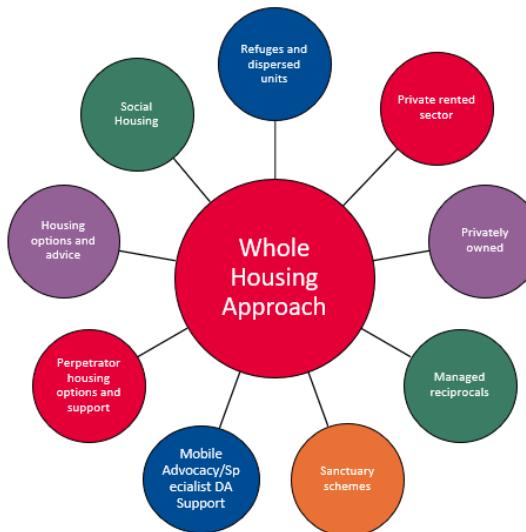
8.47 The view of Council Officers is that particular gaps in the provision of safe accommodation could potentially be resolved through the provision of perpetrator accommodation. For example, 20% of victims have 3 or more children, yet safe

⁴⁷ The WHA is a framework for addressing the housing and safety needs of victim/survivors in a local area. It brings together under one umbrella all the main housing tenure types alongside the housing options and support initiatives needed to help people experiencing domestic abuse to either maintain or access safe and stable housing.

accommodation such as refuges are not equipped to serve people with multiple children, and housing for larger families is harder to source.

8.48 The evidence from Council Officers is that a lack of affordable housing is creating a blockage in existing safe accommodation as people are unable to move out and resettle in the local community. This is another reason that perpetrator accommodation is being considered in the county.

Figure 31. Whole Housing Approach - Southend, Essex & Thurrock Domestic Abuse Board



Source: Essex County Council 2024 Domestic Abuse Needs Assessment

Estimated need for accommodation that safely supports victims and survivors of domestic abuse by 2039

8.49 Essex County Council's policy objective is to explore the delivery of accommodation for perpetrators of domestic abuse rather than to significantly expand the same additional safe accommodation for victims and survivors experiencing domestic abuse.

8.50 Based on this intention, this Needs Assessment assumes that the estimations for safe accommodation required for victims and survivors of domestic abuse, can be used as a proxy for the accommodation required for perpetrators of domestic abuse.

8.51 The estimates of current and future need for accommodation that safely supports victims and survivors of domestic abuse are based on the contextual and qualitative evidence set out previously.

8.52 In the first instance, the estimated need for additional safe accommodation for victims/survivors is provided using referral data. It is then interpreted to reflect the Council's policy objective to provide accommodation for perpetrators so that victims and survivors of domestic abuse are not the ones forced to move. This approach has been taken as there is limited accurate evidence on the number of perpetrators in Essex, instead an assumption has been made that for every referral, there is potentially one perpetrator to be housed.

8.53 The estimated need for additional accommodation that safely supports victims and survivors of domestic abuse has been calculated based on a proportion of the referrals to safe accommodation that were not accommodated in 2023/24.

8.54 Whilst Essex County Council data indicates a range of reasons that a referral was not accommodated in 2023/24 (see Table 95), based on evidence from Council Officers, two reasons have been used in the estimation calculations as they are the most likely to influence the additional need for accommodation that safely supports victims and survivors of domestic abuse.

8.55 The first is the 65 referrals refused due to a lack of space/capacity and the second is the 103 referrals refused due to the refuge provider being unable to meet the clients' needs.

8.56 To estimate how many units of accommodation that safely supports victims and survivors of domestic abuse are required for the 168 (65+103) referrals that were unable to be accommodated, the turnover rate is estimated to indicate how frequently a typical safe accommodation unit is likely to become available for a new occupant within a year.

8.57 Based on data from Essex County Council's Domestic Abuse Needs Assessment 2024, the average length of stay in existing safe accommodation in non-specialist refuge is 116 days (approx. 17 weeks or 3 months). Whilst the 2024 Domestic Abuse Needs Assessment provides a different average length of stay for refuge and specialist refuge, the average length of stay for refuge has been used in this estimation method. This is because there is limited data to determine the proportion of referrals that will require specialist refuge compared to non-specialist refuge.

8.58 Therefore, the turnover rate is estimated to be around 3 stays per unit per year (since $52 \text{ weeks} \div 17 \text{ weeks} = 3$). This means that for every one unit about 3 clients are able to be accommodated per year.

8.59 Since each unit is likely to accommodate about 3 clients per year, the required additional units for the referrals that were unable to be accommodated in 2023/24 are:

- 21 units for referrals unable to be accommodated due to a lack of space ($65 \div 3$)
- 34 units for referrals unable to be accommodated due to being unable to meet client's needs ($103 \div 3$)

8.60 This gives an *additional* need of 55 units of accommodation that safely supports victims and survivors of domestic abuse for 2023/24. on.

8.61 Table 97 shows the estimation calculations.

8.62 To reflect Essex County Council's policy intention to work with housing authorities and landlords to accommodate perpetrators of domestic abuse, it is assumed that the 55 units could be provided as accommodation for perpetrators of domestic abuse.

8.63 To note, this method assumes that for every individual referral there is one perpetrator of domestic abuse that could be housed elsewhere. It also assumes that the average stay that a victim/survivor of domestic abuse stays in safe accommodation will be the same as how long a perpetrator will stay in alternative accommodation.

Table 97. Estimated need for accommodation that safely supports victims and survivors of domestic abuse for 2023/24

	Reason referral was unable to be accommodated in safe accommodation	
	Lack of space	Unable to support clients' needs
Number of referrals unable to be accommodated in 2023/24	65	103
Average length of stay in existing safe accommodation	116 days (approx. 17 weeks or 3 months)	116 days (approx. 17 weeks or 3 months)
Turnover rate	c.3 (52 weeks/17 weeks)	c.3 (52 weeks/17 weeks)
Estimated additional accommodation required	21 units (65/3)	34 units (103/3)
Total	55 units	

Source: Essex County Council/HLIN

8.64 The estimated number of additional units of accommodation that safely supports victims and survivors of domestic abuse that the Council is seeking to deliver as accommodation for perpetrators has been estimated to 2039 by applying the 4.8% average annual growth rate from the referrals unable to be accommodated in safe accommodation in Figure 28.

8.65 Using this estimated growth rate the estimated need for additional accommodation that safely supports victims and survivors of domestic abuse is estimated to be 58 units in 2024/25 and 95 units by 2039/40. It is the intention of the Council that this is provided as accommodation for perpetrators, to enable victims to safely stay in their own home.

Table 98. Estimated additional need for accommodation that safely supports victims and survivors of domestic abuse to 2039/40

	Current supply 2023/24	2023/24	2024/25	2029/30	2034/35	2039/40
No of units	95 units	55 units	58 units	68 units	81 units	95 units

Source: Essex County Council/Housing LIN

8.66 Essex County Council commissioners note that:

- Refuge and dispersed accommodation for victims will increase in the next 5 years through the recently joint commissioned domestic abuse offer with Southend-on-Sea and Thurrock. This will provide opportunities for victims to move areas within Greater Essex to be safe, whilst still maintaining their local connections. This offer includes developing safe accommodation for under-served groups such as young

people, men, LGBTQ+, large families. The domestic abuse providers will also continue to support victims to stay in their own home where it is safe, the perpetrator does not reside, and additional security measures are in place

- To support victims to safely stay in their own home (where appropriate), Essex County Council commissioners need to identify how they support perpetrators with their housing options. They will be working with partners, including domestic abuse perpetrator services, housing authorities and private landlords to deliver a perpetrator housing pilot, which will include accommodation alongside support to engage with behaviour change programmes. The pilot will be funded from the PFCCs perpetrator Home Office grant and will be evaluated

Disaggregation of estimated need by the Essex's quadrants/districts

8.67 The evidence from Essex County Council's Domestic Abuse Needs Assessment is that there are district level differences in demand for services, with Colchester, Basildon, Harlow, and Tendring being highlighted across multiple metrics as the districts with the most demand compared to the local population.

8.68 While seeing a lower Compass referral rate, Basildon ranks higher across multiple other metrics, including for victims accessing provider and Local Housing Authority support services.

8.69 This may suggest that there are particular geographic gaps for accommodation that safely supports people experiencing domestic abuse in these areas.

Practice examples from other local authorities and potential benefits of accommodating perpetrators

The London Borough of Barking and Dagenham - Housing Perpetrator remove abuse innovation programme

8.70 In 2019, Barking and Dagenham set up the 'Barking and Dagenham Domestic Abuse Commission' (BDDAC) to examine the attitudes in the local community around domestic abuse, review the Council's service provision in response to domestic abuse and create a blueprint for other local authorities to follow.

8.71 As part of a wider workshop which explored housing opportunities for victims/survivors, the BDDAC discussed the possibility of whether the perpetrator should be the one to move out of the family home. In the current system, victims and survivors are expected to leave the home which further reinforces the loss of control and agency they had experienced at the hands of the perpetrator. Barking and Dagenham were particularly interested in the possibility of providing short-term accommodation to the perpetrator alongside an evidence-informed programme of behaviour change work.

8.72 Barking and Dagenham used property they had nomination rights for with the addition of twenty-four-hour security and a site manager. This was to ensure the safety of practitioners visiting the perpetrator. They could offer up to ten places over twelve months. Perpetrators would be offered a six-month tenancy agreement on the condition that they engaged with the behaviour change programme. In certain circumstances, Barking and Dagenham would consider paying for the accommodation if there was strong engagement from the perpetrator.

Making Safe Scheme

8.73 Making Safe was a multi-agency service based in North Yorkshire, providing perpetrators with accommodation for up to two years alongside behavioural change intervention as well as advocacy support for victims/survivors and families. Findings from the research study⁴⁸ highlighted themes around increased perpetrator accountability, the changing balance of power in abusive relationships and the increased opportunities for victims and their families to engage in recovery work whilst remaining in the family home.

8.74 Survivors identified four positive outcomes from their abusers being rehoused:

- immediate respite from daily fear and anxiety caused by the controlling presence of the perpetrator
- spared the hardships associated with having to move into temporary accommodation and settle in a new area at a time of crisis
- continue drawing on existing formal and informal social support networks
- feeling empowered to take necessary action to end the violence

Hampshire County Council

8.75 In Hampshire, the Domestic Abuse lead for Portsmouth has negotiated an arrangement with the Director of the Portsmouth Housing Authority to create an emergency housing pathway for perpetrators in receipt of a Domestic Violence Protection Order. Hampshire Police are including the agreement to house the perpetrator as the evidence presented to the magistrate at the DVPO hearing, preventing the situation where the order may not be granted due to the potential that the perpetrator is made intentionally homeless.

Potential benefits of providing accommodation to perpetrators

8.76 The 2021 Domestic Abuse Housing Alliance research conducted research with frontline practitioners, local authority workers and those with lived experience about the benefits of enabling the victim-survivor to stay within their accommodation by

⁴⁸ 'Making Safe': A Coordinated Community Response to Empowering Victims and Tackling Perpetrators of Domestic Violence, Clarke & Wydall (2013). 'Making Safe': A Coordinated Community Response to Empowering Victims and Tackling Perpetrators of Domestic Violence

removing or diverting the perpetrator from the family home and offering alternative housing.⁴⁹

Victim/survivors' benefits

- Physical separation from the perpetrator may reduce harm from abuse and give increased survivor safety, choices and increase her space for action⁵⁰
- The survivor will remain close to existing support networks near their home – whether this is friends and family or professional services (e.g. health and mental health services)
- Ongoing support for survivors offers a buffer against postseparation abuse which is common (and now recognised through the Domestic Abuse Bill 2021)
- Less disruption to the children's schooling, friendships, and overall stability
- Less trauma to children through continued exposure to abuse, contributing to Adverse Childhood Experience (ACE)
- Reduce the economic burden of relocating, including maintaining continuity of employment and benefits
- Reducing the need for victims to struggle to know and plan for the future
- Reducing the stress and anxiety of victims and families struggling to cope with loss of the family home, toys, possessions, clothing etc
- Reducing the risk of perpetrators continuing coercive controlling behaviour in the form of manipulating victim-survivors into believing that they are responsible for 'making their partner / father of their child homeless'
- Perpetrators will be better equipped to engage in behavioural change programmes if their basic needs (including housing) are met

Local authority and wider system benefits

- The domestic abuse victim and/or perpetrator will be less likely to become homeless and sleep rough, which decreases the risk presented by perpetrators to victims and other vulnerable individuals experiencing rough sleeping
- Any children may be less likely to have contact with children's social care, than if the perpetrator was not rehoused
- Any additional costs may be counterbalanced by smaller housing requirements for a single perpetrator rather than a family

⁴⁹ Domestic Abuse Housing Alliance (2021). Accommodation for Perpetrators of Domestic Abuse Discussion Paper. Available at: <https://www.dahalliance.org.uk/media/11029/accommodation-for-perpetrators-of-domestic-abuse-discussion-paper-apr-21.pdf>

⁵⁰ It is important to note that physical separation does not guarantee a reduction in abuse and harm but can be a step towards it if there are ongoing safety and support measures in place.

- Support and interventions provided to victims and perpetrators will have better chance of success if basic needs, including stable accommodation, are being met – reducing the likelihood of the perpetrator continuing to cause abuse toward the victims or new victims

9. Older people

Introduction

9.01 The intention of this assessment is to identify the need for different types of housing suited to older people, including the need for specialist and supported housing and accommodation for older people by 2044:

- Retirement/sheltered housing (age-designated housing)
- Extra care housing (age-designated housing)
- Residential and nursing care homes

9.02 This assessment covers the need for specialist and supported housing and accommodation amongst the overall older population in Essex including older people (aged 65+) who will need to self-fund their housing and care and for people who draw on adult social care support from Essex County Council; for this latter population group of the older population this need is likely to include affordable retirement/sheltered housing, affordable extra care housing and care home capacity (placements) funded and/or arranged by Essex County Council for eligible older people.

9.03 This assessment uses data about people aged 55+ for the demographic contextual evidence in relation to the population of older people. However, for the assessment of estimated need for specialist and supported housing and accommodation, the population of people aged 65+ is used as this age population group is more likely to be a stronger predictor of moves in later life.

9.04 The assessment of need for housing and accommodation suited to the needs of older people draws on a range of evidence, including:

- Demographic evidence: current population and projected population of older people in Essex to 2044
- Current provision of specialist housing and accommodation for older people
- Local policy context
- Local stakeholder perspectives and intelligence
- Older people's housing needs and their likelihood of moving. This is based on evidence from a survey conducted by Ipsos for the Housing LIN in December 2023 of a representative sample (c.5,600 people) of the UK's 50+ population and applied to Essex level data and evidence

Baseline population and population projections

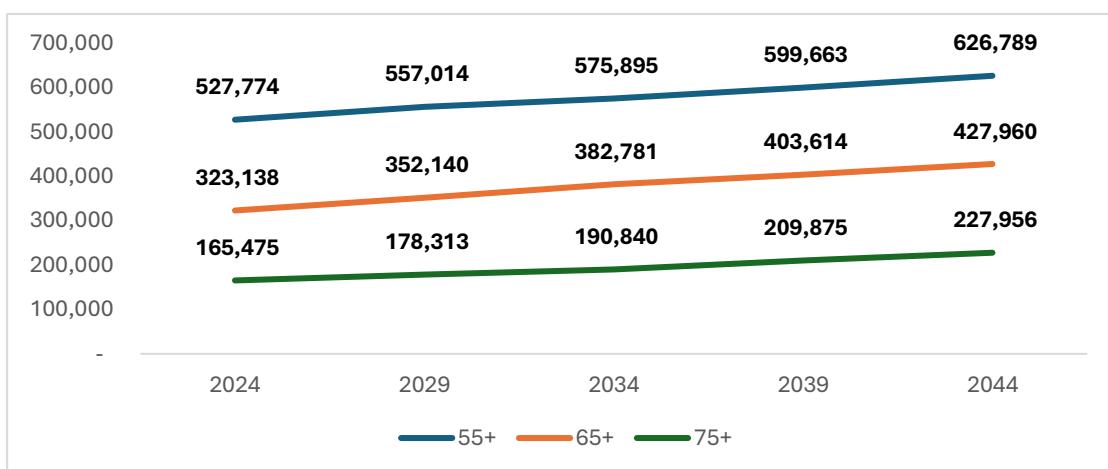
Demographic projections

Older persons population

9.05 To identify the current older population in the Essex, the ONS 2021 census has been used which identifies the number of people over the age of 55+, 65+ and 75+.

9.06 To produce population projections for the number of people aged 55+, 65+ and 75+, the most recent (2018) ONS sub national population projections (SNPP) growth rates data (see Table 188 in Annex 1) has been applied to data from the ONS 2021 census for the years 2024, 2029, 2034, 2039 and 2044.

Figure 32. Population projections for people aged 55+, 65+ and 75+ in Essex to 2044



Source: ONS (2021), SNPP (2018)

Table 99. Population projections for people aged 55+, 65+ and 75+ in Essex by district

Age Population group	Local Authority	2024	2029	2034	2039	2044
55+	Basildon	56,596	58,796	60,386	62,854	65,232
	Braintree	54,840	58,273	59,872	61,855	64,675
	Brentwood	26,090	26,573	27,061	27,892	28,535
	Castle Point	35,733	36,584	36,740	37,465	38,363
	Chelmsford	60,308	64,027	66,567	69,669	73,104
	Colchester	59,148	62,959	65,391	68,157	71,577
	Epping Forest	46,201	48,715	50,705	53,309	55,753
	Harlow	24,980	25,788	26,545	27,771	28,686
	Maldon	28,068	29,921	30,884	31,902	33,488
	Rochford	33,051	34,922	35,908	37,142	38,773
	Tendring	69,254	73,834	77,049	80,533	84,742
	Uttlesford	33,491	36,603	38,790	41,151	43,902
65+	Essex	527,774	557,014	575,895	599,663	626,789
	Basildon	32,962	35,323	37,922	39,584	41,596
	Braintree	33,315	36,581	39,903	42,125	44,847
	Brentwood	15,711	16,717	17,743	18,317	19,062
	Castle Point	23,215	24,414	25,673	26,359	27,332

Age Population group	Local Authority	2024	2029	2034	2039	2044
75+	Chelmsford	36,793	39,893	43,220	45,742	48,449
	Colchester	35,770	39,122	42,760	45,310	48,099
	Epping Forest	27,341	29,919	32,727	34,726	36,932
	Harlow	13,991	15,196	16,358	17,051	18,030
	Maldon	17,481	19,235	21,134	22,284	23,828
	Rochford	20,651	22,425	24,267	25,539	26,999
	Tendring	46,003	50,606	55,580	59,045	62,903
	Uttlesford	19,909	22,739	25,546	27,613	29,982
	Essex	323,138	352,140	382,781	403,614	427,960
	Basildon	16,183	17,016	18,021	19,629	21,001
75+	Braintree	16,663	18,492	19,914	21,847	24,089
	Brentwood	8,247	8,436	8,828	9,658	10,139
	Castle Point	12,392	13,060	13,416	14,227	15,284
	Chelmsford	19,060	20,505	21,970	23,907	25,983
	Colchester	18,329	19,997	21,245	23,333	25,478
	Epping Forest	13,838	14,733	15,906	17,754	19,159
	Harlow	6,463	6,922	7,618	8,495	9,044
	Maldon	8,926	9,914	10,684	11,675	12,981
	Rochford	10,962	11,796	12,485	13,598	14,764
	Tendring	24,422	26,307	28,354	31,599	34,387
75+	Uttlesford	10,008	11,167	12,441	14,215	15,726
	Essex	165,475	178,313	190,840	209,875	227,956

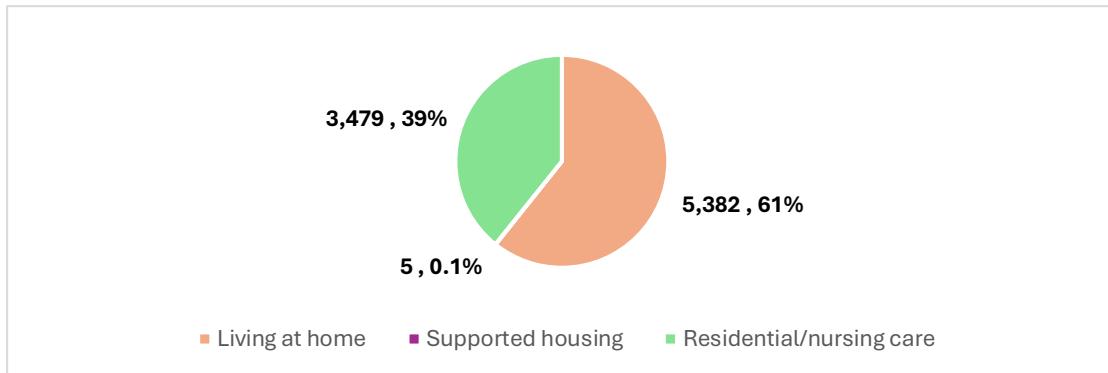
Source: ONS (2021), SNPP (2018)

Population of older people who draw on adult social care support from Essex County Council

9.07 Data from MOSAIC indicates that there are 8,866 older people (aged 65+) who draw on adult social care support from Essex County Council as of September 2024. MOSAIC is the system used by Essex County Council to record data in relation to people who draw on adult social care support. Essex County Council uses 65+ as the age indicator for older people in MOSAIC.

9.08 Figure 33 presents the accommodation status of 8,866 older people who draw on adult social care support from Essex County Council as of September 2024. The majority (61%) are living at home (5,382 individuals), while 39% (3,479 individuals) reside in residential or nursing care. A very small number (5 individuals) are in 'supported housing' (this is likely to be supported housing for people with disability/mental health needs and the 5 people are now over the age of 65).

Figure 33. Accommodation status of older people (aged 65+) who draw on adult social care support from Essex County Council as of September 2024



Source: Essex County Council (MOSAIC, 2024)

9.09 Whilst MOSAIC doesn't provide the number of older people (65+) living in extra care housing, it is anticipated that the 'living at home' category includes people living in extra care housing. In May 2024, 618 out of 695 units of social/affordable extra care housing were Essex County Council nominations to extra care housing (this will also include people aged under 65 who are living in extra care housing). This indicates that approximately 618 out of the 5,382 people 'living at home' who draw on adult social care support from Essex County Council were living in extra care housing. The remainder of people 65+ 'living at home' are living in mainstream housing (i.e. not specialised housing for older people) or retirement/sheltered housing and receiving a package of care funded by Essex County Council.

9.10 Trends in the number of older people who draw on adult social care support from Essex County Council has been analysed using MOSAIC data from 2020 to 2024 (Table 100). This analysis shows an average annual increase of 2% in the number of people aged 65+ who draw on adult social care support from Essex County Council over that period. This growth rate has been used to project forward to estimate the number of older people who will draw on adult social care support from Essex County Council in the future (Figure 34).

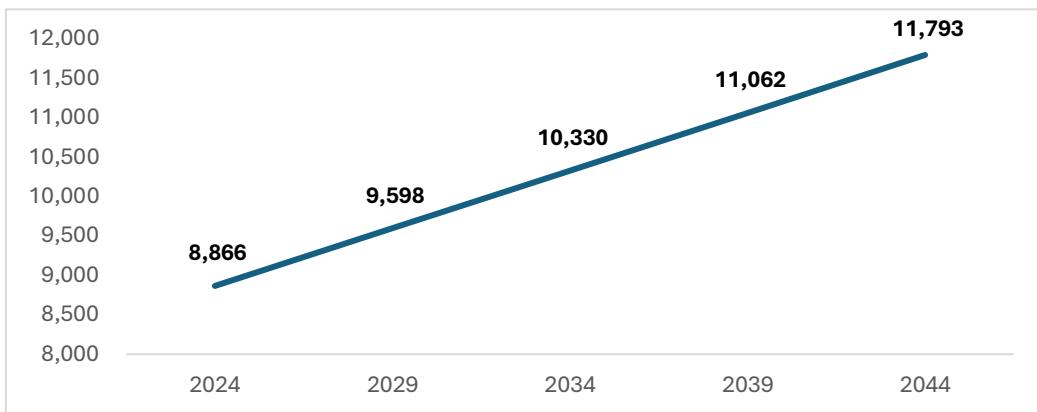
9.11 By 2044, there are estimated to be c.11,790 older people who draw on adult social care support from Essex County Council.

Table 100. Number and accommodation status of older people (aged 65+) who draw on adult social care support from Essex County Council from 2020 to 2024

Accommodation status	2020	2021	2022	2023	2024
Living at home*	4,836	4,649	4,606	4,876	5,382
Supported housing**	7	8	9	6	5
Residential/nursing care	3,474	3,445	3,562	3,562	3,479
Total	8,317	8,102	8,177	8,444	8,866

Source: Essex County Council (MOSAIC, 2024). *Includes people living in extra care housing. ** These are people in supported housing schemes for people with a learning disability or mental health need who are now over 65

Figure 34. Estimated number of older people (aged 65+) who are likely to draw on adult social care support from Essex County Council by 2044



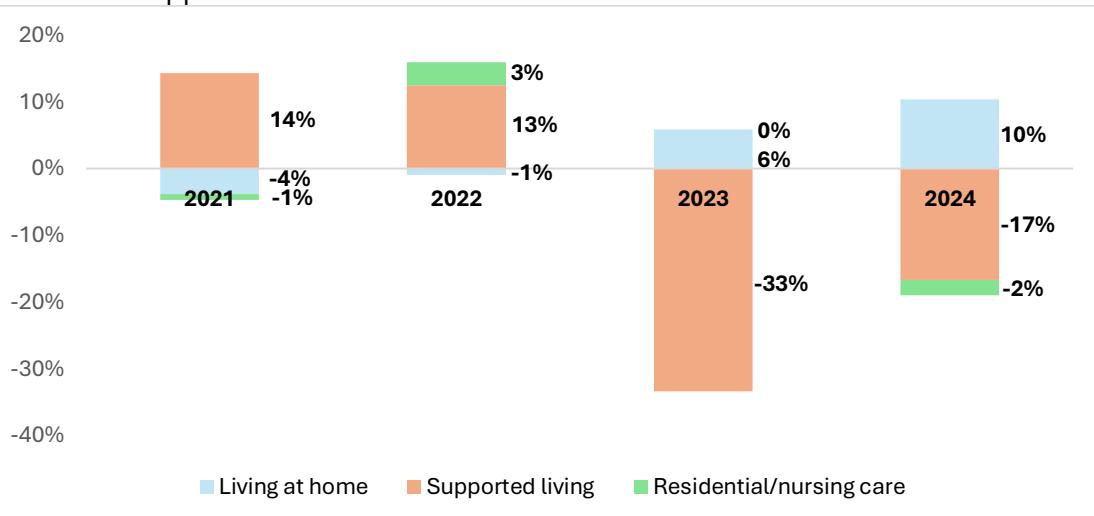
Source: Essex County Council (2024), Housing LIN (2025)

9.12 Figure 35 shows the changing accommodation status of older people who draw on adult social care support in Essex, based on MOSAIC data from 2020 to 2024.

9.13 Between 2021 and 2024, the proportion of older people (65+) who draw on adult social care support in Essex living at home increased steadily, with a 6% rise in 2023 and 10% in 2024, indicating a growing emphasis on supporting people to remain at home. This aligns with Essex County Council's strategic policy intention to provide care and support to people living at home for as long as it is safe to do so.

9.14 While supported living shows large percentage changes, a 33% drop in 2023 and 17% in 2024, these shifts are based on a relatively small number of individuals, so the percentage variations appear more dramatic than the actual volume change. Residential and nursing care remained largely stable, with only minor fluctuations throughout the period (see Annex 1 Table 189 to Table 191 for further detail).

Figure 35. The trend in accommodation status of older people 65+ who draw on adult social care support in Essex from MOSAIC data from 2020 to 2024

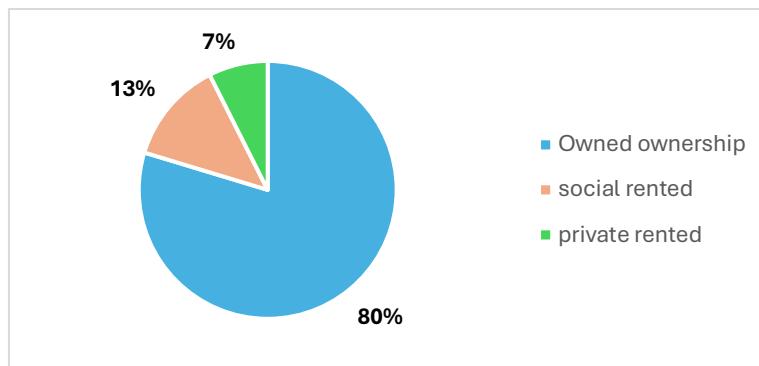


Source: Essex County Council (MOSAIC 2024)

Tenure and income

9.15 The majority of 55+ households in Essex are homeowners (80%) with 20% renting their homes from a social landlord (13%) or private landlord (7%).

Figure 36. Tenure split of 55+ households in Essex



Source: ONS (2021)

9.16 The majority of households headed by a person aged 55+ are homeowners. 13% of households headed by a person aged 55+ live in social housing. 7% of households headed by a person aged 55+ live in private rented housing. This is shown in Table 101 as well as how this tenure breakdown changes slightly amongst households headed by a person aged 65+ and 75+.

9.17 It should be noted that amongst the 45-64 age group the home ownership rate is lower, 73%. This is likely to be reflected in changes in the tenure mix need for retirement/sheltered housing and for extra care housing as this population group enters the 65+ age population group over the next 20 years.

Table 101. Household tenure type by different aged households in Essex

Age group	Ownership	%	Social rented	%	Private rented	%	Total	%
45-64	173,841	73%	32,413	14%	32,531	14%	238,785	100%
55+	253,756	80%	41,060	13%	23,664	7%	318,480	100%
65+	163,519	82%	25,056	13%	11,172	6%	199,747	100%
75+	87,093	83%	12,714	12%	5,183	5%	104,990	100%

Source: ONS (2021). Percentages may not sum to 100% due to rounding

9.18 The Income Deprivation Affecting Older People Index (IDAOPI) score for Essex is 11.3. Compared to its CIPFA comparators⁵¹, Essex is ranked 10th out of 16 compared to the deprivation scores of its CIPFA comparators meaning it is more deprived than some areas but less deprived than others. It is slightly less deprived than the average for England, which is 14.2. This suggests that there is a moderate level of income

⁵¹ CIPFA (Chartered Institute of Public Finance and Accountancy) is a professional body in the UK that provides guidance, financial management tools, and benchmarking services for local government, healthcare, and other public sector organizations. CIPFA creates "nearest neighbour" comparator groups, which are used to compare the performance, spending, and service outcomes of similar local authorities or organizations based on factors such as demographics, socio economic indicators, levels of deprivation, service demand and provision etc.

deprivation affecting older people in Essex, however this is likely to vary between districts.

Table 102. The Income Deprivation Affecting Older People Index (IDAOPI) score for Essex and its CIPFA comparators

Rank	Local Authority	IDAOPI score
Least deprived		
1	Hampshire	8.6
2	Leicestershire	9.2
3	West Sussex	9.5
4	Gloucestershire	9.8
5	Hertfordshire	9.9
6	Warwickshire	10.4
7	Suffolk	10.4
8	Worcestershire	10.7
9	Staffordshire	11
10	Essex	11.3
11	Nottinghamshire	11.4
12	Kent	11.6
13	Derbyshire	11.7
14	Norfolk	12.1
15	Lincolnshire	12.4
16	Lancashire	14.1
	England average	14.2
Most deprived		

Source: Ministry of Housing Communities and Local Government (2022)

Health and social care characteristics

9.19 The table below shows that Essex's older population is relatively healthy – with over 89% of older people reporting 'very good' or 'fair' health status. This may influence an older person's decision to move into specialist housing and accommodation, e.g. amongst the minority (11%) of older persons aged 65+ who report 'bad' or 'very bad' health who may opt to move to specialist housing and accommodation for health-related reasons.

Table 103. Self-reported health status of people aged 65+ living in Essex

Self-reported health status	'Very good' or 'good'	'Fair'	'Bad' or 'very bad'	Total
Number of people (65+)	187,250	88,112	34,617	309,979
% of total counted	60%	28%	11%	100%

Source: ONS (2021)

9.20 In Essex, the average life expectancy (2021-23) at 65 for females is 21.4 years, which is slightly lower than the East of England average of 21.5 years and higher than the national average for England, which is 21.1 years.

9.21 For males, the life expectancy at 65 in Essex is 18.9 years, below the East of England average of 19.1 years and higher than the England average of 18.6 years.

9.22 To identify the number of people 65+ living with dementia, LG Inform⁵², the local area benchmarking tool from the Local Government Association has been used which uses data from NHS England. The estimate is based on the characteristics of the population and the age and sex specific prevalence rates from the Cognitive Function and Ageing Study II.

9.23 According to LG inform, there are currently an estimated 21,997 people aged 65+ living with dementia in Essex.

Table 104. Estimated number of people living with dementia aged 65+ in Essex

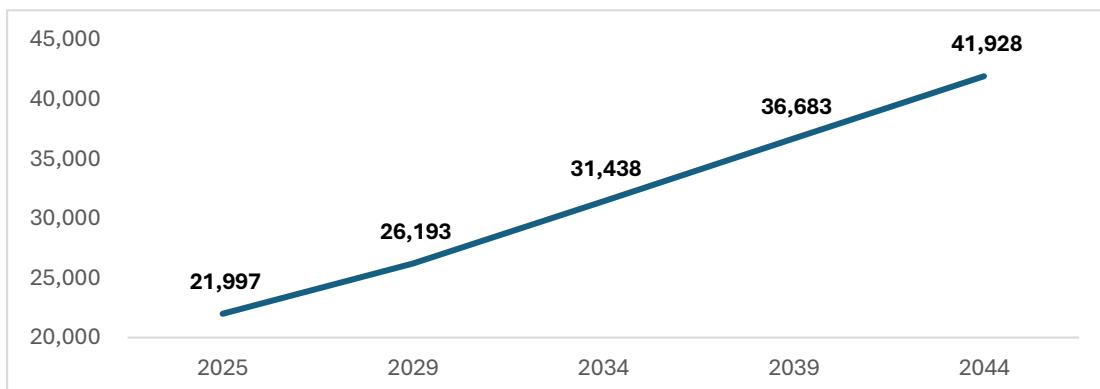
Year	Estimated no. of people living with dementia aged 65+
2023	20,050
2024	21,456
2025	21,997

Source: NHS England through LG Inform Platform (2025)

9.24 To estimate the change in the number of people living with dementia to 2044, the average annual growth rate between 2023, 2024 and 2025 (5%) has been applied. By 2044, the estimated number of people in Essex who are aged 65 plus with dementia is estimated to increase by 91% to 41,928.

9.25 The projected upward trend in the number of people aged 65+ living with dementia is corroborated by evidence from the Southend, Essex & Thurrock Dementia Strategy 2022-2026⁵³.

Figure 37. Estimated number of people living with dementia aged 65+ in Essex to 2044



Source: NHS England (2025) and HLIN (2025)

Current supply of specialist housing for older people

9.26 To identify the current supply of older persons' specialist age-designated housing in Essex, the Elderly Accommodation Counsel's (EAC) national database⁵⁴ of specialist accommodation for older people has been used as a baseline and then 'sense checked'

⁵² LG Inform (2025). Dementia estimate for people aged 65 and over in Essex

Available at: https://lginform.local.gov.uk/reports/lgastandard?mod-metric=19573&mod-area=E10000012&mod-group>AllCountiesInCountry_England&mod-type=namedComparisonGroup

⁵³ <https://www.essexproviderhub.org/media/n5ilypxh/dementia-strategy.pdf>

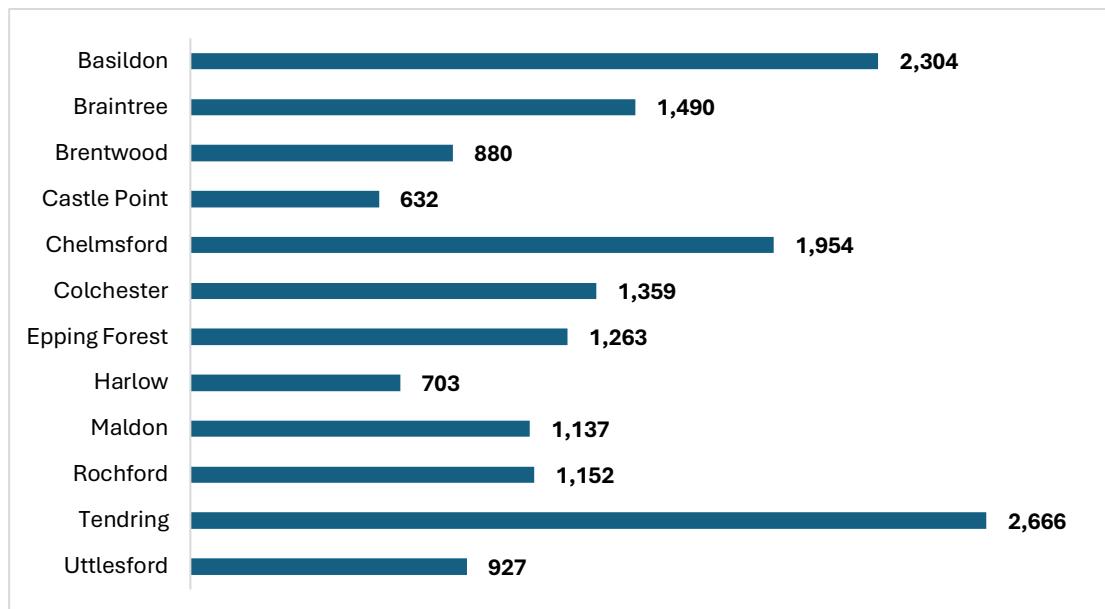
⁵⁴ <https://housingcare.org/>

for accuracy with Essex County Council and the district/borough/city councils. The current supply of older persons' specialist housing has been categorised into the following types:

- *Retirement/sheltered housing* is restricted to older residents and is an important form of specialist housing, though Essex County Council is not a developer, provider or commissioner of such accommodation. Sheltered housing is provided by social and not for profit landlords such as housing associations and local authorities at social or affordable rents. Retirement housing is the equivalent to sheltered housing provided usually by private for-profit companies where residents purchase a leasehold property or pay a market rent. Residents in sheltered schemes will typically have a lower level of support need, but may be supported by carers in their family, privately funded carers, or Essex County Council commissioned carers under an agreed personal care package. Retirement/sheltered housing schemes may be comprised of rented or owned homes and may be managed by councils, Registered Providers of Social Housing or private companies. However, there are no accreditation or quality ratings required of sheltered housing schemes. An area of market growth has been the development of 'retirement villages' and 'retirement apartments'. Management companies provide on-site housing management and some communal facilities, and residents may access further peripatetic care and support as individuals or households – as they would in sheltered housing schemes or in their private home. Homes are typically market sale or market rent; though some offer '[Older Persons Shared Ownership](#)' (a government backed Affordable Housing tenure). These retirement schemes provide an option in the market for those who can afford to meet their own housing needs from their own resources, but which is often unaffordable to those who are not already in the home-ownership sector. Essex County Council does not nominate or place residents in these market housing schemes, and they operate on the same basis as any other market owner-occupied housing. Where residents of retirement communities ultimately experience a higher level of care and/or support need, other forms of specialist housing and accommodation may be appropriate to meet those needs
- *Extra care housing* is defined as accommodation that provides access to 24-hour, seven day (24/7) on-site care and support for adults, many of whom may also have care and support needs met by Adult Social Care as part of Essex County Council's duties under the Care Act 2014. Extra care housing schemes are for adults who want to live in their own home with access to on-site care and support 24/7, if and when they need it. It means living in a safe property, with self-contained apartments in a well-maintained scheme in the heart of the community that is purpose built and tailored to the needs of older adults and adults with disabilities. It is often referred to as 'extra care housing' when provided by housing associations and local authorities (for affordable rent and shared ownership) and 'assisted living' or 'retirement villages' or 'integrated retirement communities' by private sector providers for market sale (and sometimes for market rent)

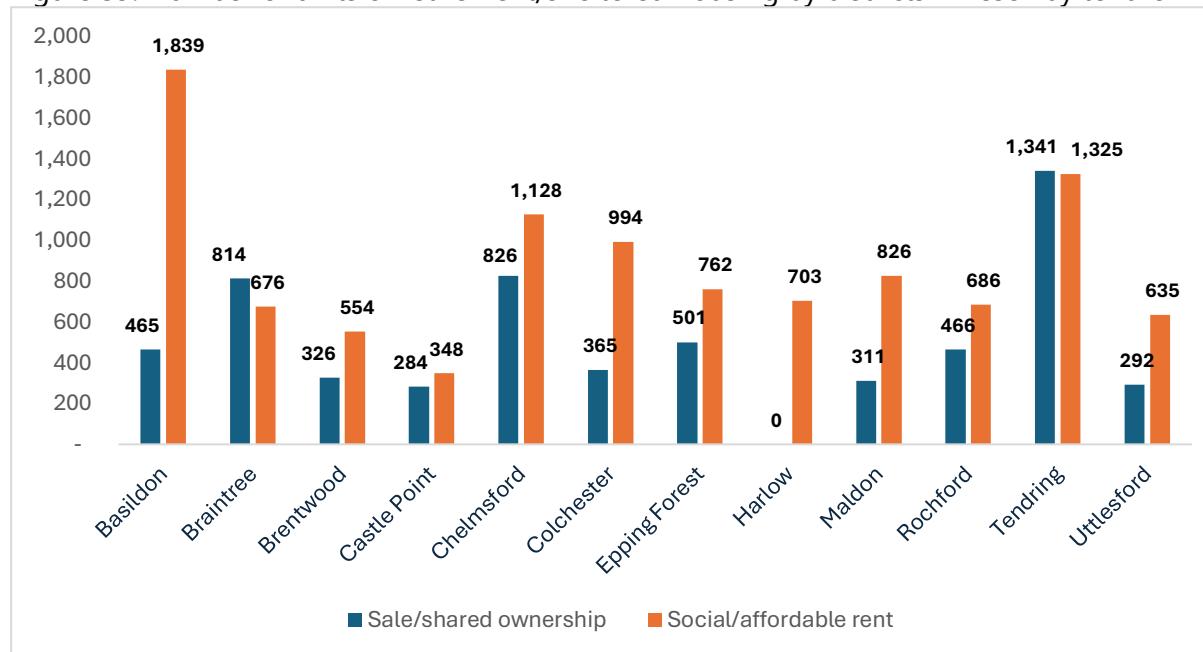
9.27 There are currently 16,467 units of retirement/sheltered housing across 531 schemes in Essex. The majority (63%) of retirement/sheltered housing is available for rent (social and affordable rent) with 37% available for sale/shared ownership.

Figure 38. Number of units of retirement/sheltered housing by districts in Essex



Source: EAC (2023). Essex County Council (2024)

Figure 39. Number of units of retirement/sheltered housing by districts in Essex by tenure



Source: EAC (2023). Essex County Council (2024)

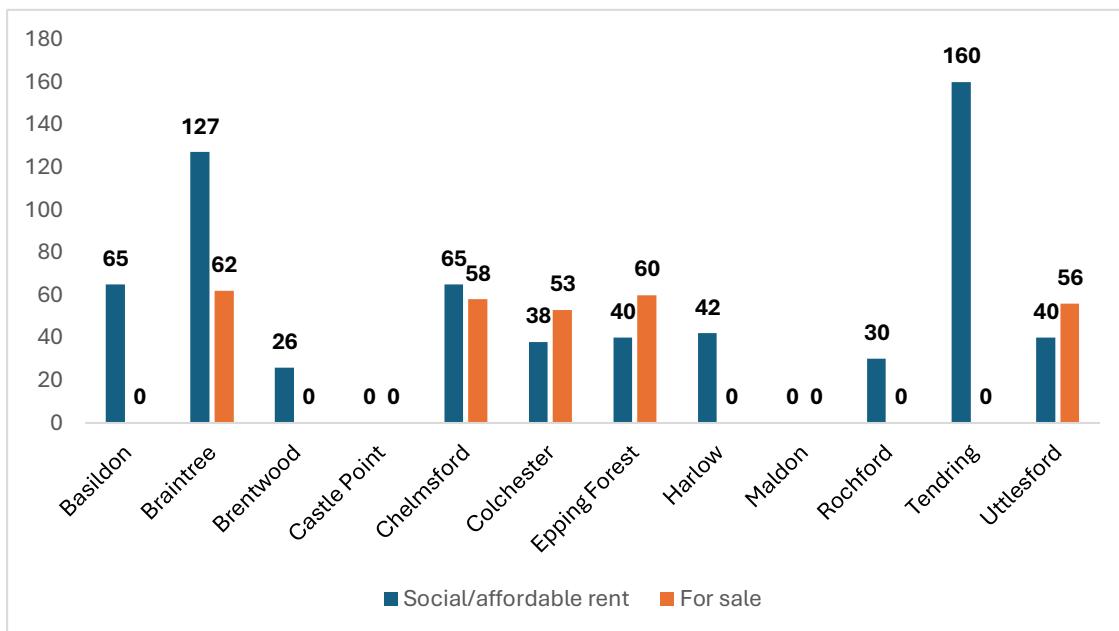
9.28 There are currently 922 units of extra care housing across 18 schemes in Essex. The majority (69%) of extra care housing is available for rent (social and affordable rent) with 31% available for market sale/rent.

Table 105. Number of units of extra care housing (all tenures) by districts in Essex

District/City/Borough Council	Extra care housing (dwellings)	Extra care housing (%)
Basildon	65	7%
Braintree	189	20%
Brentwood	26	3%
Castlepoint	0	0%
Chelmsford	123	13%
Colchester	91	10%
Epping Forest	100	11%
Harlow	42	5%
Maldon	0	0%
Rochford	30	3%
Tendring	160	17%
Uttlesford	96	10%
Total (Essex)	922	100%

Source: EAC (2023). Essex County Council (2024)

Figure 40. Number of units of extra care housing by districts in Essex by tenure



Source: EAC (2023). Essex County Council (2024)

NB: Poplar house in Basildon 13 of the 65 social and affordable tenure units are shared ownership but now being brought back to affordable rent.

9.29 Essex County Council has nomination rights for 605 units across all the 14 existing social/affordable extra care housing schemes. These 14 schemes also have an on-site care and support contract with Essex County Council.

9.30 The majority of people that move into extra care housing are aged over 65 years. Just over half (55%) of people that moved in between 2020-2025 were over the age of 75 and nearly a quarter (22%) were over the age of 65.

9.31 However, extra care housing in Essex can also accommodate younger people with care and support needs. People moving under the age of 45 or between the ages of 45-64 mainly had a learning disability or a physical and/or sensory impairment. Those that moved in that might be considered 'younger' old (55-64) also tended to have a physical and/or sensory impairment.

9.32 Over the period 2022-2025, 25 people whose primary need is learning disability moved into extra care housing (equivalent to c.8 people per annum), 10 people whose primary need is a mental health need moved into extra care housing (equivalent to c.3 people per annum), and 52 people whose primary need is physical disability and/or sensory impairment moved into extra care housing (equivalent to c.17 people per annum).

Table 106. Age of adults moving into extra care housing with Essex County Council nomination rights (14 schemes) 2022-2025

Age population group	Number of people	Percentage
Under 45	5	1%
45-54	22	6%
55-64	52	15%
65-74	76	22%
75+	191	55%
Total	346	100%

Source: Essex County Council (2025)

Table 107. Age of adults moving into extra care housing with Essex County Council nomination rights (14 schemes) by population group 2022-2025

Population group	Under 45	45-54	55-64	65-74	over 75
Learning disability and Autism (count)	3	10	8	3	1
Percentage	60%	45%	15%	4%	1%
Mental Health (count)	0	1	0	3	6
Percentage	0%	5%	0%	4%	3%
Older Persons (count)	0	1	11	63	184
Percentage	0%	5%	21%	83%	96%
PSI (count)	2	10	33	7	0
Percentage	40%	45%	63%	9%	0%
Total (count)	5	22	52	76	191
Percentage	100%	100%	100%	100%	100%

Source: Essex County Council (2025)

9.33 As of April 2025, there are 7 extra care housing schemes that are in Essex County Council's development 'pipeline' which are intended to provide an additional 424 units of extra care housing in the next few years. Three have planning permission and the remainder are in the process of securing planning permission. As of April 2025, there are 95 private extra care units that are in development.

Table 108. Planned ('pipeline') extra care housing schemes in Essex

District/City/Borough Council	Scheme name	No. of units
Chelmsford	St Peters	60
Colchester	Lexden Springs	64
Epping Forest	Hillhouse	60
Harlow	Westfield	60
Maldon	Mundon Road	60
Rochford	Rocheway	60
Tendring	Coppins Court	60
	Total	424

Source: Essex County Council (2024)

NB: Essex County Council are site seeking in Basildon and Castle Point. As no sites have been forthcoming in the past 7 years these have been removed from the table as to include them would estimate supply that is not there.

Table 109. Planned ('pipeline') private specialist housing schemes in Essex

Scheme name	Provider	Type	Location: District/City/Borough Council	No. of units
N/A	McCarthy Stone	Extra care housing (Retirement living plus)	Billericay, Basildon	65
N/A	Cherry Orchard Homes & Villages	32 over-55s apartments 22 over-55s houses, 9 over-55s bungalows 30 over-55s assisted living apartments (extra care) 34 over-55s sheltered apartments	Rochford	127 (30 are extra care)
Park Chase	McCarthy Stone	Retirement/sheltered housing	Hadleigh, Castle Point	39
N/A	McCarthy Stone	Retirement/sheltered housing	South Woodham Ferrers, Chelmsford	N/A
N/A	ASA-owned Retirement Villages Group	Retirement/sheltered housing	Chigwell, Epping Forest	144
			Total	375

Source: Essex County Council and HLIN

9.34 Prevalence rates are calculated to indicate the number of homes (units) per 1,000 of the 65+ population for retirement/sheltered housing and the 75+ population for extra care housing. This is used as a means of comparison with national average prevalence rates for the supply of retirement/sheltered housing and extra care housing.

9.35 Table 110 indicates that compared to the national average, Essex has a lower prevalence rate for both retirement/sheltered housing (51 vs. 52) and significantly lower for extra care housing (6 vs. 11), indicating a potential shortfall in specialist housing for older people.

9.36 Amongst the 12 districts, Basildon has the highest prevalence of retirement/sheltered housing at 70, higher than England average prevalence, while Braintree has the highest prevalence of extra care housing at 11, almost same as the England average prevalence.

Table 110. Current supply and prevalence of retirement/sheltered housing and extra care housing in Essex and the 12 districts

Districts	Retirement/sheltered housing				Extra care housing			
	For sale	For social/affordable rent	Total	Prev.	For sale	For social/affordable rent	Total	Prev.
Basildon	465	1,839	2,304	70	-	65	65	4
Braintree	814	676	1,490	45	62	127	189	11
Brentwood	326	554	880	56	-	26	26	3
Castle Point	284	348	632	27	-	-	-	-
Chelmsford	826	1,128	1,954	53	58	65	123	6
Colchester	365	994	1,359	38	53	38	91	5
Epping Forest	501	762	1,263	46	60	40	100	7
Harlow	-	703	703	50	-	42	42	6
Maldon	311	826	1,137	65	-	-	-	-
Rochford	466	686	1,152	56	-	30	30	3
Tendring	1,341	1,325	2,666	58	-	160	160	7
Uttlesford	292	635	927	47	56	40	96	10
Essex	5,991	10,476	16,467	51	289	633	922	6
England	151,683	432,391	584,074	52	13,629	46,176	59,805	11

Source: Elderly Accommodation Counsel (2023), Essex County Council and the 12 District Councils (2024)

N.B. 'Prev' denotes the prevalence rate – the number of housing units per 1,000 population 65+ and 75+

* Prevalence rates for Castle Point for retirement/sheltered housing are lower than for other local authorities in Essex; however, this is likely to reflect that there are two large park homes sites that are expressly promoted to and are for older people.

Local policy context

9.37 Essex County Council's Housing Strategy 2021 - 2025⁵⁵ sets out three strategic goals the second is the most relevant to the needs of older people, *'to enable people to live independently throughout their life'*. Essex County Council aims to deliver the following outcomes:

- New homes and places are designed for residents to live independent and healthy lives
- Homes are adapted and digital technologies adopted, to support residents to live independently
- Access to high quality specialist and supported accommodation for those who need it

⁵⁵ Essex County Council (2020). Housing Strategy 2021 to 2025. Available at:

<https://www.essex.gov.uk/about-council/plans-and-strategies/jobs-economy-and-growth/housing-strategy-2021-2025>

9.38 The Council's Market Position Statement⁵⁶ (MPS) highlights the Council's ambition to increase the supply of extra care housing. Essex County Council produced an Extra Care Housing in Essex Supplement to the Market Position Statement in 2023⁵⁷ outlining the Council's commitment to delivering extra care housing across Essex. It indicates that the Council has in the pipeline 9 extra care schemes totalling 544 units.

9.39 The MPS also indicates that there is currently an oversupply of registered residential care homes in the market. There is a need to work with the market to ensure care home provision meets future demand and need, including an increase in nursing care provision and supporting adults with more complex needs later in life.

9.40 Essex County Council's Adult Social Care Business Plan 2024-2039⁵⁸ highlights the Council's policy intention to prevent, reduce, or delay the need for people to access social care for as long as possible by supporting them to be more independent or retain their independence for longer. It wants to increase the number of people living their own lives, independently, at home by focusing on care enabled technologies.

9.41 The Business Plan indicates that Essex County Council wants to improve access to housing, including the development of a wider range of accommodation options to provide community-based alternatives to residential care including general needs housing and supported housing.

Estimated need for retirement/sheltered housing and extra care housing

9.42 Modelling of estimated need for retirement/sheltered housing and extra care housing suited to older people is based on a recent (December 2023) large scale nationally representative survey of c.5,600 older people aged 50+ in the UK⁵⁹ and a statistical model that applies the survey findings to quantitative demographic data. This work has been jointly undertaken by the Housing LIN and Ipsos.

9.43 In 2023/24, the Housing LIN received funding from United Kingdom Research & Innovation to undertake large scale primary research with older people and to develop a statistical model to estimate the need for a range of housing options for people as they age.

9.44 The new model estimates the need for a range of housing options and types of homes that are needed for people aged 65+, including retirement/sheltered housing and extra

⁵⁶ Essex County Council (2025). Market Position Statement. Available at:

<https://www.essexproviderhub.org/the-essex-market/market-position-statement/>

⁵⁷ Essex County Council (2023). Extra Care Housing in Essex: Supplement to the Market Position Statement. Available at: <https://www.essexproviderhub.org/media/n4wkdp4e/Essex County Council-extra-care-supplement-to-the-mps-2023.pdf>

⁵⁸ Essex County Council (2024-2030). Adult Social Care Business Plan. Available at:

<https://www.essexproviderhub.org/media/m0dpp5hx/adult-social-care-business-plan-2024-2030.pdf>

⁵⁹ Housing LIN (2024) Housing preferences for older people: A survey of 5,600+ older people across the UK carried out by Ipsos for the Housing LIN. Available at:

<https://www.housinglin.org.uk/Topics/type/Older-Peoples-Housing-Preferences/>

care housing, as well as the need for mainstream housing. This model, which uses evidence from the survey (referred to above) of a representative sample of the UK's 50+ population, the estimated need for retirement/sheltered housing and extra care housing is derived.

9.45 Unlike 'prevalence' based models of estimating need for specialist housing for older people, this new statistical model is based on primary research with older people (50+) about housing need and the likelihood of moving in later life. An analysis of the survey data has been undertaken to inform the modelling of future need for retirement/sheltered housing and extra care housing, which takes into account the following survey evidence:

- Older persons' *housing needs* in relation to different housing types, including extra care housing and retirement/sheltered housing
- Older persons' *likelihood of moving* from their current accommodation within a 12-month period, within 1-2 years, within 3-5 years, and within 5-10 years
- Age of the respondents
- Tenure status of the respondents

9.46 The survey evidence is then combined with quantitative demographic data from the ONS 2021 Census and SNPP 2018 population projections.

9.47 This model estimates the need for retirement/sheltered housing and extra care housing for all people over the age of 65, including older people who will self-fund their housing and care and older people who will draw on adult social care support from Essex County Council.

9.48 The following method is used to estimate the need for retirement/sheltered housing and extra care housing:

- Estimated number of moves to retirement/sheltered housing and extra care housing based on the new model using the survey evidence results of people aged 65+ and combining this with demographic data for Essex
- Estimated turnover within retirement/sheltered housing and extra care housing, i.e. capacity in existing provision that becomes available to meet need due to residents leaving/dying. Estimated annual turnover is assumed to be c.10%, based on local knowledge from housing providers and Councils, and the Housing LIN's experience of specialist housing for older people
- A further adjustment is made to the extra care housing estimates to consider Essex County Council's policy objective of providing extra care housing as a genuine alternative to the use of residential care for some older people. Using Essex County Council data, it has been assumed that each year 16 people aged 65+ whom Essex County Council would otherwise have funded to move to a residential care home, can be 'diverted' to move into extra care housing as an alternative

- The tenure split of estimated need using the affordability considerations and tenure profile of the existing 65+ households for estimates to 2034 and the affordability considerations and tenure profile amongst people currently aged 45-64 for the estimates from 2034 onwards
- Estimated need for retirement/sheltered housing and for extra care housing are disaggregated by district based on a weighted method that considers the location of existing supply and the proportion of the total number of older people (65+) in Essex living in each district

9.49 An approach to using the survey data to model need for specialist housing for older people has been developed based on the survey findings in relation to the *expressed housing need* of older people and their *most likely housing need* in the future. This modelling has been used to develop estimates of future need for retirement/sheltered housing and for extra care housing. It should be noted that this modelling is subject to further refinement and development. Estimates of need at this stage are produced for retirement/sheltered housing and extra care housing over the period to 2044.

9.50 Using evidence from the survey, specifically the stated *expressed housing need* of older people and the stated *likelihood of moving* amongst older people, 'Transition Probabilities' (TPs) have been produced to estimate the predicted likelihood of people moving in 5 year periods, based on their age and their current tenure status, to generate a number of moves over the next 5 years, and subsequently the estimated number of moves over the subsequent 10, 15 and 20 years.

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

9.52 The table below shows the estimated number of moves to different housing types based on people moving from their existing home to a range of other types of housing drawing on evidence of the *expressed housing need* and *likelihood of moving* based on analysis of the Ipsos survey evidence. This indicates that amongst the 65+ population in Essex the majority of older people are estimated to be likely to stay in their existing homes with a minority moving to other types of housing. The estimated moves to other types of housing are interpreted as need for these types of housing over time, in this case over the period to 2044⁶⁰.

9.53 The survey results have shown that amongst older people who express a likelihood to move in the future, there is a greater need for mainstream housing rather than specialist housing such as retirement/sheltered housing and extra care housing. Retirement/sheltered and extra care housing is needed but it is part of a wider need for mainstream housing that suits people as they age.

⁶⁰ It should be noted that moves will include couples as well as single people. The estimates of need for sheltered/retirement housing and extra care housing assume as a default that moves are by single people.

Table 111. Estimated 'Transition Probabilities' of moves to different housing types amongst the 65+ population of Essex to 2044

Housing types/preferences	Estimated need at 2024	Estimated need by 2029	Estimated need by 2034	Estimated need by 2039	Estimated need by 2044
Stay in current conventional home without adaptations	297,768	299,279	304,522	302,395	290,969
Stay in current conventional home with adaptations	1,952	3,917	5,906	7,897	9,852
Move to conventional home without adaptations	4,721	9,344	14,034	18,509	22,462
Move to conventional home with adaptations	8,683	17,290	26,012	34,512	42,406
Move to home designed to be accessible from the outset	3,266	6,523	9,840	13,091	16,132
Move to specialist accommodation: retirement/sheltered housing and extra care housing	5,046	10,075	15,142	20,154	24,985
Other	2,851	5,686	8,539	11,358	14,069
Total	324,286	352,114	383,995	407,916	420,876

Source: ONS (2021), Ipsos (2024), Housing LIN (2024). NB. Estimates of need are not cumulative.

NB: The total population figures vary slightly to the population estimates in Table 106 due to the use of different data sources/methods.

9.54 The current model (as shown in the table above) amalgamates the 'transition probability' of moves to 'specialist accommodation' which includes a move to retirement/sheltered housing and to extra care housing.

9.55 To disaggregate the estimated moves to 'specialist accommodation' i.e. to retirement/sheltered housing and extra care housing the Ipsos survey data has been analysed as follows.

9.56 The survey findings indicates that when considering their future housing needs, the *expressed housing need* and *most likely housing need* amongst older people in relation to specialist accommodation are:

- 10% of respondents expressed a need to move to retirement/sheltered housing and 7% think that it is likely
- 5% of respondents expressed a need to move to extra care housing and 4% think that it is likely

9.57 To balance the difference between *expressed housing need* and *most likely housing need* a median value for each housing and accommodation type is calculated:

- 8.5% of moves to retirement/sheltered housing
- 4.5% of moves to extra care housing

9.58 Using evidence from the survey, based on evidence of older people's *expressed housing need* and *most likely housing need*, moves to 'specialist accommodation' (shown in Table 111 as moves to retirement/sheltered housing; extra care housing, is disaggregated as follows:

- 65% of moves estimated to be to retirement/sheltered housing
- 35% of moves estimated to be to extra care housing

9.59 The estimated need for retirement/sheltered housing and extra care housing to 2044 is shown in the table below; estimated need for 16,337 units of retirement/sheltered housing and estimated need for 8,649 units of extra care housing.

Table 112. The initial estimated need for retirement/sheltered housing and extra care housing in Essex

Specialist housing type	Estimated need in 2024	Estimated need by 2029	Estimated need by 2034	Estimated need by 2039	Estimated need by 2044
Retirement/sheltered housing	3,299	6,587	9,901	13,178	16,337
Extra care housing	1,747	3,487	5,241	6,977	8,649
Total	5,046	10,075	15,142	20,154	24,985

Source: IPSOS (2023/24) and HLIN (2024). NB estimates of need are not cumulative.

9.60 To adjust the estimated need for retirement/sheltered housing and extra care housing in Table 112 the following has been applied:

- A 10% annual turnover rate in the existing supply of specialist housing in Essex has been applied to the estimated need
- It has been assumed that 16 people aged 65+ whom Essex County Council would otherwise have funded to move to a residential care home, can be 'diverted' to move into extra care housing
- Based on evidence of the profile of need of people who have moved into Essex County Council commissioned extra care housing (paragraph 9.32), it is assumed that the estimated need for social/affordable extra care housing will include need amongst people whose primary need is learning disability (approximately 8 people; per annum), people whose primary need is mental health needs (approximately 3 people per annum), and amongst people whose primary need is physical disability and/or sensory impairment (approximately 17 people per annum)

9.61 Based on Essex County Council commissioner intelligence, and the Housing LIN's experience of retirement/sheltered housing and extra care housing, it is assumed that 10% of the current stock will become available per annum. With 16,467 units in retirement/sheltered housing and 922 units in extra care housing available in Essex (Table 110), this equates to 1,647 units in retirement/sheltered housing and 92 units in extra care housing becoming available per annum.

9.62 The turnover calculation allows for 10% of the estimated need for retirement/sheltered housing and extra care housing to be met from the existing supply and has been subtracted from the estimated need in Table 112.

9.63 A further adjustment is then made to take into account Essex County Council policy objective of providing extra care housing as an alternative to the use of residential care for some older people. Using Essex County Council data, it has been assumed that 16 people aged 65+ whom Essex County Council would otherwise have funded to move to a residential care home, can be 'diverted' to move into extra care housing as an alternative; this would increase the need for extra care housing provided as affordable/social housing by 16 units at 2024 and each subsequent 5 year interval.

9.64 The adjusted estimates of additional need for retirement/sheltered housing and extra care housing are shown below.

Table 113. Estimated additional need for retirement/sheltered housing and extra care housing for all people over the age of 65 in Essex to 2044

Specialist housing type	Estimated need in 2024	Estimated need by 2029	Estimated need by 2034	Estimated need by 2039	Estimated need by 2044
Retirement/sheltered housing	1,652	4,941	8,254	11,531	14,690
Extra care housing	1,654	3,395	5,149	6,884	8,557
Total	3,307	8,336	13,403	18,416	23,247

Source: Essex County Council (2024), IPSOS (2023/24 and HLIN (2023/24).

NB: Estimates are adjusted to allow for 10% turnover per annum in existing supply and 16 people diverted per annum to extra care from residential care). Estimates of need are not cumulative.

9.65 The estimated additional need for retirement/sheltered housing and for extra care housing by tenure is shown for 2029, 2034, 2039 and 2044 in Table 114. Estimated need is not cumulative. The estimated need for retirement/sheltered housing and extra care housing is for all people over the age of 65, not just those that are who draw on adult social care support from Essex County Council.

9.66 It has been assumed that estimates of future need are based on the current tenure split amongst people aged 65+, i.e. 82% home ownership and 18% social/affordable rent (including people currently living in private rented housing) (see Table 101). An allowance of 5% is made for shared ownership in the 82% of estimated need for home ownership. Based on guidance from Essex County Council Officers in relation to very limited take up of shared ownership units in extra care housing schemes, the allowance of shared ownership has been included within the estimated need for social/affordable housing. On this basis, the tenure split for future projected retirement/sheltered housing and extra care housing need to 2034 is assumed to be:

- 77% of the estimated need for market housing
- 23% of the estimated need for affordable/social housing

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

- 68% of the estimated need will be for market housing
- 32% of the estimated need will be for affordable/social housing

9.68 Evidence from Essex County Council demonstrates that c.10% of people who move into extra care housing for social/affordable rent are homeowners. Based on qualitative evidence from Essex County Council from discussion with residents living in extra care housing, this is because extra care housing for social/affordable rent is a more affordable option for some home owners compared with market (for sale) extra care housing (although it should be noted that there is currently a greater supply of social/affordable extra care housing compared with market (for sale) extra care housing). It has been assumed that this trend will continue. The assumed tenure split for future projected housing need has been adjusted to take account of this need for social/affordable tenures amongst homeowners as follows.

9.69 The tenure split for future projected retirement/sheltered housing and extra care housing need to 2034 is:

- 67% of the estimated need for market housing
- 33% of the estimated need for affordable/social housing

9.70 The tenure split for future projected housing need from 2034 onwards is:

- 58% of the estimated need will be for market housing
- 42% of the estimated need will be for affordable/social housing

9.71 In this context market housing could include market sale and market rent homes and affordable/social housing could include homes that are available for affordable or social rent or as shared ownership. The consideration of shared ownership for older people will be dependent on localised demand and viability considerations.

Table 114. Estimated additional need for retirement/sheltered housing and for extra care housing for Essex by tenure to 2044.

Housing / accommodation type	Estimated need at 2024	Estimated need by 2029	Estimated need by 2034	Estimated need by 2039	Estimated need by 2044
Retirement/sheltered housing (units)	1,652	4,941	8,254	11,531	14,690
Market housing	1,280	3,813	5,652	7,893	10,052
Affordable/social housing	372	1,128	2,602	3,638	4,637
Extra care housing (units)	1,670	3,411	5,165	6,900	8,573
Market housing	1,110	2,277	3,265	4,365	5,424
Affordable/social housing	560	1,134	1,900	2,536	3,148

Source: Essex County Council (2024), IPSOS and HLIN (2023/24), Estimates of need are not cumulative.

9.72 The estimated additional need for retirement/sheltered housing by 2034 is c.8,250 homes of which c.5,650 homes are estimated to be required as market housing and c.2,600 are estimated to be required as affordable/social housing.

9.73 The estimated additional need for retirement/sheltered housing by 2044 is c.14,690 homes of which c.10,050 are estimated to be required as market housing and c.4,640 are estimated to be required as affordable/social housing.

9.74 The estimated additional need for extra care housing by 2034 is c.5,165 homes of which c.3,265 are estimated to be required as market housing, and c.1,900 are estimated to be required as affordable/social housing.

9.75 The estimated additional need for extra care housing by 2044 is c.8,575 homes of which c.5,425 are estimated to be required as market housing, and c.3,150 are estimated to be required as affordable/social housing.

9.76 The estimated additional need for extra care housing will meet the housing and care needs of older people who fund and arrange their own care as well as older people who need rented housing and who are eligible for care funded by Essex County Council in full or in part and/or have their care arranged by Essex County Council.

Estimated need for retirement/sheltered housing and extra care housing by district

9.77 The modelling approach used to estimate the need for retirement/sheltered housing and extra care housing in Essex has also been applied at district level. Using Transition Probabilities (TPs) derived from the Ipsos survey, the estimates account for demographic trends, tenure split, and age profiles specific to each district.

Table 115. Basildon: Estimated additional need for retirement/sheltered housing and for extra care housing by tenure to 2044.

Housing / accommodation type	Estimated need at 2024	Estimated need by 2029	Estimated need by 2034	Estimated need by 2039	Estimated need by 2044
Retirement/sheltered housing (units)	89	402	713	1,018	1,310
Market housing	63	287	448	640	823
Affordable/social housing	25	115	265	378	487
Extra care housing (units)	164	330	495	656	811
Market housing	100	202	285	379	468
Affordable/social housing	64	128	209	277	343

Source: Essex County Council (2024), IPSOS and HLIN (2024). NB estimates of need are not cumulative

Table 116. Braintree: Estimated additional need for retirement/sheltered housing and for extra care housing by tenure to 2044.

Housing / accommodation type	Estimated need at 2024	Estimated need by 2029	Estimated need by 2034	Estimated need by 2039	Estimated need by 2044
Retirement/sheltered housing (units)	193	537	885	1,230	1,559
Market housing	141	393	587	815	1,034
Affordable/social housing	51	143	298	414	525
Extra care housing (units)	164	346	530	713	887
Market housing	103	218	324	436	543
Affordable/social housing	61	128	206	277	344

Source: Essex County Council (2024), IPSOS and HLIN (2024). NB estimates of need are not cumulative

Table 117. Brentwood: Estimated additional need for retirement/sheltered housing and for extra care housing by tenure to 2044.

Housing / accommodation type	Estimated need at 2024	Estimated need by 2029	Estimated need by 2034	Estimated need by 2039	Estimated need by 2044
Retirement/sheltered housing (units)	79	239	396	548	692
Market housing	62	189	269	371	469
Affordable/social housing	16	50	128	176	223
Extra care housing (units)	86	171	255	335	411
Market housing	59	118	159	210	258
Affordable/social housing	27	53	95	125	153

Source: Essex County Council (2024), IPSOS and HLIN (2024). NB estimates of need are not cumulative

Table 118. Castle Point: Estimated additional need for retirement/sheltered housing and for extra care housing by tenure to 2044.

Housing / accommodation type	Estimated need at 2024	Estimated need by 2029	Estimated need by 2034	Estimated need by 2039	Estimated need by 2044
Retirement/sheltered housing (units)	179	413	638	854	1,056
Market housing	152	351	485	649	802
Affordable/social housing	27	62	153	205	253
Extra care housing (units)	129	253	372	487	594
Market housing	96	189	264	345	421
Affordable/social housing	33	64	109	142	173

Source: Essex County Council (2024), IPSOS and HLIN (2024). NB estimates of need are not cumulative

Table 119. Chelmsford: Estimated additional need for retirement/sheltered housing and for extra care housing by tenure to 2044.

Housing / accommodation type	Estimated need at 2024	Estimated need by 2029	Estimated need by 2034	Estimated need by 2039	Estimated need by 2044
Retirement/sheltered housing (units)	185	561	941	1,316	1,681
Market housing	145	442	638	893	1,140
Affordable/social housing	39	119	303	424	541
Extra care housing (units)	191	390	591	790	983
Market housing	130	267	370	495	616
Affordable/social housing	61	123	221	295	367

Source: Essex County Council (2024), IPSOS and HLIN (2024). NB estimates of need are not cumulative

Table 120. Colchester: Estimated additional need for retirement/sheltered housing and for extra care housing by tenure to 2044.

Housing / accommodation type	Estimated need at 2024	Estimated need by 2029	Estimated need by 2034	Estimated need by 2039	Estimated need by 2044
Retirement/sheltered housing (units)	231	598	970	1,339	1,695
Market housing	180	465	658	908	1,149
Affordable/social housing	52	134	312	431	546
Extra care housing (units)	187	381	578	773	962
Market housing	125	257	362	485	603
Affordable/social housing	62	125	216	289	359

Source: Essex County Council (2024), IPSOS and HLIN (2024). NB estimates of need are not cumulative

Table 121. Epping Forest: Estimated additional need for retirement/sheltered housing and for extra care housing by tenure to 2044.

Housing / accommodation type	Estimated need at 2024	Estimated need by 2029	Estimated need by 2034	Estimated need by 2039	Estimated need by 2044
Retirement/sheltered housing (units)	152	431	712	994	1,269
Market housing	116	327	483	674	860
Affordable/social housing	37	103	229	320	409
Extra care housing (units)	139	286	435	584	730
Market housing	91	188	273	366	458
Affordable/social housing	48	98	163	218	272

Source: Essex County Council (2024), IPSOS and HLIN (2024). NB estimates of need are not cumulative

Table 122. Harlow: Estimated additional need for retirement/sheltered housing and for extra care housing by tenure to 2044.

Housing / accommodation type	Estimated need at 2024	Estimated need by 2029	Estimated need by 2034	Estimated need by 2039	Estimated need by 2044
Retirement/sheltered housing (units)	55	179	303	426	543
Market housing	33	108	164	230	294
Affordable/social housing	21	70	139	196	250
Extra care housing (units)	63	128	194	259	321
Market housing	31	65	95	127	157
Affordable/social housing	31	64	99	132	164

Source: Essex County Council (2024), IPSOS and HLIN (2024). NB estimates of need are not cumulative

Table 123. Maldon: Estimated additional need for retirement/sheltered housing and for extra care housing by tenure to 2044.

Housing / accommodation type	Estimated need at 2024	Estimated need by 2029	Estimated need by 2034	Estimated need by 2039	Estimated need by 2044
Retirement/sheltered housing (units)	73	262	455	646	828
Market housing	58	208	336	477	612
Affordable/social housing	15	54	119	168	216
Extra care housing (units)	100	200	302	403	500
Market housing	69	138	208	277	344
Affordable/social housing	31	62	94	126	156

Source: Essex County Council (2024), IPSOS and HLIN (2024). NB estimates of need are not cumulative

Table 124. Rochford: Estimated additional need for retirement/sheltered housing and for extra care housing by tenure to 2044.

Housing / accommodation type	Estimated need at 2024	Estimated need by 2029	Estimated need by 2034	Estimated need by 2039	Estimated need by 2044
Retirement/sheltered housing (units)	104	322	541	757	963
Market housing	86	266	422	591	753
Affordable/social housing	18	56	118	165	211
Extra care housing (units)	114	229	345	460	569
Market housing	82	166	252	335	416
Affordable/social housing	32	63	93	124	154

Source: Essex County Council (2024), IPSOS and HLIN (2024). NB estimates of need are not cumulative

Table 125. Tendring: Estimated additional need for retirement/sheltered housing and for extra care housing by tenure to 2044.

Housing / accommodation type	Estimated need at 2024	Estimated need by 2029	Estimated need by 2034	Estimated need by 2039	Estimated need by 2044
Retirement/sheltered housing (units)	196	659	1,130	1,601	2,056
Market housing	155	523	759	1,075	1,380
Affordable/social housing	40	136	371	526	676
Extra care housing (units)	231	476	726	975	1,216
Market housing	159	329	450	604	754
Affordable/social housing	72	147	276	371	462

Source: Essex County Council (2024), IPSOS and HLIN (2024). NB estimates of need are not cumulative

Table 126. Uttlesford: Estimated additional need for retirement/sheltered housing and for extra care housing by tenure to 2044.

Housing / accommodation type	Estimated need at 2024	Estimated need by 2029	Estimated need by 2034	Estimated need by 2039	Estimated need by 2044
Retirement/sheltered housing (units)	118	338	569	805	1,037
Market housing	88	253	403	570	735
Affordable/social housing	30	86	166	234	302
Extra care housing (units)	103	220	342	467	589
Market housing	66	141	225	307	388
Affordable/social housing	37	78	117	160	202

Source: Essex County Council (2024), IPSOS and HLIN (2024). NB estimates of need are not cumulative

9.78 The summary of estimated additional need for retirement/sheltered housing and for extra care housing to 2044 by tenure is given in the below table.

Table 127. Summary of estimated additional need for retirement/sheltered housing and for extra care housing by tenure to 2044

Districts	Estimated need for retirement/sheltered housing														Estimated need for extra care housing															
	2024			2029			2034			2039			2044			2024			2029			2034			2039			2044		
	Total	Market housing	Affordable/social housing	Total	Market housing	Affordable/social housing	Total	Market housing	Affordable/social housing	Total	Market housing	Affordable/social housing	Total	Market housing	Affordable/social housing	Total	Market housing	Affordable/social housing	Total	Market housing	Affordable/social housing	Total	Market housing	Affordable/social housing	Total	Market housing	Affordable/social housing			
Basildon	89	63	25	402	287	115	713	448	265	1,018	640	378	1,310	823	487	164	100	64	330	202	128	495	285	209	656	379	277	811	468	343
Braintree	193	141	51	537	393	143	885	587	298	1,230	815	414	1,559	1,034	525	164	103	61	346	218	128	530	324	206	713	436	277	887	543	344
Brentwood	79	62	16	239	189	50	396	269	128	548	371	176	692	469	223	86	59	27	171	118	53	255	159	95	335	210	125	411	258	153
Castle Point	179	152	27	413	351	62	638	485	153	854	649	205	1,056	802	253	129	96	33	253	189	64	372	264	109	487	345	142	594	421	173
Chelmsford	185	145	39	561	442	119	941	638	303	1,316	893	424	1,681	1,140	541	191	130	61	390	267	123	591	370	221	790	495	295	983	616	367
Colchester	231	180	52	598	465	134	970	658	312	1,339	908	431	1,695	1,149	546	187	125	62	381	257	125	578	362	216	773	485	289	962	603	359
Epping Forest	152	116	37	431	327	103	712	483	229	994	674	320	1,269	860	409	139	91	48	286	188	98	435	273	163	584	366	218	730	458	272
Harlow	55	33	21	179	108	70	303	164	139	426	230	196	543	294	250	63	31	31	128	65	64	194	95	99	259	127	132	321	157	164
Maldon	73	58	15	262	208	54	455	336	119	646	477	168	828	612	216	100	69	31	200	138	62	302	208	94	403	277	126	500	344	156
Rochford	104	86	18	322	266	56	541	422	118	757	591	165	963	753	211	114	82	32	229	166	63	345	252	93	460	335	124	569	416	154
Tendring	196	155	40	659	523	136	1,130	759	371	1,601	1,075	526	2,056	1,380	676	231	159	72	476	329	147	726	450	276	975	604	371	1,216	754	462
Uttlesford	118	88	30	338	253	86	569	403	166	805	570	234	1,037	735	302	103	66	37	220	141	78	342	225	117	467	307	160	589	388	202
Essex	1,652	1,280	372	4,941	3,813	1,128	8,254	5,652	2,602	11,531	7,893	3,638	14,690	10,052	4,637	1,670	1,110	560	3,411	2,277	1,134	5,165	3,265	1,900	6,900	4,365	2,536	8,573	5,424	3,148

Source: Essex County Council (2024), IPSOS and HLIN (2024). NB estimates of need are not cumulative.

Care home capacity requirements in Essex

9.79 This section considers estimated need for care home capacity for older people (aged 65+).

9.80 It draws on evidence in relation to:

- The current supply of residential care and nursing care home provision for older people (65+) in Essex
- Current utilisation of this care home capacity
- Essex County Council (Essex County Council's) use of care home capacity
- Demographic projections of the 65+ population to 2044
- Stakeholder views about likely trends in future need for care home bed capacity

Supply of care homes in Essex

9.81 As of April 2025, there were 212 care homes in Essex that Essex County Council has categorised as older people care homes. This includes both residential and nursing care homes. Of these, 68% are residential without nursing care homes, while the remaining 32% are nursing care homes with nursing.

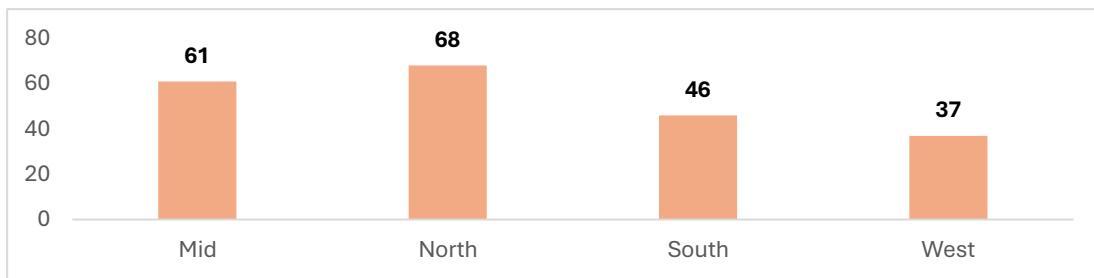
9.82 The distribution of care homes across the districts in Essex is shown below.

Table 128. Distribution of care homes by districts in Essex

Districts	Number of residential care homes	Number care homes with nursing	Total number of care homes
Basildon	11	2	13
Braintree	17	10	27
Brentwood	6	7	13
Castle Point	8	3	11
Chelmsford	11	8	19
Colchester	13	11	24
Epping Forest	10	8	18
Harlow	2	2	4
Maldon	13	2	15
Rochford	7	2	9
Tendring	35	9	44
Uttlesford	10	5	15
Essex	143	69	212

Source: Essex County Council (2025)

Figure 41. Distribution of care homes across the quadrants in Essex



Source: Essex County Council (2025)

9.83 To identify the care home capacity in Essex, the Care Quality Commission (CQC) national database of care home provision was used and cross-referenced with data from Essex County Council. The types of care homes include:

- *Residential care home*: provides accommodation, meals, wellbeing activities and support for multiple people, with access to personal care and support 24 hours a day, seven days a week. Personal care activities can include support with washing, dressing, taking medicines, going to the toilet etc
- *Nursing care home*:⁶¹ similar to a residential care home but additionally providing care from qualified nurses. There will always be 1 or more qualified nurses on duty to provide nursing care. These are sometimes called 'care homes with nursing'

9.84 From Essex County Council data in relation to the overall care home market in Essex, there are a total of 10,798 care home beds in Essex for older people (65+). This includes 8,077 residential care beds and 2,721 nursing care beds. This shows that currently 75% of care home beds are for residential care and 25% of care home beds are for nursing care.

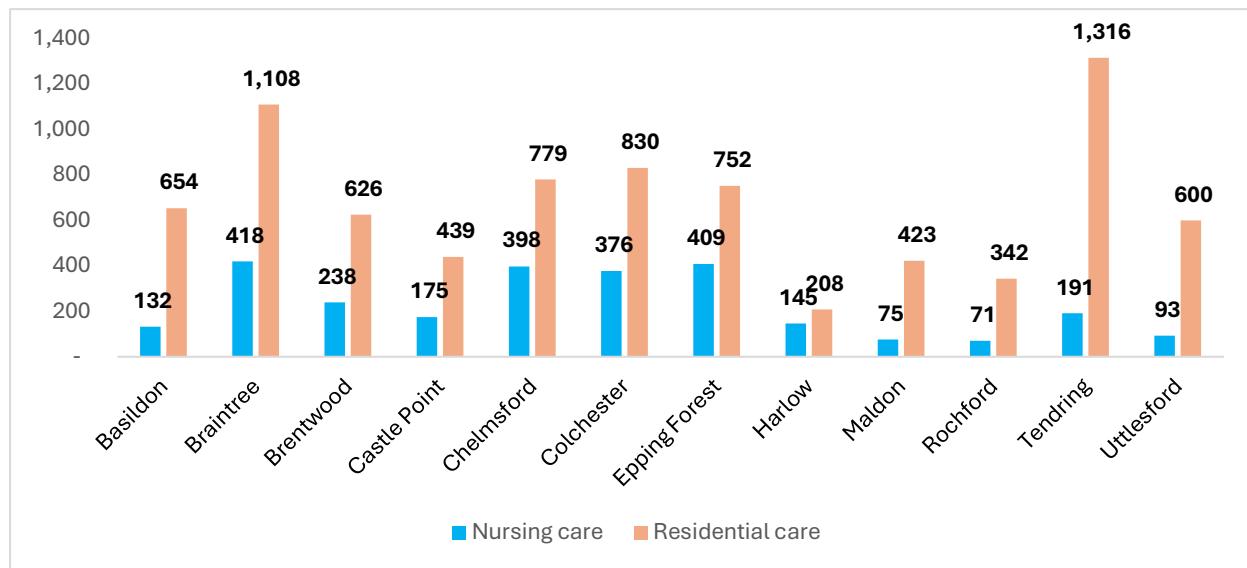
Table 129. Care home capacity in Essex by district

Districts	Nursing care capacity (beds)	Residential care capacity (beds)	Total care home capacity
Basildon	132	654	786
Braintree	418	1,108	1,526
Brentwood	238	626	864
Castle Point	175	439	614
Chelmsford	398	779	1,177
Colchester	376	830	1,206
Epping Forest	409	752	1,161
Harlow	145	208	353
Maldon	75	423	498
Rochford	71	342	413
Tendring	191	1,316	1,507
Uttlesford	93	600	693
Essex	2,721	8,077	10,798

Source: Essex County Council (2025)

⁶¹ [NHS: Care homes](#)

Figure 42. Residential care and nursing care capacity in Essex by district (beds)



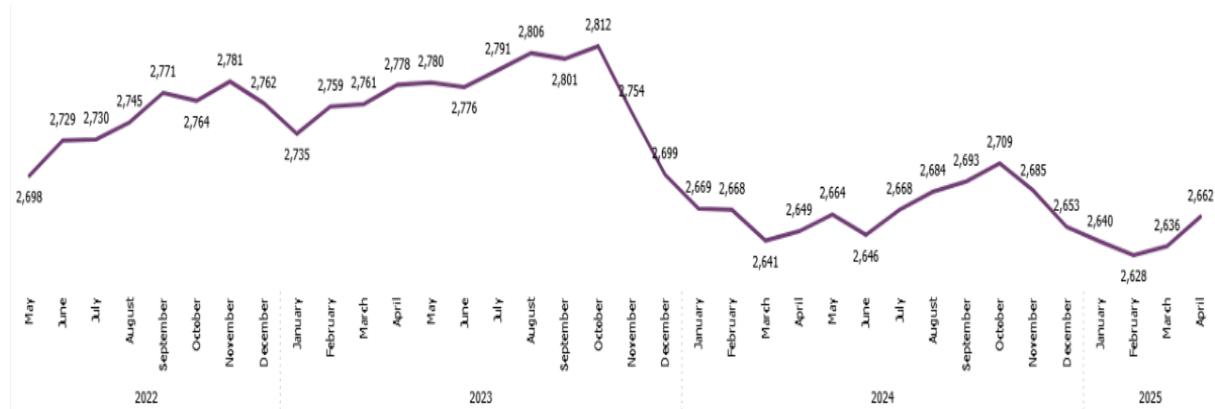
Source: Essex County Council (2025)

9.85 Analysing the trend of 65+ care placements by Essex County Council into residential and nursing care homes shows:

- Residential placements decreased from 2,759 in February 2023 to 2,628 in February 2025, a c.5.0% decline over the two-year period.
- Nursing placements increased from 618 in February 2023 to 712 in February 2025, a c.15% increase, reflecting Essex County Council's growing use of nursing care placements for older adults

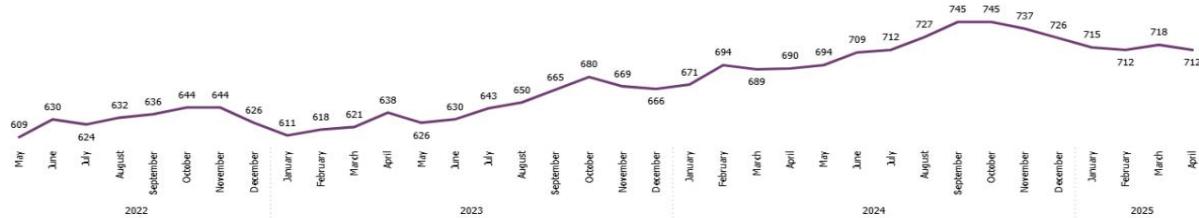
9.86 As of February 2025, c.79% of Essex County Council placements (2,628 out of 3,340) were into residential care, and 21% (712 placements) were into nursing care. While the overall ratio remains similar, this reflects a clear increase in nursing care use in absolute terms.

Figure 43. Number of adults placed by Essex County Council in permanent residential care (older people) 2022-25



Source: Essex County Council (April 2025)

Figure 44. Number of adults placed by Essex County Council in permanent nursing care (older people) 2022-25



Source: Essex County Council (April 2025)

9.87 Since 2019 24 care homes (65+) have closed in Essex (Table 130). This has led to the loss of 615 residential care beds (without nursing) and 319 nursing care beds.

9.88 Based on current supply of 8,077 residential care beds, 2,721 residential with nursing care beds, this rate of annual loss of care home beds is equivalent to a decrease in residential care bed capacity by c.1.5% per annum and to a decrease in nursing care bed capacity by c.2% per annum (assuming no new care home capacity was developed).

Table 130. Care homes closed since 2019 in Essex

Districts	Residential with nursing	Residential without nursing	Total
Basildon	169	94	263
Braintree	-	80	80
Brentwood	39	117	156
Castle Point	39	-	39
Chelmsford	-	18	18
Colchester	-	20	20
Epping	-	32	32
Epping Forest	-	54	54
Tendring	-	200	200
Uttlesford	72	-	72
Total	319	615	934

Source: Essex County Council (2025)

Estimated future care home capacity need in Essex

9.89 A range of evidence and data has been reviewed and used to produce estimates of future need for care home capacity in Essex over the period to 2044.

9.90 Evidence reviewed includes:

- Current supply of care home bed capacity in Essex
- Evidence from local stakeholders knowledgeable about the care home market in Essex
- Evidence from the most recent ONS census in relation to the proportion of older people (65+) usually living in care homes in England

- Evidence from local NHS/Essex County Council care home capacity tracker data in relation to actual occupancy levels in care homes in Essex

9.91 The method used for assessing future need for care home bed capacity is:

- Using data in relation to the current percentage of people aged 65+ usually residing in care homes drawn from the ONS 2021 census⁶²
- Disaggregate the data on people residing in care homes by the following population groups: 65-74 years; 75-84 years; 85+ years
- Apply this evidence of the percentage of older people from these population groups living in care homes to the projected population for these age cohorts in Essex over the period to 2044
- Make the following adjustments to estimates of need localised to Essex:
 - Check initial estimates of need for residential care beds and nursing care beds in relation to evidence from local NHS/Essex County Council capacity tracker data regarding actual occupancy levels in care homes in Essex
 - Based on the current distribution of total care home beds between residential and nursing care home beds, drawing on stakeholder knowledge and trends in the care needs of older people, apply assumptions about the likely future trend of need between residential care provision and nursing care provision
 - Consider and apply Essex County Council Officer/stakeholder knowledge of the care home (65+) market in Essex
 - Make adjustment/s in relation to placements in Essex care homes from other local authorities
 - Make adjustment/s to allow for anticipated care home closures over next 10-20 years
 - Make adjustment/s (if appropriate) to allow for care home rooms without ensuite facilities

Current use of care home bed capacity

9.92 The care home bed capacity tracker operated by the Department of Health with care home operators, provides ongoing real time intelligence about the capacity of local care home markets.

9.93 This evidence and intelligence is available to the NHS and councils but is not publicly available.

⁶² ONS 2021;

<https://www.ons.gov.uk/peoplepopulationandcommunity/birthsdeathsandmarriages/ageing/articles/olderpeoplelivingincarehomesin2021andchangessince2011/2023-10-09>

9.94 The evidence from the capacity tracker data for the care home market in Essex, and from Essex County Council, is that over 2024/25 on average c.85% of available beds were being used at any given time in the local care home market. Vacancy rates are not consistent across all care homes.

9.95 In the context of the overall number of beds in the Essex care home market, this suggests an under-utilisation rate of c.15%. However, based on feedback from local stakeholders, it is necessary for the local care home 'system' to have some available capacity, for example to manage 'spikes' in demand during the period of hospital 'winter pressures', say of 10%. This suggests that the local care home market in Essex is operating with a slight 5% potential under usage of bed capacity at the current time.

9.96 Consequently, the modelling of future need for care home bed capacity allows for 10% vacancies at any time to allow for 'spare' capacity to meet fluctuating local needs such as varying hospital discharge rates (i.e. estimated future need is adjusted upwards by 10% to allow for 'spare' capacity in existing care home provision).

9.97 The modelling takes account of any evidence of a current potential oversupply of beds at district level (table below) based on evidence from the capacity tracker. In practice this means that where an initial statistical estimate of need indicates an oversupply of care home capacity, where there is no evidence to support this from the capacity tracker data, the estimates are adjusted upwards reflecting the most recent evidence from the capacity tracker.

9.98 Table 131 shows care home bed capacity tracker evidence at district level for March 2025.

Table 131. Care home bed capacity by District (March 2025)

District	Care home capacity usage
Basildon	85%
Braintree	84%
Brentwood	85%
Castle Point	86%
Chelmsford	78%
Colchester	90%
Epping Forest	86%
Harlow	92%
Maldon	80%
Rochford	68%
Tendring	89%
Uttlesford	87%
Total	85%

Source: Essex County Council (2025)

Distribution of total care home beds between residential and nursing care home beds

9.99 From Essex County Council data about the overall care home market in Essex, there are a total of 10,798 care home beds in Essex for older people (65+). This includes 8,077 residential care beds, 2,721 residential with nursing care beds (Table 129). This shows that currently 75% of care home beds are for residential care and 25% of care home beds are for nursing care.

9.100 Based on evidence of the increasing acuity of care and health needs amongst older people needing to use a care home and market trend evidence from Essex County Council Officers, it is assumed that over the next 10-20 years there will be a trend towards the percentage of overall care beds in the market that are for nursing care increasing and the percentage of the overall care beds in the market that are for residential care decreasing. On this basis the modelling of future need for care home bed capacity assumes that the current split of 75% residential care beds and 25% nursing care beds is likely to shift over time to 65% residential care beds and 35% nursing care beds by 2044.

Council Officer/stakeholder knowledge of the care home (65+) market in Essex

9.101 Evidence from Essex County Council Officers who purchase care home beds on behalf of the Council and who support self-funders to purchase care home beds indicates:

- It can be challenging for the Council to secure care home beds that are affordable in terms of the fees it is able to pay, although this varies between districts in Essex
- It can be challenging for some self-funders to afford the rates charged by care home operators and there is a risk that some of these people may deplete their funds (and consequently become reliant on the Council to meet their care home costs, typically at fee rates that are not affordable for the Council)
- The predominant need is for nursing care beds for older people with complex care and health needs associated with dementia, frailty and long term conditions
- There is also a need for residential care beds for older people with similarly complex care needs but who do not need nursing care
- There is a need for housing and care alternatives for older people, both Council funded and self-funders, as an alternative to residential care
- The Council does not have definitive evidence in relation to the percentage of care home beds that are occupied by non-Essex residents, but a conservative estimate based on experience from working with other authorities and local stakeholders is that it is likely to be between 5% and 8% of beds

9.102 To address these issues, current and additional care home bed capacity:

- Should be targeted at older people living with complex dementia related care needs and for people living with other complex health and care needs

- Will be for nursing care beds and residential care beds for older people with the most complex care and health needs
- Should be affordable to enable the Council to purchase care home bed capacity and for less affluent self-funders

Placements in Essex 65+ care homes by other local authorities.

9.103 The Council does not have definitive evidence in relation to the percentage of care home beds that are occupied by non-Essex residents, but a conservative estimate based on experience from working with other authorities and local stakeholders is that it is likely to be between 5% and 8% of beds.

9.104 This in effect means that a percentage of 65+ care home bed capacity is meeting need from outside of Essex.

9.105 On this basis the modelling of future need for care home bed capacity allows for at least 5% of care home beds being occupied by people aged 65+ who were not previously residents of Essex and therefore do not constitute locally derived need (i.e. adjust downwards estimated future need by 5%).

Care home rooms without ensuite facilities.

9.106 Assessments of need for care home bed capacity are typically carried out by a small number of private consultants on behalf of care home developers. These assessments typically contain very similar evidence and often make the following types of assumptions in relation to estimating need for care home bed capacity:

- They assume that existing care home provision which does not have ensuite bedrooms is effectively redundant and should not be included within the current supply of care home beds for the purpose of 'netting off' from overall estimated need for future care home bed capacity
- They typically use Laing and Buisson estimated prevalence rates for the use of care home beds amongst the 65 to 74 years population group, the 75 to 84 years population group, and the 85 plus population group. These prevalence rates typically assume that:
 - 0.54% of the 65 to 74 years population group will need a care home bed
 - 3.3% of the 75 to 84 years population group will need a care home bed
 - 13.4% of the 85 plus years population group will need a care home bed

9.107 It should be noted that:

- Local evidence and intelligence indicate that care home beds without ensuite facilities continue to be used and purchased. It is not reasonable or realistic to assume that all of these non ensuite rooms are redundant and should be discounted as part of the current supply of care home beds for the purposes of assessing future need for care home bed capacity. Discounting all beds that do not

currently have ensuite facilities will have the effect of inflating estimates of need for future care home bed capacity

- The Laing and Buisson estimated prevalence rates for the use of care home beds (above) are higher than the most recent evidence for these older population groups usually resident in care homes from the ONS 2021 census

9.108 It is assumed that existing care home rooms without ensuite facilities will continue to be used and that the current care home beds with non ensuite facilities will likely reduce over time as operators upgrade their facilities and there is a population group of clients who have a need for the most affordable care beds, which is likely to include residual rooms without ensuite facilities. It is also assumed that some of the current non ensuite room beds will be taken out of the market as some care home operators, typically smaller operators, exit the market over the next 10-15 years (see assumption below).,

Anticipated care home closures over next 10-20 years

9.109 Based on current supply of 8,162 residential care beds, 2,529 residential with nursing care beds, this rate of annual loss of care home beds is equivalent to a decrease in residential care bed capacity by c.1.5% per annum and to a decrease in nursing care bed capacity by c.2% per annum (assuming no new care home capacity was developed).

9.110 Estimated need for care home bed provision in Essex to 2044 based on the method and assumptions above, is set out below. Table 132 shows the current percentage of people aged 65+ usually residing in care homes drawn from the ONS 2021 census.

Table 132. Population aged 65+ usually residing in a care home (England)

Population group	Percentage usually residing in a care home
65-74 years	0.63%
75-84 years	2.38%
85+ years	11.07%

Derived from ONS 2021⁶³

9.111 Table 133 shows the projected population for the following population groups: 65-74 years; 75-84 years; 85+ years in Essex to 2044.

Table 133. Projected population for Essex for 65+ population groups to 2044

Population group	2024	2029	2034	2039	2044
Essex 65-74	157,649	173,824	191,951	193,757	200,025
Essex 75-84	121,020	128,367	126,804	142,300	156,4477
Essex 85+	44,473	49,977	64,079	67,637	71,589

Source: ONS 2021 and 2018 sub national population projections

9.112 Table 134 shows initial estimated need for care home beds by applying the evidence of the percentage of older people from these population groups usually resident in care homes (from Table 132) to the projected population for these population groups

⁶³<https://www.ons.gov.uk/peoplepopulationandcommunity/birthsdeathsandmarriages/ageing/articles/olderpeoplelivingincarehomesin2021andchangessince2011/2023-10-09>

in Essex over the next 20 years to 2044 (from Table 133). This produces initial estimates of need for care home beds in Essex to 2044 as shown in Table 134.

Table 134. Initial estimated need of care home beds in Essex to 2044

Age population group	Estimated need in 2024	Estimated need by 2029	Estimated need by 2034	Estimated need by 2039	Estimated need by 2044
65-74	993	1,095	1,209	1,221	1,260
75-84	2,880	3,055	3,018	3,387	3,723
85+	4,923	5,532	7,094	7,487	7,925
Total	8,796	9,683	11,321	12,095	12,908

Source: Essex County Council and HLIN. NB estimates of need are not cumulative. Totals may not sum due to rounding.

9.113 The overall estimated need for care home beds in Table 134 is distributed between residential and nursing care based on the assumptions set out in paragraph 9.91. This is shown in the table below.

Table 135. Estimated need for residential care and nursing care beds to 2044

Care type	Estimated need in 2024	Estimated need by 2029	Estimated need by 2034	Estimated need by 2039	Estimated need by 2044
Residential care (beds)	6,685	7,117	8,038	8,285	8,520
Nursing care (beds)	2,111	2,566	3,283	3,810	4,389
Total	8,796	9,683	11,321	12,095	12,908

Source: Essex County Council and HLIN. NB estimates of need are not cumulative. Totals may not sum due to rounding.

9.114 Table 136 and Table 137 show the effect of netting off from estimates of future need (from Table 135), the current supply of residential care home beds (8,077 beds) and nursing care beds (2,721 beds). This is then checked against and adjusted (if applicable) in relation to evidence from local NHS capacity tracker data, the other assumptions set out in paragraphs 9.100 to 9.109 and triangulated with local knowledge and expertise in relation to 65+ care homes in Essex.

Table 136. Adjusted estimated need for residential care home beds in Essex to 2044

Year	Gross estimated care home bed need	Current supply	Initial estimated care home bed need (net of supply)	Adjust for spare capacity requirement (+10%) & capacity tracker evidence	Adjust for use of beds by non-Essex residents (-5%)	Adjust for potential care home closures (+1.5%)	Adjust for diversion from res care to extra care	Total adjusted estimated care home bed need
2024	6,685	8,077	-1,392	1,138	-334	100	16	-471
2029	7,117	8,077	-960	1,216	-356	107	16	23
2034	8,038	8,077	-39	1,377	-402	121	16	1,072
2039	8,285	8,077	208	1,423	-414	124	16	1,357
2044	8,520	8,077	443	1,465	-426	128	16	1,625

Source: Essex County Council and HLIN. NB estimates of need are not cumulative

Table 137. Adjusted estimated need for nursing care home beds in Essex to 2044

Year	Gross estimated care home bed need	Current supply	Initial estimated care home bed need (net of supply)	Adjust for spare capacity requirement (+10%) & capacity tracker evidence	Adjust for use of beds by non-Essex residents (-5%)	Adjust for potential care home closures (+2%)	Total adjusted estimated care home bed need
2024	2,111	2,721	-610	861	-106	42	188
2029	2,566	2,721	-155	1,046	-128	51	814
2034	3,283	2,721	562	1,341	-164	66	1,805
2039	3,810	2,721	1,089	1,557	-190	76	2,532
2044	4,389	2,721	1,668	1,793	-219	88	3,329

Source: Essex County Council and HLIN. NB estimates of need are not cumulative

9.115 Following the same methodology, the need for care home beds is disaggregated to district level.

9.116 An implication of these estimates of need for care home bed capacity is that there will need to be discussions between Essex County Council and NHS commissioners of care home beds with care home operators in relation to a shift in need away from residential care beds to nursing care beds. This means that there is likely to be a change in the designation of some current care home beds from residential to nursing care use to cater for the higher acuity of care and health needs amongst older people who need care home beds.

9.117 In this context, at least over the period to 2034, care home developers/operators and local authority planners should consider the *overall* level of need for care home beds in Essex and the 12 Essex Districts taking account of the *overall balance of estimated need* for both residential care beds and nursing care beds.

Estimated care home capacity need by district

9.118 Following the same methodology, the need for care home beds is disaggregated to district level.

Table 138. Adjusted estimated need for residential care home beds in Basildon to 2044

Year	Gross estimated care home bed need	Current supply	Initial estimated care home bed need (net of supply)	Adjust for spare capacity requirement (+10%) & capacity tracker evidence	Adjust for use of beds by non-Essex residents (-5%)	Adjust for potential care home closures (+1.5%)	Adjust for diversion from res care to extra care	Total adjusted estimated care home bed need
2024	670	654	16	34	-34	10	1	28
2029	706	654	52	35	-35	11	1	63
2034	794	654	140	40	-40	12	1	153
2039	814	654	160	41	-41	12	1	173
2044	831	654	177	42	-42	12	1	191

Source: Essex County Council and HLIN. NB estimates of need are not cumulative

Table 139. Adjusted estimated need for nursing care home beds in Basildon to 2044

Year	Gross estimated care home bed need	Current supply	Initial estimated care home bed need (net of supply)	Adjust for spare capacity requirement (+10%) & capacity tracker evidence	Adjust for use of beds by non-Essex residents (-5%)	Adjust for potential care home closures (+2%)	Total adjusted estimated care home bed need
2024	212	132	80	11	-11	4	84
2029	254	132	122	13	-13	5	127
2034	324	132	192	16	-16	6	199
2039	374	132	242	19	-19	7	250
2044	428	132	296	21	-21	9	305

Source: Essex County Council and HLIN. NB estimates of need are not cumulative

Table 140. Adjusted estimated need for residential care home beds in Braintree to 2044

Year	Gross estimated care home bed need	Current supply	Initial estimated care home bed need (net of supply)	Adjust for spare capacity requirement (+10%) & capacity tracker evidence	Adjust for use of beds by non-Essex residents (-5%)	Adjust for potential care home closures (+1.5%)	Adjust for diversion from res care to extra care	Total adjusted estimated care home bed need
2024	651	1,108	-457	404	-33	10	2	-74
2029	700	1,108	-408	434	-35	11	2	4
2034	789	1,108	-319	489	-39	12	2	145
2039	814	1,108	-294	504	-41	12	2	184
2044	842	1,108	-266	522	-42	13	2	229

Source: Essex County Council and HLIN. NB estimates of need are not cumulative

Table 141. Adjusted estimated need for nursing care home beds in Braintree to 2044

Year	Gross estimated care home bed need	Current supply	Initial estimated care home bed need (net of supply)	Adjust for spare capacity requirement (+10%) & capacity tracker evidence	Adjust for use of beds by non-Essex residents (-5%)	Adjust for potential care home closures (+2%)	Total adjusted estimated care home bed need
2024	206	418	-212	193	-10	4	-25
2029	253	418	-165	237	-13	5	64
2034	322	418	-96	303	-16	6	198
2039	374	418	-44	352	-19	7	297
2044	434	418	16	408	-22	9	410

Source: Essex County Council and HLIN. NB estimates of need are not cumulative

Table 142. Adjusted estimated need for residential care home beds in Brentwood to 2044

Year	Gross estimated care home bed need	Current supply	Initial estimated care home bed need (net of supply)	Adjust for spare capacity requirement (+10%) & capacity tracker evidence	Adjust for use of beds by non-Essex residents (-5%)	Adjust for potential care home closures (+1.5%)	Adjust for diversion from res care to extra care	Total adjusted estimated care home bed need
2024	367	626	-259	228	-18	6	1	-43
2029	384	626	-242	238	-19	6	1	-16
2034	434	626	-192	269	-22	7	1	64
2039	445	626	-181	276	-22	7	1	80
2044	451	626	-175	280	-23	7	1	90

Source: Essex County Council and HLIN. NB estimates of need are not cumulative

Table 143. Adjusted estimated need for nursing care home beds in Brentwood to 2044

Year	Gross estimated care home bed need	Current supply	Initial estimated care home bed need (net of supply)	Adjust for spare capacity requirement (+10%) & capacity tracker evidence	Adjust for use of beds by non-Essex residents (-5%)	Adjust for potential care home closures (+2%)	Total adjusted estimated care home bed need
2024	116	238	-122	110	-6	2	-15
2029	138	238	-100	132	-7	3	28
2034	177	238	-61	169	-9	4	103
2039	204	238	-34	194	-10	4	155
2044	232	238	-6	221	-12	5	208

Source: Essex County Council and HLIN. NB estimates of need are not cumulative

Table 144. Adjusted estimated need for residential care home beds in Castle Point to 2044

Year	Gross estimated care home bed need	Current supply	Initial estimated care home bed need (net of supply)	Adjust for spare capacity requirement (+10%) & capacity tracker evidence	Adjust for use of beds by non-Essex residents (-5%)	Adjust for potential care home closures (+1.5%)	Adjust for diversion from res care to extra care	Total adjusted estimated care home bed need
2024	475	439	36	24	-24	7	1	44
2029	497	439	58	25	-25	7	1	66
2034	549	439	110	27	-27	8	1	119
2039	557	439	118	28	-28	8	1	127
2044	568	439	129	28	-28	9	1	139

Source: Essex County Council and HLIN. NB estimates of need are not cumulative

Table 145. Adjusted estimated need for nursing care home beds in Castle Point to 2044

Year	Gross estimated care home bed need	Current supply	Initial estimated care home bed need (net of supply)	Adjust for spare capacity requirement (+10%) & capacity tracker evidence	Adjust for use of beds by non-Essex residents (-5%)	Adjust for potential care home closures (+2%)	Total adjusted estimated care home bed need
2024	150	175	-25	15	-7	3	-15
2029	179	175	4	18	-9	4	17
2034	224	175	49	22	-11	4	65
2039	256	175	81	26	-13	5	99
2044	293	175	118	29	-15	6	138

Source: Essex County Council and HLIN. NB estimates of need are not cumulative

Table 146. Adjusted estimated need for residential care home beds in Chelmsford to 2044

Year	Gross estimated care home bed need	Current supply	Initial estimated care home bed need (net of supply)	Adjust for spare capacity requirement (+10%) & capacity tracker evidence	Adjust for use of beds by non-Essex residents (-5%)	Adjust for potential care home closures (+1.5%)	Adjust for diversion from res care to extra care	Total adjusted estimated care home bed need
2024	768	779	-11	-84	-38	12	2	-121
2029	816	779	37	-90	-41	12	2	-79
2034	922	779	143	-101	-46	14	2	11
2039	948	779	169	-104	-47	14	2	33
2044	975	779	196	-107	-49	15	2	56

Source: Essex County Council and HLIN. NB estimates of need are not cumulative

Table 147. Adjusted estimated need for nursing care home beds in Chelmsford to 2044

Year	Gross estimated care home bed need	Current supply	Initial estimated care home bed need (net of supply)	Adjust for spare capacity requirement (+10%) & capacity tracker evidence	Adjust for use of beds by non-Essex residents (-5%)	Adjust for potential care home closures (+2%)	Total adjusted estimated care home bed need
2024	243	398	-155	109	-12	5	-54
2029	294	398	-104	132	-15	6	20
2034	377	398	-21	169	-19	8	137
2039	436	398	38	196	-22	9	221
2044	502	398	104	226	-25	10	315

Source: Essex County Council and HLIN. NB estimates of need are not cumulative

Table 148. Adjusted estimated need for residential care home beds in Colchester to 2044

Year	Gross estimated care home bed need	Current supply	Initial estimated care home bed need (net of supply)	Adjust for spare capacity requirement (+10%) & capacity tracker evidence	Adjust for use of beds by non-Essex residents (-5%)	Adjust for potential care home closures (+1.5%)	Adjust for diversion from res care to extra care	Total adjusted estimated care home bed need
2024	731	830	-99	73	-37	11	2	-49
2029	782	830	-48	78	-39	12	2	5
2034	881	830	51	88	-44	13	2	110
2039	909	830	79	91	-45	14	2	140
2044	936	830	106	94	-47	14	2	169

Source: Essex County Council and HLIN. NB estimates of need are not cumulative

Table 149. Adjusted estimated need for nursing care home beds in Colchester to 2044

Year	Gross estimated care home bed need	Current supply	Initial estimated care home bed need (net of supply)	Adjust for spare capacity requirement (+10%) & capacity tracker evidence	Adjust for use of beds by non-Essex residents (-5%)	Adjust for potential care home closures (+2%)	Total adjusted estimated care home bed need
2024	231	376	-145	134	-12	5	-18
2029	282	376	-94	164	-14	6	61
2034	360	376	-16	209	-18	7	182
2039	418	376	42	242	-21	8	272
2044	482	376	106	280	-24	10	372

Source: Essex County Council and HLIN. NB estimates of need are not cumulative

Table 150. Adjusted estimated need for residential care home beds in Epping Forest to 2044

Year	Gross estimated care home bed need	Current supply	Initial estimated care home bed need (net of supply)	Adjust for spare capacity requirement (+10%) & capacity tracker evidence	Adjust for use of beds by non-Essex residents (-5%)	Adjust for potential care home closures (+1.5%)	Adjust for diversion from res care to extra care	Total adjusted estimated care home bed need
2024	579	752	-173	133	-29	9	1	-59
2029	615	752	-137	141	-31	9	1	-16
2034	699	752	-53	161	-35	10	1	85
2039	724	752	-28	167	-36	11	1	115
2044	743	752	-9	171	-37	11	1	138

Source: Essex County Council and HLIN. NB estimates of need are not cumulative

Table 151. Adjusted estimated need for nursing care home beds in Epping Forest to 2044

Year	Gross estimated care home bed need	Current supply	Initial estimated care home bed need (net of supply)	Adjust for spare capacity requirement (+10%) & capacity tracker evidence	Adjust for use of beds by non-Essex residents (-5%)	Adjust for potential care home closures (+2%)	Total adjusted estimated care home bed need
2024	183	409	-226	205	-9	4	-27
2029	222	409	-187	248	-11	4	54
2034	285	409	-124	320	-14	6	188
2039	333	409	-76	373	-17	7	287
2044	383	409	-26	429	-19	8	391

Source: Essex County Council and HLIN. NB estimates of need are not cumulative

Table 152. Adjusted estimated need for residential care home beds in Harlow to 2044

Year	Gross estimated care home bed need	Current supply	Initial estimated care home bed need (net of supply)	Adjust for spare capacity requirement (+10%) & capacity tracker evidence	Adjust for use of beds by non-Essex residents (-5%)	Adjust for potential care home closures (+1.5%)	Adjust for diversion from res care to extra care	Total adjusted estimated care home bed need
2024	289	208	81	29	-14	4	0	100
2029	307	208	99	31	-15	5	0	120
2034	351	208	143	35	-18	5	0	166
2039	362	208	154	36	-18	5	0	178
2044	370	208	162	37	-18	6	0	186

Source: Essex County Council and HLIN. NB estimates of need are not cumulative

Table 153. Adjusted estimated need for nursing care home beds in Harlow to 2044

Year	Gross estimated care home bed need	Current supply	Initial estimated care home bed need (net of supply)	Adjust for spare capacity requirement (+10%) & capacity tracker evidence	Adjust for use of beds by non-Essex residents (-5%)	Adjust for potential care home closures (+2%)	Total adjusted estimated care home bed need
2024	91	145	-54	68	-5	2	12
2029	111	145	-34	83	-6	2	46
2034	143	145	-2	108	-7	3	102
2039	166	145	21	125	-8	3	141
2044	190	145	45	143	-10	4	182

Source: Essex County Council and HLIN. NB estimates of need are not cumulative

Table 154. Adjusted estimated need for residential care home beds in Maldon to 2044

Year	Gross estimated care home bed need	Current supply	Initial estimated care home bed need (net of supply)	Adjust for spare capacity requirement (+10%) & capacity tracker evidence	Adjust for use of beds by non-Essex residents (-5%)	Adjust for potential care home closures (+1.5%)	Adjust for diversion from res care to extra care	Total adjusted estimated care home bed need
2024	344	423	-79	34	-17	5	1	-56
2029	371	423	-52	37	-19	6	1	-27
2034	418	423	-5	42	-21	6	1	23
2039	430	423	7	43	-22	6	1	36
2044	447	423	24	45	-22	7	1	54

Source: Essex County Council and HLIN. NB estimates of need are not cumulative

Table 155. Adjusted estimated need for nursing care home beds in Maldon to 2044

Year	Gross estimated care home bed need	Current supply	Initial estimated care home bed need (net of supply)	Adjust for spare capacity requirement (+10%) & capacity tracker evidence	Adjust for use of beds by non-Essex residents (-5%)	Adjust for potential care home closures (+2%)	Total adjusted estimated care home bed need
2024	109	75	34	0	-5	2	30
2029	134	75	59	0	-7	3	55
2034	171	75	96	0	-9	3	91
2039	198	75	123	0	-10	4	117
2044	230	75	155	0	-12	5	148

Source: Essex County Council and HLIN. NB estimates of need are not cumulative

Table 156. Adjusted estimated need for residential care home beds in Rochford to 2044

Year	Gross estimated care home bed need	Current supply	Initial estimated care home bed need (net of supply)	Adjust for spare capacity requirement (+10%) & capacity tracker evidence	Adjust for use of beds by non-Essex residents (-5%)	Adjust for potential care home closures (+1.5%)	Adjust for diversion from res care to extra care	Total adjusted estimated care home bed need
2024	438	342	96	-88	-22	7	1	-6
2029	465	342	123	-93	-23	7	1	15
2034	524	342	182	-105	-26	8	1	59
2039	538	342	196	-108	-27	8	1	70
2044	553	342	211	-111	-28	8	1	81

Source: Essex County Council and HLIN. NB estimates of need are not cumulative

Table 157. Adjusted estimated need for nursing care home beds in Rochford to 2044

Year	Gross estimated care home bed need	Current supply	Initial estimated care home bed need (net of supply)	Adjust for spare capacity requirement (+10%) & capacity tracker evidence	Adjust for use of beds by non-Essex residents (-5%)	Adjust for potential care home closures (+2%)	Total adjusted estimated care home bed need
2024	138	71	67	-28	-7	3	35
2029	168	71	97	-34	-8	3	58
2034	214	71	143	-43	-11	4	94
2039	247	71	176	-49	-12	5	119
2044	285	71	214	-57	-14	6	148

Source: Essex County Council and HLIN. NB estimates of need are not cumulative

Table 158. Adjusted estimated need for residential care home beds in Tendring to 2044

Year	Gross estimated care home bed need	Current supply	Initial estimated care home bed need (net of supply)	Adjust for spare capacity requirement (+10%) & capacity tracker evidence	Adjust for use of beds by non-Essex residents (-5%)	Adjust for potential care home closures (+1.5%)	Adjust for diversion from res care to extra care	Total adjusted estimated care home bed need
2024	965	1,316	-351	222	-48	14	3	-160
2029	1,030	1,316	-286	237	-51	15	3	-83
2034	1,167	1,316	-149	268	-58	18	3	81
2039	1,210	1,316	-106	278	-60	18	3	132
2044	1,246	1,316	-70	287	-62	19	3	176

Source: Essex County Council and HLIN. NB estimates of need are not cumulative

Table 159. Adjusted estimated need for nursing care home beds in Tendring to 2044

Year	Gross estimated care home bed need	Current supply	Initial estimated care home bed need (net of supply)	Adjust for spare capacity requirement (+10%) & capacity tracker evidence	Adjust for use of beds by non-Essex residents (-5%)	Adjust for potential care home closures (+2%)	Total adjusted estimated care home bed need
2024	305	191	114	30	-15	6	135
2029	371	191	180	37	-19	7	206
2034	477	191	286	48	-24	10	319
2039	556	191	365	56	-28	11	404
2044	642	191	451	64	-32	13	496

Source: Essex County Council and HLIN. NB estimates of need are not cumulative

Table 160. Adjusted estimated need for residential care home beds in Uttlesford to 2044

Year	Gross estimated care home bed need	Current supply	Initial estimated care home bed need (net of supply)	Adjust for spare capacity requirement (+10%) & capacity tracker evidence	Adjust for use of beds by non-Essex residents (-5%)	Adjust for potential care home closures (+1.5%)	Adjust for diversion from res care to extra care	Total adjusted estimated care home bed need
2024	408	600	-192	130	-20	6	1	-75
2029	444	600	-156	142	-22	7	1	-28
2034	510	600	-90	163	-26	8	1	57
2039	535	600	-65	171	-27	8	1	89
2044	557	600	-43	178	-28	8	1	117

Source: Essex County Council and HLIN. NB estimates of need are not cumulative

Table 161. Adjusted estimated need for nursing care home beds in Uttlesford to 2044

Year	Gross estimated care home bed need	Current supply	Initial estimated care home bed need (net of supply)	Adjust for spare capacity requirement (+10%) & capacity tracker evidence	Adjust for use of beds by non-Essex residents (-5%)	Adjust for potential care home closures (+2%)	Total adjusted estimated care home bed need
2024	129	93	36	13	-6	3	45
2029	160	93	67	16	-8	3	78
2034	208	93	115	21	-10	4	130
2039	246	93	153	25	-12	5	170
2044	287	93	194	29	-14	6	214

Source: Essex County Council and HLIN. NB estimates of need are not cumulative

9.119 The summary of the estimated need by district is given below.

Table 162. Estimated need for residential care home beds in Essex by district to 2044

District/Borough/City Council	2024	2029	2034	2039	2044
Basildon	28	63	153	173	191
Braintree	-74	4	145	184	229
Brentwood	-43	-16	64	80	90
Castle Point	44	66	119	127	139
Chelmsford	-121	-79	11	33	56
Colchester	-49	5	110	140	169
Epping Forest	-59	-16	85	115	138
Harlow	100	120	166	178	186
Maldon	-56	-27	23	36	54
Rochford	-6	15	59	70	81
Tendring	-160	-83	81	132	176
Uttlesford	-75	-28	57	89	117
Essex	-471	23	1,072	1,357	1,625

Source: Essex County Council and HLIN. NB estimates of need are not cumulative

NB: The district figures may not sum exactly to the Essex total due to rounding.

Table 163. Estimated need for nursing care home beds in Essex by district to 2044

District/Borough/City Council	2024	2029	2034	2039	2044
Basildon	84	127	199	250	305
Braintree	-25	64	198	297	410
Brentwood	-15	28	103	155	208
Castle Point	-15	17	65	99	138
Chelmsford	-54	20	137	221	315
Colchester	-18	61	182	272	372
Epping Forest	-27	54	188	287	391
Harlow	12	46	102	141	182
Maldon	30	55	91	117	148
Rochford	35	58	94	119	148
Tendring	135	206	319	404	496
Uttlesford	45	78	130	170	214
Essex	188	814	1,805	2,532	3,329

Source: Essex County Council and HLIN. NB: estimates of need are not cumulative

NB: The district figures may not sum exactly to the Essex total due to rounding.

10. People with support needs

Introduction

- 10.01 The focus of this part of the housing need assessment is people in urgent need of accommodation with support needs, for example those who are homeless and vulnerable due to illness, disability or for other reasons. Many of this group will not be able to manage in general needs accommodation but are not eligible for supported accommodation commissioned by Essex County Council. Many will not be eligible for social care either, but this will not always be the case.
- 10.02 In the majority of cases this refers to people who are under a statutory duty to be provided with accommodation (something that won't apply to some of the other groups) which must be suitable, therefore may possibly exclude a large proportion of existing general needs stock.

Approach

- 10.03 The potential population in need of supported housing, i.e. people with support needs who may need supported housing and who don't, or are not likely to, draw on adult social care support from Essex County Council, is based on the following evidence.
- 10.04 Households who are owed a relief or prevention duty by the 12 housing authorities in Essex, based on statutory homelessness data returns to Government for 2023/24⁶⁴.
- 10.05 Qualitative local evidence and insights from local authority Officers responsible for managing local housing authority prevention and relief duties and temporary accommodation, refining the initial information on the statutory returns and identifying additional need such as those at risk of sleeping rough.
- 10.06 The most prevalent types of support needs of these households. These data are reliant of applicants identifying and disclosing their perceived primary need for support. It is possible therefore that some needs may be under-reported. In other cases, it is also possible that the support need can be addressed without the need for supported housing.
- 10.07 The number of households accommodated in temporary accommodation⁶⁵ and the approximate percentage of these that are single person households or families needing housing related support.
- 10.08 The estimated percentage of these households that have support needs, for example or who are in need of safe accommodation due to domestic abuse, based on qualitative local evidence and insights from local authority Officers responsible for

⁶⁴ <https://www.gov.uk/government/statistical-data-sets/live-tables-on-homelessness>

⁶⁵ <https://www.gov.uk/government/statistical-data-sets/live-tables-on-homelessness>

managing local housing authority prevention and relief duties and temporary accommodation.

- 10.09 The estimated percentage of these households living in temporary accommodation who may have a need for supported housing or those whose needs can be met through floating support, based on qualitative local evidence and insights from local authority Officers responsible for managing local housing authority prevention and relief duties and temporary accommodation.
- 10.10 These data are used as a *guide and proxy* for indicating the need for supported housing.
- 10.11 The relevant local housing authority will ultimately be the source for assessing need for these groups but that does not exclude the possibility in some cases of this being catered for through joint working with social care and other agencies such as Health and Probation, for example in schemes which provide opportunities to help people prepare for independent living through reducing current need for support for some residents and preventing escalating need for support in others.

Application to Essex district, borough and city councils

Basildon District Council

10.12 For 2023/24:

- Total households assessed: 777
- Total households with support need(s) owed a duty: 462
- Most prevalent support needs amongst households owed a prevention or relief duty shown in table below

Table 164. Support needs of households owed a prevention or relief duty

Support needs	No. of households with support need	% of households with support need
History of mental health problems	248	32.5%
At risk of / has experienced domestic abuse	41	5.4%
Offending history	71	9.3%
History of repeat homelessness	28	3.7%
Drug dependency needs	45	5.9%
History of rough sleeping	34	4.5%
Alcohol dependency needs	31	4.1%
Learning disability	63	8.3%
Young person aged 18-25 years requiring support to manage independently	28	3.7%
Access to education, employment or training	6	0.8%
At risk of / has experienced abuse (non-domestic abuse)	19	2.5%
At risk of / has experienced sexual abuse / exploitation	12	1.6%
Old age	14	1.8%
Care leaver aged 18-20 years	31	4.1%
Care leaver aged 21-24 years	4	0.5%
Care leaver aged 25+ years	4	0.5%
Care leaver aged 21+ years (retired option)	3	0.4%
Young person aged 16-17 years	7	0.9%
Young parent requiring support to manage independently	10	1.3%
Former asylum seeker	29	3.8%
Served in HM Forces	7	0.9%

Source: Statutory homelessness: Detailed local authority-level tables, 2023/24 (MHCLG)

10.13 Number of households accommodated in temporary accommodation: 710 (September 2024)

- Estimated percentage of these households that have support needs 80% (568 households)

- Estimated percentage of these households living in temporary accommodation who may have a need for:
 - Supported housing: 35% (199 households)
 - Floating support: 15% (85 households)

10.14 Estimated net need for supported housing (2024/25): up to 284 households with support needs per annum require supported housing (if no floating support services are available) instead of being accommodated in temporary accommodation.

10.15 It assumes that these households have an average length of stay in supported housing of no more than 12 months.

Braintree District Council

10.16 For 2023/24:

- Total households assessed: 447
- Total households with support need(s) owed a duty: 293
- Most prevalent support needs amongst households owed a prevention or relief duty shown in table below

Table 165. Support needs of households owed a prevention or relief duty

Support needs	No. of households with support need	% of households with support need
History of mental health problems	103	24.2%
At risk of / has experienced domestic abuse	43	10.1%
Offending history	21	4.9%
History of repeat homelessness	12	2.8%
Drug dependency needs	19	4.5%
History of rough sleeping	16	3.8%
Alcohol dependency needs	16	3.8%
Learning disability	20	4.7%
Young person aged 18-25 years requiring support to manage independently	33	7.8%
Access to education, employment or training	25	5.9%
At risk of / has experienced abuse (non-domestic abuse)	9	2.1%
At risk of / has experienced sexual abuse / exploitation	5	1.2%
Old age	14	3.3%
Care leaver aged 18-20 years	8	1.9%
Care leaver aged 21-24 years	0	0.0%
Care leaver aged 25+ years	0	0.0%
Care leaver aged 21+ years (retired option)	4	0.9%

Support needs	No. of households with support need	% of households with support need
Young person aged 16-17 years	7	1.6%
Young parent requiring support to manage independently	17	4.0%
Former asylum seeker	1	0.2%
Served in HM Forces	1	0.2%

Source: Statutory homelessness: Detailed local authority-level tables, 2023/24 (MHCLG)

10.17 Number of households accommodated in temporary accommodation: 34 (September 2024)

- Estimated percentage of these households that have support needs 80% (27 households)
- Estimated percentage of these households living in temporary accommodation who may have a need for:
 - Supported housing: 35% (10 households)
 - Floating support: 15% (4 households)

10.18 Estimated net need for supported housing (2024/25): up to 14 households with support needs per annum require supported housing (if no floating support services are available) instead of being accommodated in temporary accommodation.

10.19 It assumes that these households have an average length of stay in supported housing of no more than 12 months.

Brentwood Borough Council

10.20 At the time of writing, data in relation to the support needs of households owed a prevention or relief duty 2023/24 were not available.

10.21 Number of households accommodated in temporary accommodation: 29 (September 2024)

- Estimated percentage of these households that have support needs 80% (23 households)
- Estimated percentage of these households living in temporary accommodation who may have a need for:
 - Supported housing: 35% (8 households)
 - Floating support: 15% (3 households)

10.22 Estimated net need for supported housing (2024/25): up to 12 households with support needs per annum require supported housing (if no floating support services are available) instead of being accommodated in temporary accommodation.

10.23 It assumes that these households have an average length of stay in supported housing of no more than 12 months.

Castle Point Borough Council

10.24 For 2023/24:

- Total households assessed: 249
- Total households with support need(s) owed a duty: 118
- Most prevalent support needs amongst households owed a prevention or relief duty shown in table below

Table 166. Support needs of households owed a prevention or relief duty

Support needs	No. of households with support need	% of households with support need
History of mental health problems	53	21.5%
At risk of / has experienced domestic abuse	16	6.5%
Offending history	9	3.6%
History of repeat homelessness	9	3.6%
Drug dependency needs	9	3.6%
History of rough sleeping	5	2.0%
Alcohol dependency needs	11	4.5%
Learning disability	7	2.8%
Young person aged 18-25 years requiring support to manage independently	5	2.0%
Access to education, employment or training	2	0.8%
At risk of / has experienced abuse (non-domestic abuse)	1	0.4%
At risk of / has experienced sexual abuse / exploitation	4	1.6%
Old age	7	2.8%
Care leaver aged 18-20 years	1	0.4%
Care leaver aged 21-24 years	0	0.0%
Care leaver aged 25+ years	1	0.4%
Care leaver aged 21+ years (retired option)	0	0.0%
Young person aged 16-17 years	2	0.8%
Young parent requiring support to manage independently	3	1.2%
Former asylum seeker	3	1.2%
Served in HM Forces	1	0.4%

Source: Statutory homelessness: Detailed local authority-level tables, 2023/24 (MHCLG)

10.25 Number of households accommodated in temporary accommodation: 130 (September 2024)

- Estimated percentage of these households that have support needs 80% (104 households)
- Estimated percentage of these households living in temporary accommodation who may have a need for:
 - Supported housing: 35% (36 households)
 - Floating support: 15% (16 households)

10.26 Estimated net need for supported housing (2024/25): up to 52 households with support needs per annum require supported housing (if no floating support services are available) instead of being accommodated in temporary accommodation.

10.27 It assumes that these households have an average length of stay in supported housing of no more than 12 months.

Chelmsford City Council

10.28 For 2023/24:

- Total households assessed: 1,025
- Total households with support need(s) owed a duty: 572
- Most prevalent support needs amongst households owed a prevention or relief duty shown in table below

Table 167. Support needs of households owed a prevention or relief duty

Support needs	No. of households with support need	% of households with support need
History of mental health problems	347	35.2%
At risk of / has experienced domestic abuse	152	15.4%
Offending history	81	8.2%
History of repeat homelessness	86	8.7%
Drug dependency needs	42	4.3%
History of rough sleeping	82	8.3%
Alcohol dependency needs	40	4.1%
Learning disability	96	9.7%
Young person aged 18-25 years requiring support to manage independently	42	4.3%
Access to education, employment or training	59	6.0%
At risk of / has experienced abuse (non-domestic abuse)	65	6.6%
At risk of / has experienced sexual abuse / exploitation	47	4.8%
Old age	16	1.6%
Care leaver aged 18-20 years	17	1.7%
Care leaver aged 21-24 years	5	0.5%

Support needs	No. of households with support need	% of households with support need
Care leaver aged 25+ years	3	0.3%
Care leaver aged 21+ years (retired option)	8	0.8%
Young person aged 16-17 years	13	1.3%
Young parent requiring support to manage independently	20	2.0%
Former asylum seeker	9	0.9%
Served in HM Forces	7	0.7%

Source: Statutory homelessness: Detailed local authority-level tables, 2023/24 (MHCLG)

10.29 Number of households accommodated in temporary accommodation: 481 (September 2024)

- Estimated percentage of these households that have support needs 80% (385 households)
- Estimated percentage of these households living in temporary accommodation who may have a need for:
 - Supported housing: 35% (135 households)
 - Floating support: 15% (58 households)

10.30 Estimated net need for supported housing (2024/25): up to 192 households with support needs per annum require supported housing (if no floating support services are available) instead of being accommodated in temporary accommodation.

10.31 It assumes that these households have an average length of stay in supported housing of no more than 12 months.

Colchester City Council

10.32 At the time of writing, data in relation to the support needs of households owed a prevention or relief duty 2023/24 were not available.

10.33 Number of households accommodated in temporary accommodation: 383 (September 2024)

- Estimated percentage of these households that have support needs 80% (306 households)
- Estimated percentage of these households living in temporary accommodation who may have a need for:
 - Supported housing: 35% (107 households)
 - Floating support: 15% (46 households)

10.34 Estimated net need for supported housing (2024/25): up to 153 households with support needs per annum require supported housing (if no floating support services are available) instead of being accommodated in temporary accommodation.

10.35 It assumes that these households have an average length of stay in supported housing of no more than 24 months.

Epping Forest District Council

10.36 For 2023/24:

- Total households assessed: 468
- Total households with support need(s) owed a duty: 237
- Most prevalent support needs amongst households owed a prevention or relief duty shown in table below

Table 168. Support needs of households owed a prevention or relief duty

Support needs	No. of households with support need	% of households with support need
History of mental health problems	125	26.9%
At risk of / has experienced domestic abuse	68	14.6%
Offending history	17	3.7%
History of repeat homelessness	22	4.7%
Drug dependency needs	11	2.4%
History of rough sleeping	27	5.8%
Alcohol dependency needs	11	2.4%
Learning disability	48	10.3%
Young person aged 18-25 years requiring support to manage independently	22	4.7%
Access to education, employment or training	36	7.7%
At risk of / has experienced abuse (non-domestic abuse)	23	4.9%
At risk of / has experienced sexual abuse / exploitation	19	4.1%
Old age	10	2.2%
Care leaver aged 18-20 years	3	0.6%
Care leaver aged 21-24 years	2	0.4%
Care leaver aged 25+ years	3	0.6%
Care leaver aged 21+ years (retired option)	3	0.6%
Young person aged 16-17 years	7	1.5%
Young parent requiring support to manage independently	14	3.0%
Former asylum seeker	10	2.2%
Served in HM Forces	1	0.2%

Source: Statutory homelessness: Detailed local authority-level tables, 2023/24 (MHCLG)

10.37 Number of households accommodated in temporary accommodation: 123 (September 2024)

- Estimated percentage of these households that have support needs 80% (98 households)
- Estimated percentage of these households living in temporary accommodation who may have a need for:
 - Supported housing: 35% (34 households)
 - Floating support: 15% (15 households)

10.38 Estimated net need for supported housing (2024/25): up to 49 households with support needs per annum require supported housing (if no floating support services are available) instead of being accommodated in temporary accommodation.

10.39 It assumes that these households have an average length of stay in supported housing of no more than 12 months.

Harlow District Council

10.40 For 2023/24:

- Total households assessed: 367
- Total households with support need(s) owed a duty: 163
- Most prevalent support needs amongst households owed a prevention or relief duty shown in table below

Table 169. Support needs of households owed a prevention or relief duty

Support needs	No. of households with support need	% of households with support need
History of mental health problems	47	13.5%
At risk of / has experienced domestic abuse	34	9.8%
Offending history	5	1.4%
History of repeat homelessness	7	2.0%
Drug dependency needs	6	1.7%
History of rough sleeping	9	2.6%
Alcohol dependency needs	7	2.0%
Learning disability	10	2.9%
Young person aged 18-25 years requiring support to manage independently	6	1.7%
Access to education, employment or training	0	0.0%
At risk of / has experienced abuse (non-domestic abuse)	6	1.7%
At risk of / has experienced sexual abuse / exploitation	1	0.3%
Old age	7	2.0%

Support needs	No. of households with support need	% of households with support need
Care leaver aged 18-20 years	19	5.5%
Care leaver aged 21-24 years	0	0.0%
Care leaver aged 25+ years	0	0.0%
Care leaver aged 21+ years (retired option)	3	0.9%
Young person aged 16-17 years	4	1.1%
Young parent requiring support to manage independently	1	0.3%
Former asylum seeker	8	2.3%
Served in HM Forces	0	0.0%

Source: Statutory homelessness: Detailed local authority-level tables, 2023/24 (MHCLG)

10.41 Number of households accommodated in temporary accommodation: 337 (September 2024)

- Estimated percentage of these households that have support needs 80% (270 households).
- Estimated percentage of these households living in temporary accommodation who may have a need for:
 - Supported housing: 35% (94 households)
 - Floating support: 15% (40 households)

10.42 Estimated net need for supported housing (2024/25): up to 135 households with support needs per annum require supported housing (if no floating support services are available) instead of being accommodated in temporary accommodation.

10.43 It assumes that these households have an average length of stay in supported housing of no more than 12 months.

Maldon District Council

10.44 For 2023/24:

- Total households assessed: 182
- Total households with support need(s) owed a duty: 159
- Most prevalent support needs amongst households owed a prevention or relief duty shown in table below

Table 170. Support needs of households owed a prevention or relief duty

Support needs	No. of households with support need	% of households with support need
History of mental health problems	100	55.9%
At risk of / has experienced domestic abuse	42	23.5%
Offending history	14	7.8%
History of repeat homelessness	6	3.4%
Drug dependency needs	10	5.6%
History of rough sleeping	8	4.5%
Alcohol dependency needs	9	5.0%
Learning disability	30	16.8%
Young person aged 18-25 years requiring support to manage independently	11	6.1%
Access to education, employment or training	1	0.6%
At risk of / has experienced abuse (non-domestic abuse)	2	1.1%
At risk of / has experienced sexual abuse / exploitation	13	7.3%
Old age	0	0.0%
Care leaver aged 18-20 years	0	0.0%
Care leaver aged 21-24 years	0	0.0%
Care leaver aged 25+ years	0	0.0%
Care leaver aged 21+ years (retired option)	0	0.0%
Young person aged 16-17 years	4	2.2%
Young parent requiring support to manage independently	5	2.8%
Former asylum seeker	1	0.6%
Served in HM Forces	2	1.1%

Source: Statutory homelessness: Detailed local authority-level tables, 2023/24 (MHCLG)

10.45 Number of households accommodated in temporary accommodation: 33 (September 2024)

- Estimated percentage of these households that have support needs 80% (26 households)
- Estimated percentage of these households living in temporary accommodation who may have a need for:
 - Supported housing: 35% (9 households)
 - Floating support: 15% (4 households)

10.46 Estimated net need for supported housing (2024/25): up to 13 households with support needs per annum require supported housing (if no floating support services are available) instead of being accommodated in temporary accommodation.

10.47 It assumes that these households have an average length of stay in supported housing of no more than 12 months.

Rochford District Council

10.48 For 2023/24:

- Total households assessed: 273
- Total households with support need(s) owed a duty: 99
- Most prevalent support needs amongst households owed a prevention or relief duty shown in table below

Table 171. Support needs of households owed a prevention or relief duty

Support needs	No. of households with support need	% of households with support need
History of mental health problems	44	16.6%
At risk of / has experienced domestic abuse	30	11.3%
Offending history	14	5.3%
History of repeat homelessness	6	2.3%
Drug dependency needs	7	2.6%
History of rough sleeping	6	2.3%
Alcohol dependency needs	6	2.3%
Learning disability	14	5.3%
Young person aged 18-25 years requiring support to manage independently	3	1.1%
Access to education, employment or training	4	1.5%
At risk of / has experienced abuse (non-domestic abuse)	10	3.8%
At risk of / has experienced sexual abuse / exploitation	4	1.5%
Old age	6	2.3%
Care leaver aged 18-20 years	3	1.1%
Care leaver aged 21-24 years	2	0.8%
Care leaver aged 25+ years	0	0.0%
Care leaver aged 21+ years (retired option)	2	0.8%
Young person aged 16-17 years	1	0.4%
Young parent requiring support to manage independently	1	0.4%
Former asylum seeker	1	0.4%
Served in HM Forces	2	0.8%

Source: Statutory homelessness: Detailed local authority-level tables, 2023/24 (MHCLG)

10.49 Number of households accommodated in temporary accommodation: 54 (September 2024)

- Estimated percentage of these households that have support needs 80% (43 households)

- Estimated percentage of these households living in temporary accommodation who may have a need for:

- Supported housing: 35% (15 households)
- Floating support: 15% (6 households)

10.50 Estimated net need for supported housing (2024/25): up to 22 households with support needs per annum require supported housing (if no floating support services are available) instead of being accommodated in temporary accommodation.

10.51 It assumes that these households have an average length of stay in supported housing of no more than 12 months.

Tendring District Council

10.52 For 2023/24:

- Total households assessed: 869
- Total households with support need(s) owed a duty: 590
- Most prevalent support needs amongst households owed a prevention or relief duty shown in table below

Table 172. Support needs of households owed a prevention or relief duty

Support needs	No. of households with support need	% of households with support need
History of mental health problems	351	41.3%
At risk of / has experienced domestic abuse	107	12.6%
Offending history	33	3.9%
History of repeat homelessness	23	2.7%
Drug dependency needs	30	3.5%
History of rough sleeping	47	5.5%
Alcohol dependency needs	39	4.6%
Learning disability	36	4.2%
Young person aged 18-25 years requiring support to manage independently	28	3.3%
Access to education, employment or training	6	0.7%
At risk of / has experienced abuse (non-domestic abuse)	11	1.3%
At risk of / has experienced sexual abuse / exploitation	5	0.6%
Old age	24	2.8%
Care leaver aged 18-20 years	12	1.4%
Care leaver aged 21-24 years	3	0.4%
Care leaver aged 25+ years	5	0.6%
Care leaver aged 21+ years (retired option)	0	0.0%

Support needs	No. of households with support need	% of households with support need
Young person aged 16-17 years	16	1.9%
Young parent requiring support to manage independently	8	0.9%
Former asylum seeker	6	0.7%
Served in HM Forces	5	0.6%

Source: Statutory homelessness: Detailed local authority-level tables, 2023/24 (MHCLG)

10.53 Number of households accommodated in temporary accommodation: 167 (September 2024)

- Estimated percentage of these households that have support needs 80% (134 households)
- Estimated percentage of these households living in temporary accommodation who may have a need for:
 - Supported housing: 35% (47 households)
 - Floating support: 15% (20 households)

10.54 Estimated net need for supported housing (2024/25): up to 67 households with support needs per annum require supported housing (if no floating support services are available) instead of being accommodated in temporary accommodation.

10.55 It assumes that these households have an average length of stay in supported housing of no more than 12 months.

Uttlesford District Council

10.56 For 2023/24:

- Total households assessed: 192
- Total households with support need(s) owed a duty: 131
- Most prevalent support needs amongst households owed a prevention or relief duty shown in table below

Table 173. Support needs of households owed a prevention or relief duty

Support needs	No. of households with support need	% of households with support need
History of mental health problems	69	35.9%
At risk of / has experienced domestic abuse	44	22.9%
Offending history	16	8.3%
History of repeat homelessness	14	7.3%

Support needs	No. of households with support need	% of households with support need
Drug dependency needs	5	2.6%
History of rough sleeping	13	6.8%
Alcohol dependency needs	10	5.2%
Learning disability	13	6.8%
Young person aged 18-25 years requiring support to manage independently	5	2.6%
Access to education, employment or training	27	14.1%
At risk of / has experienced abuse (non-domestic abuse)	2	1.0%
At risk of / has experienced sexual abuse / exploitation	9	4.7%
Old age	2	1.0%
Care leaver aged 18-20 years	2	1.0%
Care leaver aged 21-24 years	0	0.0%
Care leaver aged 25+ years	1	0.5%
Care leaver aged 21+ years (retired option)	0	0.0%
Young person aged 16-17 years	0	0.0%
Young parent requiring support to manage independently	0	0.0%
Former asylum seeker	10	5.2%
Served in HM Forces	0	0.0%

Source: Statutory homelessness: Detailed local authority-level tables, 2023/24 (MHCLG)

10.57 Number of households accommodated in temporary accommodation: 38 (September 2024)

- Estimated percentage of these households that have support needs 80% (30 households)
- Estimated percentage of these households living in temporary accommodation who may have a need for:
 - Supported housing: 35% (11 households)
 - Floating support: 15% (5 households)

10.58 Estimated net need for supported housing (2024/25): up to 15 households with support needs per annum require supported housing (if no floating support services are available) instead of being accommodated in temporary accommodation.

10.59 It assumes that these households have an average length of stay in supported housing of no more than 12 months.

Table 174. Summary of estimated need for supported housing for households living in temporary accommodation (2024/25)

District/ Borough/City councils	Number of households living in Temporary Accommoda- tion	Estimated number of households in temporary accommodation that have support needs, (80%)	Estimated number of households in temporary accommodation that have support needs who may have a need for supported housing (35%)	Estimated number of households in temporary accommodation that have support needs who may have a need for floating support (15%)	Estimated net need for supported housing and floating support
Basildon	710	568	199	85	284
Braintree	34	27	10	4	14
Brentwood	29	23	8	3	12
Castle Point	130	104	36	16	52
Chelmsford	481	385	135	58	192
Colchester	383	306	107	46	153
Epping Forest	123	98	34	15	49
Harlow	337	270	94	40	135
Maldon	33	26	9	4	13
Rochford	54	43	15	6	22
Tendring	167	134	47	20	67
Uttlesford	38	30	11	5	15
Essex	2,519	2,015	705	302	1,008

Source: Statutory homelessness: Detailed local authority-level tables, 2023/24 (MHCLG)

Estimated need for supported housing for households living in temporary accommodation by 2029/30

10.60 It is assumed that the future need for supported housing among households in temporary accommodation will increase in line with the growth of the adult (18+) population.

10.61 To project this forward to 2029/30, the Office for National Statistics (ONS 2021) and the 2018-based Subnational Population Projections (SNPP 2018) for Essex have been used.

Table 175. Estimated need for supported housing for households living in temporary accommodation to 2029/30

District/Borough/City councils	2024/25	2029/30
Basildon	284	291
Braintree	14	14
Brentwood	12	12
Castle Point	52	53
Chelmsford	192	199
Colchester	153	160
Epping Forest	49	50
Harlow	135	138
Maldon	13	14
Rochford	22	22
Tendring	67	70
Uttlesford	15	16
Essex	1,008	1,039

10.62 The estimated growth is solely based on ONS working age household growth projections. In practice the need for supported housing may be influenced by other factors that we can't quantitatively predict, e.g. increase/decrease in homelessness presentations, whether additional supported housing is delivered in practice, whether floating support can assist people to live in general needs housing to avoid a move to temporary accommodation etc.

11. Prevention

Introduction

11.01 A wide range of preventative services are commissioned and provided in Essex. This component of the Supported and Specialist Housing and Accommodation Needs Assessment considers the role of preventative services that are most relevant in terms of both complementing, and in some instances potentially mitigating the need for, supported and specialist housing and accommodation.

11.02 A wide range of preventative services are commissioned and provided in Essex including:

- Early help services
- Technology; care enabled technology and assistive technology
- Home adaptations, including through the use of Disabled Facilities Grants (DFGs)
- Public Health funded supported housing and support services and floating support services

Early help services

11.03 Early help and prevention is the first stage of the Essex County Council adult social care 'customer journey'⁶⁶:

11.04 ***The right support will be given in the right place at the right time. The prevention and early help offer will proactively support adults' wellbeing, identifying and responding to emerging problems so they do not escalate, therefore preventing, reducing or delaying the need for care and support. The offer will be person-centred enabling adults to help themselves and to overcome difficulties and build resilience.***

11.05 Adult Social Care and Public Health have a comprehensive and diverse range of services to prevent, reduce and delay the need for people requiring long term care and support. Some of these services include:

- Essex County Council website provides information and advice on social care help, advice on disabilities and health conditions, Blue Badge applications, and paying for care and support
- Essex Wellbeing Service provides information and advice as well as support including emotional and mental wellbeing, debt, housing and employment advice, child and family lifestyle services, health improvement services, access to volunteers and Community Agents, and enhanced support for carers

⁶⁶ [https://www.essexproviderhub.org/the-essex-market/market-position-statement/market-population groups/early-help-offer/](https://www.essexproviderhub.org/the-essex-market/market-position-statement/market-population-groups/early-help-offer/)

- Local Linked Support supports learning disabled or autistic adults to find local community networks
- Essex Community Dementia Support Service, delivered by the Alzheimer's Society provides a range of information and support
- Essex Care Technology service provides a wide range of care technologies and equipment with care technology leads in each of our localities across Essex and additional roles working as part of our integrated hospital discharge teams to consider and maximise the use of technology for people leaving hospital and returning home
- The Integrated Community Equipment Loan Service is co-commissioned with Thurrock Council and Essex health partners providing information, advice and guidance as well as equipment to enable independence
- Reconnect offers physical activity to help improve the lives of people living with disabilities and/or long-term health conditions
- The Independent Workforce Team provides fast, effective occupational therapy assessment and intervention for people with a health or medical condition which significantly affects their quality of life. They specialise in assessments for complex equipment provision, moving and handling routines or major adaptations
- Hospital discharge processes focus on a 'home first' approach and support people to maximise their independence
- The sensory support service offers information, advice and guidance as well as assessments for support, equipment, life skills and tools to manage daily living. It also offers access to qualified rehabilitation staff to support people with more complex sensory needs
- Reablement services are available across the whole of Essex to support residents to be as independent as possible
- Assessment Technician Service provides assessment and provision of specified equipment and minor adaptations to prevent admission, reduce risks in the home, and delay the need for onward referrals to other services

11.06 The intention is not to repeat here the full range of early help services that are available in Essex, rather to consider the preventative services that are most relevant in terms of both complementing, and in some instances potentially mitigating the need for, supported and specialist housing and accommodation, in particular:

- Essex Wellbeing Service. This type of service is likely to provide support for a range of individuals that may help to reduce the use of and mitigate the need for a range of types of supported and specialised housing and accommodation
- Local Linked Support supports learning disabled or autistic adults to find local community networks. This service has a role in sustaining some people with learning disabilities and autistic adults in mainstream general needs housing,

avoiding the need to move to live in supported housing, as well as assisting some people to move on from supported housing to live in general needs housing

- Essex Community Dementia Support Service. This service may help to delay and mitigate the need for people living with dementia to move to supported and specialised housing and accommodation
- Essex Care Technology service (see below)

11.07 In addition, the role of home adaptations, floating support services and other public health funded supported housing services are considered below.

Technology: care enabled technology and assistive technology

11.08 Care Technology (sometimes referred to as telecare or assistive technology) is monitoring and alert equipment that can help a person to remain independent in their home and in the community.

11.09 Essex County Council's Care Technology service is a core element of Essex County Council's early help offer. The service is currently free of charge to the end user inclusive of monitoring and response where required. Eligibility is:

- Over 18 years of age including carers
- Residing in Essex, excluding Southend and Thurrock
- Eligible under Prevent, Reduce Delay or full Care Act eligibility

11.10 Monitoring equipment provides a person, their carers, family and friends with the reassurance that help is available 24 hours a day, seven days a week. Care Technology covers a wide range of equipment, such as alarm systems, medication dispensers and GPS location trackers.

11.11 In the context of this Supported and Specialist Housing and Accommodation Needs Assessment, the use of Care Technology can assist older people and disabled working age adults to remain living independently in their homes rather than move to a supported or specialised housing setting.

11.12 In the context of supported and specialist housing and accommodation, this may include, for example, alarm systems in specialist housing for older people such as in sheltered housing and extra care housing, and Care Technology that, for example, can enable people with physical and sensory disabilities to be less reliant on staff support in supported housing settings.

Home adaptations, including through the use of Disabled Facilities Grants (DFGs)

11.13 The benefits of adapting the home are recognised as an effective way to improve the health and wellbeing of older people, and disabled adults and children. A more

accessible home environment can improve independence, reduce risk and reduce reliance on assistance.

- 11.14 As the body of evidence demonstrating the benefits of home adaptations grows, so does the recognition that the sooner they are installed, the greater will be the preventative benefits⁶⁷. This may include avoiding or delaying the need for a move to supported and specialist housing and accommodation.
- 11.15 Local authorities provide advice and assistance to people who may need to make an adaptation to their home, including older people, and disabled adults and children. For people who are eligible, this may include awarding a Disabled Facilities Grant (DFG) to fund adaptations that are assessed to be necessary to support a person to live independently in their home. There is evidence that the need for adaptions to peoples' homes is increasing in Essex.
- 11.16 The Disabled Facilities Grant (DFG) is a means-tested capital grant provided through the Better Care Fund (BCF) and administered by local Housing Authorities in England. Its primary aim is to align housing, health, and social care objectives by funding essential home adaptations. DFG practices are determined at the district level; Essex County Council can influence decisions to ensure effective delivery and utilisation of the grant. Adaptations to council properties are funded through the Housing Revenue Account, not the district's DFG allowance.
- 11.17 Whether funded by the DFG or HRA, these adaptations enhance safety and accessibility, making daily tasks like cooking and bathing easier for older and disabled individuals. They key adaptations funded include:
 - Stairlifts
 - Level access showers
 - Ramps and wider doors
 - Bespoke extensions
 - Heating systems and insulation
 - Assistive technology
- 11.18 The table below indicates that the majority of adaptations are funded by a Disabled Facilities Grant. The number of adaptations between 2022/23 and 2024/25 increased across the whole of Essex, with an average annual change of 7%.
- 11.19 The districts with the largest average annual change in the number of adaptions funded either by a DFG or the HRA is Castle Point (111%). Harlow also saw strong growth of 18%, followed by Colchester at 14%. In contrast, some districts experienced a decline over the period. Brentwood saw an 11% decrease, while Braintree, Rochford, and Tendring also reported reductions in total adaptations, with average annual changes of -7%, -7%, and -2% respectively.

⁶⁷ <https://www.housinglin.org.uk/News/Housing-LIN-and-RCOT-release-Adaptations-without-Delay/>

Table 176. Total adaptations delivered by funding source by districts and across Essex from 2022/23 to 2024/25

Districts	Adaptation funding source	2022/23	2023/24	2024/25	Average annual change
Basildon	Number of adaptations funded by the DFG	106	118	156	22%
	Number of adaptations funded by the HRA	193	174	195	1%
	Total delivered adaptations	299	292	340	7%
Braintree	Number of adaptations funded by the DFG	135	181	95	-7%
	Number of adaptations funded by the HRA	0	0	0	0%
	Total delivered adaptations	135	181	95	-7%
Brentwood	Number of adaptations funded by the DFG	23	24	15	-17%
	Number of adaptations funded by the HRA	58	45	49	-7%
	Total delivered adaptations	81	69	64	-11%
Castle Point	Number of adaptations funded by the DFG	17	25	89	152%
	Number of adaptations funded by the HRA	16	48	58	110%
	Total delivered adaptations	33	73	147	111%
Chelmsford	Number of adaptations funded by the DFG	116	108	115	0%
	Number of adaptations funded by the HRA	0	0	0	0%
	Total delivered adaptations	116	108	115	0%
Colchester	Number of adaptations funded by the DFG	74	88	103	18%
	Number of adaptations funded by the HRA	134	139	168	12%
	Total delivered adaptations	208	227	271	14%
Epping Forest	Number of adaptations funded by the DFG	112	140	101	-1%
	Number of adaptations funded by the HRA	142	124	183	17%
	Total delivered adaptations	254	264	284	6%
Harlow*	Number of adaptations funded by the DFG	76	96	120	26%
	Number of adaptations funded by the HRA	108	144	131	-5%
	Total delivered adaptations	184	240	251	18%

Districts	Adaptation funding source	2022/23	2023/24	2024/25	Average annual change
Maldon	Number of adaptations funded by the DFG	66	78	80	10%
	Number of adaptations funded by the HRA	N/A	0	0	0%
	Total delivered adaptations	66	78	80	10%
Rochford	Number of adaptations funded by the DFG	75	64	65	-7%
	Number of adaptations funded by the HRA	0	0	0	0%
	Total delivered adaptations	75	64	65	-7%
Tendring	Number of adaptations funded by the DFG	138	132	155	7%
	Number of adaptations funded by the HRA	189	191	162	-7%
	Total delivered adaptations	327	323	317	-2%
Uttlesford	Number of adaptations funded by the DFG	29	27	20	-16%
	Number of adaptations funded by the HRA	52	73	57	9%
	Total delivered adaptations	81	100	77	0%
Essex	Number of adaptations funded by the DFG	967	1,081	1,114	7%
	Number of adaptations funded by the HRA	892	938	1,003	6%
	Total delivered adaptations**	1,859	2,019	2,106	7%

Source: DFG applications and completions (Essex County Council, 2024)

*Avg. annual change shows the average yearly percentage increase or decrease from 2022/23 to 2024/25.

11.20 Essex County Council holds more detailed data on the adaptations funded by a DFG which are provided below.

11.21 Between 2022/23 and 2024/25, there has been a steady increase in both Disabled Facilities Grant (DFG) applications and completed adaptations across Essex. Applications rose by 19%, from 1,050 to 1,250, while the number of completed adaptations increased by 15%, from 967 to 1,114 over the same period. Evidence from Essex County Council is that this trend should be encouraged, and appropriate measures must be taken to increase capacity both at Essex County Council and District levels to assess for and deliver adaptations to meet demand in future years.

11.22 In Basildon, Harlow, Rochford and Castle Point, the number of DFG-funded adaptation applications increased significantly between 2022/23 and 2024/25 although the number of completed adaptations did not rise at the same rate.

Table 177. DFG applications and completions by district from 2022/23 to 2024/25

District/ Borough/ City	DFG submitted or completed	2022/23	2023/24	2024/25	Total 2022/23 to 2024/25	*Avg. Annual chang e
Basildon	Total number of grant applications submitted	115	155	229	499	41%
	Total number of grants completed	106	118	156	380	22%
Braintree	Total number of grant applications submitted	135	190	61	386	-14%
	Total number of grants completed	135	181	95	411	-7%
Brentwood	Total number of grant applications submitted	18	24	21	63	10%
	Total number of grants completed	23	24	15	62	-17%
Castle Point	Total number of grant applications submitted	25	44	106	175	108%
	Total number of grants completed	17	25	89	131	152%
Chelmsford	Total number of grant applications submitted	112	101	114	327	2%
	Total number of grants completed	116	108	115	339	0%
Colchester	Total number of grant applications submitted	92	85	112	289	12%
	Total number of grants completed	74	88	103	265	18%
Epping Forest	Total number of grant applications submitted	120	122	109	351	-4%
	Total number of grants completed	112	140	101	353	-1%
Harlow	Total number of grant applications submitted	88	126	140	354	27%
	Total number of grants completed	76	96	120	292	26%
Maldon	Total number of grant applications submitted	90	86	85	261	-3%
	Total number of grants completed	66	78	80	224	10%
Rochford	Total number of grant applications submitted	99	78	82	259	-8%
	Total number of grants completed	75	64	65	204	-7%
Tendring	Total number of grant applications submitted	123	139	171	433	18%
	Total number of grants completed	138	132	155	425	7%

District/ Borough/ City	DFG submitted or completed	2022/23	2023/24	2024/25	Total 2022/23 to 2024/25	*Avg. Annual chang e
Uttlesford	Total number of grant applications submitted	33	30	20	83	-21%
	Total number of grants completed	29	27	20	76	-16%
Essex	Total number of grant applications submitted	1,050	1,180	1,250	3,480	9%
	Total number of grants completed	967	1,081	1,114	3,162	7%

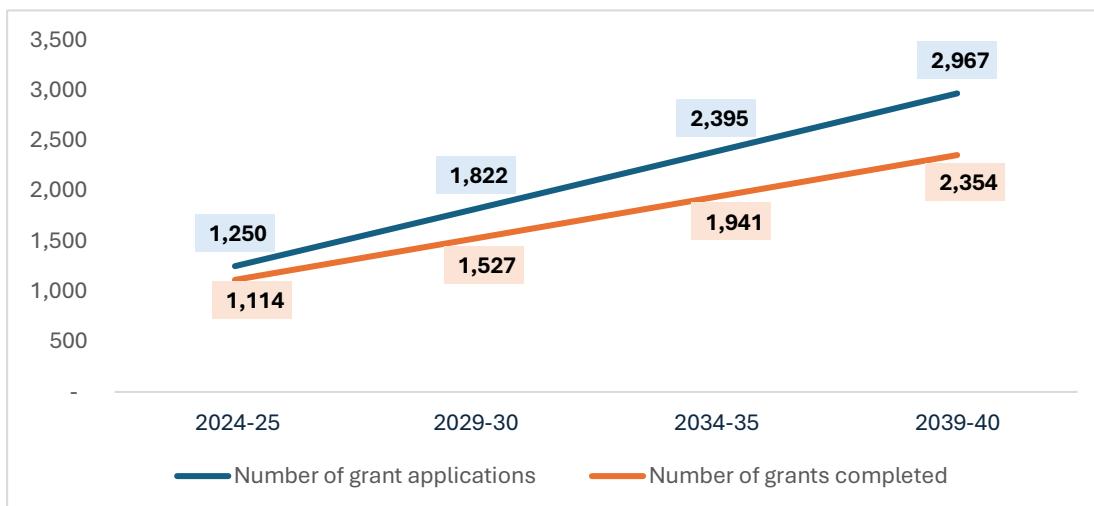
Source: DFG statistics (Essex County Council)

*Avg. annual change shows the average yearly percentage increase or decrease from 2022/23 to 2024/25.

NB. in some cases the number of DFGs completed is higher than the applications received because some of the DFG jobs cross financial years until they are completed. In some cases, clients choose not to proceed with the application.

11.23 The average annual change in the number of grant applications submitted (c.9%) over the period from 2022/23 to 2024/25 (Table 177) has been used as the basis for projecting forward to estimate future demand for DFG funded adaptions.

Figure 45. Projected number of grant applications and completions to 2039/40



11.24 Between 2022/23 and 2024/25, the majority of completed DFGs in Essex were provided to people aged 66 and above; on average across the 3 years 54% were completed for people in this age group. This is followed by people aged 18-65 (39%) and aged 17 or less (7%). These proportions have remained broadly stable across the three-year period.

Table 178. Number of completed DFGs in Essex by age group

Age group	2022/23	2023/24	2024/25
Aged 17 years or less	76	70	74
Aged 18-64	332	418	439
Aged 66 years and above	559	593	601
Total	967	1,081	1,114

Source: DFG applications and completions (Essex County Council, 2024)

11.25 The number of completed DFGs by age group to 2039/40 has been estimated by applying the average age percentages for completed DFGs to the estimated number of completed DFG adaptations.

Table 179. Estimated number of completed DFGs in Essex by age group

Age group	2029/30	2034/35	2039/40
Aged 17 years or less	100	127	154
Aged 18-64	596	758	919
Aged 66 years and above	831	1,056	1,281
Total	1,527	1,941	2,354

Source: DFG applications and completions (Essex County Council, 2024)

11.26 Between 2022/23 and 2024/25, Disabled Facilities Grant (DFG) completions in Essex were mostly provided to owner occupiers (61% on average), followed by social housing tenants (33%) and private renters (4%). These proportions have remained broadly stable across the four-year period.

11.27 In addition to the adaptations delivered in Essex via the Disabled Facilities Grants, District, City and Borough Councils received requests and completed adaptations for Council tenants. These are paid for from the Districts' Housing Revenue Account and as above have been increasing by an average of 3% per year.

11.28 Essex Districts could work closely with Housing Associations to increase the adaptations delivered to Housing Association tenants including making arrangements for Housing Associations to contribute to the cost of the works, so more social housing tenants benefit from adaptations reducing the needs for moves to other properties and further DFG applications.

Table 180. Proportion of DFGs completed by tenure from 2022/23 to 2024/25 in Essex

Proportion of DFG completed	2022/23	2023/24	2024/25	Average %
Number of grants completed for owner occupiers	64%	59%	61%	61%
Number of grants completed for Registered Provider/Housing Association tenants	31%	35%	34%	33%
Number of grants completed for private rented tenants	4%	5%	4%	4%

Source: Essex County Council 2022/23 – 2024/25

11.29 There are significant DFG underspends in some Essex Districts. In addition to improving facilities for disabled persons in temporary accommodation and the community, districts could use these underspends to contribute to the cost of building accessible housing to increase supported/specialist housing capacity, reduce the need for DFGs and reduce/delay the need for health and social care interventions.

Public health funded supported housing and floating support services

- 11.30 Public health commissioned housing related support services directly complement and potentially mitigate the need for other types of supported and specialist housing and accommodation.
- 11.31 'Floating support' is a support service providing practical, housing related support, such as support to maintain a tenancy, to people with support needs living in general needs housing.
- 11.32 There is a contract with Peabody to provide floating support for people aged 18 years and over. This service provides practical housing related support to individuals to avoid the need for people to move to supported and specialist housing and accommodation but also to provide support to people who have been living in supported and specialist housing and accommodation and are moving onto live in general needs housing.

12. Providers of Supported and Specialist Housing and Accommodation

Introduction

12.01 As part of undertaking the Supported and Specialist Housing and Accommodation need assessment, engagement was undertaken with a sample of providers of supported and specialist housing and accommodation to seek their perspectives and experiences in relation to the current supply of and the current supported and specialist housing and accommodation.

12.02 Engagement was undertaken with a sample of supported and specialist housing and accommodation providers that accommodate and support:

- Young people with support needs
- Older people
- Working age adults with care/support needs

Providers of supported housing and housing related support services for young people with support needs

12.03 Key messages and perspectives from this sample of providers of supported housing and housing related support services are:

- There is increasing demand for supported housing and housing related support services in all areas of Essex
- The support needs of young people being referred for supported housing and housing related support are increasing and becoming more complex
- In relation to the supply of supported housing, there is a role for both shared supported housing and self-contained housing to suit the differing needs of young people
- However, there is an increasing need for self-contained housing to be used as supported housing, reflecting the increasing support needs of some young people, meaning that shared supported housing is not suited to their needs
- Securing independent housing for young people to move on to is increasingly challenging for a number of reasons: there is an overall shortage of affordable housing, including social housing for rent private rented sector housing and affordability pressures for first time buyers
- The policies and procedures used by the 12 District/Borough/City Councils in Essex vary in relation to access to independent move on housing for young people. This

is because Local Housing Authorities have different Allocation Policies and as mentioned previously nominations are discretionary and are based on demand and supply in each area

Providers of supported and specialist housing and accommodation for older people

12.04 Key messages and perspectives from this sample of providers of supported housing and housing related support services were:

- The majority of older people are seeking to live independently and 'age in place' in their homes and communities, rather than move to supported or specialised housing and accommodation
- However, there is an increasing demand for retirement/sheltered housing and extra care housing in Essex. Extra care housing can be an alternative to residential care in some cases
- There will likely be an increasing need for residential or nursing care, but this will need to accommodate older people with the most complex care and health needs
- In relation to the existing supply of retirement/sheltered housing, some of this is outdated and in need of refurbishment to make it attractive to older people
- There is a need for more affordable retirement housing and extra care housing options for 'middle market' older homeowners who may not be in a position to afford current market retirement housing options

Providers of supported and specialist housing and accommodation for working age adults with care/support needs.

12.05 Key messages and perspectives from this sample of providers of supported housing and housing related support services were:

- There is an increasing number of working age adults with care/support needs that require supported housing
- There is a need to review and take stock of voids within existing supported housing to understand the number of voids and reasons why existing stock isn't being utilised. The evidence from providers is that this is due to a variety of reasons:
 - The expectations of working age adults and their families is changing, and people are expecting higher quality accommodation than is currently provided in some cases
 - Much of the existing stock provides shared accommodation and there can be challenges matching residents

- Some of the existing supply of supported housing is often not built to accessibility standards; this makes it unsuitable for people who have physical disability and mobility needs alongside other needs
- However, there is recognition that in relation to the supply of supported housing, there is a role for both shared supported housing and self-contained housing to suit the differing needs of working age adults
- There is a need for an increase in the availability of general needs housing for working age adults to move on to from supported housing and for people who may need support but don't need supported housing

Annexe 1. Demographic evidence

Table 181. Percentage of people with physical disabilities by district including both people who draw on adult social care support from Essex County Council and people and others with physical disabilities who do not draw on adult social care support from Essex County Council, aged under 65 and 65+ in Essex

Districts	Proportion of population under 65	Proportion of population 65+
Basildon	13%	11%
Braintree	10%	10%
Brentwood	5%	5%
Castle Point	5%	7%
Chelmsford	12%	11%
Colchester	13%	11%
Epping Forest	9%	8%
Harlow	7%	5%
Maldon	4%	5%
Rochford	5%	6%
Tendring	9%	14%
Uttlesford	6%	6%
Essex	100%	100%

Source: ONS 2021 (MOSAIC 2020-2024)

A1.1 Essex County Council adult social care (MOSAIC) data for 2020–2024 (September 2024) used for trend calculation of people who draw on adult social care support from Essex County Council with physical disabilities and/or sensory impairments (PSI).

Table 182. Trend of people with PSI living at home from 2020 to 2024

District	2020	2021	2022	2023	2024
Basildon	196	194	188	205	215
Braintree	183	195	197	196	201
Brentwood	68	65	60	71	74
Castle Point	113	111	120	126	132
Chelmsford	182	180	178	181	183
Colchester	256	250	238	233	231
Epping forest	125	125	137	137	142
Harlow	112	115	115	122	110
Maldon	64	59	52	63	62
Rochford	80	70	69	78	80
Tendring	183	174	172	179	200
Uttlesford	67	61	67	74	74
Essex	1,629	1,599	1,593	1,665	1,704

Source: Essex County Council (MOSAIC) (2024)

Table 183. Annual percentage change of people with PSI living at home from 2020 to 2024

District	2021	2022	2023	2024	Average
Basildon	-1%	-3%	9%	5%	2%
Braintree	7%	1%	-1%	3%	2%
Brentwood	-4%	-8%	18%	4%	3%
Castle Point	-2%	8%	5%	5%	4%
Chelmsford	-1%	-1%	2%	1%	0%
Colchester	-2%	-5%	-2%	-1%	-3%
Epping forest	0%	10%	0%	4%	3%
Harlow	3%	0%	6%	-10%	0%
Maldon	-8%	-12%	21%	-2%	0%
Rochford	-13%	-1%	13%	3%	0%
Tendring	-5%	-1%	4%	12%	2%
Uttlesford	-9%	10%	10%	0%	3%
Essex	-2%	0%	5%	2%	1.2%

Source: Essex County Council (MOSAIC) (2024)

Table 184. Trend of people with PSI in supported living from 2020 to 2024

District	2020	2021	2022	2023	2024
Basildon	3	3	4	3	4
Braintree	3	3	3	3	4
Brentwood	1	1	1	1	1
Castle Point	2	2	2	1	2
Chelmsford	2	1	2	3	3
Colchester	10	8	7	7	7
Epping forest	5	4	4	4	2
Harlow	0	0	0	0	0
Maldon	0	0	0	0	0
Rochford	0	0	0	1	1
Tendring	15	14	14	12	11
Uttlesford	1	1	2	2	1
Essex	42	37	39	37	36

Source: Essex County Council (MOSAIC) (2024)

Table 185. Annual percentage change of people with PSI in supported living from 2020 to 2024

District	2021	2022	2023	2024	Average
Basildon	0%	33%	-25%	33%	10%
Braintree	0%	0%	0%	33%	8%
Brentwood	0%	0%	0%	0%	0%
Castle Point	0%	0%	-50%	100%	13%
Chelmsford	-50%	100%	50%	0%	25%
Colchester	-20%	-13%	0%	0%	-8%
Epping forest	-20%	0%	0%	-50%	-18%
Harlow	0%	0%	0%	0%	0%
Maldon	0%	0%	0%	0%	0%
Rochford	0%	0%	0%	0%	0%
Tendring	-7%	0%	-14%	-8%	-7%
Uttlesford	0%	100%	0%	-50%	13%

Supported and Specialist Housing and Accommodation Needs Assessment

District	2021	2022	2023	2024	Average
Essex	-12%	5%	-5%	-3%	-3.6%

Source: Essex County Council (MOSAIC) (2024)

Table 186. Trend of people with PSI in residential/nursing care from 2020 to 2024

District	2020	2021	2022	2023	2024
Basildon	10	11	11	9	11
Braintree	16	20	16	17	19
Brentwood	6	2	2	4	4
Castle Point	4	4	5	6	6
Chelmsford	14	20	19	18	21
Colchester	36	34	36	31	32
Epping forest	18	21	22	16	14
Harlow	3	8	7	6	8
Maldon	2	0	3	4	3
Rochford	2	3	2	3	3
Tendring	69	65	56	60	70
Uttlesford	2	4	4	6	4
Essex	182	192	183	180	195

Essex County Council (MOSAIC) (2024)

Table 187. Annual percentage change of people with PSI in residential/nursing care from 2020 to 2024

District	2021	2022	2023	2024	Average
Basildon	10%	0%	-18%	22%	4%
Braintree	25%	-20%	6%	12%	6%
Brentwood	-67%	0%	100%	0%	8%
Castle Point	0%	25%	20%	0%	11%
Chelmsford	43%	-5%	-5%	17%	12%
Colchester	-6%	6%	-14%	3%	-3%
Epping forest	17%	5%	-27%	-13%	-5%
Harlow	167%	-13%	-14%	33%	43%
Maldon	0%	0%	33%	-25%	2%
Rochford	50%	-33%	50%	0%	17%
Tendring	-6%	-14%	7%	17%	1%
Uttlesford	100%	0%	50%	-33%	29%
Essex	5%	-5%	-2%	8%	2%

Source: Essex County Council (MOSAIC) (2024)

A1.2 Sub national population projections (SNPP) 2018 growth rates data used for the population projections of the number of people aged 55+, 65+ and 75+.

Table 188. Sub national population projections (SNPP) 2018 growth rates of the 55+, 65+ and 75+ populations in Essex

Age Population group	Local Authority	2024	2029	2034	2039	2044
55+	Basildon	3.5%	7.5%	10.4%	14.9%	19.3%
	Braintree	5.3%	11.8%	14.9%	18.7%	24.1%
	Brentwood	1.9%	3.8%	5.7%	9.0%	11.5%
	Castle Point	3.0%	5.4%	5.9%	8.0%	10.6%
	Chelmsford	4.7%	11.2%	15.6%	21.0%	26.9%
	Colchester	5.1%	11.8%	16.1%	21.1%	27.1%
	Epping Forest	4.3%	10.0%	14.5%	20.3%	25.9%
	Harlow	2.8%	6.1%	9.2%	14.3%	18.0%
	Maldon	5.9%	12.9%	16.5%	20.4%	26.4%
	Rochford	4.6%	10.5%	13.6%	17.5%	22.7%
	Tendring	5.2%	12.2%	17.1%	22.4%	28.8%
	Uttlesford	7.3%	17.3%	24.3%	31.9%	40.7%
	Essex	4.6%	10.4%	14.1%	18.8%	24.2%
65+	Basildon	3.3%	10.7%	18.9%	24.1%	30.4%
	Braintree	5.1%	15.4%	25.9%	32.9%	41.5%
	Brentwood	1.4%	7.8%	14.5%	18.2%	23.0%
	Castle Point	2.7%	8.0%	13.6%	16.6%	20.9%
	Chelmsford	4.2%	13.0%	22.4%	29.6%	37.2%
	Colchester	4.3%	14.1%	24.7%	32.1%	40.2%
	Epping Forest	4.0%	13.8%	24.4%	32.0%	40.4%
	Harlow	3.6%	12.6%	21.2%	26.3%	33.6%
	Maldon	5.9%	16.6%	28.1%	35.1%	44.4%
	Rochford	4.3%	13.3%	22.6%	29.0%	36.4%
	Tendring	4.8%	15.3%	26.6%	34.5%	43.3%
	Uttlesford	7.6%	22.9%	38.1%	49.3%	62.1%
	Essex	4.3%	13.7%	23.6%	30.3%	38.1%
75+	Basildon	10.1%	15.8%	22.6%	33.5%	42.9%
	Braintree	16.5%	29.3%	39.3%	52.8%	68.5%
	Brentwood	7.1%	9.6%	14.6%	25.4%	31.7%
	Castle Point	13.7%	19.8%	23.1%	30.5%	40.2%
	Chelmsford	13.4%	22.1%	30.8%	42.3%	54.7%
	Colchester	14.6%	25.0%	32.8%	45.8%	59.2%
	Epping Forest	9.8%	16.9%	26.2%	40.9%	52.1%
	Harlow	6.0%	13.5%	24.9%	39.3%	48.3%
	Maldon	17.5%	30.5%	40.6%	53.6%	70.8%
	Rochford	14.2%	22.9%	30.1%	41.6%	53.8%
	Tendring	13.6%	22.4%	31.9%	47.0%	59.9%
	Uttlesford	15.0%	28.4%	43.0%	63.4%	80.8%
	Essex	13.0%	21.7%	30.3%	43.3%	55.6%

Source: ONS 2021 and 2018 sub national population projections

A1.3 The table below shows the MOSAIC data from 2020 to 2024 (September 2024 snapshot) which gives the accommodation status of older people (aged 65+) who draw on adult social care support from Essex County Council.

Table 189. Number of older people living at home

Districts	2020	2021	2022	2023	2024
Basildon	579	572	558	571	674
Braintree	482	473	463	514	550
Brentwood	233	212	204	207	253
Castle Point	461	429	448	456	486
Chelmsford	477	495	491	493	557
Colchester	444	382	414	433	473
Epping forest	406	397	416	414	432
Harlow	298	317	328	322	335
Maldon	219	199	210	239	281
Rochford	311	287	314	329	374
Tendring	718	668	556	678	740
Uttlesford	208	218	204	220	227
Sum of districts	4,836	4,649	4,606	4,876	5,382

Source: Essex County Council (MOSAIC) (2024)

Table 190. Number of older people in supported living

Districts	2020	2021	2022	2023	2024
Basildon	0	1	1	1	1
Braintree	1	1	1	1	1
Brentwood	0	0	0	0	0
Castle Point	1	1	0	0	0
Chelmsford	1	1	0	0	0
Colchester	3	3	3	2	1
Epping forest	0	0	0	0	0
Harlow	0	0	0	0	0
Maldon	0	0	0	0	0
Rochford	0	0	0	0	0
Tendring	0	0	3	1	1
Uttlesford	1	1	1	1	1
Sum of districts	7	8	9	6	5

Source: Essex County Council (MOSAIC) (2024)

Table 191. Number of older people in residential/nursing care homes

Districts	2020	2021	2022	2023	2024
Basildon	351	324	283	289	275
Braintree	500	429	484	461	473
Brentwood	140	142	142	139	139
Castle Point	222	234	234	243	219
Chelmsford	319	325	327	337	337
Colchester	408	398	424	424	420
Epping forest	282	329	343	369	356
Harlow	141	166	200	206	181

Districts	2020	2021	2022	2023	2024
Maldon	151	152	178	167	156
Rochford	115	113	100	90	89
Tendring	639	613	610	622	625
Uttlesford	206	220	237	215	209
Sum of districts	3,474	3,445	3,562	3,562	3,479

Source: Essex County Council (MOSAIC) (2024)

A1.4 Below tables show the tenure split of 45-64 and 65+ population in Essex by districts

Table 192. Tenure split of 45-64 years old population in Essex by districts

45-64 years old	Owned ownership	%	Social rented	%	Private rented	%
Basildon	19,652	68%	5,793	20%	3,520	12%
Braintree	18,253	71%	3,912	15%	3,430	13%
Brentwood	-	-	-	-	-	-
Castle Point	11,190	81%	786	6%	1,839	13%
Chelmsford	-	-	-	-	-	-
Colchester	-	-	-	-	-	-
Epping Forest	-	-	-	-	-	-
Harlow	8,330	59%	4,090	29%	1,687	12%
Maldon	8,857	79%	1,132	10%	1,232	11%
Rochford	11,517	83%	996	7%	1,338	10%
Tendring	17,236	72%	1,857	8%	4,801	20%
Uttlesford	11,616	76%	1,687	11%	2,006	13%
Essex	173,841	73%	32,413	14%	32,531	14%

Source: ONS 2021

NB: Entries for Brentwood, Colchester, Chelmsford and Epping Forest were not published by the ONS 2021

Table 193. Tenure split of 65+ years old population in Essex by districts

65+ year olds	Owned ownership	%	Social rented	%	Private rented
Basildon	16,079	76%	4,105	20%	858
Braintree	15,873	78%	3,120	15%	1,282
Brentwood	8,392	84%	1,071	11%	512
Castle Point	13,030	90%	673	5%	783
Chelmsford	18,988	84%	2,765	12%	910
Colchester	18,291	83%	2,482	11%	1,361
Epping Forest	13,554	81%	2,285	14%	887
Harlow	6,017	66%	2,809	31%	335
Maldon	8,737	84%	1,024	10%	588
Rochford	11,301	88%	1,059	8%	524
Tendring	24,078	84%	2,100	7%	2,358
Uttlesford	9,181	80%	1,563	14%	774
Essex	163,521	82%	25,056	13%	11,172

Annexe 2 Long Term Housing Requirements in Emerging Plans

The table below shows the Long-Term Housing Requirements in Emerging Plans for Essex and the 12 district, borough and city councils.

It also shows:

- Number of supported and specialist housing units required by 2044
- Number of supported and specialist housing units required by 2044 as % of overall housing requirements
- Number of wheelchair accessible units required by 2044
- Number of wheelchair accessible units required by 2044 as % of overall housing requirements

Table 194. The Long Term Housing Requirements in Emerging Plans for Essex and the 12 district, borough and city councils

District	Plan Period	Housing Requirement/ Supply	Number of supported and specialist housing units required by 2044	Number of supported and specialist housing units required by 2044 as % of overall housing requirements	Number of wheelchair accessible units required by 2044	Number of wheelchair accessible units required by 2044 as % of overall housing requirements
Basildon**	2023 - 2043	27,100	2,495	9%	277	1.0%
Braintree**	2026 - 2041	18,400	2,537	14%	248	1.3%
Brentwood*	2025 - 2044	13,800	1,147	8%	123	0.9%
Castle Point**	2023 - 2043	14,000	1,744	12%	158	1.1%
Chelmsford* **	2022 - 2041	23,400	2,953	13%	283	1.2%
Colchester**	2025 - 2041	21,100	2,955	14%	290	1.4%
Epping Forest*	2023 - 2043	26,000	2,098	8%	207	0.8%
Harlow*	2023 - 2043	12,700	1,046	8%	130	1.0%
Maldon**	2028 - 2053	9,900	1,369	14%	115	1.2%
Rochford**	2023 - 2043	13,800	1,587	11%	145	1.1%
Tendring**	2024 - 2041	19,300	3,449	18%	298	1.5%
Uttlesford*** *	2021 - 2041	15,200	1,679	11%	141	0.9%
Essex	2021 - 2043	214,700	25,059	12%	2,416	1%

*New/Review Local Plan not commenced - no public consultation to date (NPPF 2024)

Supported and Specialist Housing and Accommodation Needs Assessment

**New/Review Local Plan commenced - Regulation 18 consultation to date - no preferred spatial strategy (NPPF 2024)

***New/Review Local Plan commenced - Regulation 19 consultation completed (NPPF 2024)

****New Local Plan Submitted for examination (Pre NPPF 2024)

NB: Braintree - includes 10% buffer in annual requirement from 1,115 pa to 1,227pa

Chelmsford - based on the NPPF 2024 transitional requirement of 1,210 rather than 1,454p

Uttlesford - submitted Plan is at examination based on 675pa rather than the NPPF 805pa

Housing Requirement/Supply - rounded to the nearest 100 homes

The supported accommodation need for vulnerable young people, including care leavers, was estimated quadrant-wise. This need has been disaggregated equally across the districts within each quadrant.

The estimated housing need for victims, survivors and perpetrators of domestic abuse was calculated at the county level. This figure has been equally distributed across all districts.

Annexe 3 Glossary

Affordable housing

Housing that is provided for rent or shared ownership for people who cannot afford to rent or purchase a property on the open market.

Care Technology

The term used to describe digital or smart devices and services that can support a person's independence; to help them/others to better self-manage and monitor their health and wellbeing and/or provide peace of mind. Services include telecare (long distance monitoring), assistive technology, such as digital assistants, and telehealth (remote health monitoring).

Disabled Facilities Grants (DFG)

A grant available from Local Authorities to pay for changes to a person's home to enable them to continue to live there.

Extra care housing

Self-contained homes with design features and support services available to enable self- care and independent living.

General Needs Housing

Housing that is not purpose built, adapted or managed for a particular client/care group.

Housing Association

An organisation that provides houses and flats to people on low incomes or with needs. Also known as 'registered provider'.

Housing Related Support (HRS)

A service provided to help vulnerable people regain, maintain or achieve independent living.

Housing register

A register or list of people who are seeking social and affordable housing in a district, city or borough council area. Most councils have local rules about who can join their housing register.

Integrated Care Systems (ICSs)

Partnerships of organisations that come together to plan and deliver joined up health and care services, and to improve the lives of people who live and work in their area

Local Plan

A document produced by district, city, borough or unitary councils to set the framework and policies for decisions on future development proposals and to address the development needs

and opportunities of the area for a 15-20 year period. Local Plans identify specific sites for development and their development principles to demonstrate it can meet the local housing need. Topics that Local Plans usually cover include housing, employment, retail and the infrastructure needed to support any new development (such as schools, health facilities, transport). The Local Plan will also identify where development should take place and areas where development should be restricted given local, national and international environmental constraints.

Move on housing

This is general needs housing in the social housing sector or in the private rented sector that is required for people with care and/or support needs to move to once they no longer have a need to live in supported housing, for example young people with support needs who need to move on from supported housing to general needs housing as part of living independently.

Nursing care

Long-term personal and medical care provided in a care home.

Residential care

Long-term personal care provided in a care home instead of a person's own home.

Shared Lives

Shared Lives schemes match people who need care and support with an approved carer, who the person sometimes also moves in and lives with, so that they can live more independently in the community.

Social housing

Housing provided by either local councils or housing associations. Social homes have rents set to reflect local incomes. The providers of the homes are independently monitored by a national regulator.

Spatial Development Strategy (SDS)

A strategic plan, prepared by a Mayor or a Combined Authority, setting out a broad framework for development up to 30 years ahead. Local plans must be in general conformity with the SDS, ensuring that local development aligns with the broader strategic goals. It seeks to address key strategic planning issues, such as housing needs (including the distribution and scale of development), economic growth, infrastructure development, health and environmental matters, including climate change.

Supported and Specialist Housing and Accommodation

Specialist and Supported Accommodation is where housing, support and/or care services are provided to help people with a particular need to live as independently as possible. Supported

accommodation provides homes for a wide range of people including older people, people with a disability or autism, people with mental health related needs, and vulnerable young people.

Supported Living

Housing where support and/or care services are provided to help people to live as independently as possible.

Tenure

The conditions under which land or buildings are held or occupied, for example, owned outright, secured on a mortgage, rented from a private landlord or rented from the or a Housing Association.