

**Comprehensive planning need assessment (CPNA)**  
Care home - elderly

## **Land off Trowbridge Road, Bradford on Avon**

**Prepared for:**  
Waddeton Park Ltd

**Carterwood Report – February 2026**

**Prepared by:**

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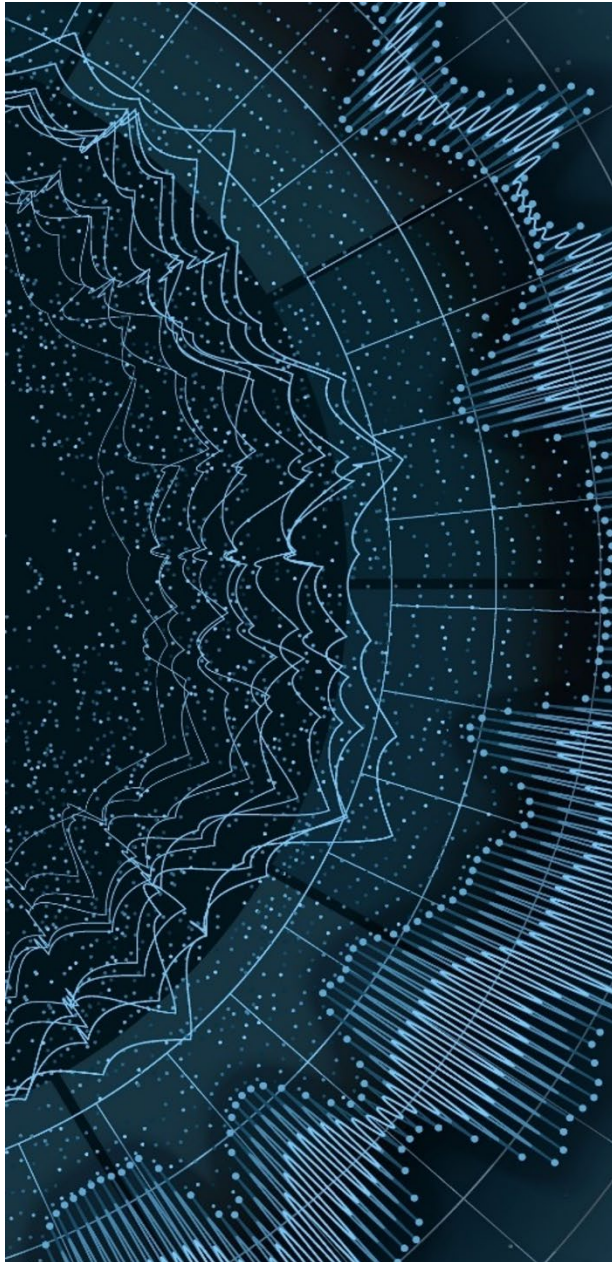
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## Key findings

Background and the proposal

National context and key definitions

Commissioning enquiries

Need assessment – local market quantitative and qualitative assessment

Data tables and map

Appendices

## Key figures

### Market catchment

#### Care home



**708**  
Wetroom gross  
need



**228**  
Existing wetroom  
beds



**26**  
Planned beds



**454**  
Wetroom net need

### Local authority

#### Care home



**4,081**  
Wetroom gross  
need



**2,482**  
Existing wetroom  
beds



**422**  
Planned beds



**1,177**  
Wetroom net need

### Economic benefits



**Increase in the number of  
jobs during the  
construction phase**



**Release of  
underoccupied family  
homes**



**A range of full and part  
time care and support  
jobs when operational**



**Reduced reliance  
on the NHS**

### Social benefits



**Improved individual  
health management  
and quality of life**



**Reduced loneliness**



**Reduced unpaid  
carers burden**



**Appropriate homes  
for the community**

## T1 Planning need assessment summary

|                 |                                                                                                                                                                                                                                        |
|-----------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Site            | Land off Trowbridge Road, Bradford on Avon                                                                                                                                                                                             |
| Proposed scheme | Outline application including a 72-bed purpose-built care home to meet the needs of all aspects of elderly nursing, residential and dementia care.                                                                                     |
| Notes           | <ul style="list-style-type: none"> <li>The subject scheme is not included in our 'planned supply' figures</li> <li>Need assessment based on a circa 5-mile market catchment and the Wiltshire Council local authority area.</li> </ul> |

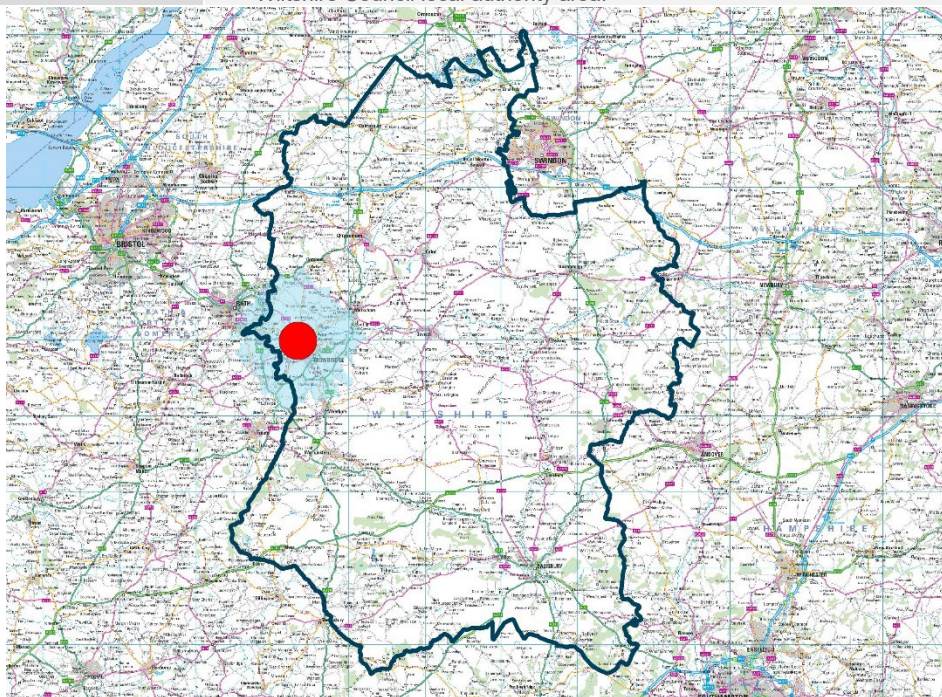


Figure 1: Location of the proposed care home and its catchment areas

The proposed scheme is shown by the red dot, with the market catchment area shaded light blue and the Wiltshire Council area outlined in dark blue

## T2 Assessment of need

We assess need on two bases – minimum and full market standard bedrooms; we define a **minimum market standard bedroom** as providing an en-suite with a minimum of a WC and wash-hand basin (although do not stipulate minimum size, accessibility or suitability for purpose).

In line with rising market expectations, we also assess need on the basis of **full market standard bedrooms** which incorporate an en-suite with a level access shower (wetroom) to enable bathing and personal care to take place within a resident's own room. All new care homes provide spacious en-suite bedrooms, the vast majority having full en-suite wetrooms.

## T3 Need analysis summary (2029)

| Basis of assessment                                   | All beds |       | Dedicated dementia |       |
|-------------------------------------------------------|----------|-------|--------------------|-------|
| Type of care                                          | Market   | LA    | Market             | LA    |
| Gross need                                            |          |       |                    |       |
| All bed/specialist dementia need                      | 653      | 3,766 | 273                | 1,574 |
| Occupancy capacity allowance                          | 55       | 315   | 23                 | 132   |
| Total need                                            | 708      | 4,081 | 296                | 1,706 |
| Supply                                                |          |       |                    |       |
| Existing elderly en-suite                             | 301      | 3,537 | 116                | 886   |
| Existing elderly wetroom                              | 228      | 2,482 | 112                | 727   |
| Extant planned beds (to 2029)                         | 26       | 422   | 26                 | 209   |
| Total supply (en-suite)                               | 327      | 3,959 | 142                | 1,095 |
| Total supply (wetrooms)                               | 254      | 2,904 | 138                | 936   |
| Net need                                              |          |       |                    |       |
| En-suite bedrooms (minimum market standard)           | 381      | 122   | 154                | 611   |
| Full wetroom en-suite bedrooms (full market standard) | 454      | 1,177 | 158                | 770   |

For full assumptions, see Table T25 on page 26.

## T4 Carterwood need assessment

- Our assessment based on 2029, the earliest the proposed care home could be delivered, indicates a net need for 454 full market standard bedrooms in the market catchment and 1,177 in the Wiltshire Council local authority area. Shortfalls of full market standard dedicated dementia beds, based on 2029, are 158 and 770 in the two catchments, respectively.
- Even when assessed on the basis of more basic, minimum market standard supply, there is a shortfall of 381 care bedrooms in the market catchment and 122 in the local authority area, based on 2029. The undersupply of dedicated dementia beds is significant, at 154 and 611 bedrooms in the two catchments, respectively, indicating a considerable under-provision of care bedrooms best suited for this form of care.
- By 2039, the undersupply of full market standard care bedrooms is projected to be 675 in the market catchment and 2,801 in the local authority (including 256 and 1,454 dedicated dementia beds in the two assessed catchments, respectively).
- In each assessment above it is assumed that existing supply and prevalence remains constant, and that all planned supply is developed at our anticipated timeframe. In each case, therefore, we overestimate the potential supply, given that we make no allowance for the potential closure of existing, operational minimum market standard care home bedspaces and because planned schemes may not progress over the timescales we have assumed, or be developed at all.

## T5 National context and the proposal

- The proposed, specifically designed, CQC registered care home will provide 72 single bedrooms, all with en-suite wetrooms, together with a variety of spacious, well-appointed communal areas and be capable of caring for residents who require nursing, personal and specialist dementia care, by providing flexible, infection control-compliant accommodation to enable care to be administered most effectively and efficiently.
- As hospital stays reduce due to delayed discharge legislation, rehabilitation within a care home is often considered as a short-term measure. For those with higher dependency care needs or dementia, 24-hour care within a care home setting may be the only suitable long-term option.
- Great Britain's elderly population is set to grow dramatically over the coming years, continuing to drive demand for housing for older people. Planning policy sets out that there is a 'critical' need for all forms of housing for older people, including care home beds.
- The NPPF has strengthened its approach to older people's housing by requiring the identification of need across retirement housing, housing-with-care and care homes to assist the development of new provision.
- The increasing dependency of those moving to a care home mean that accommodation must be fit for purpose and flexible, to enable care to be provided effectively and safely. Modern schemes increasingly provide larger bedrooms with en-suite wetrooms, flexible layouts and the ability for residents to self-isolate.
- The care home sector faces multiple challenges in meeting projected demand for high-dependency beds, including the need to improve accommodation quality, achieve economies of scale, respond to rising market expectations, secure sustainable funding and recruit/retain staff.
- Appeal decisions have recognised a 'market standard' approach that distinguishes between registered care beds and those that are realistically suitable and available. One appeal decision confirmed that planning is not intended to manage the care home market, but should support redevelopment and renewal to replace outdated stock with modern, purpose-built provision. Another emphasised the urgency of need, noting that people requiring care home accommodation cannot wait, and that PPG expects local authorities to take a positive approach where unmet need is identified..

## T6 Commissioning and local authority review

- Wiltshire Council's social care strategy seeks to support people to live independently wherever possible, while ensuring those requiring more intensive support can access appropriate services, including care within a registered care home.
- The *Market Position Statement (2023)* identifies significant growth in Wiltshire's older population, with the 65+ cohort increasing above the national average and those aged 85+ projected to rise substantially. It confirms that, whilst supporting independence at home remains a priority, residential and nursing care will continue to play a vital role for people with complex and specialist needs, and highlights existing challenges in securing appropriate, high quality placements.
- The *Dementia Strategy 2023 to 2028* highlights the increase in dementia and advanced dementia and identifies the need for a sustained and appropriately skilled response across all care settings, including specialist residential and nursing provision, to meet growing and increasingly complex demand. The *Joint Strategic Needs Assessment* notes that a proportion

## T6 Commissioning and local authority review

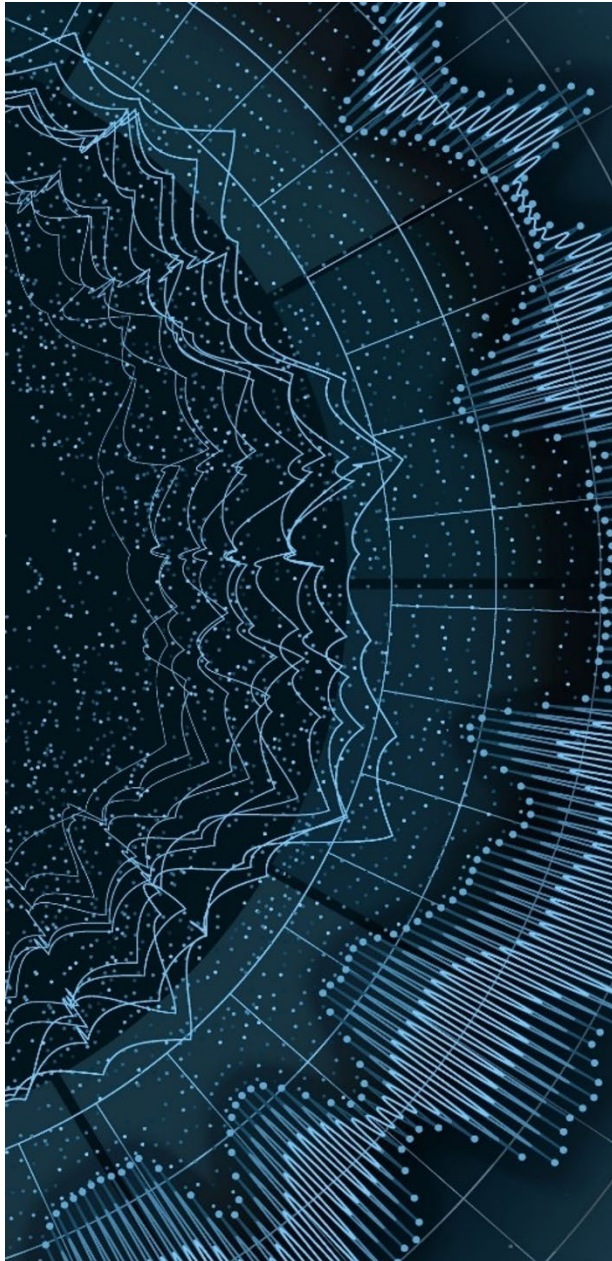
- of people with dementia remain undiagnosed, reinforcing the scale of future need and the requirement for forward planning of appropriate care accommodation.
- The *Local Housing Needs Assessment 2023* reinforces this position by identifying a significant requirement for Class C2 accommodation between 2020 and 2038, including the equivalent of an extra 1,469 dwellings in Wiltshire (approximately 2,644 care beds). These projections assume sufficient delivery of care bedspaces and highlight the role of specialist accommodation in meeting future housing and care needs.

## T7 Qualitative need assessment for care home beds

- Delayed hospital discharges keep elderly patients in NHS acute settings longer than necessary, when cost-effective care home beds could provide step-down, rehabilitation, or long-term care. Access to well-equipped, infection control-compliant care home beds for high-dependency needs is crucial for freeing up NHS beds for those who most need them.
- The COVID-19 pandemic highlighted shortcomings in the social care sector and reduced occupancy in the short term, resulting in a reduction of poorer quality supply and additional need for better specified, new care home provision to cater to a still rapidly rising elderly demographic.
- A range of care and accommodation options is necessary, to provide for the needs of those who require support, mitigate the impact on social services budgets and provide choice to those who fund their own care.
- There remain, however, an increasing number of elderly people who are the most frail and those with dementia, who require full-time support within a specifically designed care home that provides high-dependency care, suitable for such needs.

## T8 Conclusions

- The Carterwood planning need assessment identifies a significant shortfall of full market standard care home bedrooms in the market catchment and Wiltshire Council local authority area. Even at minimum market standard level the shortfalls of care home bedspaces are clear, particularly for those who require dementia care.
- Wiltshire Council commissioning provides key demand drivers for new care home beds, particularly for complex care and dementia care, given the expected growth in the elderly demographic. Residential and nursing care continue to play a vital role for older people with specialist needs and high quality care homes are required to meet the increasing demand.
- A good proportion of those requiring care are likely to be self-funded, with their choice of care home being based on location, quality of care and accommodation, and proximity to friends and family, rather than funding alone.
- The proposed 72- bedroom care home will be specifically designed for purpose and best suited for caring for residents, including those who require dementia care within a specialist unit, with spacious, flexible, infection control-compliant care accommodation to enable care to be administered most efficiently and effectively.
- The proposal will assist in meeting the existing and increasing shortfall of full market standard care bedrooms in both the market catchment and the Wiltshire Council local authority area.



## Key findings

# Background and the proposal

Introduction

Carterwood

Description of proposal

Operational viability and closures

The proposed scheme – position on the care spectrum

National context and key definitions

Commissioning enquiries

Need assessment – local market quantitative and qualitative assessment

Data tables and map

Appendices

## 1. Introduction

- 1.1 Carterwood has been commissioned to prepare a need assessment on behalf of Waddeton Park Ltd in relation to the development of a new 72-bed purpose-built care home, forming part of a wider proposed development on Land off Trowbridge Road, Bradford on Avon.
- 1.2 The proposed, purpose-designed care home will provide modern accommodation capable of flexibly adapting to meet the needs of those requiring elderly nursing, residential and dementia care. It will incorporate physical adaptations and an environment suited to the provision of specialist dementia care, to meet a growing need in this area.
- 1.3 In this report, we have considered the national context, together with a detailed study of the market catchment and local authority area.

### Limitations to advice

- 1.4 The trading environment of the care sector in Great Britain, which impacts upon market conditions, remains in a volatile state. Contributing factors include political and economic pressures resulting from some ongoing limitations of post-Brexit trading conditions, operating with the legacy and any future risks of COVID-19 and the effect of the conflict in Ukraine.
- 1.5 Our reports are prepared using high-quality data and expert analysis from our experienced team. Any recommendations made are based upon the market and financial climate as at the date of the report, but do not take into account future economic or market fluctuations caused by the events outlined above or other unforeseen events.
- 1.6 This report contains data relating to the 2021 census for England and Wales, and the 2022 census for Scotland.

### T9 Instruction summary

|                   |                                       |
|-------------------|---------------------------------------|
| Purpose of advice | Planning need assessment              |
| Research date     | 19 January 2026                       |
| Prepared by       | Elyssa Thom BA                        |
| Reviewed by       | Jessamy Venables BSc (Hons) MSc MRICS |
| Report date       | 24 February 2026                      |

## 2. Carterwood

- 2.1 Carterwood is a multi-award-winning property adviser dedicated to social care. We provide market analysis services and software to investors, developers and operators within the elderly care home and retirement living sectors. We combine sector-specialism with unparalleled data quality and a commitment to innovation, to help our clients make better decisions. Carterwood acts for 85 per cent of the top 20 care home group operators, and our commercially-focused team is one of the largest dedicated to health and social care.



- 2.2 We work with the leading operators, investors and developers in our markets.

### T10 Elderly care home



### T11 Housing with care



- 2.3 Carterwood's client base represents many operators currently seeking to develop new care homes and extra care schemes. Accordingly, we are in an almost unique position in the sector, having assessed over 4,500 sites since 2008, for a range of providers across a range of scheme types and care categories.

### 3. Description of proposal



Figure 2: Aerial photograph of the subject site for identification purposes only

#### Location and scheme description

- 3.1 The site is located to the south-east of Bradford on Avon, approximately one mile from the town centre. It is situated on the north-eastern side of the A363 Trowbridge Road which provides access to the centre of Bradford-on-Avon, as well as to Trowbridge, approximately 2.5 miles to the south east.
- 3.2 The proposed care home which is the subject of this report, forms part of the wider scheme which comprises an 'Outline application (with all matters reserved except for access) for the erection of up to 224 residential dwellings (Class C3), 72-bed care home (Class C2), with sports pitch, allotments, country park, landscaping and open space'.
- 3.3 The proposed care home will provide high-quality care accommodation, with 72 single occupancy bedrooms, each equipped with a full en-suite wetroom.
- 3.4 The care home will be designed to be flexible in terms of the layout of accommodation and offer a range of spacious communal areas, each of which will

be finished to the highest standard. These will include, inter alia, café/bar area, lounges, dining rooms, library, activities room, cinema room and hair salon.

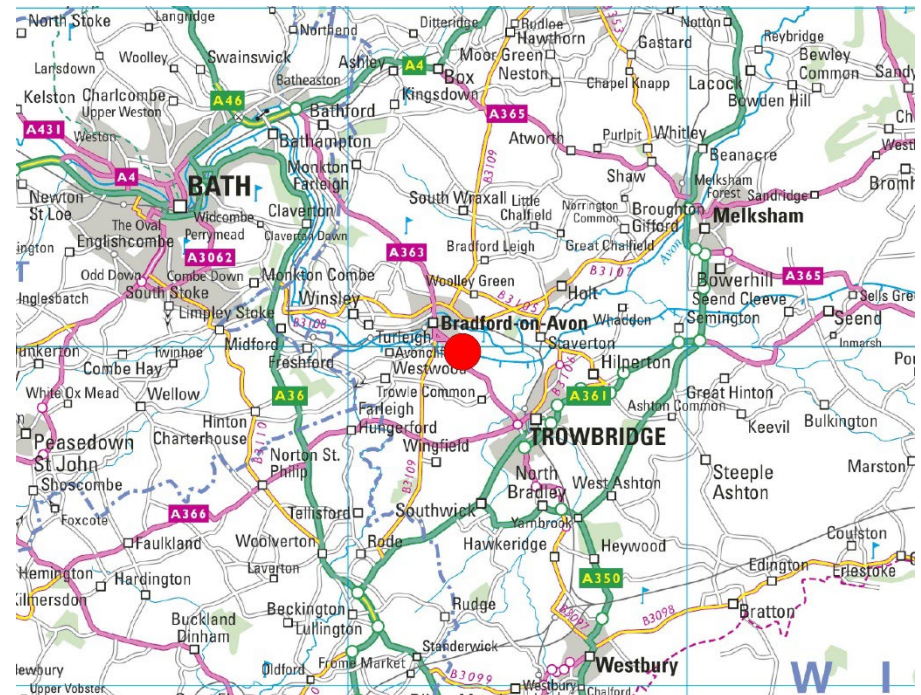


Figure 3: Location map of the subject site

- 3.5 Further detail in respect of the proposal can be found in the planning statement accompanying the application

## 4. Operational viability and closures

### Size of care home

- 4.1 The importance of economies of scale has become paramount in recent years, to ensure the most cost effective operation and provision of the range of facilities required in the development of modern care homes to meet with market expectations.
- 4.2 For this reason, there has been a decline in care homes that are no longer considered to be fit-for-purpose and those smaller care homes which are inefficient to operate, for example those where a poor layout necessitates increased staff numbers to oversee residents or the buildings are not cost effective to maintain or heat.
- 4.3 All care homes incur fixed costs of operation, comprising both staff and non-staff costs. The greater the number of beds, the greater the efficiency of the scheme and the greater the ability to spread the costs. These fixed costs are particularly high in respect of the following:
- Care home management team – there is very little variation in care home manager and deputy manager hours and wages by size of home.
  - Ancillary care staff – domestic, laundry, maintenance and administration functions are required to varying degrees, depending on the size of the care home.
  - Some non-staff costs such as marketing, PR, accountancy, finance/bank charges do not vary by the size of the home or group of care homes – and the greater the number of beds the more these costs can be spread and the lower the cost on a per resident basis.
  - Other non-staff costs such as heat and light and food/provisions also vary according to the size of the home. However, the costs are much more expensive for the first few beds than the last few beds as there is also a fixed element to the cost regardless of the scheme size.
- 4.4 In our experience, schemes of between 65 and 75 bedspaces are currently viewed as the ideal compromise between the institutional, hospital environments of some very large homes of 80+ beds, and the inefficiencies of schemes with less than 60 bedspaces. This is evidenced in both applications for, and developments of, new care homes during recent years.
- ### Closure of operational care homes
- 4.5 We have completed a review of the loss of care home supply in the Wiltshire Council area in recent years. Our research shows that a total of 19 care homes have closed since 2017, (although we note that one care home, Leonora Home, has been re-developed at a new address). While the quality of accommodation may not be the only reason for the closure of a care home, in our opinion, in most

cases the number of care bedrooms, availability of en-suites and general quality of accommodation is usually a factor.

- 4.6 The closed homes' most recent CQC inspection reports show that around 53 per cent were advised as 'requires improvement', 'inadequate' or had no rating/not assessed prior to their closure. The poor CQC rating may also have been due to staffing issues however ultimately, a well operated care home with suitable numbers of occupied beds to ensure it is economically viable will be more likely to be able to recruit and retain appropriate staff to care for residents.
- 4.7 The first year of operation of the closed care homes, where known, was between 1946 and 2012 (the vast majority between 1985 and 1999) which indicates that the accommodation available was likely to be less spacious, with fewer communal areas and therefore less well suited to the care needs of those who now require full time care. The smallest of the closed care homes was registered for 9 residents and the largest, 54 residents. The percentage of bedrooms even with a minimum market standard en-suite was low and only 4 of the closed homes had any bedrooms providing full en-suite wetrooms.
- 4.8 For information, we have provided a full list of existing care homes in the market catchment and local authority area in Table T28 on page 29 which sets out the total number of registered care beds, en-suite and en-suite wetroom bedrooms together with the first year of operation and the most recent CQC inspection rating and occupancy (where available).
- 4.9 Given the wider range of options intended by Wiltshire Council to meet the needs and expectations of all older people, those now requiring care in a care home will have high dependency care needs which can only be met in appropriately specified accommodation. Care operators have learned from the pandemic that the physical and spatial environment of a care home is of utmost importance both for residents and staff. Such accommodation also needs to be operationally viable, particularly given the difficulties recruiting and retaining trained staff and the increasing operational costs. There are many examples of smaller sized care homes that have already closed or have been re-developed for this reason.
- 4.10 The subject proposal will have regard to the needs of the local community and will therefore serve not only to meet the assessed shortfall of full market standard care bedrooms by 2029 and beyond, but also to assist in replacing the potential loss of any further sub-standard accommodation.

## 5. The proposed care home – position on the care spectrum

5.1 In planning terms, care homes for the elderly fall under Class C2 ('residential institutions') of The Town and Country Planning (Use Classes) Order 1987. PPG states that *'there are different types of specialist housing designed to meet the diverse needs of older people' describing the form of accommodation proposed at the subject scheme as:*

***'Residential care homes and nursing homes:*** *These have individual rooms within a residential building and provide a high level of care meeting all activities of daily living'*

5.2 The Care Quality Commission (CQC), responsible for the regulation of care homes in England under the Health and Social Care Act 2008, defines a care home as:

*'a place where personal care and accommodation are provided together. People may live in the service for short or long periods. For many people, it is their sole place of residence and so it becomes their home, although they do not legally own or rent it. Both the care that people receive, and the premises are regulated'.*

5.3 **Care homes/personal care homes/residential care homes** provide personal care (not nursing care) to the elderly, assistance with personal hygiene, continence management, food and diet management, counselling and support, simple treatments, dressing and going to bed, mechanical or manual aids.

5.4 **Care homes with nursing** offer the same services as residential care homes, with registered nurses also being available to provide 24-hour nursing care to residents with complex health issues that can only be administered by nursing staff.

5.5 In addition to the home-level registration, care homes can specialise in the form of care provided, such as elderly frail, dementia and/or other specialist care.

5.6 Table T12, below, shows the range of options available within the 'spectrum of care'. We have compared the subject care home against other forms of accommodation in respect of care provided, cost of care and regulation. To clarify, a care home does not provide 'housing-with-care' or 'extra care'. This usually comprises an individual's own accommodation with a medium to high level of care available, if required, through an onsite CQC registered care agency.

5.7 Delayed discharge legislation, which imposes fines upon local authorities for 'blocked beds', has resulted in reduced hospital stays, with a temporary move to a care home often being considered as a short-term measure for those who require rehabilitation prior to returning home. For complex care needs or dementia, 24-hour care within a care home may be the only suitable long-term option.

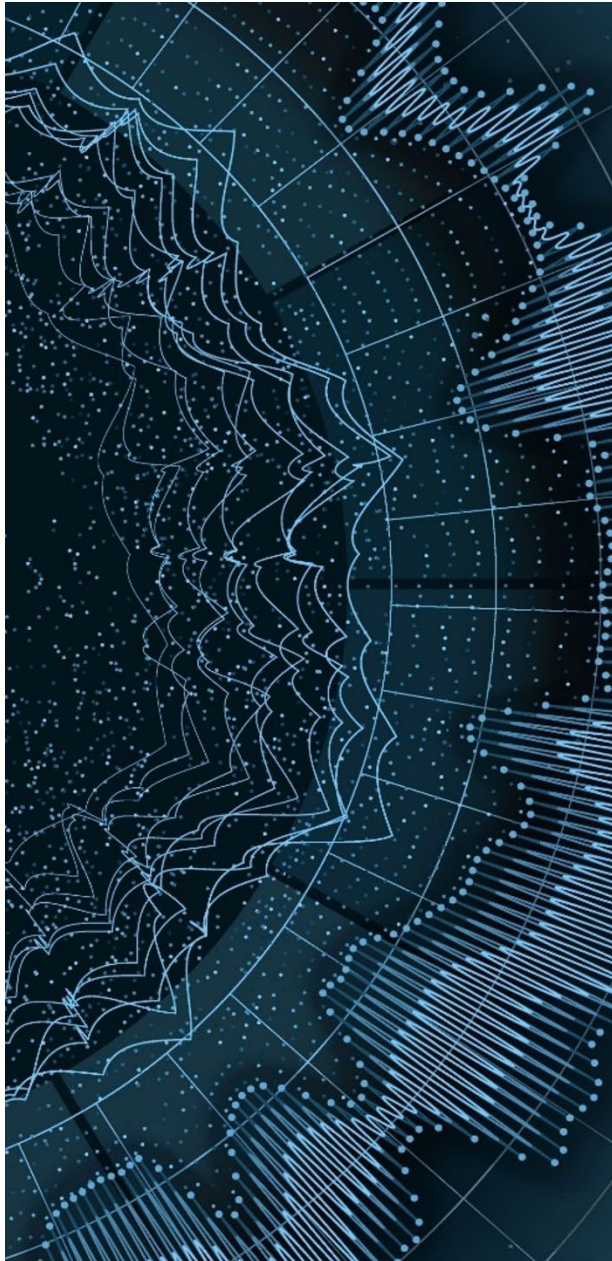
5.8 The subject care home will be capable of providing nursing, residential and dementia care to residents, including within a specialist unit specifically designed to cater to higher dependency needs. It will be flexible in terms of layout, to provide areas where residents can be isolated, should this be required.

### Key findings – the subject scheme and the care proposed

- The proposed, specifically designed, CQC registered care home will provide 72 single bedrooms, all with en-suite wetrooms, together with a variety of spacious, well-appointed communal areas and be capable of caring for residents who require nursing, personal and specialist dementia care, by providing flexible, infection control-compliant accommodation to enable care to be administered most effectively and efficiently.
- As hospital stays reduce due to delayed discharge legislation, rehabilitation within a care home is often considered as a short-term measure. For those with higher dependency care needs or dementia, 24-hour care within a care home setting may be the only suitable long-term option.

T12 Elderly care spectrum

| Accommodation             | Age restricted housing                           | Sheltered housing                  | Extra care / assisted living               | Care homes                                    | Care homes with nursing                                    | Hospitals           |
|---------------------------|--------------------------------------------------|------------------------------------|--------------------------------------------|-----------------------------------------------|------------------------------------------------------------|---------------------|
| Care provided             | No care or support unless individually arranged. | On-site support, call system.      | On-site CQC registered domiciliary care    | Personal care and dementia care               | Nursing (including dementia nursing care) and medical care |                     |
| Cost of care              | Low to medium and highly variable                |                                    |                                            | Medium to high                                | High                                                       | Very high           |
| Accommodation types/style | Apartment, flat, cottage, bungalow               | Apartment, flat, cottage, bungalow | Suite, apartments, flat, cottage, bungalow | Bedrooms in a care home setting               |                                                            | Acute hospital Beds |
| CQC regulation            | Regulated only if care provided                  |                                    |                                            | Highly regulated – all care and accommodation |                                                            |                     |
| Proposed care home        |                                                  |                                    |                                            | Requirements met in proposed care home        |                                                            |                     |



Key findings

Background and the proposal

## **National context and key definitions**

Elderly population trends in Great Britain

Provision of care homes in Great Britain

Key points regarding the care home sector

Commissioning enquiries

Need assessment – local market quantitative and qualitative assessment

Data tables and map

Appendices

## 6. Elderly population trends in Great Britain

- 6.1 Planning Policy Guidance (PPG) advises that the need for housing for older people is 'critical', the only planning need addressed in such urgent terms. This is because people are living longer lives and the proportion of older people in the population is increasing: 'In mid-2016 there were 1.6 million people aged 85 and over; by mid-2041 this is projected to double to 3.2 million'.
- 6.2 The elderly population in Great Britain is set to grow dramatically over the coming years (see Figure 4 below), and the predicted rapid increase is likely to continue to drive demand for both non-residential care, such as extra care schemes and other accommodation options, as well as care home beds.

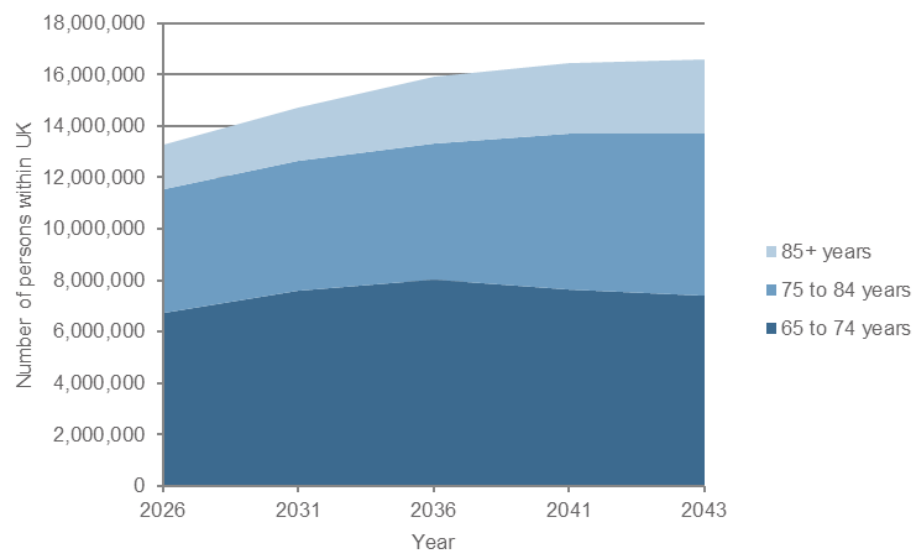


Figure 4: GB 65+ population growth 2026 to 2043 by age band

Source: 2021 Census, ONS population projections.

- 6.3 The Office for National Statistics (ONS) states that in mid-2022 there were 1.7 million people aged 85 years and over, making up 2.5% of the population. By mid-2047, this is projected to have nearly doubled to 3.3 million, representing 4.3% of the total UK population. There are projected to be many more people at older ages by 2047, in part because of larger cohorts from the 1960s now aged over 80 years, as well as general increases in life expectancy.

## 7. Provision of care homes in Great Britain

7.1 There are currently approximately 10,000 care homes providing over 446,000 registered care beds for older people in Great Britain.

7.2 T13 analyses the supply by year of first registration and identifies the significant proportion of homes registered both prior to and during the 1990s. As a broad generalisation, care homes registered from 1990 are likely to include en-suite bedrooms and those registered from 2010, full en-suite wetrooms.

**T13 Existing elderly care bed supply by year of first registration (GB)**

| Year              | Care homes | Total registered beds | % of total beds by age banding |
|-------------------|------------|-----------------------|--------------------------------|
| 2020s (2020–)     | 584        | 37,550                | 8.4                            |
| 2010s (2015–2019) | 541        | 32,803                | 7.4                            |
| 2010s (2010–2014) | 595        | 35,067                | 7.9                            |
| 2000s             | 944        | 54,079                | 12.1                           |
| 1990s             | 3,391      | 154,232               | 34.6                           |
| Pre 1990s/unknown | 3,883      | 132,420               | 29.7                           |
| Total             | 9,938      | 446,151               | 100                            |

Source: subscribed data sources, Carterwood – updated December 2025

7.3 T14 provides the current supply of registered bedrooms by en-suite (our definition of 'minimum market standard') and those that provide full en-suite wetrooms. Across Great Britain, an average of 79.4 per cent of care home bedrooms include an en-suite and 35.5 per cent include a full wetroom en-suite.

**T14 Market segmentation (GB)**

| Care category                                | No of care homes | Total registered beds | % en-suite bedrooms | % wetroom bedrooms |
|----------------------------------------------|------------------|-----------------------|---------------------|--------------------|
| Total market – all homes and care categories |                  |                       |                     |                    |
| Personal care                                | 5,704            | 210,633               | 75.1                | 30.9               |
| Nursing care                                 | 4,234            | 235,518               | 83.2                | 39.5               |
| Overall                                      | 9,938            | 446,151               | 79.4                | 35.5               |
| Specialist dementia provision only           |                  |                       |                     |                    |
| Dementia homes                               | 924              | 37,952                | 73.9                | 26.6               |
| Dementia units                               | 2,575            | 67,858                | 88.8                | 52.5               |
| Overall                                      | 3,499            | 105,810               | 83.5                | 43.2               |

7.4 The GB averages are slightly higher for dedicated dementia care homes and those that incorporate a specialist dementia unit, with 83.5 per cent of bedrooms having an en-suite and 43.2 per cent of bedrooms having a full en-suite wetroom.

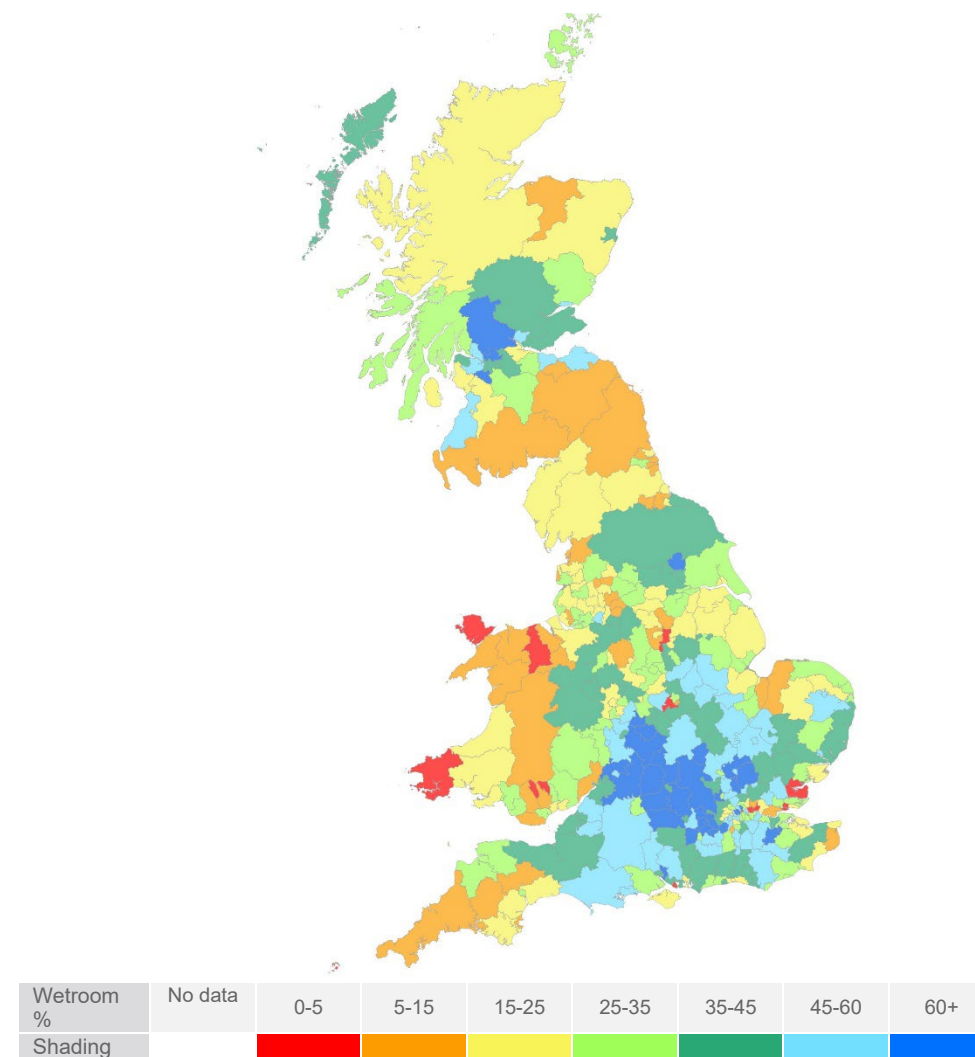


Figure 5: Percentage of elderly beds with en-suite wetroom by GB local authority (April 2025)

## 8. Key points regarding the care home sector

8.1 The December 2023 revision to the National Planning Policy Framework (NPPF) expanded upon the previous assessment of housing needed for older people (by 'size, type and tenure'), by breaking down the established need between three specific types: 'retirement housing, housing-with-care and care homes' (para 63). It was unchanged in the December 2024 revision and is also included in the draft NPPF for consultation, dated December 2025 (Section 6, 'Delivering a sufficient supply of homes'). This should assist in bringing forward new provision for each form of specialist housing for older people.

8.2 Key issues for the care home sector include:

- **Rising dependency and complex care needs**, requiring modern, adaptable accommodation to support safe delivery of care with privacy and dignity;
- **Outdated and converted care home stock**, which may be unsuitable for modern standards and difficult to reconfigure or upgrade;
- **Financial viability pressures**, particularly for smaller homes that cannot achieve economies of scale and are more exposed to rising costs;
- **Growing demand for dementia-capable provision**, reflecting the increasing prevalence of dementia among older people;
- **Increasing pressure on health and care systems**, including impacts on NHS capacity and long-term social care funding responsibilities;
- **Workforce and operating cost pressures**, driven by Brexit-related labour impacts, wage increases and higher employer national insurance contributions;
- **Continuing legacy impacts of COVID-19**, affecting occupancy, resilience, infection control expectations and staffing.

8.3 It is now 25 years since the Department of Health published the National Minimum Standards under the Care Standards Act 2000, which introduced environmental requirements for new care homes, including single occupancy bedrooms of at least 12 sq m and en-suite facilities (at minimum a WC and wash hand basin). Although the detailed requirements were amended following opposition from operators and applied only to new developments from 2002, they nonetheless established an important benchmark for improved spatial and environmental care home quality.

8.4 Over the past two decades, the design of care home bedrooms has progressed significantly, driven by changes in regulation, increasing acuity of need, and a stronger focus on resident dignity, privacy and quality of life. By the 2010s, new-build homes were typically providing bedrooms of around 14–16 sq m, often with compact en-suite wetrooms incorporating level-access showers, and this trajectory has continued, with contemporary schemes increasingly delivering more generous room sizes to better support safe care delivery while also improving comfort and the overall resident experience.



Figure 6: Evolution of care home bedrooms since the early 2000s (Not to scale)

8.5 Operators of some older, pre-existing care homes have sought to remain viable by reconfiguring layouts, upgrading facilities or extending buildings where feasible, while many obsolete homes have closed entirely. However, the full extent of capacity lost is not clearly understood, including the number of registered beds no longer operational or fit for modern care delivery. This is increasingly important as local authorities promote housing-with-care and domiciliary care for lower-dependency residents, meaning the remaining care home stock must support a higher proportion of people with complex needs. For further detail see Appendix B.

8.6 The Covid-19 pandemic highlighted the importance of purpose-designed bedrooms that provide a safe, infection-controlled environment for residents with complex needs. Evidence from the Less Covid-19 study showed that self-contained "zones" within care homes helped limit transmission, influencing more flexible layouts based on smaller resident clusters and a range of dayrooms. The ability for residents to self-isolate in their own bedroom with a properly sized wetroom en-suite is now central to delivering accommodation that is both future-proof and appealing to those who need full-time care.

8.7 In appeal decisions since the Covid-19 pandemic, the quality and suitability of care home accommodation has taken on greater weight when assessing the need for additional bedspaces. For example, in relation to a proposed care home in Girton,

Cambridge, the assessment of existing supply distinguished between the maximum number of CQC-registered bedspaces and the number of beds that were actually available for use, and a 'market standard' approach was considered to be accepted as market practice.

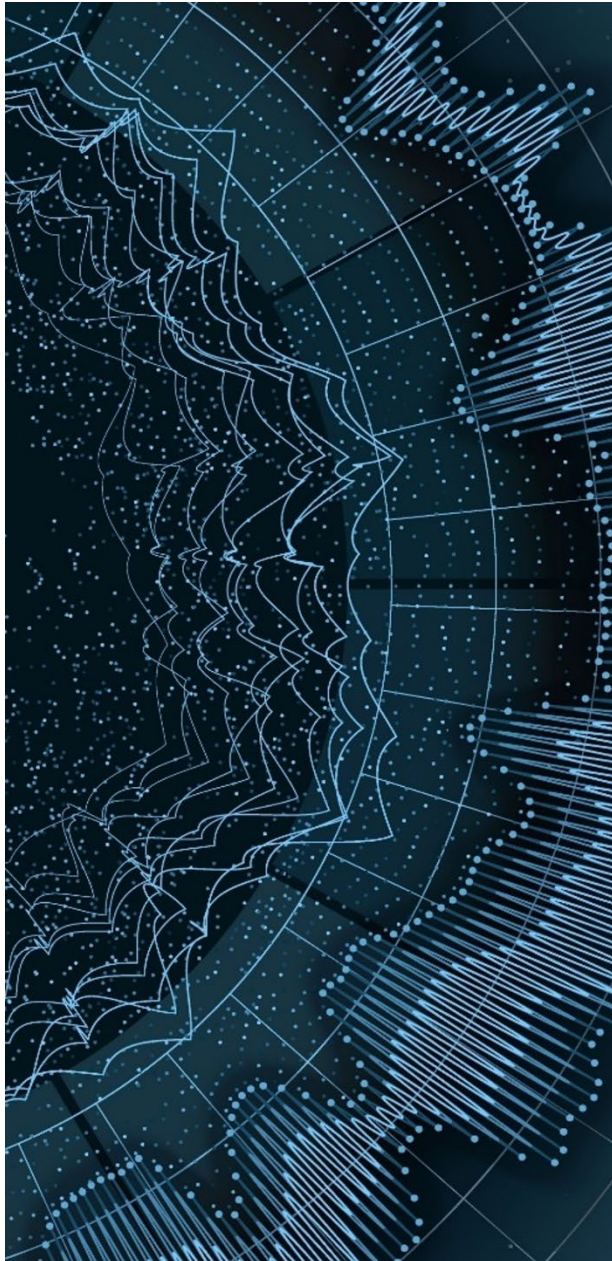
- 8.8 The appeal decision for a proposed care home in Cheltenham stated: *'I acknowledge the responsibility of local authorities under the Care Act (2014) to ensure the wellbeing of residents in need of care and support services. I also acknowledge that Government support is given to the home first approach. However, it is not the role of the planning system to manage the care home market. The proposal would accord with processes of redevelopment and renewal which have been taking place within the care sector as part of an open market economy, as new purpose-built care homes replace older, outdated stock, in line with modern standards and expectations and the quality of care homes is improved'.*
- 8.9 The Inspector also considered care bed need in terms of funding (means tested state funded when capital is below £23,250, otherwise care must be self-funded) advising that *'Moreover, and noting austerity issues within the public sector, I find that the proposed standard of accommodation proposed (sic), including full ensuite wet rooms would reasonably be attractive to self-funding residents of the appeal scheme who, in addition to considering proximity to family and friends, would take account of the quality of care and accommodation in making their choice of accommodation, rather than the objectives of the commissioning authority'.*
- 8.10 Providing a range of housing and care options is essential to help older people meet changing needs in accommodation best suited to them, while also reducing costs to social care and health systems. The Government's Older People's Housing Taskforce final report (November 2024) recommends optimising all forms of older people's housing, including care homes, and acknowledges their vital role in supporting some of the most vulnerable people, including those with advanced dementia and those at end of life.
- 8.11 The House of Commons Health and Social Care Committee's (HSCC) June 2023 report warned that adult social care in England was in crisis and the failure to deliver reform since 2021 had left local authorities financially exposed, providers under pressure and unmet need rising. It called for a Fair Pay Agreement, a 10-year funding settlement, investment in digital care and a national workforce plan. The Government's response in July 2025 broadly accepted these concerns and confirmed £3.7bn additional council funding, a legislated Fair Pay Agreement and over £4bn investment by 2028–29, alongside proposals for neighbourhood health and care models, home-first delivery and personal budgets. It also established the independent Casey Commission to develop longer-term reform (initial report 2026, final report 2028), though the response stopped short of structural reform or a long-term settlement.
- 8.12 In September 2025, the Government launched a consultation on a Fair Pay Agreement (FPA) for adult social care in England, intended to set minimum pay and

conditions, with proposed implementation in 2028. Presented as an early step towards a "national care service", the FPA represents a significant policy shift with implications for commissioning, fee levels and workforce planning. For care providers, it signals progress on workforce recognition, but funding certainty, market sustainability and system resilience remain unresolved pending the Casey Commission's 2026 and 2028 reports.

- 8.13 As set out in PPG *'Where there is an identified unmet need for specialist housing, local authorities should take a positive approach to schemes that propose to address this need'.* Older people who are in need of care cannot afford to wait until appropriate levels of provision become available. The urgency of need for care homes was identified as an issue at the appeal for a new care home in Harpenden where the inspector observed *'Elderly people requiring care home accommodation are less able to wait than those in the general population needing accommodation because their needs are immediate. Accordingly, there is an urgency in meeting this unmet need and for all these reasons, significant weight is given to these housing and people care benefits'.*

#### Key findings – national context

- Great Britain's elderly population is set to grow dramatically over the coming years, continuing to drive demand for housing for older people. Planning policy sets out that there is a *'critical'* need for all forms of housing for older people, including care home beds.
- The NPPF has strengthened its approach to older people's housing by requiring the identification of need across retirement housing, housing-with-care and care homes to assist the development of new provision.
- The increasing dependency of those moving to a care home mean that accommodation must be fit for purpose and flexible, to enable care to be provided effectively and safely. Modern schemes increasingly provide larger bedrooms with en-suite wetrooms, flexible layouts and the ability for residents to self-isolate.
- The care home sector faces multiple challenges in meeting projected demand for high-dependency beds, including the need to improve accommodation quality, achieve economies of scale, respond to rising market expectations, secure sustainable funding and recruit/retain staff.
- Appeal decisions have recognised a 'market standard' approach that distinguishes between registered care beds and those that are realistically suitable and available. One appeal decision confirmed that planning is not intended to manage the care home market, but should support redevelopment and renewal to replace outdated stock with modern, purpose-built provision. Another emphasised the urgency of need, noting that people requiring care home accommodation cannot wait, and that PPG expects local authorities to take a positive approach where unmet need is identified.



Key findings

Background and the proposal

National context and key definitions

## **Commissioning enquiries**

Commissioning and local authority review

Need assessment – local market quantitative and qualitative assessment

Data tables and map

Appendices

## 9. Commissioning and local authority review

9.1 The subject site is situated within the Wiltshire Council area, which is also the Adult Social Care Commissioning Authority. We have therefore conducted a review of the following documentation:

- *Older Adults Market Position Statement. 2023.* Wiltshire Council
- *Wiltshire Dementia Strategy 2023 to 2028.* Wiltshire Council. (online)
- *Joint Strategic Needs Assessment (JSNA) 2025.* Wiltshire Council (online)
- *Wiltshire Local Housing Needs Assessment Update Vol 2 (2023)* ORS on behalf of Wiltshire Council.

9.2 We have provided, verbatim, relevant extracts from the above documents in relation to elderly care below, together with our review

9.3 We would be happy to discuss the proposed care home scheme with Wiltshire Council's adult social care team as part of the planning application process, if and when required.

### Older Adults Market Position Statement (2023)

9.4 *'We will support older adults to maintain their independence. Older adults tell us that they wish to remain in their own homes where possible to maintain their independence. Wiltshire Council has committed to increasing the number of people able to remain living at home and reducing the total number of people who are permanently admitted to care homes.'* (page 5)

9.5 *'We will ensure that residential and nursing care is a positive choice for people with more long-term complex needs.'* (page 5)

9.6 *'Wiltshire Council has commissioned block home care provision in the North, South and West of Wiltshire to directly meet urgent hospital discharge demand.'* (page 7)

9.7 *'New Census data released in 2022 shows that 510,400 people lived in Wiltshire in 2021. This makes Wiltshire the ninth largest local authority in England by population size, but the eleventh lowest by population density. Wiltshire's population has increased by 8.4% since the last Census in 2011 - a higher rate of increase than the overall rate of increase in England (6.6%).'* (page 10)

9.8 *'In line with the national picture, Wiltshire's population is getting older. The number of people aged 50 to 64 years rose by around 15,800 (an increase of 17.0%), while the number of residents between 35 and 49 years fell by around 9,700 (9.4% decrease).'* (page 10)

9.9 *'21.8% of people are aged 65 and over (compared to 18.4% in England), with 3% aged 85 and over. Overall, in England, there has been an increase of 20.1% in people aged 65 years and over between 2011 and 2021; by contrast, in Wiltshire*

*there has been an increase of 30.5% in people aged 65 and over. Wiltshire is one of only three local authorities in the Southwest whose 65+ population has increased by more than 30%. (page 10)*

9.10 *'Our 65+ population currently represents just over a fifth of Wiltshire's population, but by 2040 this age group will make up nearly a third of the total population. Between 2021 and 2040:*

- *65+ population is expected to grow by 43%*
- *Under 65 population is expected to decrease by 3%*
- *85+ population is expected to grow by 87% (page 11)*

9.11 *'The map below shows the concentration of older adults across Wiltshire.'* (pg 12)

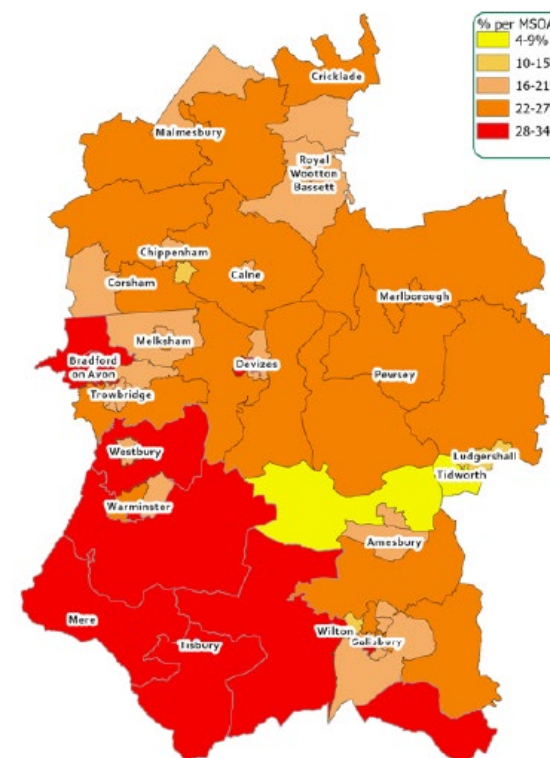


Figure 7: Population of Wiltshire Residents aged 65+ per Middle Super Output Area (MSOA)

- 9.12 'The table below details the forecasted population increases by age band in Wiltshire. Whilst these figures are based on pre-2021 Census data, we are confident in its forecast that the overall older population of Wiltshire will grow by around 25% in the next ten years, and around 45% in the next 20 years. Given that people receiving adult social care are often aged 85+, we need to plan for a 30% increase in the size of this group in the next 10 years, and a 110% increase in the next 20 years. (page 16)

|                              | 2020    | 2025    | 2030    | 2035    | 2040    |
|------------------------------|---------|---------|---------|---------|---------|
| People aged 65-69            | 28,500  | 31,700  | 37,200  | 38,100  | 35,700  |
| People aged 70-74            | 29,700  | 27,600  | 30,700  | 36,100  | 37,100  |
| People aged 75-79            | 21,600  | 27,300  | 25,500  | 28,500  | 33,700  |
| People aged 80-84            | 15,000  | 18,200  | 23,100  | 21,800  | 24,600  |
| People aged 85-89            | 9,500   | 10,900  | 13,300  | 17,100  | 16,400  |
| People aged 90 and over      | 5,700   | 6,400   | 7,400   | 9,200   | 12,000  |
| Total population 65 and over | 110,000 | 122,100 | 137,200 | 150,800 | 159,500 |

Figure 8: Forecast population increases by age band in Wiltshire (Source: POPPI)

- 9.13 'The London School of Economics and Political Science estimates that there are currently 7,900 people living with dementia aged 65 and over in Wiltshire. This is set to increase almost 11,500 by 2030, driven primarily by increased life expectancy' (page 17)
- 9.14 'This means the main role of residential and nursing care is now to support people who can no longer live safely in their own home and/or have complex nursing and specialist needs. We expect the care home market to adapt to changing needs (e.g., training and development of staff and adapting the physical environment), and we will work with care homes to develop new models e.g., in-reach into people's homes.' (page 20)
- 9.15 'We have generally seen increased demand for home care and reduced demand for residential and nursing care because of COVID-19 – and we predict this will continue, especially if we face successive waves of the pandemic.' (Page 25)
- 9.16 'Of 165 homes, 46 care homes include nursing provision and the remaining 119 care homes are without nursing. In terms of beds provided in the same month there were 2,489 beds in care homes with nursing (please note that not all of these

will be nursing beds), and 2,219 beds in care homes without nursing. This is a total of 4,708 beds in Wiltshire in Oct 2022. For comparison purposes this is the equivalent of 905.54 beds per 10,000 people aged 75 and over. The graph below shows how Wiltshire's care home bed capacity compares with other English unitary authorities.' (page 34)

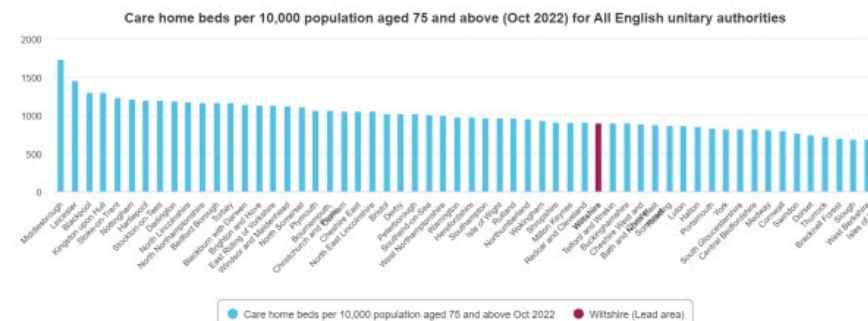


Figure 9: Care home beds per 10,000 population aged 75 and above (Oct 2022) for all English unitary authorities

- 9.17 'In terms of quality, Wiltshire's care homes compare unfavourably to CQC ratings nationally and regionally. The table below [not shown] shows that Wiltshire has a lower percentage of care homes and beds that are good or outstanding than the England and regional averages. This is especially the case for nursing care beds.' (page 35)
- 9.18 'Wiltshire's care homes vary in size. 63 care homes (38.2%) have fewer than 10 beds, 77 care homes (46.7%) have 10-60 beds, and 25 care homes (38.2%) have more than 60 beds.' (page 36)
- 9.19 'About 35% of older people's care home beds in Wiltshire are occupied by people funded by Wiltshire Council. The remaining 65% are purchased by self-funders, other councils or the NHS. The Council has found it increasingly difficult to find appropriate care homes for older people with more complex needs, due either to a lack of appropriately trained staff or unsuitable care home environments. 29 older adults are currently placed in out of county residential or nursing care.' (page 36)
- Dementia Strategy 2023 to 2028 (Online)**
- 9.20 'This strategy builds on the 2014 Wiltshire Dementia Strategy, whose aim was that all people with dementia and their carers and families in Wiltshire are treated as individuals and can access the right information, care and support at the right time so that they can live well with dementia within supportive and understanding communities.'

- 9.21 'The likelihood of developing dementia doubles every five years after a person's 65th birthday. However, dementia does not only affect older people (research suggests that around 5% of people living dementia are under 65). It is not a natural part of ageing.'
- 9.22 'There are approximately 8,300 people living with dementia in Wiltshire, although not all these people will have a diagnosis. Based on the prevalence of dementia by age and the recent 2021 Census date, we can accurately predict that around 5,200 women (62.7%) and 3,100 men (37.3%) in Wiltshire have dementia. Approximately 300 people with dementia in Wiltshire are under 65; around 1,900 are aged 90 and over. This reflects the increasing risk of dementia as people get older.'
- 9.23 'Many people feel that being able to stay living in their own home is the best way to maintain dignity and wellbeing, although this is not the case for everyone. This section outlines how we need to provide excellent care and support in all care environments, whether the person's own home, a care home, hospice, or in hospital.'
- 9.24 'The number of people living with dementia has increased by around 25% since Wiltshire's last Dementia Strategy was published in 2014, and the number of people with advanced dementia has increased at an even faster rate. To reflect these changes, Wiltshire Council will publish a clear commissioning framework which sets out its expectations of home care, extra care housing, residential and nursing care and other providers, and provides clarity around the training and skills that care professionals need to have. This will include work that began in 2023 to develop a menu of housing, accommodation and care options for older people in Wiltshire.'

### Joint Strategic Needs Assessment 2025 (Online)

- 9.25 'In 2024, 61.7% of people aged 65 and over with dementia in Wiltshire are estimated to have a diagnosis, equivalent to around 4,900 people. This infers that there are in the region of an estimated 3,000 people in older age groups in the county that are undiagnosed. Estimated dementia diagnosis levels for persons over the age of 65 in Wiltshire has remained relatively stable between 2021 - 2024, slightly higher than the South West region, but slightly lower than those estimated nationally.'
- 9.26 'By 2045, the population of Wiltshire is estimated to rise by 11%, to 581,308 persons. This increase, however, will not be uniform across all age groups. The proportion of persons aged 30 years and under is forecast to decline, whilst, conversely the proportion of persons in older age groups is predicted to increase. The ageing population in Wiltshire presents a unique range of challenges and opportunities in terms of service delivery across the county.'

- 9.27 'By 2045, the population aged over 65 years in Wiltshire is forecast to rise by 39% compared with 35% in the South West and 32% in England. The population aged over 85 years in Wiltshire meanwhile, is predicted to double (an increase of just over 100%). This is again higher than proportional increases for this age group anticipated in the South West (88%) and across England (75%).'
- 9.28 'The number of people aged 65 years and over in Wiltshire is expected to increase by around 47,500 persons over the next 20 years. Wiltshire's population aged over 85 years however, is expected to double. This represents an increase of just over 17,000 persons within this age range.'

### Local Housing Needs Assessment (2023)

- 9.29 'The figures also contain market needs which represents the need for Use Class C2 bedspaces, such as care homes, converted to dwellings. The Class C2 figure is outlined in Figure 39 [shown below], which considers the projected growth in those in Class C2 in the population and household projections. It is important to note that we are not assuming that the equivalent of 1,469 dwellings in Wiltshire are delivered as Class C2 bedspaces. Instead, the population and household projections assume that older people and others who require Class C2 will move out of their homes, freeing up the equivalent of 1,469 dwellings. If these moves do not occur because Class C2 bedspaces are not provided, then 1,469 more Class C3 dwellings will be required. If new Class C2 bedspaces are delivered they can be counted at a ratio of 1.8 bedspaces equals 1 dwelling in the LHN figures.' (page 42)

|              | Affordable Dwellings          |                                            |                                | Total Affordable Housing | Total Market Housing | Total Housing |
|--------------|-------------------------------|--------------------------------------------|--------------------------------|--------------------------|----------------------|---------------|
|              | Unable to afford market rents | Unable to afford market ownership          |                                |                          |                      |               |
|              |                               | Able to afford 50% but not 70% First Homes | Able to afford 70% First Homes |                          |                      |               |
| 1 bedroom    | 155                           | 69                                         | 236                            | 459                      | 1,111                | 1,571         |
| 2 bedrooms   | 2,739                         | 419                                        | 771                            | 3,929                    | 2,947                | 6,876         |
| 3 bedrooms   | 3,275                         | 579                                        | 991                            | 4,845                    | 13,328               | 18,173        |
| 4+ bedrooms  | 986                           | 203                                        | 321                            | 1,509                    | 6,061                | 7,570         |
| DWELLINGS    | 7,155                         | 1270                                       | 2318                           | 10,743                   | 23,446               | 34,189        |
| C2 Dwellings | -                             | -                                          | -                              | -                        | 1,469                | 1,469         |
| LHN          | 7,155                         | 1,270                                      | 2,318                          | 10,743                   | 24,915               | 35,658        |

Figure 10: Overall need for Market and Affordable Dwellings (including affordable home ownership products) by property size (Source: ORS Housing Model) [Fig 39]

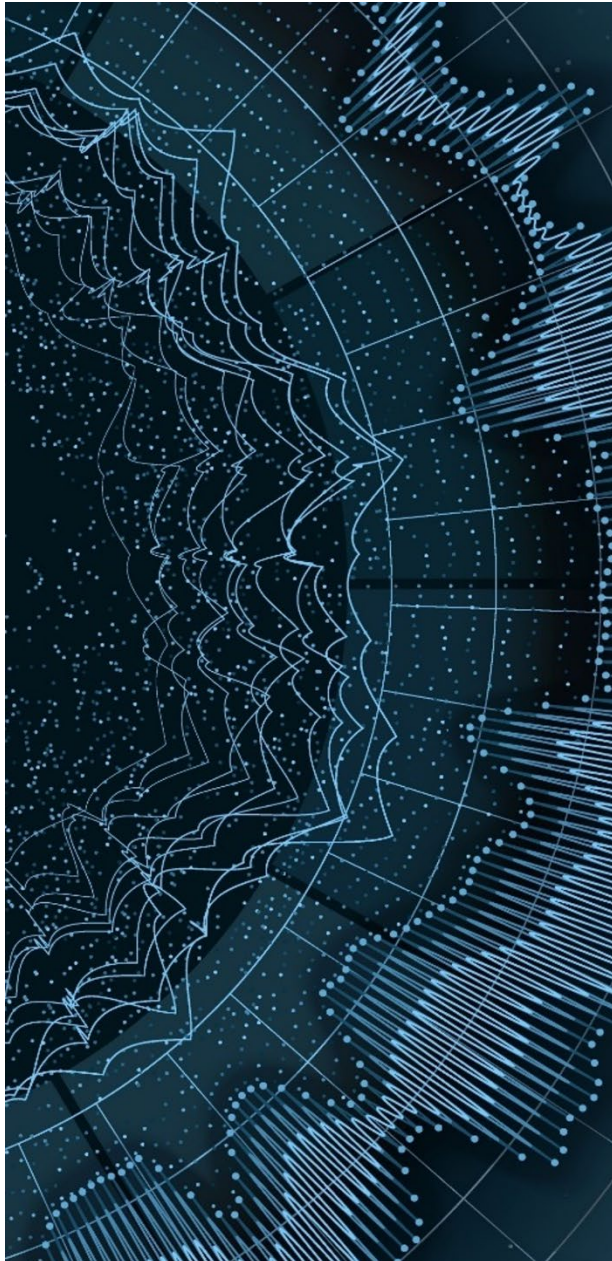
- 9.30 'The population projections underlying the Local Housing Need figure for Wiltshire show a substantial increase in the older population during the period 2021-2038. The population aged 75+ is likely to increase by around 32,920 persons based on providing the number of homes needed to meet the local housing need.' (page 46)

### Carterwood review

- 9.31 The above documentation is in line with councils' commissioning strategies across the country where local authorities are seeking to manage significantly increased demand for accommodation and care at a time of unprecedented financial austerity. By following a new model for state-funded adult care provision it effectively maintains or limits the cost of providing care by reducing the numbers of, and costs for, those who require such services.
- 9.32 The *Older Adults Market Position Statement (2023)* outlines the increasing demographic pressures of the older population in Wiltshire, with an expected 30.5 per cent growth in the 65+ age cohort, compared with a national average of 20.1 per cent. It is expected that by 2040, nearly a third of the Wiltshire population will be aged 65 and over, with those aged 85 and over expected to grow by 87 per cent. In addition, the number of people aged 65 and over living with dementia, currently estimated at 7,900, is projected to rise to almost 11,500 by 2030.
- 9.33 In the context of this demographic change, the *Market Position Statement* sets out the council's commitment to support people to live in their own homes for as long as possible. However, the strategy recognises that *'the main role of residential and nursing care is now to support people who can no longer live safely in their own home and/or have complex nursing and specialist needs'* with residential and nursing care remaining *'a positive choice for people with more long-term complex needs'*. The council has *'found it increasingly difficult to find appropriate care homes for older people with more complex needs'* and it notes that care homes in Wiltshire have a low CQC performance compared with regional and national ratings.
- 9.34 The *Dementia Strategy (2023 to 2028)* states that *'the likelihood of developing dementia doubles every five years after a person's 65th birthday'*. On the basis of the projected growth in the over 65 and over 85 cohorts, and the recorded increase in dementia and advanced dementia since 2014, the strategy identifies a sustained and increasing requirement for appropriately resourced and skilled dementia care, including specialist residential and nursing care homes in Wiltshire.
- 9.35 The current *Joint Strategic Needs Assessment* reaffirms the projected demographic pressures from those aged 65 and over, forecasting a 39 per cent increase in those aged 65+, with those aged 85 and over expected to double by 2045, both exceeding regional and national averages and equating to an additional 47,500 people over 65. The JSNA also outlines that roughly only two thirds of those with dementia have received a diagnosis, leaving around 3,000 older people potentially undiagnosed.
- 9.36 The *Local Housing Needs Assessment (2023)* identifies a significant future need for C2 care beds in the Wiltshire Council area between 2020 and 2038. It sets out that the equivalent of 1,469 dwellings should be delivered as Use Class C2 (on the basis of a 1.8 ratio of care beds this would mean an extra 2,644 care beds), reflecting the expected growth in care-based accommodation to meet the need of the substantial increase in the older population during the period 2021-2038.
- 9.37 It should be remembered that Wiltshire Council is only funding a proportion of those living within care homes that provide residential and dementia care, and therefore the strategic comments with regard to local authority-funded beds made within the commissioning documentation relate to that proportion of the local population only. A significant number of those who would occupy the proposed care home would be self-funded and would make their own decision (sometimes with input or by proxy by their family ) as to when to enter a care home setting. These numbers will continue to grow. The quality of care and accommodation, along with its location and proximity to family and friends in the local community will therefore be the major drivers of this decision-making process, rather than solely the commissioning intentions of the local authority.
- 9.38 The documents set out above clearly identify how the demographic pressure of an ageing population will manifest over the coming decade. Those who move into care homes are increasingly likely to have high-level needs or require step-down care. Well specified, spacious, infection control-compliant, flexible care accommodation is necessary to enable care to be administered most effectively. The proposed purpose-designed care home would offer much-needed high dependency care.

#### Key findings – commissioning review

- Wiltshire Council's social care strategy seeks to support people to live independently wherever possible, while ensuring those requiring more intensive support can access appropriate services, including care within a registered care home.
- The *Market Position Statement (2023)* identifies significant growth in Wiltshire's older population, with the 65+ cohort increasing above the national average and those aged 85+ projected to rise substantially. It confirms that, whilst supporting independence at home remains a priority, residential and nursing care will continue to play a vital role for people with complex and specialist needs, and highlights existing challenges in securing appropriate, high quality placements.
- The *Dementia Strategy 2023 to 2028* highlights the increase in dementia and advanced dementia and identifies the need for a sustained and appropriately skilled response across all care settings, including specialist residential and nursing provision, to meet growing and increasingly complex demand. The *Joint Strategic Needs Assessment* notes that a proportion of people with dementia remain undiagnosed, reinforcing the scale of future need and the requirement for forward planning of appropriate care accommodation.
- The *Local Housing Needs Assessment 2023* reinforces this position by identifying a significant requirement for Class C2 accommodation between 2020 and 2038, including the equivalent of an extra 1,469 dwellings in Wiltshire (approximately 2,644 care beds). These projections assume sufficient delivery of care bedspaces and highlight the role of specialist accommodation in meeting future housing and care needs.



Executive summary

Background and the proposal

National context and key definitions

Commissioning enquiries

## **Need assessment – local market quantitative and qualitative assessment**

Methodology and catchment area assessment

Gross need

Additional demand for the NHS

Supply

Balance of provision

Need growth

Data tables and map

Appendices

## 10. Methodology and catchment area assessment

- 10.1 Full details regarding our care home bedroom need methodology, including an explanation of the use of 'full' and 'minimum' market standard' beds are set out in Appendix B.
- 10.2 We have undertaken our quantitative assessment of need for the proposed care home on two bases: firstly, a market catchment area, and secondly, the area covered by Wiltshire Council, as shown on the map opposite.
- 10.3 We have previously analysed resident data provided by a number of private operators of high-quality operational care homes, akin to that proposed. From this information, we have calculated the mean distance travelled by each resident into their respective care home. The headline results are provided below.

**T15 Average distance travelled to a care home**

| Comparable location                               | Average distance travelled by resident (miles) |
|---------------------------------------------------|------------------------------------------------|
| Location 1: Rural location                        | 5.7                                            |
| Location 2: Rural location with good A-road links | 5.4                                            |
| Location 3: Urban location                        | 4.3                                            |
| Overall average                                   | 5.1                                            |

Source: Carterwood

- 10.4 The subject site is located to the south east of Bradford-on-Avon. It accords most closely with Location 2 above and we have therefore adopted a circa-5-mile market catchment, as shown opposite shaded light blue.
- 10.5 The exact perimeter of the catchment is explained by the use of the Census 2021-defined 'output areas' for our analysis of the catchment population. There are approximately 189,000 'output areas' across England and Wales, which form the base unit for all census data and enable a granular level of analysis. They vary considerably in size and shape, covering small areas in urban districts and much larger areas in rural communities due to the fact that all have to include circa 300 people of similar housing types/tenures. The catchment will therefore always be based on a nearest match to the output area data and it is not possible to use a perfect radius around a site or specific catchment, as no data fits perfectly.
- 10.6 All care homes will also inevitably draw service users in some instances from substantially further than a typical catchment. If the family is the key decision maker in the placement decision then sometimes the service user may move significant distances, which can distort catchment area analysis. Conversely, if the local authority is the key decision maker then the service user's choice can be highly constrained to vacant beds in affordable homes.

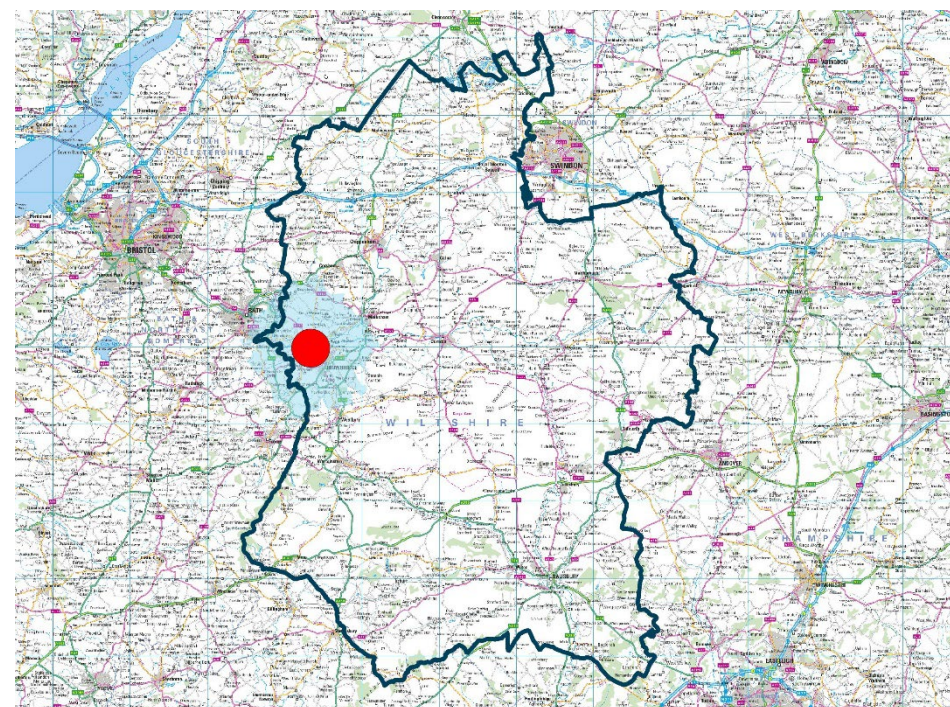


Figure 11: Basis of assessment

The red spot shows the approximate location of the site. The blue shaded area illustrates the market catchment and the dark blue line illustrates the boundary of the Wiltshire Council area

## 11. Gross need

### Population profile

- 11.1 We have summarised the elderly population profile in T16, opposite. The market catchment is characterised by a higher-than-average elderly population compared to Great Britain. The Wiltshire Council area is also characterised by a higher than average elderly population profile when compared to Great Britain.

### Projected increase in gross need

- 11.2 We have utilised the most up-to-date '2022-based' ONS population growth rates applied to 2021 Census data for people aged 65+ (in 5 year age bands) to show the projected increase in gross need over the 18 years between 2026 and 2044. The increase in gross need in the market catchment and local authority area is significantly above the average for Great Britain to 2044.

- 11.3 Between 2026 and 2044 gross need is expected to rise by c.70 and 73 per cent in the market catchment and Wiltshire Council area, respectively, assuming all other things remain equal, indicating an increased requirement for additional care home beds.

### Gross need – total market

- 11.4 We adopt Market Prevalence Rates (MPR), a tool to predict the risk of a person aged 65+ being in a care home at a given age (See Appendix B) to assess the 'total market' need for care home bedrooms (with and without nursing, as there is no industry-recognised method of differentiating between the need for either form). Table T18 shows the number of people aged 65+ that are at risk of requiring care in a residential setting as at 2029, the earliest the proposed care home could be made available. Our assessment of gross need is therefore 653 and 3,766 care home bedspaces within the market catchment and Wiltshire Council local authority area, respectively.

### Gross need – specialist dementia

- 11.5 Our need analysis is based upon LaingBuisson's 2020 adjustment to the 2012 Centre for Policy for Ageing survey regarding risk of admission with dementia, which indicates that 41.3 per cent of residents were admitted to a care home with dementia as the prevailing cause on a national basis. (See Appendix B).
- 11.6 Utilising this prevalence rate, adjusted for regional prevalence, we have calculated the gross need in the market catchment and local authority area from residents with dementia as a primary cause of admission as a subset of total market beds, as shown opposite in Table T19. Best practice states that people living with dementia should be cared for within a specialist, dedicated dementia environment. The number of people that are at risk of requiring dedicated dementia care as at 2029 is 273 within the market catchment and 1,574 within the local authority area.

**T16 Elderly population profile (2029)**

| Age profile    | Market catchment |      | Local authority |      | Differential to GB % |      |
|----------------|------------------|------|-----------------|------|----------------------|------|
|                | Number           | %    | Number          | %    | Market               | LA   |
| All population | 94,713           | -    | 538,985         | -    | -                    | -    |
| Age 65+        | 24,043           | 25.4 | 136,408         | 25.3 | +4.8                 | +4.8 |
| Age 75+        | 12,340           | 13.0 | 69,891          | 13.0 | +3.0                 | +2.9 |
| Age 85+        | 3,581            | 3.8  | 20,402          | 3.8  | +1.0                 | +1.0 |

**T17 Projected increase in gross need for care beds based on population (65+) growth**

| Increase in gross need based on 65+ population growth by 5 year age band (%) | Year             | Market catchment | Comparison to GB average | Local authority | Comparison to GB average |
|------------------------------------------------------------------------------|------------------|------------------|--------------------------|-----------------|--------------------------|
|                                                                              | 2029 (from 2026) | 12.0             | +2.7                     | 12.3            | +3.0                     |
|                                                                              | 2034             | 34.4             | +8.2                     | 35.2            | +9.0                     |
|                                                                              | 2039             | 56.5             | +12.9                    | 58.7            | +15.1                    |
|                                                                              | 2044             | 70.1             | +15.2                    | 72.8            | +17.9                    |

**T18 Gross need (2029) – total market**

| Age range           | Market catchment | Local authority |
|---------------------|------------------|-----------------|
| 65–74 years         | 74               | 417             |
| 75–84 years         | 175              | 997             |
| 85 years +          | 404              | 2,352           |
| Need – total market | 653              | 3,766           |

**T19 Gross need (2029) – specialist dementia**

| Age range                  | Market catchment | Local authority |
|----------------------------|------------------|-----------------|
| 65–74 years                | 31               | 174             |
| 75–84 years                | 73               | 417             |
| 85 years +                 | 169              | 983             |
| Need – specialist dementia | 273              | 1,574           |

## 12. Additional demand from the NHS

### Delayed discharges- NHS Bath and North East Somerset, Swindon and Wiltshire Integrated Care Board (ICB)

- 12.1 Another indicator of need for elderly care home beds is derived from assessing NHS data for people who remain in hospital who 'no longer meet the criteria to reside', which provides some insight into the availability of options for those who are ready to be discharged.
- 12.2 Transferring appropriate placements from the NHS to social care is critical due to cost savings – NHS beds cost significantly more to provide than care home beds – and effective utilisation of NHS beds is paramount for critical illnesses where care cannot be delivered elsewhere.
- 12.3 Research by the King's Fund<sup>1</sup> confirms the pandemic has had a significant impact on the availability and use of hospital beds. Incentives to moderate demand often struggle to succeed, with progress dependent upon sufficient capacity being available outside hospital to provide appropriate care.
- 12.4 Post pandemic NHS data includes all those awaiting discharge from hospital rather than only those specifically awaiting a care home bed.. Nevertheless, as shown in Figure 12, this still highlights a failing of the health and social care system in Bath and North East Somerset, Swindon and Wiltshire when compared with the average for England. If the system were functioning with zero delayed discharge through more effective use of care home beds, this would reduce reliance on the NHS.
- 12.5 The CQC<sup>2</sup> advise that waits for care home beds and home-based care accounted for 45% of delays in discharging people who had been in an

acute hospital for 14 days or more, with nearly 4,000 people delayed on an average day in England.

- 12.6 Greater clarity is needed from the NHS in terms of future expectations for health and care bed capacity.

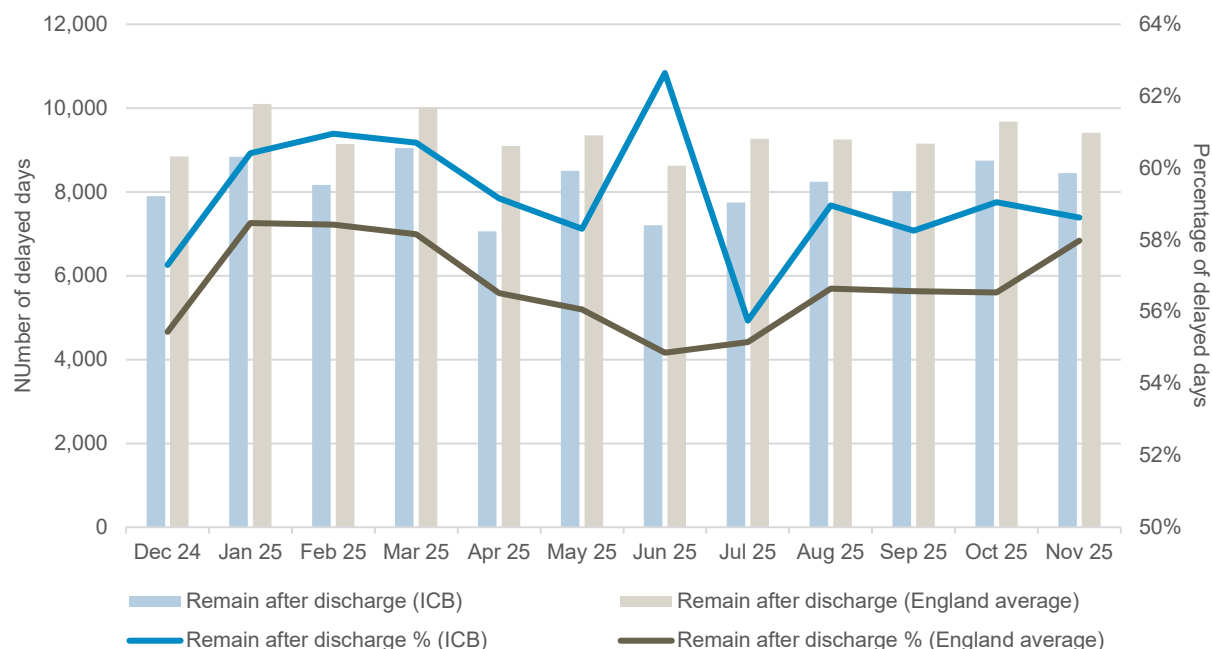


Figure 12: Delayed discharge days awaiting non-acute NHS care - NHS Bath and North East Somerset, Swindon and Wiltshire ICB

<sup>1</sup> Ward, D et al (2017 – updated 2021) *NHS Hospital bed numbers*

<sup>2</sup> The state of health care and adult social care in England 2023/24. The Care Quality Commission (CQC) 2024.

## 13. Supply

### Existing supply

- 13.1 We have assessed supply based upon minimum market standard bedspaces, which we define as any registered bedroom providing a minimum of an en-suite WC and wash-hand basin (See Appendix B).
- 13.2 Within the market catchment, there are 7 care homes, which provide 330 registered bedspaces, 91 per cent of which are equipped with an en-suite, meeting the criteria of 'minimum market standard'. Within the local authority area, there are 89 care homes, which provide 4,348 registered bedspaces, 81 per cent of which are equipped with an en-suite, meeting the criteria of 'minimum market standard'. These should be compared with a current GB average of 79.4 per cent.
- 13.3 In terms of bedrooms providing en-suite wetrooms, meeting the criteria of 'full market standard, 69 per cent of bedrooms in the market catchment and 57 per cent in the local authority area provide full en-suite wetrooms, which may be of the same size and specification as those proposed at the subject scheme. This compares with a GB average of 35.5 per cent.
- 13.4 A detailed list of existing supply is included in T28 on page 29 and its location is shown in Figure 14 on page 41.

### Planned supply

- 13.5 We have made enquiries with our planning databases and cross-checked planning applications for new elderly care home beds against the relevant local planning authority's online register for applications either submitted, granted, or where a planning decision has been appealed within the last 3 years. Our research was carried out on 19 January 2026.
- 13.6 While we endeavour to include all extant planning permissions beyond the 3-year timeframe, we check whether any applications older than 3 years have either been implemented (and are therefore included in current supply), for further activity on the planning register (i.e. a reserved matters or Lawful Development Certificate application) or for evidence of development on site.
- 13.7 We have identified 11 extant planning permissions for additional care home beds or beds providing specialist dedicated provision in the local authority area, of which two also fall within the market catchment. Details of planned supply and applications pending a decision are included in T29 on page 36 and T30 on page 39.
- 13.8 Our analysis assumes that all pipeline bedspaces with extant permission will be developed at our anticipated timeframe and it therefore potentially overestimates future supply given that a number of the proposed schemes in the planning system may never be delivered.

| T20 Existing supply (market catchment) |             |                 |                |                    |                 |                |
|----------------------------------------|-------------|-----------------|----------------|--------------------|-----------------|----------------|
| Care category                          | No of homes | Total reg. beds | Total en-suite | Total wetroom beds | % en-suite beds | % wetroom beds |
| Total market provision                 |             |                 |                |                    |                 |                |
| Overall                                | 7           | 330             | 301            | 228                | 91              | 69             |
| Specialist dementia provision          |             |                 |                |                    |                 |                |
| Dedicated dementia homes               | 2           | 42              | 22             | 18                 | 52              | 43             |
| Dedicated dementia units               | 3           | 94              | 94             | 94                 | 100             | 100            |
| Overall                                | 5           | 136             | 116            | 112                | 85              | 82             |

| T21 Existing supply (local authority catchment) |             |                 |                |                    |                 |                |
|-------------------------------------------------|-------------|-----------------|----------------|--------------------|-----------------|----------------|
| Care category                                   | No of homes | Total reg. beds | Total en-suite | Total wetroom beds | % en-suite beds | % wetroom beds |
| Total market provision                          |             |                 |                |                    |                 |                |
| Overall                                         | 89          | 4,348           | 3,537          | 2,482              | 81              | 57             |
| Specialist dementia provision                   |             |                 |                |                    |                 |                |
| Dedicated dementia homes                        | 6           | 157             | 95             | 18                 | 61              | 11             |
| Dedicated dementia units                        | 33          | 884             | 791            | 709                | 89              | 80             |
| Overall                                         | 39          | 1,041           | 886            | 727                | 85              | 70             |

| T22 Planned supply (with extant permission) by year of estimated completion |      |      |      |      |       |
|-----------------------------------------------------------------------------|------|------|------|------|-------|
| Supply                                                                      | 2026 | 2027 | 2028 | 2029 | 2030+ |
| Market catchment                                                            | 0    | 0    | 26   | 0    | 60    |
| Local authority                                                             | 20   | 306  | 26   | 70   | 60    |

| T23 Planned supply (with extant permission) for need assessment calculations (2029) |                  |                 |
|-------------------------------------------------------------------------------------|------------------|-----------------|
| Basis of assessment                                                                 | Market catchment | Local authority |
| Total market planned beds                                                           | 26               | 422             |
| Specialist dementia planned beds                                                    | 26               | 209             |

## 14. Balance of provision

- 14.1 We have calculated the gross need for care home beds as at 2029, the earliest the proposed care home could be made available, on the following catchments:
- market – a c 5-mile radius from the subject site;
  - local authority – the Wiltshire Council area.
- 14.2 Need is assessed for two forms of elderly care:
- all beds – all categories or ‘total market’ need
  - specialist dementia.
- 14.3 The specialist dementia care need assessment is a subset of the total market need for the provision of living environments that accord with best practice in caring for people with such needs.
- 14.4 We have assessed the existing supply element on two bases in order to illustrate the impact of stock quality and obsolescence:
- minimum market standard – only en-suite bedrooms;
  - full market standard – only bedrooms with full wetroom en-suites.
- 14.5 T25 provides our analysis of net need in 2029 on the basis that all care bedrooms provide full wetroom en-suites, all planned beds with extant permission are developed and available at our anticipated timeframe, and there is no change to existing supply. Our assessment indicates total market shortfalls of 454 and 1,177 en-suite wetroom bedrooms including shortfalls of 158 and 770 dedicated dementia en-suite wetroom beds in the market and local authority catchments, respectively.
- 14.6 Our analysis at more basic, minimum market standard level in T25 indicates there is a net need for 381 ‘all bed’ bedrooms in the market catchment and 122 in the local authority area. There are significant shortfalls of 154 and 611 dedicated dementia beds in the local authority area and market catchment, respectively, indicating a significant undersupply of this form of supply.

- 14.7 Net need on the basis of minimum market standard beds is expected to increase to 602 market standard beds in the market catchment and 1,746 in the local authority area by 2039, which reflects the sustained and escalating nature of need and the requirement for new provision.
- 14.8 Projected net need on the basis of full market standard bedrooms, akin to those proposed in the subject care home, is expected to increase to 675 in the market catchment and 2,801 in the local authority area by 2039 (including 256 and 1,454 dedicated dementia care beds in the two assessed areas, respectively), which reflects the requirement for the provision of care home bedrooms that meet fully with current market expectations.

### T24 Primary year for need analysis

|                            |      |                                                                    |
|----------------------------|------|--------------------------------------------------------------------|
| Primary year of assessment | 2029 | The earliest the subject scheme could be developed and operational |
|----------------------------|------|--------------------------------------------------------------------|

### T25 Need analysis summary (2029)

| Type of care                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | All beds         |                 | Specialist dementia only |                 |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------|-----------------|--------------------------|-----------------|
| Basis of assessment                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | Market catchment | Local authority | Market catchment         | Local authority |
| Gross need                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |                  |                 |                          |                 |
| All bed/specialist dementia need                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | 653              | 3,766           | 273                      | 1,574           |
| Occupancy capacity allowance                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | 55               | 315             | 23                       | 132             |
| Total gross need                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | 708              | 4,081           | 296                      | 1,706           |
| Supply                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                  |                 |                          |                 |
| Current elderly en-suites                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | 301              | 3,537           | 116                      | 886             |
| Current elderly wetrooms                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | 228              | 2,482           | 112                      | 727             |
| Extant planned beds (to 2029)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | 26               | 422             | 26                       | 209             |
| Total supply (en-suite)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | 327              | 3,959           | 142                      | 1,095           |
| Total supply (wetroom)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | 254              | 2,904           | 138                      | 936             |
| Net need                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                  |                 |                          |                 |
| En-suite bedrooms (minimum market standard)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | 381              | 122             | 154                      | 611             |
| Full wetroom en-suite bedrooms (full market standard)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | 454              | 1,177           | 158                      | 770             |
| Assumptions                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |                  |                 |                          |                 |
| <ul style="list-style-type: none"> <li>• Total market need based on ONS Census (2021) data projected to 2029 and Market Prevalence Rates (MPR).</li> <li>• Occupancy capacity allowance adjustment, being a function of occupancy and not registered capacity. We have adopted an ‘effective full capacity’ level of 92.3 per cent.</li> <li>• Planned supply based upon individual analysis of each scheme and assessment of likely potential development completion.</li> <li>• The need analysis excludes the subject scheme.</li> <li>• See Appendix B for full details of our need analysis above.</li> </ul> |                  |                 |                          |                 |

## 15. Need growth

- 15.1 As well as considering need based upon the earliest year the subject care home could be operational, we also assess the need growth over the decade from the year of assessment and beyond, having regard to potential regulatory and other requirements.
- 15.2 Nationally, the decline in care home bed prevalence rates seen in recent years, driven by growing demand for alternative models of care (including domiciliary care, live-in care and extra care), increased availability of these services, and the impact of the pandemic now appears to have stabilised. Across Great Britain, prevalence rates for care home beds recorded a net increase of 1.0% between 2025/2026, broadly consistent with the 1.2% increase seen between 2024/2025.
- 15.3 This stabilisation and now increase in prevalence should also be considered alongside the rapidly growing older population, which is expected to drive increased demand for care home beds over the coming years. This need may be further intensified by the potential loss of existing care homes, particularly where facilities become outdated, fall short of modern market expectations, or close for other operational reasons. Demand and supply will continue to be shaped by national and regional variables, as well as site-specific factors; however, the overall direction of travel points towards a strengthening requirement for additional, fit-for-purpose care home provision.
- 15.4 T26 illustrates our analysis of the projected net need for minimum market standard (en-suite) care beds and full market standard (wetroom) care beds, respectively, together with the need for dedicated dementia beds (as sub-sets of the above assessments), in the market catchment over the 10 years from our base year of assessment. This assumes that existing care bedroom provision remains constant and that all currently planned care beds (with extant permission) are developed. Similarly, in T27 we have analysed the projected net need on the same basis for the local authority area.
- 15.5 In each case, therefore, we overestimate the potential supply, given that we make no allowance for the potential closure of existing, operational minimum market standard care home bedspaces and because planned schemes may not progress over the timescales we have assumed, or be developed at all.
- 15.6 To provide some context, Carterwood research the number of extant permissions for care home developments in Great Britain which progress to completed care homes. As at Q3, 2025, for those applications initially validated between 2016 and 2020, a maximum of only 56 per cent of extant permissions from any one year have since been developed and registered as operational care homes.
- 15.7 The chart below projects the net need for new 'all bed' care home bedrooms (at minimum market standard (en-suite) and full market standard (en-suite wetroom)

level) in the market catchment from 2029 to 2046 on the same basis.

- 15.8 The shortfall of care bedrooms within the market catchment and local authority area is clear, and is likely to remain, given the scale of the demographic change over the coming decade. A significant increase in planning and construction activity is needed in order to reduce the shortfall of provision.

| T26 Projected care bed net need (market catchment) |      |      |      |
|----------------------------------------------------|------|------|------|
| All beds                                           | 2029 | 2034 | 2039 |
| Minimum market standard (en-suite)                 | 381  | 463  | 602  |
| Full market standard (en-suite wetroom)            | 454  | 536  | 675  |
| Specialist dementia provision                      |      |      |      |
| Minimum market standard dementia (en-suite)        | 154  | 193  | 252  |
| Full market standard dementia (wetroom)            | 158  | 197  | 256  |

| T27 Projected care bed net need (local authority) |       |       |       |
|---------------------------------------------------|-------|-------|-------|
| All beds                                          | 2029  | 2034  | 2039  |
| Minimum market standard (en-suite)                | 122   | 893   | 1,746 |
| Full market standard (wetroom)                    | 1,177 | 1,948 | 2,801 |
| Specialist dementia provision                     |       |       |       |
| Minimum market standard dementia (en-suite)       | 611   | 939   | 1,295 |
| Full market standard dementia (wetroom)           | 770   | 1,098 | 1,454 |

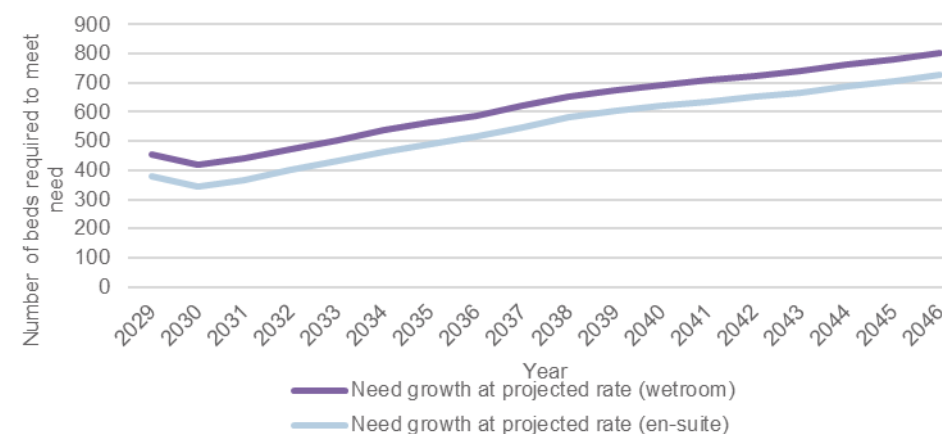
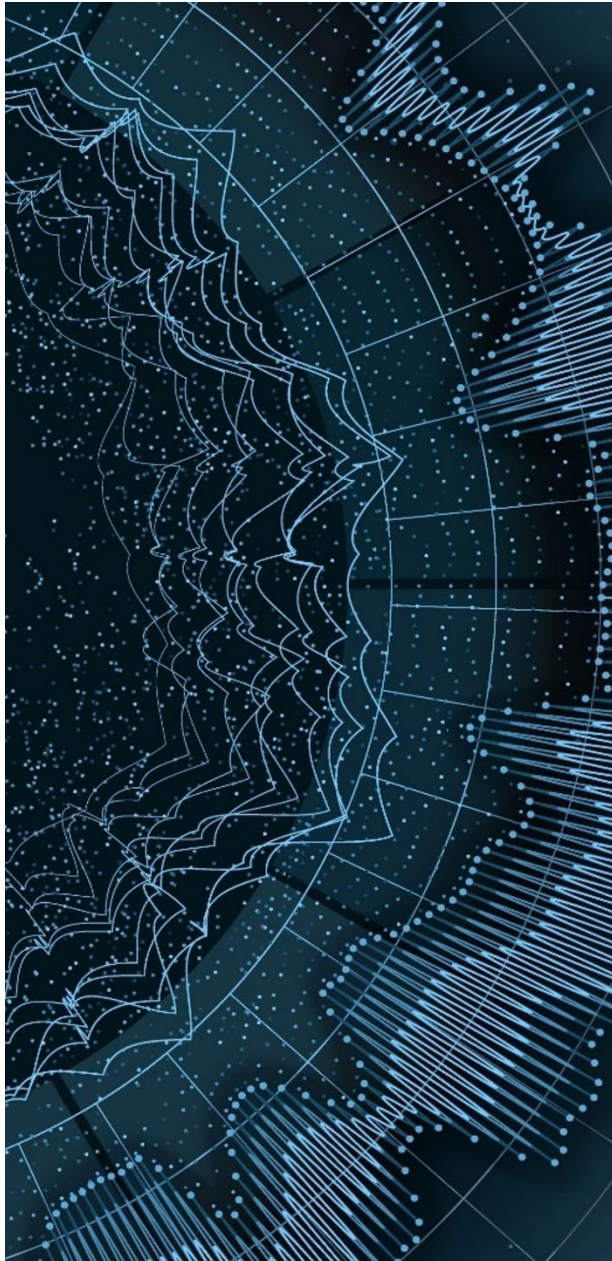


Figure 13: Projected shortfall of en-suite and en-suite wetroom bedrooms - market catchment



Executive summary

Background and the proposal

National context and key definitions

Commissioning enquiries

Need assessment – local market quantitative and qualitative assessment

Key findings and conclusions

## **Data tables and map**

Existing and planned supply

Map showing existing and planned supply

Appendices

## 16. Existing and planned supply

### T28 Existing care homes within the assessed catchments

| Catchment                  | Home, address                                                                               | Operator                   | Distance to subject site (miles) | First year as care home | Accommodation |               |              | CQC report date | CQC rating           | CQC occupancy |
|----------------------------|---------------------------------------------------------------------------------------------|----------------------------|----------------------------------|-------------------------|---------------|---------------|--------------|-----------------|----------------------|---------------|
|                            |                                                                                             |                            |                                  |                         | Elderly beds  | En-suite beds | Wetroom beds |                 |                      |               |
| Nursing                    |                                                                                             |                            |                                  |                         |               |               |              |                 |                      |               |
| Market and Local Authority | Wiltshire Heights Care Home, Cottle Avenue, Off Berryfield Road, Bradford On Avon, BA15 1FD | Porthaven                  | 1.2                              | 2013                    | 63            | 63            | 63           | 19/10/2023      | Good                 | 84%           |
| Market and Local Authority | The Wingfield, 70A Wingfield Road, Trowbridge, BA14 9EN                                     | Barchester Healthcare      | 1.6                              | 2003                    | 89            | 83            | 83           | 25/03/2023      | Good                 | -             |
| Market and Local Authority | Trowbridge Oaks Care Home, West Ashton Road, Trowbridge, BA14 6DW                           | Bupa Care Homes            | 2.5                              | 1993                    | 52            | 52            | 0            | 29/10/2021      | Good                 | -             |
| Market and Local Authority | The Old Parsonage, The Street, Broughton Gifford, Melksham, SN12 8PR                        | Roseville Care Homes       | 3.4                              | 1996                    | 22            | 2             | 0            | 11/03/2024      | Good                 | -             |
| Local Authority only       | Blenheim House Care Home, 27 Shurnhold, Melksham, SN12 8DD                                  | Berkley Care Group         | 4.9                              | 2013                    | 85            | 85            | 85           | 01/07/2025      | Requires improvement | 81%           |
| Local Authority only       | Mavern House Nursing Home, Corsham Road, Shaw, Melksham, SN12 8EH                           | Welford Healthcare         | 5.0                              | -                       | 55            | 39            | 4            | 09/01/2025      | Good                 | -             |
| Local Authority only       | Brunel House, The Wharf, Box, Corsham, SN13 8EP                                             | Maria Mallaband Care Group | 5.6                              | 2013                    | 65            | 65            | 65           | 15/10/2025      | Good                 | 88%           |
| Local Authority only       | Westbury Court, Station Road, Westbury, BA13 3JH (*1)                                       | Country Court              | 5.7                              | 2012                    | 60            | 60            | 60           | 30/07/2025      | Requires improvement | 93%           |
| Local Authority only       | Bybrook House Nursing Home, Bybrook House, Middle Hill, Box, Corsham, SN13 8QP              | Avon Care Homes            | 5.8                              | 1990                    | 30            | 25            | 2            | 07/05/2021      | Good                 | -             |
| Local Authority only       | The Westbury Care Home, 86 Warminster Road, Westbury, BA13 3PR                              | Welford Healthcare         | 6.1                              | 1994                    | 51            | 51            | 33           | 04/02/2020      | Good                 | -             |
| Local Authority only       | Avon Court Care Home, St Francis Avenue, Chippenham, SN15 2SE                               | HC-One                     | 9.4                              | 1991                    | 60            | 60            | 0            | 26/08/2022      | Good                 | -             |
| Local Authority only       | Henford House, Lower Marsh Road, Warminster, BA12 9PB                                       | Barchester Healthcare      | 10.1                             | 1982                    | 49            | 47            | 18           | 15/10/2025      | Good                 | -             |
| Local Authority only       | Briggs Lodge Residential and Nursing Home, London Road, Devizes, SN10 2DY                   | Sanctuary Care             | 11.5                             | 1994                    | 66            | 66            | 66           | 28/04/2023      | Good                 | -             |
| Local Authority only       | Sutton Veny House, Sutton Veny, Warminster, BA12 7BJ                                        | Avon Care Homes            | 11.6                             | 1982                    | 28            | 18            | 5            | 03/11/2023      | Good                 | -             |

## T28 Existing care homes within the assessed catchments

| Catchment            | Home, address                                                                                        | Operator                         | Distance to subject site (miles) | First year as care home | Accommodation |               |              | CQC report date | CQC rating           | CQC occupancy |
|----------------------|------------------------------------------------------------------------------------------------------|----------------------------------|----------------------------------|-------------------------|---------------|---------------|--------------|-----------------|----------------------|---------------|
|                      |                                                                                                      |                                  |                                  |                         | Elderly beds  | En-suite beds | Wetroom beds |                 |                      |               |
| Local Authority only | Avebury House, 11 Canal Way, Devizes, SN10 2UB                                                       | Coate Water Care                 | 11.8                             | 1996                    | 30            | 30            | 0            | 07/09/2023      | Requires improvement | -             |
| Local Authority only | Longbridge Deverill House and Nursing Home, Church Street, Longbridge Deverill, Warminster, BA12 7DJ | Care Concern Group               | 11.9                             | 1995                    | 80            | 61            | 61           | 21/10/2022      | Requires improvement | -             |
| Local Authority only | Market Lavington Care Home, 39 High Street, Market Lavington, Devizes, SN10 4AG (*2)                 | HC-One                           | 11.9                             | 1999                    | 79            | 79            | 0            | 11/07/2023      | Good                 | -             |
| Local Authority only | Hayward Care Centre, Corn Croft Lane, Off Horton Road, Devizes, SN10 2FR                             | The Orders Of St John Care Trust | 12.2                             | 2015                    | 80            | 80            | 80           | 23/12/2025      | Good                 | 89%           |
| Local Authority only | Goatacre Manor Care Centre, Goatacre Lane, Goatacre, Calne, SN11 9HY                                 | Goatacre Manor Care              | 15.7                             | 1987                    | 48            | 48            | 13           | 19/02/2022      | Good                 | -             |
| Local Authority only | Somerhill Care Home, Little Somerford, Chippenham, SN15 5BH                                          | Cedar Care Homes                 | 17.6                             | 1988                    | 41            | 41            | 41           | 13/12/2023      | Requires improvement | -             |
| Local Authority only | OSJCT Athelstan House, Priory Way, Burton Hill, Malmesbury, SN16 0FB                                 | The Orders Of St John Care Trust | 17.7                             | 2008                    | 80            | 80            | 80           | 06/08/2025      | Good                 | -             |
| Local Authority only | Hays House Nursing Home, Sedgehill, Shaftesbury, SP7 9JR                                             | Park Healthcare                  | 19.9                             | 1986                    | 43            | 16            | 10           | 16/03/2022      | Good                 | -             |
| Local Authority only | Bassett House, Cloatley Crescent, off Station Road, Wootton Bassett, SN4 7FJ                         | AMS Care                         | 20.1                             | 2011                    | 63            | 63            | 63           | 02/12/2025      | Good                 | 78%           |
| Local Authority only | Miranda House, High Street, Royal Wootton Bassett, Swindon, SN4 7AH                                  | Aria Healthcare Group            | 20.5                             | 1995                    | 68            | 68            | 0            | 02/09/2022      | Good                 | -             |
| Local Authority only | Amesbury Abbey Care Home, Church Street, Amesbury, Salisbury, SP4 7EX                                | Amesbury Abbey                   | 22.7                             | 1980                    | 40            | 40            | 40           | 18/09/2020      | Good                 | -             |
| Local Authority only | Camelot Care Homes, 1 Countess Road, Amesbury, Salisbury, SP4 7DW                                    | Camelot Care Homes               | 22.9                             | 2006                    | 57            | 40            | 0            | 28/07/2024      | Good                 | -             |
| Local Authority only | Savernake View Care Home, Priory Court, Salisbury Road, Marlborough, SN8 4FE                         | Porthaven                        | 23.0                             | 2016                    | 64            | 64            | 64           | 31/12/2022      | Good                 | 75%*          |
| Local Authority only | The White Lodge, Braydon, Swindon, SN5 0AD                                                           | Barchester Healthcare            | 23.3                             | 1992                    | 80            | 80            | 80           | 08/04/2020      | Good                 | -             |

## T28 Existing care homes within the assessed catchments

| Catchment                  | Home, address                                                             | Operator                         | Distance to subject site (miles) | First year as care home | Accommodation |               |              | CQC report date | CQC rating           | CQC occupancy |
|----------------------------|---------------------------------------------------------------------------|----------------------------------|----------------------------------|-------------------------|---------------|---------------|--------------|-----------------|----------------------|---------------|
|                            |                                                                           |                                  |                                  |                         | Elderly beds  | En-suite beds | Wetroom beds |                 |                      |               |
| Local Authority only       | Ashgrove House Nursing Home, 63 Station Road, Purton, Swindon, SN5 4AJ    | Mr & Mrs K Trowbridge            | 23.8                             | 1984                    | 35            | 33            | 0            | 16/12/2020      | Outstanding          | -             |
| Local Authority only       | Bourne House, 1 Mitre Way, Old Sarum, Salisbury, SP4 6GW                  | The Orders Of St John Care Trust | 25.5                             | 2016                    | 72            | 72            | 72           | 15/10/2022      | Good                 | 83%*          |
| Local Authority only       | Braemar Lodge, 18-20 Stratford Road, Salisbury, SP1 3JH                   | Colten Care                      | 26.1                             | 2007                    | 95            | 94            | 14           | 23/02/2022      | Good                 | -             |
| Local Authority only       | Salisbury Manor, Wilton Road, Salisbury, SP2 7EJ                          | Care UK                          | 26.2                             | 2013                    | 63            | 63            | 63           | 26/01/2021      | Good                 | 65%*          |
| Local Authority only       | Laverstock Care Centre, London Road, Salisbury, SP1 3YU                   | Caring Homes                     | 26.6                             | 2009                    | 80            | 80            | 80           | 08/02/2024      | Good                 | -             |
| Local Authority only       | Maristow Nursing Home, 16 Bourne Avenue, Salisbury, SP1 1LT               | Maristow Nursing Home            | 26.9                             | 1992                    | 17            | 10            | 0            | 26/03/2020      | Good                 | -             |
| Local Authority only       | Harnham Croft Care Home, 76 Harnham Road, Salisbury, SP2 8JN              | Jadeas                           | 27.0                             | 1947                    | 40            | 40            | 10           | 01/06/2023      | Good                 | -             |
| Local Authority only       | Little Manor Care Centre, Manor Farm Road, Salisbury, SP1 2JA <b>(*3)</b> | Wessex Care                      | 27.1                             | 2020                    | 30            | 30            | 30           | 02/02/2024      | Requires improvement | 83%           |
| Local Authority only       | Kimberly West & East Care Centres, 27 Tollgate Road, Salisbury, SP1 2JA   | Wessex Care                      | 27.1                             | 2017                    | 54            | 54            | 54           | 06/06/2020      | Good                 | 89%*          |
| Local Authority only       | Milford House, Milford Mill Road, Milford, Salisbury, SP1 1NJ             | Barchester Healthcare            | 27.6                             | 2007                    | 71            | 56            | 6            | 27/11/2020      | Good                 | -             |
| Local Authority only       | Aldbourn Nursing Home, South Street, Aldbourn, Marlborough, SN8 2DW       | Aldbourn Nursing Home            | 28.6                             | 1988                    | 40            | 38            | 35           | 08/03/2024      | Good                 | -             |
| Local Authority only       | Brendoncare Froxfield, Littlecote Road, Froxfield, Marlborough, SN8 3JY   | Brendoncare                      | 29.4                             | 1986                    | 44            | 9             | 7            | 14/08/2019      | Good                 | -             |
| Local Authority only       | Ashley Grange Nursing Home, Lode Hill, Downton, Salisbury, SP5 3PP        | Hartford Care                    | 32.6                             | 1991                    | 55            | 33            | 0            | 23/12/2025      | Good                 | -             |
| Local Authority only       | The Cedars Nursing Home, Northlands, Landford, Salisbury, SP5 2EJ         | Barchester Healthcare            | 35.5                             |                         | 62            | 60            | 58           | 05/02/2022      | Good                 | -             |
| Personal care              |                                                                           |                                  |                                  |                         |               |               |              |                 |                      |               |
| Market and Local Authority | Romney House, 11 Westwood Road, Trowbridge, BA14 9BR                      | Romney House                     | 1.0                              | 1991                    | 20            | 17            | 0            | 09/04/2022      | Good                 | -             |

**T28 Existing care homes within the assessed catchments**

| Catchment                  | Home, address                                                                                                     | Operator                         | Distance to subject site (miles) | First year as care home | Accommodation |               |              | CQC report date | CQC rating | CQC occupancy |
|----------------------------|-------------------------------------------------------------------------------------------------------------------|----------------------------------|----------------------------------|-------------------------|---------------|---------------|--------------|-----------------|------------|---------------|
|                            |                                                                                                                   |                                  |                                  |                         | Elderly beds  | En-suite beds | Wetroom beds |                 |            |               |
| Market and Local Authority | Staverton House, 51a, Staverton, Trowbridge, BA14 6NX                                                             | Fidelia Care                     | 1.6                              | 2007                    | 20            | 20            | 18           | 02/12/2022      | Good       | -             |
| Market and Local Authority | Goodson Lodge Care Centre, Hilpert Road, Trowbridge, BA14 7JG                                                     | The Orders Of St John Care Trust | 2.2                              | 2017                    | 64            | 64            | 64           | 10/09/2020      | Good       | 81%*          |
| Local Authority only       | OSJCT Brookside, Ruskin Avenue, Melksham, SN12 7NG                                                                | The Orders Of St John Care Trust | 5.2                              | 1994                    | 50            | 0             | 0            | 15/10/2019      | Good       | -             |
| Local Authority only       | Alpine Villa Care Home, 70 Lowbourne, Melksham, SN12 7ED                                                          | Alpine Villa Care Home           | 5.4                              | 1992                    | 15            | 8             | 0            | 31/10/2019      | Good       | -             |
| Local Authority only       | OSJCT Watersmead, White Horse Way, Westbury, BA13 3AH                                                             | The Orders Of St John Care Trust | 5.6                              | 1994                    | 50            | 1             | 0            | 16/01/2020      | Good       | -             |
| Local Authority only       | Warrington Residential and Dementia Care, The Linleys, Gastard Road, Corsham, SN13 9PD                            | Warrington Care Homes            | 6.3                              | 2011                    | 51            | 46            | 30           | 28/03/2020      | Good       | 41%*          |
| Local Authority only       | OSJCT Hungerford House, Beechfield Road, Corsham, SN13 9DR                                                        | The Orders Of St John Care Trust | 6.8                              | 1994                    | 48            | 0             | 0            | 12/08/2021      | Good       | -             |
| Local Authority only       | Wren House Residence for the Retired & Elderly - Warminster, Wren House, 32 Vicarage Street, Warminster, BA12 8JF | Wren Retirement Living           | 9.4                              | 1981                    | 14            | 14            | 0            | 19/11/2022      | Good       | -             |
| Local Authority only       | Flowers Manor, 1 Wood Lane, Chippenham, SN15 3DQ                                                                  | Elmfield Care                    | 9.8                              | 2021                    | 66            | 66            | 66           | 07/06/2024      | Good       | -             |
| Local Authority only       | Middlefields House, Cornfields, Chippenham, SN14 6GA                                                              | Pilgrims' Friend Society         | 9.9                              | 2021                    | 48            | 48            | 48           | 16/12/2022      | Good       | 88%*          |
| Local Authority only       | Ashwood Care Centre, Gipsy Lane, Warminster, BA12 9LR                                                             | The Orders Of St John Care Trust | 9.9                              | 2014                    | 82            | 82            | 82           | 21/11/2020      | Good       | 98%*          |
| Local Authority only       | Ferfoot Care Home, Old and New House, The Folly, Old Hardenhuish Lane, Chippenham, SN14 6HH                       | Aria Healthcare Group            | 10.0                             | 1996                    | 52            | 14            | 7            | 18/01/2022      | Good       | -             |
| Local Authority only       | The Old Vicarage, 54 St Mary Street, Chippenham, SN15 3JW                                                         | The Old Vicarage                 | 10.0                             | 1962                    | 21            | 20            | 5            | 19/05/2022      | Good       | -             |
| Local Authority only       | OSJCT Seymour House, Monkton Park, Chippenham, SN15 3PE                                                           | The Orders Of St John Care Trust | 10.2                             | 1994                    | 42            | 0             | 0            | 10/06/2025      | Good       | -             |

## T28 Existing care homes within the assessed catchments

| Catchment            | Home, address                                                                   | Operator                         | Distance to subject site (miles) | First year as care home | Accommodation |               |              | CQC report date | CQC rating           | CQC occupancy |
|----------------------|---------------------------------------------------------------------------------|----------------------------------|----------------------------------|-------------------------|---------------|---------------|--------------|-----------------|----------------------|---------------|
|                      |                                                                                 |                                  |                                  |                         | Elderly beds  | En-suite beds | Wetroom beds |                 |                      |               |
| Local Authority only | The Priory Care Home, Greenway Lane, Chippenham, SN15 1AA                       | Lower Green                      | 10.3                             | 1990                    | 24            | 24            | 8            | 10/07/2021      | Good                 | -             |
| Local Authority only | Kingston House, Lansdowne Crescent East, Derry Hill, Calne, SN11 9NP            | Greensleeves Care                | 10.5                             | 1978                    | 46            | 46            | 16           | 10/04/2024      | Good                 | -             |
| Local Authority only | Cepen Lodge, West Cepen Way, Chippenham, SN14 6UZ                               | Barchester Healthcare            | 10.8                             | 2009                    | 63            | 63            | 63           | 07/12/2023      | Good                 | -             |
| Local Authority only | The Fairways, Malmesbury Road, Chippenham, SN15 5LJ                             | MHA                              | 10.9                             | 2013                    | 60            | 60            | 60           | 17/08/2019      | Good                 | 85%           |
| Local Authority only | Dauntsey House, 9 Church Street, West Lavington, Devizes, SN10 4LB              | Dauntsey House Care              | 11.5                             | 1987                    | 21            | 0             | 0            | 01/12/2025      | Good                 | -             |
| Local Authority only | OSJCT Marden Court, Quarr Barton, Calne, SN11 0EE                               | The Orders Of St John Care Trust | 12.2                             | 1994                    | 28            | 0             | 0            | 08/02/2024      | Good                 | -             |
| Local Authority only | The Firs Care Home, 2 Lickhill Road, Calne, SN11 9DD                            | Geniecare Homes                  | 12.5                             | 1980                    | 32            | 16            | 16           | 06/11/2024      | Good                 | -             |
| Local Authority only | Sursum Bramley House, Bramley House, Castle Street, Mere, BA12 6JN              | Sursum                           | 17.2                             | 1987                    | 42            | 41            | 20           | 07/04/2025      | Requires improvement | -             |
| Local Authority only | Castle Lodge Care Home, Mere, Warminster, BA12 6LA                              | Country Court                    | 17.3                             | 2025                    | 70            | 70            | 70           |                 | No rating            | -             |
| Local Authority only | Stainsbridge House, 101 Gloucester Road, Malmesbury, SN16 0AJ                   | West Country Care                | 18.3                             | 1975                    | 46            | 45            | 0            | 14/02/2025      | Requires improvement | -             |
| Local Authority only | Albany House - Tisbury, The Square, Tisbury, Salisbury, SP3 6JP                 | BM Care                          | 20.2                             | 1991                    | 21            | 19            | 2            | 21/03/2025      | Requires improvement | -             |
| Local Authority only | OSJCT Ridgeway House, The Lawns, Wootton Bassett, SN4 7AN                       | The Orders Of St John Care Trust | 20.3                             | 1994                    | 43            | 1             | 0            | 17/02/2022      | Good                 | -             |
| Local Authority only | Marsh Farm Manor Care Home, Coped Hall, Royal Wootton Bassett, Swindon, SN4 8ER | Anchor                           | 21.1                             | September 2023          | 66            | 66            | 66           | 03/05/2024      | Good                 | 36%           |
| Local Authority only | Merlin Court Care Home, The Common, Marlborough, SN8 1JR                        | Avery Healthcare                 | 22.6                             | 1999                    | 62            | 62            | 62           | 07/04/2021      | Requires improvement | -             |
| Local Authority only | Caring Hands (Wiltshire), Battle Lake Farm, Braydon, Swindon, SN5 0AA           | Mrs Vicki Ann Fowler             | 22.6                             | 2011                    | 7             | 0             | 0            | 05/03/2025      | Good                 | -             |
| Local Authority only | OSJCT Coombe End Court, London Road, Marlborough, SN8 2AP                       | The Orders Of St John Care Trust | 23.1                             | 1994                    | 60            | 60            | 60           | 24/06/2025      | Good                 | -             |

**T28 Existing care homes within the assessed catchments**

| Catchment            | Home, address                                                                   | Operator                         | Distance to subject site (miles) | First year as care home | Accommodation |               |              | CQC report date | CQC rating           | CQC occupancy |
|----------------------|---------------------------------------------------------------------------------|----------------------------------|----------------------------------|-------------------------|---------------|---------------|--------------|-----------------|----------------------|---------------|
|                      |                                                                                 |                                  |                                  |                         | Elderly beds  | En-suite beds | Wetroom beds |                 |                      |               |
| Local Authority only | OSJCT Buckland Court, South Mill Road, Amesbury, Salisbury, SP4 7HR             | The Orders Of St John Care Trust | 23.3                             | 1994                    | 50            | 2             | 0            | 18/08/2025      | Requires improvement | -             |
| Local Authority only | Marlborough Lodge, 83-84 London Road, Marlborough, SN8 2AN                      | Fidelity Healthcare              | 23.3                             |                         | 18            | 8             | 0            | 14/07/2023      | Requires improvement | -             |
| Local Authority only | OSJCT The Cedars, High Street, Purton, SN5 4AF                                  | The Orders Of St John Care Trust | 23.4                             | 1994                    | 49            | 4             | 0            | 09/12/2020      | Good                 | -             |
| Local Authority only | Cotswolds Rise Residential Care Home, Upper Mill, Purton, Swindon, SN5 4FL      | Hartford Care                    | 24.2                             | October 2023            | 66            | 66            | 66           | 21/05/2025      | Good                 | 53%           |
| Local Authority only | Wilton Place Care Home, Buckeridge Road, Wilton, Salisbury, SP2 0FX             | Barchester Healthcare            | 24.3                             | December 2022           | 66            | 66            | 66           | 10/09/2024      | Good                 | 70%           |
| Local Authority only | Old Sarum Manor, Rhodes Moorhouse Way, Old Sarum, Longhedge, Salisbury, SP4 6BW | Elmfield Care                    | 25.2                             | 2020                    | 66            | 66            | 66           | 21/12/2022      | Good                 | 100%*         |
| Local Authority only | Avon Court, 1 Mitre Way, Old Sarum, Salisbury, SP4 6GW                          | The Orders Of St John Care Trust | 25.5                             | 2016                    | 48            | 48            | 48           | 30/12/2024      | Good                 | -             |
| Local Authority only | Castle View Care Centre, 8 Old Castle Road, Salisbury, SP1 3SF                  | Wessex Care                      | 25.6                             | 1991                    | 28            | 28            | 28           | 11/08/2018      | Good                 | -             |
| Local Authority only | OSJCT Bemerton Lodge, Christie Miller Road, Salisbury, SP2 7EN                  | The Orders Of St John Care Trust | 25.8                             | 1994                    | 56            | 0             | 0            | 23/12/2021      | Good                 | -             |
| Local Authority only | Fairfax House, 85 Castle Road, Salisbury, SP1 3RW                               | Salisbury Christian Care Homes   | 26.2                             | 1988                    | 20            | 12            | 0            | 01/12/2021      | Good                 | -             |
| Local Authority only | Tower House Residential Home, 43 Manor Road, Salisbury, SP1 1JT                 | Mrs Eileen O'Connor-Marsh        | 26.8                             | 1995                    | 24            | 24            | 0            | 25/03/2021      | Good                 | -             |
| Local Authority only | Inwood House, 10 Bellamy Lane, Salisbury, SP1 2SP                               | Salisbury Christian Care Homes   | 27.0                             | 1987                    | 20            | 12            | 0            | 29/10/2022      | Good                 | -             |
| Local Authority only | Holmwood Care Home, 30 Fowlers Road, Salisbury, SP1 2QU                         | Wessex Care                      | 27.1                             | 1989                    | 21            | 15            | 0            | 27/09/2023      | Good                 | -             |
| Local Authority only | Milford Manor Care Home, Milford Manor Gardens, Salisbury, SP1 2RN              | Wessex Care                      | 27.4                             | 1987                    | 30            | 20            | 0            | 10/04/2021      | Good                 | -             |

**T28 Existing care homes within the assessed catchments**

| Catchment            | Home, address                                                 | Operator                         | Distance to subject site (miles) | First year as care home | Accommodation |               |              | CQC report date | CQC rating | CQC occupancy |
|----------------------|---------------------------------------------------------------|----------------------------------|----------------------------------|-------------------------|---------------|---------------|--------------|-----------------|------------|---------------|
|                      |                                                               |                                  |                                  |                         | Elderly beds  | En-suite beds | Wetroom beds |                 |            |               |
| Local Authority only | OSJCT Willowcroft, Odstock Road, Salisbury, SP2 8BG           | The Orders Of St John Care Trust | 27.4                             | 1994                    | 42            | 0             | 0            | 21/05/2022      | Good       | -             |
| Local Authority only | Woodfalls Care Home, Vale Road, Woodfalls, Salisbury, SP5 2LT | Woodfalls Care                   | 33.4                             | 1987                    | 24            | 15            | 0            | 06/01/2022      | Good       | -             |

Notes: Occupancy levels researched for care homes opened since 2010 which will generally be more comparable to the subject care home in terms of the quality of accommodation available.

Within the CQC occupancy column, \* indicates that the CQC Inspection took place during the COVID-19 pandemic (falling between March 2020 to May 2023) – which may have impacted on occupancy. .

Notes:

(\*1) This home has an effective capacity of 60 beds, whereas CQC has a total registration for 63 beds

(\*2) Market Lavington Care Home has an effective capacity of 79 beds, as stated on the care home website, despite a registration of 87 beds.

(\*3) Little Manor Care Centre is used as a rehabilitation unit for the local hospital.

## T29 Summary of planned provision with extant permission

| Map ref | Catchment                  | Site address                                          | Applicant                  | Scheme                                                                                                                                                                                                                                                                                                                                                                                                                                         | Net elderly beds | Dementia beds | Evidence construction has commenced | Earliest estimated year of opening | Distance from subject site (miles) | Planning reference and date permission granted | Notes                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
|---------|----------------------------|-------------------------------------------------------|----------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------|---------------|-------------------------------------|------------------------------------|------------------------------------|------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Granted |                            |                                                       |                            |                                                                                                                                                                                                                                                                                                                                                                                                                                                |                  |               |                                     |                                    |                                    |                                                |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| A       | Market and Local Authority | Staverton House, 51a, Staverton, Trowbridge, BA14 6NX | Fidelia Care Ltd           | 'Demolition of The Old Vicarage with replacement building and extension to Staverton House, providing 13 Bedrooms on Lower Ground Floor, 12 Bedrooms on Ground Floor, all with auxiliary space & together with the Existing Care Home would provide 46 bedrooms total and associated works'.                                                                                                                                                   | 26               | 26            | No                                  | 2028                               | 1.6                                | PL/2025/02846 - 13/08/2025                     | This application proposes to demolish the closed care home, The Old Vicarage, and develop a 26 bed extension to Staverton House                                                                                                                                                                                                                                                                                                                                                                                                                           |
| B       | Market and Local Authority | Land South East of Trowbridge, Wiltshire, BA14 0XB    | Ashton Park Trowbridge Ltd | Outline planning application for mixed use development comprising: residential (up to 2,500 dwellings - Classes C3 & C2); employment (Class E ('Business' only), B2, and B8); two local centres (Classes E, C2, and C3); two primary schools, one secondary school, ecological visitor facility, public open space, landscaping and associated highway works including for the 'Yarnbrook / West Ashton Relief Road' and the access junctions. | 60               | 20            | No                                  | 2030                               | 3.0                                | 15/04736/OUT - 02/09/2025                      | Outline application 15/04736/OUT includes a C2 scheme. Due to it's outline nature it has not been confirmed to be a care home or extra care units and we have therefore included an estimated 60 units each. The decision was delegated to the Strategic Planning Committee who reviewed the application on 15 June 2022. The resolution was to either grant the application, subject to a s.106 agreement being completed by 31 January 2023, or refuse if the condition was not met. Details of the s.106 agreement were published on 2 September 2025. |

## T29 Summary of planned provision with extant permission

| Map ref | Catchment            | Site address                                                         | Applicant              | Scheme                                                                                                                                                                                | Net elderly beds | Dementia beds | Evidence construction has commenced | Earliest estimated year of opening | Distance from subject site (miles) | Planning reference and date permission granted | Notes |
|---------|----------------------|----------------------------------------------------------------------|------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------|---------------|-------------------------------------|------------------------------------|------------------------------------|------------------------------------------------|-------|
| C       | Local Authority only | Western Way, Melksham, Wiltshire, SN12 6BD                           | Hallam Land Management | Outline application (with all matters reserved except for access) for the construction of up to 210 residential units (class C3) and a 70 bedroom care home (class C2).               | 70               | 23            | No                                  | 2029                               | 5.0                                | PL/2022/08504 - 14/11/2023                     | -     |
| D       | Local Authority only | Land at Longleaze Lane, Melksham, Wiltshire, SN12 6QJ                | Aspire LPP             | Construction of elderly care home (Use Class C2) with associated access works, landscaping and drainage. Improvements to site access and Longleaze Lane/Snowberry Lane junction.      | 86               | 35            | No                                  | 2027                               | 5.4                                | PL/2023/06725 - 21/08/2024                     | -     |
| E       | Local Authority only | 6 Station Road, Westbury-On-Severn, Gloucestershire, BA13 3JH        | Country Court Care     | Of, extension and re-modelling existing care home facility to include 11 additional bedrooms, increased day space, 10 additional parking spaces, and improved external amenity space. | 11               | 0             | No                                  | 2026                               | 5.7                                | PL/2025/03653 - 30/06/2025                     | -     |
| F       | Local Authority only | Land at Verbena Court, Melksham, Wiltshire, SN12 7GG                 | Frontier Estates Ltd   | Construction of a care home (within class C2), parking, access, hard and soft landscaping and other associated works.                                                                 | 71               | 26            | No                                  | 2027                               | 6.0                                | PL/2023/06976 - 02/05/2025                     | -     |
| G       | Local Authority only | 1 Linleys, Corsham, Wiltshire, SN13 9PD                              | Warrington Homes       | Proposed demolitions, single and two-storey extensions to the residential home.                                                                                                       | 3                | 0             | No                                  | 2027                               | 6.3                                | PL/2023/03748 - 21/02/2024                     | -     |
| H       | Local Authority only | Land at Showell Farm, Patterdown Road, Showell, Chippenham, SN15 2NT | Country Court Care     | Reserved matters application pursuant to the grant of outline planning permission (18/04241/OUT) for the erection of a new care home (c2).                                            | 74               | 38            | No                                  | 2027                               | 8.5                                | PL/2022/07442 - 01/12/2023                     | -     |

## T29 Summary of planned provision with extant permission

| Map ref                                                    | Catchment            | Site address                                                                                          | Applicant           | Scheme                                                                                                                                                                                                                                                                                 | Net elderly beds | Dementia beds | Evidence construction has commenced | Earliest estimated year of opening | Distance from subject site (miles) | Planning reference and date permission granted | Notes |
|------------------------------------------------------------|----------------------|-------------------------------------------------------------------------------------------------------|---------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------|---------------|-------------------------------------|------------------------------------|------------------------------------|------------------------------------------------|-------|
| I                                                          | Local Authority only | Land North of Grovelands Way, Warminster, Trowbridge, Wiltshire, BA12 8RL                             | Angel Care Plc      | Construction of a two storey 62 bedroom care home (class C2) together with access and parking provisions.                                                                                                                                                                              | 62               | 31            | No                                  | 2027                               | 9.2                                | PL/2021/03889 - 22/05/2023                     | -     |
| J                                                          | Local Authority only | Longbridge Deverill Nursing Home, Church Street, Longbridge Deverill, Warminster, Wiltshire, BA12 7DJ | Care Concern Group  | Proposed internal alterations to provide 9 additional bedrooms and associated facilities including removal of existing internal swimming pool and increased height of terrace balustrade.                                                                                              | 9                | 0             | No                                  | 2026                               | 11.8                               | PL/2022/05421 - 22/11/2023                     | -     |
| K                                                          | Local Authority only | Milford Manor Rest Home, Milford Manor Gardens, Salisbury, Wiltshire, SP1 2RN                         | Wessex Care Limited | Proposed refurbishment of existing 30 bedroom care home including demolition and replacement of existing 1990's care room wing, reinstated of original rooms/spaces within Milford Manor itself with associated improvements to services (sustainability) parking and landscapes area. | 10               | 30            | No                                  | 2027                               | 27.4                               | PL/2024/10153 - 20/01/2025                     | -     |
| Total in market catchment                                  |                      |                                                                                                       |                     |                                                                                                                                                                                                                                                                                        | 86               | 46            |                                     |                                    |                                    |                                                |       |
| Total in local authority area                              |                      |                                                                                                       |                     |                                                                                                                                                                                                                                                                                        | 482              | 229           |                                     |                                    |                                    |                                                |       |
| Total in market catchment by year of assessment (2029)     |                      |                                                                                                       |                     |                                                                                                                                                                                                                                                                                        | 26               | 26            |                                     |                                    |                                    |                                                |       |
| Total in local authority area by year of assessment (2029) |                      |                                                                                                       |                     |                                                                                                                                                                                                                                                                                        | 422              | 209           |                                     |                                    |                                    |                                                |       |

Sources: subscribed data sources and relevant planning departments, Carterwood.

## T30 Summary of applications pending a decision

| Map ref | Catchment                  | Site address                                                                      | Applicant             | Scheme                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | Net elderly beds | Dementia beds | Distance from subject site (miles) | Planning reference | Notes                                                                                                                                                                      |
|---------|----------------------------|-----------------------------------------------------------------------------------|-----------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------|---------------|------------------------------------|--------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Pending |                            |                                                                                   |                       |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                  |               |                                    |                    |                                                                                                                                                                            |
| L       | Market and Local Authority | Land Off Bradford Road, Trowbridge, Wiltshire, BA14 9AX                           | Montpelier Estates    | The construction of a new care home (class C2) with associated parking and landscaping includes sustainable drainage system.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | 80               | 32            | 1.4                                | PL/2021/11939      | -                                                                                                                                                                          |
| M       | Market and Local Authority | Land South of White Horse Business Park, Trowbridge, Wiltshire, BA14 0RG          | Mr. Neil Cowley       | Outline application for up to 100 residential units and a care home (class C2 use) of up to 64 beds (up to 3,750 sqm), as well as vehicular access from the A363. Matters to be considered access in to the site.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | 64               | 21            | 2.9                                | 20/03641/OUT       | -                                                                                                                                                                          |
| N       | Local Authority only       | Land at Chippenham Riverside, East of Chippenham, Chippenham, Wiltshire, SN15 3RB | Chippenham 2020 LLP   | Outline Application for Mixed Use Development Comprising up to 1500 Dwellings (Use Class C3), Including a Retirement Village; Approximately 1.0 Ha of Land for a Retirement Home Focused on New Leaze Farm (Use Class C2); Approximately 5 Ha of Employment Land (B1 and B2 Use Classes); 2.1 Ha of Land Safeguarded for a 2 Form Entry Primary School (Use Class D1), a Local Centre Focused on a Mixed Use refurbishment of Harden's Farm to provide A1, A2, A3, A4, B1, D1 and/or D2 Use Classes; 2.1 Ha of Land Safeguarded for the Expansion of Abbeyfield School (Use Class D1); a New Distributor Road from the North-Western Site Boundary to the A4; Land Safeguarded for the Construction of a Branch to the Kennett and Avon Canal, a 51 Ha Country/Riverside Park, including SUDS; and Associated Landscape, Drainage and Infrastructure Works. | 60               | 20            | 10.5                               | 15/12363/OUT       | This application offers limited details other than there will be provision for a retirement village and retirement care home, we have estimated 60 units for each element. |
| O       | Local Authority only       | Rawlings Farm, Cocklebury Lane, Chippenham, Wiltshire, SN15 5QQ                   | Details Not Available | Approval of appearance, landscaping, scale and layout following 15/12351/OUT, sought for the development of Phase 2 comprising 454 residential units, care home and 5no. Commercial buildings together with associated highways, garages, car parking, public open space including country park, play space and infrastructure works.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | 66               | 25            | 10.9                               | PL/2024/09507      |                                                                                                                                                                            |

## T30 Summary of applications pending a decision

| Map ref                       | Catchment            | Site address                                                                  | Applicant                    | Scheme                                                                       | Net elderly beds | Dementia beds | Distance from subject site (miles) | Planning reference | Notes |
|-------------------------------|----------------------|-------------------------------------------------------------------------------|------------------------------|------------------------------------------------------------------------------|------------------|---------------|------------------------------------|--------------------|-------|
| P                             | Local Authority only | Ashley Grange Nursing Home, Lode Hill, Downton, Salisbury, Wiltshire, SP5 3PP | Hartford Care (Southern) Ltd | New care home with associated landscaping and car parking including suds., . | 32               | 13            | 32.6                               | PL/2023/10966      |       |
| Total in market catchment     |                      |                                                                               |                              |                                                                              | 144              | 53            |                                    |                    |       |
| Total in local authority area |                      |                                                                               |                              |                                                                              | 302              | 111           |                                    |                    |       |

Sources: subscribed data sources and relevant planning departments, Carterwood.

Applications pending a decision are not included in our analysis of net need and are set out for information purposes only.

17. Map of existing and planned supply

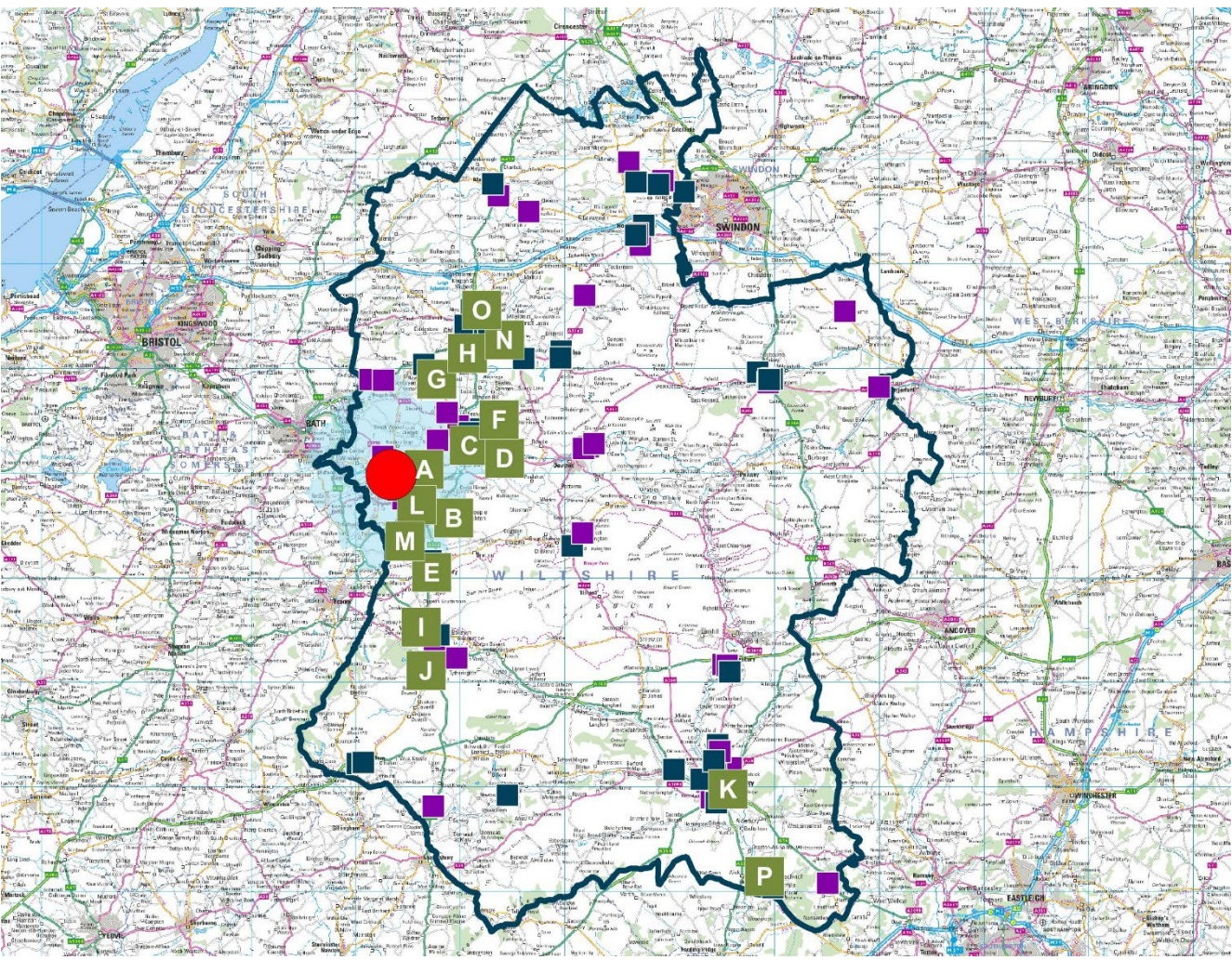


Figure 14: Map showing existing and planned care homes

Key:

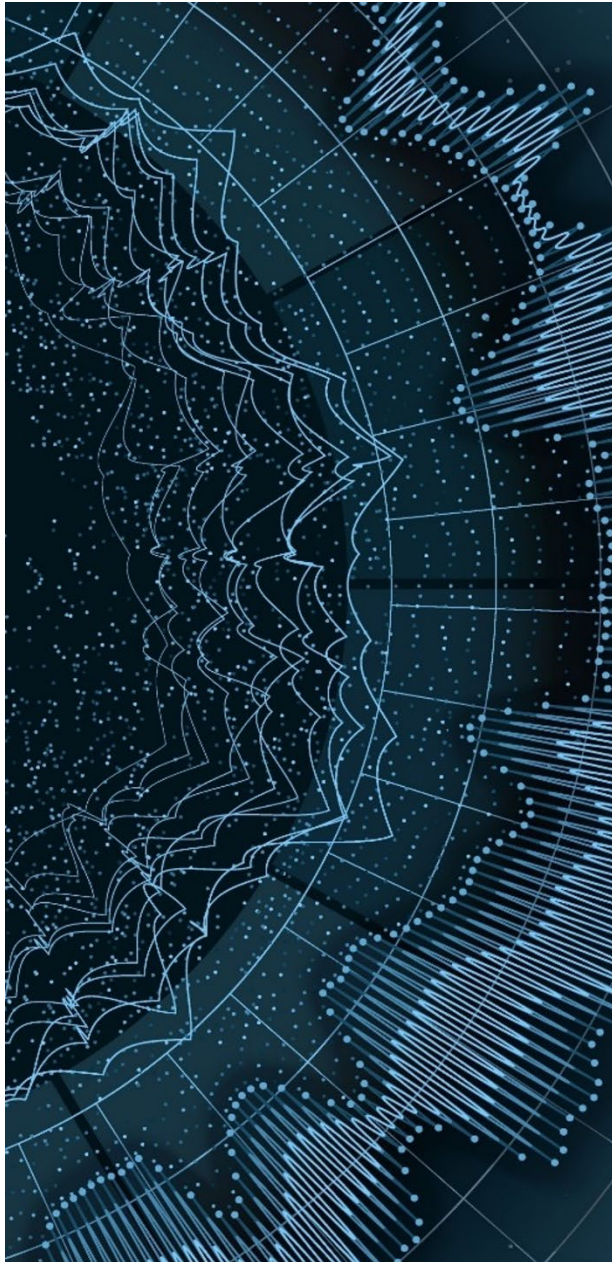
- Subject site
- Personal care
- Nursing
- Planned provision

Please note that the locations of all existing and planned schemes are approximate.

Dark blue line shows Wiltshire Council area  
Light blue shading shows the market catchment.



Figure 15: Location map



Executive summary

Background and the proposal

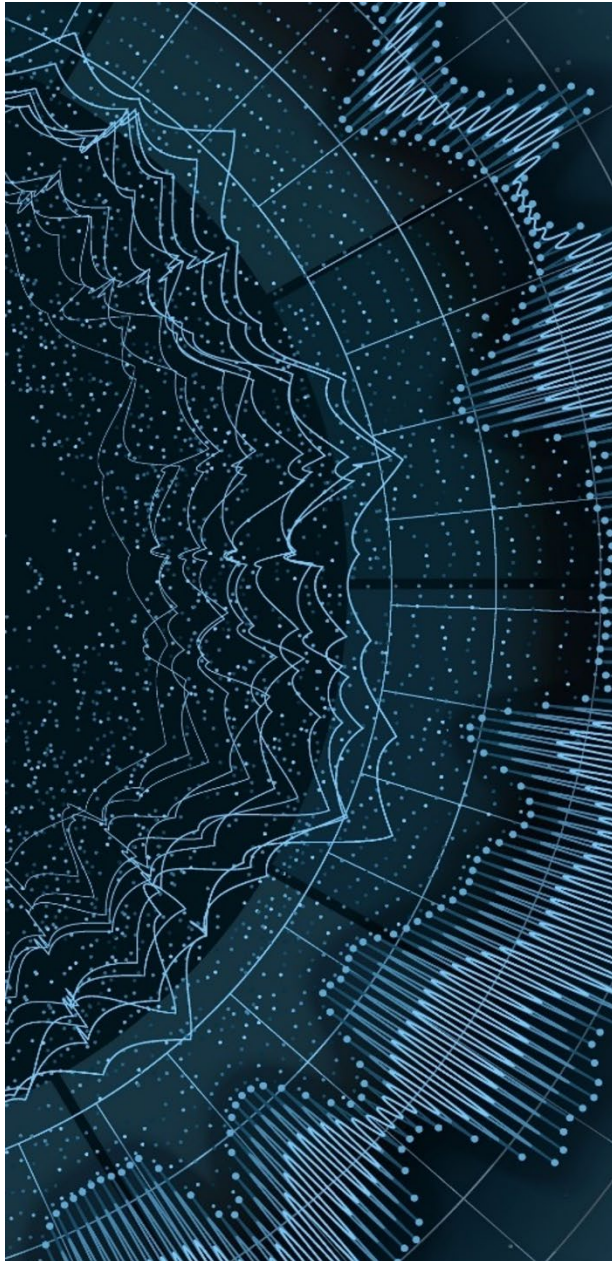
National context and key definitions

Commissioning enquiries

Need assessment – local market quantitative and qualitative assessment

Data tables

**Appendices**



## Appendix

### A: Sources of information and references

## Sources of information

We have utilised the following sources of information:

- Census 2021 population statistics;
- ONS 2022-based population projections;
- Carterwood database;
- NHS England;
- www.housingcare.org;
- www.cqc.org.uk;
- Contains Ordnance Survey data © Crown copyright and database right (since 2018);
- Contains LPS Intellectual Property © Crown copyright and database right (since 2016);
- Relevant planning departments;
- Glenigan;
- Planning Pipe;
- Centre for Policy on Ageing: *A profile of residents in Bupa care homes: results from the 2012 Bupa Census*;
- Wiltshire Council;

In preparing our advice, we have also relied upon the following:

- Background information provided by the client;
- Documentation submitted with planning application (if applicable).

In accordance with our definitions and reservations (attached in Appendix D), we have assumed that the information above is accurate and should it be proven through further investigations to be incorrect, then this could affect our advice.

## Conflict of interest

There are no conflicts of interest that we are aware of that would prevent us from providing our advice.

## References

Appeal Ref: APP/B1605/W/22/3310455 Adey Limited, Gloucester Road, Cheltenham GL51 8NR (March 2023) (para 51)

Appeal Ref: APP/B1930/W/20/3259161 Chelford House, Coldharbour Lane, Harpenden AL5 4UN (September 2021) (para 34)

Appeal Ref: APP/W0530/W/22/3307903 Former Hotel Felix, Whitehouse Lane, Girton, Cambridge CB3 0LX (2023)

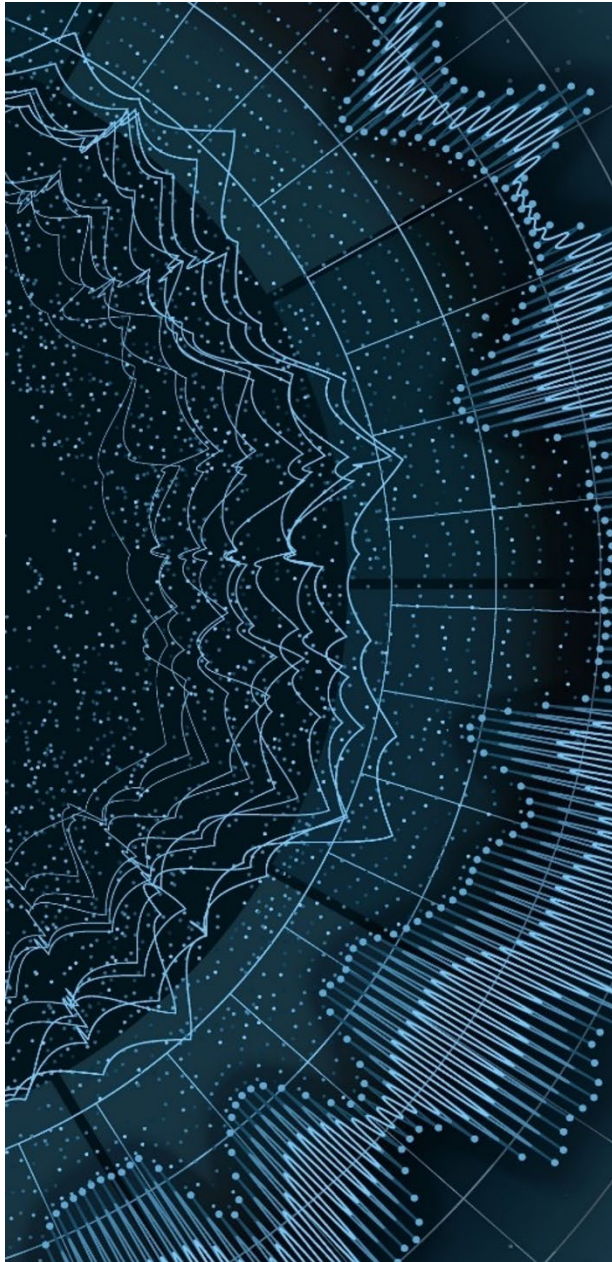
Planning Practice Guidance (PPG) Housing for Older and Disabled People (2019)

*Independent Investigation into the National Health Service in England* (2024). The Rt Hon. Professor the Lord Darzi of Denham OM KBE FRS FMedSci HonFREng.

*Our Future Homes: Housing that promotes wellbeing and community for an ageing population*. Older People's Housing Taskforce (2024)

Alzheimer's Society: *Low expectations: Attitudes on choice, care and community for people with dementia in care homes*, February 2013

*National population projections: 2022-based. The potential future population size of the UK and its constituent countries. (28 January 2025)*. Office for National Statistics (ONS).



## Appendix

### **B: Methodology for assessing need**

**Definition of ‘minimum’ and ‘full’ market standard beds**

**Proposed care home – commonly raised questions**

## Methodology for assessing net need for ‘total market’ and ‘specialist dementia’ care beds

Current and future need for elderly care home supply is influenced by a host of factors including the balance between gross need and supply, together with social, political, regulatory and financial issues.

In our opinion, taking all factors into account, the most appropriate means of assessing whether a catchment has sufficient net need to warrant additional supply is to measure the difference between gross need for elderly care home beds and the current and future supply.

Our need methodology for the catchment area is provided below, with the analysis and results in relation to the proposed care home contained within Sections 10-15 of this report.

### Need versus Demand

The Department for Communities and Local Government ‘Estimating Housing Need’ paper (2010) differentiates between ‘need’ and ‘demand’:

*‘These discussions also generally distinguish “need” – shortfalls from certain normative standards of adequate accommodation – from “demand” – the quantity and quality of housing which households will choose to occupy given their preferences and ability to pay (at given prices)’ (page 25).*

Whilst the above refers explicitly to housing, the key themes relate to need being ‘shortfalls from certain normative standards of adequate accommodation’. In our assessment of existing supply, we have assumed that normative standards of adequate accommodation exclude care home bedrooms that do not have the benefit of their own WC and wash-hand basin as a minimum.

Although the regulator (CQC) currently makes no restriction on care home bedrooms that do not provide an en-suite, we consider that those that do not provide adequate en-suite facilities are fast becoming obsolete. It is very hard to think of any other form of communal establishment that does not provide en-suite bedrooms meeting minimum acceptable standards, and other uses, such as hotels, do not care for the oldest and frailest members of society.

We also provide a separate measure of need based upon ‘full market standard’ beds. It is arguable that this relates more to ‘demand’ rather than ‘need’. However, on a qualitative basis it is difficult to argue against allowing the oldest and frailest members of society the dignity of being able to shower in privacy, particularly following the COVID-19 pandemic, where the benefits of self-isolation and infection control within self-contained bedrooms are obvious.

### Gross need (total market)

We assess gross need for care home bedrooms for older people using Census 2021 population data and ONS 2022-based population growth rates.

We apply Carterwood Market Prevalence Rates (MPR) to the Census data, a tool used to predict the risk of an elderly person being in a residential setting at a given age. The methodology applies standard GB regional patterns of care home admission (based upon ONS studies estimating the number of residents in care homes in England and Wales, produced in 2023, adjusted annually using up-to-date Carterwood *Collab* data to reflect changes in occupancy and supply) to population statistics by 5-year age band (from 65 years). Relative occupancy changes by region are updated on an annual basis and the MPR currently applied date from January 2026. The rates used within this report for the South West are 65-69 years, 0.43%, 70-74 years, 0.87%, 75-79 years, 1.30%, 80-84 years, 2.79% 85–89 years, 7.15% and 90 years and above, 19.11%.

It should be understood that MPR are, therefore, a function of population; not a direct measure of demand for care services, being only an indicator of them. MPR utilise an industry-recognised approach to determining gross need for care in a residential setting.

### Gross need (specialist dementia)

Our measure is based upon LaingBuisson's 2020 adjustment to the 2012 Centre for Policy for Ageing survey regarding risk of admission to a care home which indicates that, on a national basis, 41.3 per cent of residents are admitted with dementia as the primary cause.

We have then applied local Integrated Care System dementia prevalence statistics to provide regional estimates of demand for dementia care relative to the national rate. Regional rates are not available for Wales and Scotland and we therefore apply the national rate.

We have calculated gross need within each catchment area from residents with dementia as a primary cause of admission. Best practice states that people living with dementia should be cared for within a specialist, dedicated dementia environment. It should be noted, however, that there may be other physical frailty in addition and conversely, there will also be a pool of dementia sufferers who were admitted due to a physical frailty or disability, but who now also suffer from some form of dementia.

### Occupancy allowance

In our calculations of gross need, above, we apply an occupancy capacity allowance adjustment, as a function of occupancy (and

not capacity of market standards beds). Care homes cannot operate sustainably at 100 per cent occupancy and we adopt an ‘effective full’ average level of 92.3 per cent, to ensure that every home has sufficient capacity to cater for excessive winter death rates, other seasonal variations, local demand spikes, vacancies between admissions, infection control, etc.

### Current supply

We provide a detailed analysis of the existing care home provision for older people, which analyses the quality of accommodation and total number of bedspaces.

In the event of any anomaly in our subscribed data source, *A–Z Care Homes Guide*, we cross-reference against the CQC website and, where necessary, we review the home's/operator's website or contact the home directly to confirm the query.

In our assessment, we include care homes registered for either personal or nursing care and those that provide both forms of care. There is, as yet, no industry-recognised measure of assessing the need for solely nursing or solely personal care.

### Planned supply

We assess planned supply within the catchment by conducting a review of all applications for new care home beds within the planning system (both new-build and extensions) that have been granted, refused, withdrawn or are pending decision. This is cross-referenced against the online planning website for the relevant local authority.

Additional bedspaces are of key importance as they are likely to be of a high standard and provide significant competition to the proposed care home, once completed and trading. In our analysis we assume all planned bedrooms will provide full en-suite wetrooms (unless the plans indicate otherwise).

We search for planning applications submitted over the past 3 years. Where an application has been refused or withdrawn, we enter the postcode into the local authority online planning facility to identify if a subsequent application or appeal application has been submitted. We would note that the planning registers to which we subscribe are not definitive and may exclude some applications as they rely upon each local authority for provision of the information.

A proportion of planned care home beds are never implemented; however, for completeness, we include all pipeline planned schemes with an extant planning permission, regardless of their deliverability. Any planning applications which are pending a decision are not included in our analysis but are clearly set out in our assessment of potential supply which may be forthcoming.

We differentiate the planned schemes by estimating the earliest potential timescale for deliverability, depending on their planning status, the likelihood of imminent development or whether there is any evidence that construction has commenced.

### Balance of provision/net need

Gross need analysis results are combined with our assessment of existing supply and planned provision to provide a measure of the balance of provision within the catchment, or net need.

The measure utilises a 'maximum planned supply' scenario, based on the earliest year the subject scheme could be made available, assuming those planned beds considered deliverable by the same year are developed and operational. This is likely to overstate the number of beds that will actually come forward from the planning system as applications may be refused or schemes with extant permission may not be delivered.

We consider this methodology is a logical, industry-recognised means of establishing if there is a net need for additional elderly care home beds in any given area.

Going forward, it is harder to predict future industry trends and there are other factors that may influence the longer-term need for care services, which include:

- political and regulatory change;
- funding constraints;
- increase in adaptive technology and 'telecare', prolonging the ability for people to remain in their own homes;
- medical advancement;
- Another pandemic/outbreak of life altering transmittable illness.

We provide an indication of need growth between the years 2029 and 2046 in Section 15. This estimate assumes that all other factors remain equal, with the only variances being the increased gross need for care based upon the rise in the number of elderly persons and the anticipated year of completion of all schemes currently in the planning system.

Brief details of the methodology we have used to assess the quantitative need for care home beds in the assessed catchment areas are set out opposite.

### Methodology for quantitative care home need

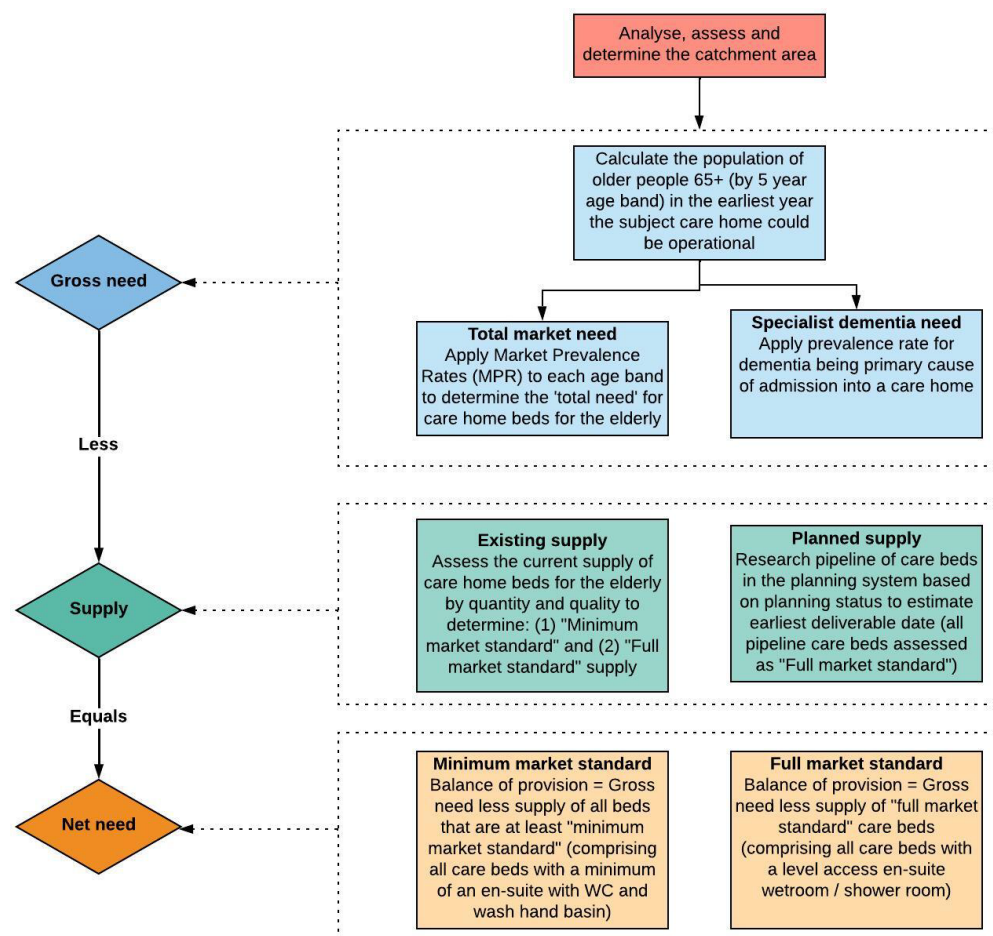


Figure 16: Need assessment methodology

## Definition of ‘minimum’ and ‘full’ market standard’ beds

In calculating the current supply of care home beds, we assess the total provision of minimum market standard bedrooms which we define as the total number of bedrooms operated by each care home that provide en-suite facilities. An en-suite includes a WC and wash-hand basin (as a minimum) and does not necessarily provide a level access shower/bathing facilities.

We do not assess the shortfall of bedrooms based upon a care home's total registered capacity. The total registered capacity is often greater, as it includes the maximum number of bedspaces (rather than bedrooms) that the care home is registered to provide by the sector's regulator, the Care Quality Commission (CQC), for England, the Care Inspectorate Wales (CIW) or the Scottish Care Inspectorate. This registered provision will therefore include:

- minimum market standard bedrooms;
- under-sized bedrooms;
- bedrooms in care homes with internal or external stepped access (without the benefit of a shaft lift) – which therefore require a level of physical acuity and may limit a potential resident from being able to occupy the room;
- bedrooms accessed via narrow corridors – making them unsuitable for wheelchair access;
- Undersized or poorly shaped bedrooms that prevent two care assistants from assisting a person into and out of bed;
- historic shared occupancy bedrooms – now often only ‘marketable’ as single occupancy rooms, as market expectations and commissioning standards rise;
- bedrooms without en-suite facilities – en-suites have been actively encouraged for the last 25+ years in new developments, both by the government's regulator as well as by the market. This has served to improve the overall quality of accommodation and is intended to meet basic expectations that current referrals and their next of kin see as mandatory.

We are aware that some commissioning authorities suggest that, as CQC continues to register existing care bedrooms that do not comply with the definition of ‘minimum market standard’, the total registered capacity should be the appropriate basis of assessment of market supply.

However, this argument fails to take account of the rising dependency levels of those individuals who now require care in a care home. The profile of care home occupants has changed markedly over the past 15 years with care homes now catering to

those with high dependency residential, nursing and dementia care needs, as alternative forms of housing and care have increased, suitable for those with lower dependency care needs.

A failure to address the shortcomings in the existing standard of care home supply will mean inadequate accommodation for those who require the most care over the coming years, as the well-publicised, projected, significant increase in the elderly population starts to take effect.

This was addressed in the appeal decision for a proposed care home in South Cambridgeshire<sup>3</sup>, where the Appellant identified issues with the Council's approach to the assessment of need and also with regard to the identification of the actual ‘available beds’ used in the analysis. The Inspector considered that: *‘The Appellant has provided an alternative approach which arguably provides a more thorough understanding of the current supply within the District, applying up-to-date data on regional demand rates within the East of England to produce a projection of the need for additional care beds. This looks beyond the registered capacity and includes quality considerations as well’.*

In our opinion, it is the local planning authority and the commissioning authority, not the government's regulator, that holds the ability to influence developments and drive spatial and environmental quality forward. In this respect, Carterwood has been involved in a considerable number of successful planning applications since 2008 and has submitted planning need assessments using a prevalence rate methodology similar to that prepared as part of this submission, where the need case has been accepted by the relevant local authority during the application process. We are pleased to provide some recent examples of such below which evidence both the geographical and temporal nature of these planning permissions. A full list of planning permissions can be provided on request.

- Land West Of Lamledge Lane, Shifnal, Shropshire (planning ref: 25/03507/FUL). Proposed 47No. bed care home and associated facilities. (December 2025)
- The Woodlands Hotel, Coupals Road, Sturmer, Essex CB9 7UW (planning ref: 23/01994/FUL). Demolition of the existing buildings on site, and the erection of a 64no. bed care home (Use Class C2), together with access, car parking, landscaping and associated works. (September 2025)
- TCFC Commercial Ltd, Truro City AFC Football Ground, Treyew Road, Truro, Cornwall TR1 2TH (planning ref:

PA24/03640). Demolition of existing structures and construction of a care home (within Class C2) and retirement apartments (Class C3) with access, car parking, electric vehicle charging, cycle parking, refuse storage, 2 substations, air source heat pumps, ground source heat pumps, meter house, solar PV, PV store, landscaping, boundary treatments and other associated works. (September 2025)

- Land On South Side Of Manston Court Road and West Side Of Haine Road, Ramsgate, Kent (planning ref: F/TH/25/0278). Erection of a three storey 66 bed care home (Use Class C2) with parking, access, landscaping and associated works. (September 2025)
- John Morley Importers Limited, Morley Drive, Congleton, Cheshire East, CW12 3LF (planning ref: 24/2497C). Demolition of existing buildings and regeneration of site to provide a care home, 53 retirement living apartments and 14 houses. (September 2025)
- Staverton House, 51A New Terrace, Staverton, Trowbridge, BA14 6NX (planning ref: PL/2025/02846). Demolition of The Old Vicarage with replacement building and extension to Staverton House, providing 13 Bedrooms on Lower Ground Floor, 12 Bedrooms on Ground Floor, all with auxiliary space & together with the Existing Care Home would provide 46 bedrooms total and associated works. (August 2025)
- The Woodlands, Tarragon Way, Bourne, Lincolnshire (planning ref: S24/1842). Proposed demolition of existing buildings and erection of new 66 bed care home for older people. (June 2025)
- Stockport Rugby Union Football Club, To South of Jacksons Lane, Hazel Grove, Stockport SK7 3AN (planning ref: DC/093768). Hybrid planning application comprising: a) Application for full planning permission for the provision of an Artificial Grass Pitch (AGP) and extensions and enhancements to the club house; and b) Application for outline planning permission for the erection of:- up to 60 new residential homes including 10% all affordable supported housing (Use Class C3); - a residential care facility (Use Class C2), for up to 75 beds; and- an extra care facility (age restricted 55+ years) (Use Class C3) for 70 all affordable units; together with landscaping and open space, with all matters reserved. (June 2025)
- Victoria House, 405 Shooters Hill Road, London SE18 4LH (planning ref: 23/2747/F). Partial demolition of the existing building and addition of rear, third floor of accommodation,

<sup>3</sup> Ref: APP/W0530/W/22/3307903 Former Hotel Felix, Whitehouse Lane, Girton, Cambridge CB3 0LX (2023)

and basement extensions with retention of the existing front façade, gable ends and part of the rear façade for a change of use from Sui Generis to provide a care home (Use Class C2), with parking, access, landscaping and other associated works. (April 2025)

- Trelil Farm, Rowes Lane, Trewennack, Helston, Cornwall, TR13 0FF (Ref: PA24/06846). Construction of a 66 bedroom care home with associated car parking and landscaping with SUDS.
- Prince Of Wales High Street Solihull Lodge Solihull B90 1JW (planning ref: PL/2022/01784/PPFL). Demolition of the former Prince of Wales public house and the erection of a 72 bedroom care home facility with frontage parking together with the change of use of former agricultural land at the rear to ancillary amenity space for residents including the provision of Green Care Farming with landscaping, and associated works (Cross boundary application - Solihull and Bromsgrove).
- Former Hotel Felix Whitehouse Lane Cambridge Cambridgeshire CB3 0LX (planning ref: 21/00953/FUL and appeal ref: APP/W0530/W/22/3307903). Demolition of existing buildings and erection of a care home (Use Class C2) with external amenity space, access, parking, landscaping and other associated works
- The Mount Nursing Home, School Hill, Wargrave, Wokingham RG10 8DY (planning ref: 222456). Full application for the proposed erection of a new part two storey and part three storey care home building with associated communal spaces, back of house, and service areas, substation, parking and landscaping following demolition of the existing care home and associated ancillary buildings and a change of use of land at the eastern end of the site
- Moorhill, Moorhill Road, West End, Southampton, SO30 3AY (planning ref: F/22/94034). Proposed 70-bed care home (Use Class C2); associated access, parking, landscaping, sustainable drainage, electricity sub-station, other structures and works; following demolition and clearance of the existing site.
- Proposed Care Home and Landscaped Gateway for Alton, Winchester Road, Chawton, Alton, Southampton. (planning ref: 59484, granted May 2023). Development to provide 67 bed purpose built care home (Use Class C2) and 28 no. apartments (Use Class C3) providing 100% Affordable, age restricted, sheltered accommodation.
- Leys Farm Wyaston Road Ashbourne Derbyshire DE6 1NB (planning ref: 21/01245/FUL) Proposed demolition of existing buildings and erection of a care home (Use Class C2) with associated parking, access and landscaping.

While the total registered capacity was greater than the number of minimum market standard bedspaces, the quality, design and

type of bedspace could not be ignored, and the premise of assessing bedspaces on a minimum market standard basis was accepted by each respective council.

We have therefore assessed the net need for care home bedrooms by adopting minimum market standard beds as the basis of our analysis, due to the rising expectations of quality required by service users as well as previous regulatory requirements to provide en-suite facilities, and best practice. We consider that, going forward, homes that do not provide adequate en-suite facilities will fast become obsolete.

This method of assessing supply, utilising minimum market standard beds, is accepted market practice by all operators we currently undertake feasibility work for, when considering the development of new facilities. We have prepared over 4,500 site feasibility/need assessments since 2008, all of which adopt the minimum market standard bed approach.

It should be noted that the quality of en-suite provision in existing homes may vary significantly, from large wetroom facilities to small, converted cupboards with a WC and wash-hand basin.

All new care homes are developed with en-suite facilities, usually providing larger bedrooms with en-suite wetroom/shower rooms to enable the service user to be bathed without the necessity for larger communal bathrooms; therefore, all new bedrooms are classified as 'full market standard'. We also provide a planning need assessment on this increased bedroom quality level for the purposes of comparison with minimum market standard level.

Other factors also influence what determines a minimum market standard bedroom, including room size, layout and configuration, as well as a host of factors not related to the physical environment, most importantly the quality of care being provided to service users. However, with the information available, and without making qualitative judgements as to the calibre of any care home, we consider it the most appropriate measure to analyse the elderly care home provision currently available upon which to assess existing and projected need.

## Proposed care home – commonly raised questions

Carterwood is a market leader in the provision of need and demographic analyses in the social care sector. As a result of this expertise, we have been involved in a large number of need assessments submitted to support planning applications, and we are aware of the consistent themes raised by adult social care commissioning teams in respect of new care developments and their potential impact upon the local area.

We have, therefore, provided our response below to some commonly raised queries to pre-empt areas where there may be uncertainty or ambiguity in the need case:

### Has the Covid-19 pandemic reduced the need for care home beds?

The COVID-19 pandemic had a significant impact on the social care sector and raised questions as to how to best support older adults when experiencing a transmittable illness themselves, or living in a community where there is an outbreak of a life-altering transmittable illness.

The pandemic caused a short-term shift in need for residential care for older people with uncertainty in respect of changes to admission patterns, acute care discharge rates, death rates and other structural/social impacts. Carterwood tracked the impact of the pandemic on the care home sector, as follows:

- Occupancy low point of 78.8 per cent, reached in June 2020.
- The total excess elderly care home deaths during the COVID-19 pandemic (compared to the 5-year historic average) was approximately 39,000.
- As the pandemic progressed, weekly deaths within care homes fell below the 5-year average and by early 2023 this had offset the total number of excess deaths by around 13,000, resulting in a net excess of around 26,000 deaths over the three years from the start of 2020.

Our need analysis is based upon 2029, the earliest the proposed care home could be operational and utilises Market Prevalence Rates (MPR) based on January 2026. Our assessment assumes that occupancy has returned to pre-pandemic levels, with no material impact upon the market size estimate.

The short-term impact of COVID-19 has and continues to result in the closure of care homes that do not offer the quality of accommodation now sought by the market, those with poor CQC ratings or those most adversely impacted by the pandemic (in terms of occupancy and/or staffing). This is likely to reduce poorer quality supply and create additional need for new care home provision, to cater to a still rapidly rising elderly demographic.

Will the proposed care home impact upon existing health and social care services, and GPs, in particular?

An area of the proposed care home can be made available for a visiting GP to hold an in-house surgery for residents, if required. This reduces the number of visits made by residents to GP surgeries and allows a visiting GP to combine multiple consultations into one visit. The presence of on-site care staff also potentially reduces the number of unnecessary GP appointments, thereby alleviating rather than increasing waiting lists.

The concentration of individuals within the care home should also assist in reducing the requirement for community nurses, and there are also advantages of having residents within one location.

Any pressure on care services and GPs will not be as a direct result of the proposed development, which will provide a much-required care home for existing older local residents and will help battle the rising demographic pressure and resultant increase in care needs in the area.

### Will the proposed care home impact upon already stretched local authority budgets?

Having conducted many studies across Great Britain and spoken with a host of social care commissioning teams, our general observation is that placements both into and out of a particular local authority area tend to be broadly neutral.

While a number of care home residents will move into a local authority area when a new home is developed, when new care homes open in neighbouring boroughs or districts these will have the same effect and draw potential residents away from their existing local authority area. In effect, there are likely to be as many people leaving as there are migrating into a council area, and these two factors effectively cancel each other out.

We are aware of the challenge faced by commissioning authorities in funding long-term care for those elderly people who do not meet current savings thresholds. A further issue relates to prospective self-funding service users who subsequently deplete their savings and are then obliged to seek local authority support for their ongoing care costs.

In enquiries we have conducted with commissioning authorities, we have ascertained that this funding requirement generally tends to amount to a small proportion of the total social services budget for older people and we would be happy to assist the council in analysing this information, if required.

Also, in our experience, the incidence of this scenario developing is low compared to the number of self-funding service users who

continue to fund their care throughout their stay. To further guard against this potential problem, care operators may allocate a budget within their financial modelling for this reason, to ensure that residents' requirements can continue to be met and the care home is genuinely a 'home for life', if required. Also, their admission process and eligibility criteria ensure that any self-funding residents have proof of funds to continue to support themselves financially, normally for a minimum period of 2 years.

Notwithstanding all of the above, it is inappropriate for financial considerations and viability to be confused as part of the consideration of a planning application. We set out below an extract from an appeal decision from Cheshire East planning authority (reference: APP/R0660/A/12/2188195) in respect of a care village scheme in Handforth. Paragraph 62 of the appeal decision (for which planning permission was allowed) makes it clear that such considerations should not be material in the planning decision-making process and should therefore be disregarded, as follows:

'The Council has suggested that, due to a lack of need, new residents from outside Cheshire East could have to enter the home to ensure its viability. They would then represent a risk that the Council could be responsible for their future care. The financial concerns of the Council are however not material considerations in this case, as has been found on many other occasions including in the Health and Safety Executive v Wolverhampton City Council & Victoria Hall Ltd [2012] UKSC 34 case. This is the situation notwithstanding an annual increase in those needing Council support in care homes and the Council's 2011/12 expenditure of some £2.2m of support to those unable to afford fees previously met privately.'

### Does domiciliary care provide an alternative to the subject scheme?

Adult Social Care teams are seeking to enable older people to remain in their own homes for longer, with care provided by a domiciliary care agency. This has two specific advantages: firstly, a potentially positive outcome for the resident, who can remain in their own home and receive care; and, secondly, reduced expenditure on local authority-funded care, as, on average, the cost of domiciliary care is usually less than the weekly fee for a placement in a care home.

However, while care at home should be supported as an objective where this is possible, it is not economically viable for the provision of 24-hour 'home care', and the costs of care support at this level will typically necessitate a residential environment.

For dementia sufferers, specialist accommodation is also required to cater to this service user group's particular needs. Where informal care by family or friends is not on hand, or where the demands of the individual become too great, moderate and severe dementia sufferers, more often than not, require care in a residential setting, where 24-hour care and support is on hand in a safe and secure environment.

#### Is housing-with-care/extra care an alternative to the subject scheme?

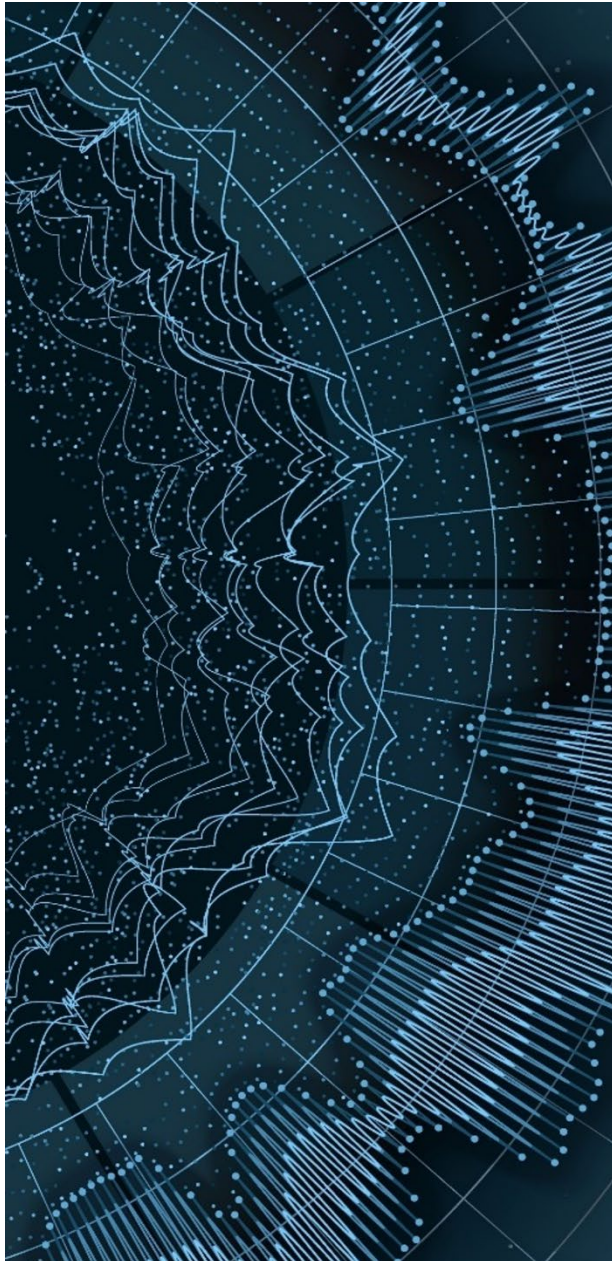
Many local authorities are seeking to support the development of extra care facilities that provide residents with 'their own front door' while providing 24-hour on-site security, care and support. The concept is also being viewed more positively by the private sector, with the development of a range of older people's housing-with-care alternatives. We agree that the supply of extra care accommodation should be expanded to enable many elderly people to continue to live rewarding and independent lives for longer. This is not in dispute.

Simply increasing extra care provision is not, however, a panacea for the accommodation and care needs of all elderly people and there is increasing recognition of its shortcomings and limitations for high-dependency residents. Evidence from the Associated Retirement Community Operators (ARCO) suggests that 8.7% of residents still need to move into a care home after living in an Integrated Retirement Community. In addition, most new extra care schemes in the private sector are aimed at the lower end of the acuity spectrum, as it is difficult, if not impossible, for private purchasers to go through the sale of their own home at the point when they may require care in a care home.

Given the forecast demographic change, which will increase the cohort of very elderly people, and the prevalence rates of dementia, it is clear that a large number of elderly people will not be able to continue to live rewarding and independent lives in housing-with-care and will go on to need 24-hour care home accommodation. The subject care home is proposing to meet the highest level of acuity for older people, where 'choice' is replaced with a 'needs-based' decision for themselves or their family/friends/key decision maker.

#### Key findings – qualitative factors

- Delayed hospital discharges keep elderly patients in NHS acute settings longer than necessary, when cost-effective care home beds could provide step-down, rehabilitation, or long-term care. Access to well-equipped, infection control-compliant care home beds for high-dependency needs is crucial for freeing up NHS beds for those who most need them.
- The COVID-19 pandemic highlighted shortcomings in the social care sector and reduced occupancy in the short term, resulting in a reduction of poorer quality supply and additional need for better specified, new care home provision to cater to a still rapidly rising elderly demographic.
- A range of care and accommodation options is necessary, to provide for the needs of those who require support, mitigate the impact on social services budgets and provide choice to those who fund their own care.
- There remain, however, an increasing number of elderly people who are the most frail and those with dementia, who require full-time support within a specifically designed care home that provides high-dependency care, suitable for such needs.



## Appendix

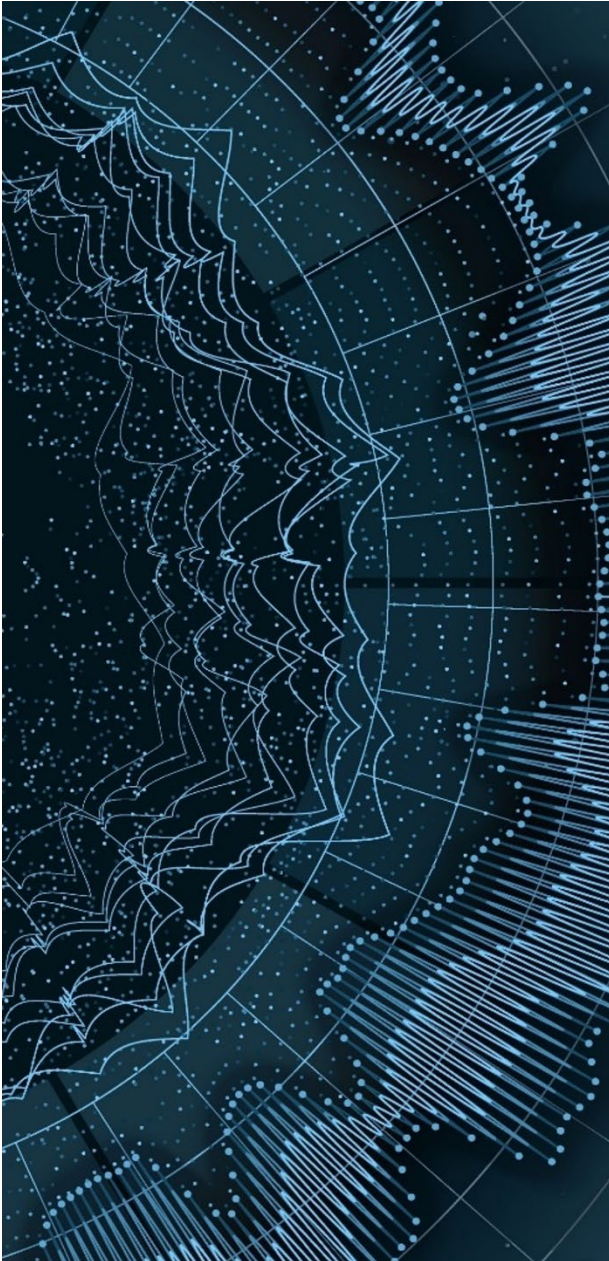
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## Appendix

### D: Definitions and reservations

### Timing of advice

Our work commenced on the date of instruction and the collection and compilation of data and other research contained within our work was undertaken at varying times during the period prior to completion of this report.

The report, information and advice provided during our work were prepared and given to address the specific circumstances as at the time the report was prepared and the scope and requirements set out in the engagement letter. Carterwood has no obligation to update any such information or conclusions after that time unless it has agreed to do so in writing and subject to additional cost.

### Data analysis and sources of information

Details of our principal information sources are set out in the appendices and we have satisfied ourselves, so far as possible, that the information presented in our report is consistent with other information such as made available to us in the course of our work in accordance with the terms of our engagement letter. We have not, however, sought to establish the reliability of these information sources by reference to other evidence.

The report includes data and information provided by third parties of which Carterwood is not able to control or verify the accuracy.

We must emphasise that the realisation of any prospective financial information or market or statistical estimates set out within our report is dependent on the continuing validity of the assumptions on which it is based and may be subject to other variables and factors outside the scope of our report. Any assumptions stated in the report will need to be reviewed and revised to reflect market conditions. We accept no responsibility for the realisation of the prospective financial or market information. Actual results may be different from those shown in our analysis because events and circumstances frequently do not occur as expected, and the differences may be material.

Measuring and predicting demand is not an exact science, and it should be appreciated that there are likely to be statistical and market related factors that could cause deviations in predicted outcomes to actual ones.

We have undertaken certain analytical activities on the underlying data provided by third parties to arrive at the information presented. We cannot and do not accept responsibility for the completeness or accuracy of this underlying data.

Where we have adapted and combined different data sources to provide additional analysis and insight, this has been undertaken with reasonable care and skill. The tools used and analysis undertaken are subject to both internal and external data-checking, proof reading and quality assurance. However, when undertaking complex statistical analysis it is understood that the

degree of accuracy is never absolute and there is inevitably variance in any findings, which must be carefully weighed up with all other aspects of the decision-making process.

The estimates and conclusions contained in this report have been conscientiously prepared in the light of our experience in the property market and information that we were able to collect, but their accuracy is in no way guaranteed.

All advice has been prepared on a 'desktop' basis and where we have prepared advice on a 'headline basis', we have conducted a higher level and less detailed review of the market. If commissioning a Headline Market Analysis report we recommend commissioning a comprehensive market analysis report before finalising the decision-making process. Where we have provided 'comprehensive' advice, we have used reasonable skill and endeavours in our analysis of primary and secondary (for example, Census, Land Registry, etc.) data sources, but we remain reliant upon the quality of information from third parties, and all references above to accuracy, statistics and market analytics remain valid.

### Purpose and use

The report has been prepared for the sole use of the client and any other persons specifically named in our engagement letter and solely for the purposes stated in the report. The report should not be relied upon by any other person or for any other purposes. The report is given in confidence to the client and any other persons specifically named in our engagement letter and should not be quoted, referred to or shown to any other parties without our prior consent.

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### Extraordinary market factors

The trading environment of the care sector in the UK, which impacts upon market conditions, remains in a volatile state. Contributing factors include some ongoing uncertainty around the post-Brexit trading conditions, operating with the legacy and future risks of COVID-19 and the effect of the conflict in Ukraine and the resulting inflationary pressures. Our reports are prepared using high quality data and expert analysis from our experienced team. Any recommendations made are based upon the market and financial climate as at the date of the report, but do not take into account future economic or market fluctuations caused by the events outlined above or other unforeseen events. With this in mind, it may be prudent to review a commissioned report periodically in light of any significant developments that may affect the care sector.

### Census 2021

This report contains data relating to the 2021 census for England and Wales. The Scottish census was delayed, with the collection phase having taken place between 28 February and 1 June 2022. We are monitoring the census data release schedule, reviewing new data as it is released and ensuring the data is embedded into our analysis as quickly as possible

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