DEMOGRAPHIC NEEDS ANALYSIS

2, 4, 6, and 8 Danson Road, Bexleyheath, DA6 8HB

14th May 2019

CONTENTS

01

DEMOGRAPHICS NEEDS ANALYSIS

CAREBASE LIMITED

To: Carebase Limited

Attention: Mike Hirsch

Property: 2, 4, 6 and 8 Danson Road, Bexleyheath, DA6 8HB

Report Date: 14/05/2019

Instructions

Appointment

In accordance with your emailed instructions dated 27 March 2019 and as confirmed in our letter dated 4 April 2019, we have undertaken a demographic needs analysis for the proposed 70 bed care home at 2, 4, 6 and 8 Danson Road, Bexleyheath, DA6 8HB.

Inspection

In preparing this needs analysis report, we have not inspected any care homes in the area, nor have we made any formal enquiries to the regulatory authority for care homes, the Care Quality Commission (CQC) or London Borough of Bexley (the local authority).

Sources of Information

In addition to information established by us, we have relied on the information obtained from you and that available in the public domain. Further, we have had regard to our knowledge of the care home sector on a local and national basis.

Confidentiality

This report is confidential to you, for your sole use and for the specific purpose stated. Other than its use in relation to the proposed planning application, we will not accept responsibility to any third party in respect of its contents.

Reliance

This viability report may be relied upon only in connection with the specific purpose stated by those parties to whom we have given our prior consent. No reliance may be placed upon this viability report by any other party.

Signed for and on behalf of Cushman & Wakefield Debenham Tie Leung Limited (C&W)

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2, 4, 6 AND 8 DANSON ROAD, BEXLEYHEATH, DA6 8HB

Instructions

- In accordance with your emailed instructions dated 27 March 2019 and as confirmed in our letter dated 4 April 2019, we have undertaken a demographic needs analysis for the proposed 70 bed care home at 2, 4, 6 and 8 Danson Road, Bexleyheath, DA6 8HB.

- Our catchment analysis is based on both the London Borough of Bexley and a 5 mile radius centred on the Property's postcode.

- In our experience, a competently operated care home providing elderly and dementia care in this location would attract prospective residents from within a 5 mile radius.

- However we note that social funded residents will typically be placed within the borough and therefore our analysis of demand and supply is provided both at 5 mile catchment and also for the London Borough of Bexley.

- We have taken into consideration both the existing and future provision of care home beds for older people together with the demographic profile within the catchment area.

- We further note that the proposed 70 bed care home will provide nursing, residential and dementia care.

- In preparing this assessment, we have not inspected any competing care homes. Enquiries to the regulatory authority in England, the Care Quality Commission (CQC) and the Local Authority are limited to publicly available web based information only.

- Our report summarises the demographic and socio-economic profile for the 5 mile catchment area centred around the proposed site.

02

KEY DEMOGRAPHIC TRENDS

THERE ARE A NUMBER OF KEY DEMOGRAPHIC TRENDS WHICH DRIVE A REQUIREMENT FOR INCREASED PROVISION, QUALITY AND DIVERSITY OF CARE FACILITIES, NAMELY:

01
AGEING POPULATION

03
CHANGES IN THE HEALTH AND DEPENDENCY LEVELS OF ELDERLY PEOPLE

02
REDUCTION IN WILLINGNESS OF FAMILY MEMBERS TO PROVIDE INFORMAL (UNPAID) CARE

04
CHANGES IN EXPECTATIONS OF OLDER CONSUMERS

DEMOGRAPHIC PROFILE

- In undertaking our analysis, we have utilised CACI's socio-economic Acorn profile (A Classification Of Residential Neighbourhoods) and more specifically, assessed the affluence and age profile within the 5 mile catchment.

- In forming our views, we have assessed the current bed supply taken from the A-Z Care Homes Guide as well as pipeline supply as provided by Glenigan.

- Further, we have had regard to Laing and Buisson's Care of Older People Market Report (29th edition).

- Laing and Buisson are the leading market intelligence provider for the healthcare market and also provide the Office for National Statistics with data on the independent sector.

- Laing and Buisson Market Reports are used across a wide range of sectors and levels including providers, commissioners, investors and regulators.

- The chart below shows the current population makeup of the catchment area by age demographic. As can be seen, the immediate area is expected to see a population increase across all age categories.

POPULATION BREAKDOWN BY AGE

Legend: ■ 2018 ■ 2023 ■ 2028
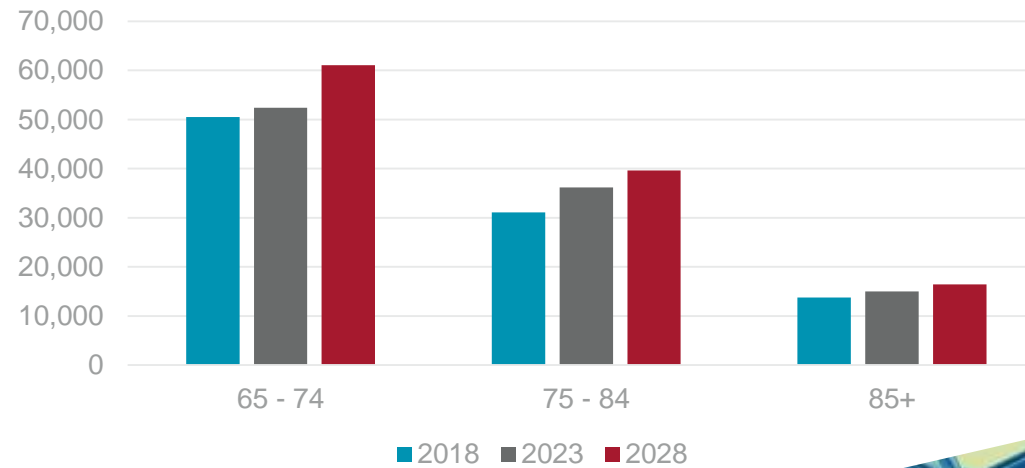
CATCHMENT

WE SET OUT IN THE FOLLOWING GRAPHS AND TABLES AN ILLUSTRATION OF THE MAKEUP OF THE LOCAL CATCHMENT AREA. A FULLER DEMOGRAPHICS DATASET IS AT APPENDIX B.

5 Mile Radius

Selected Location
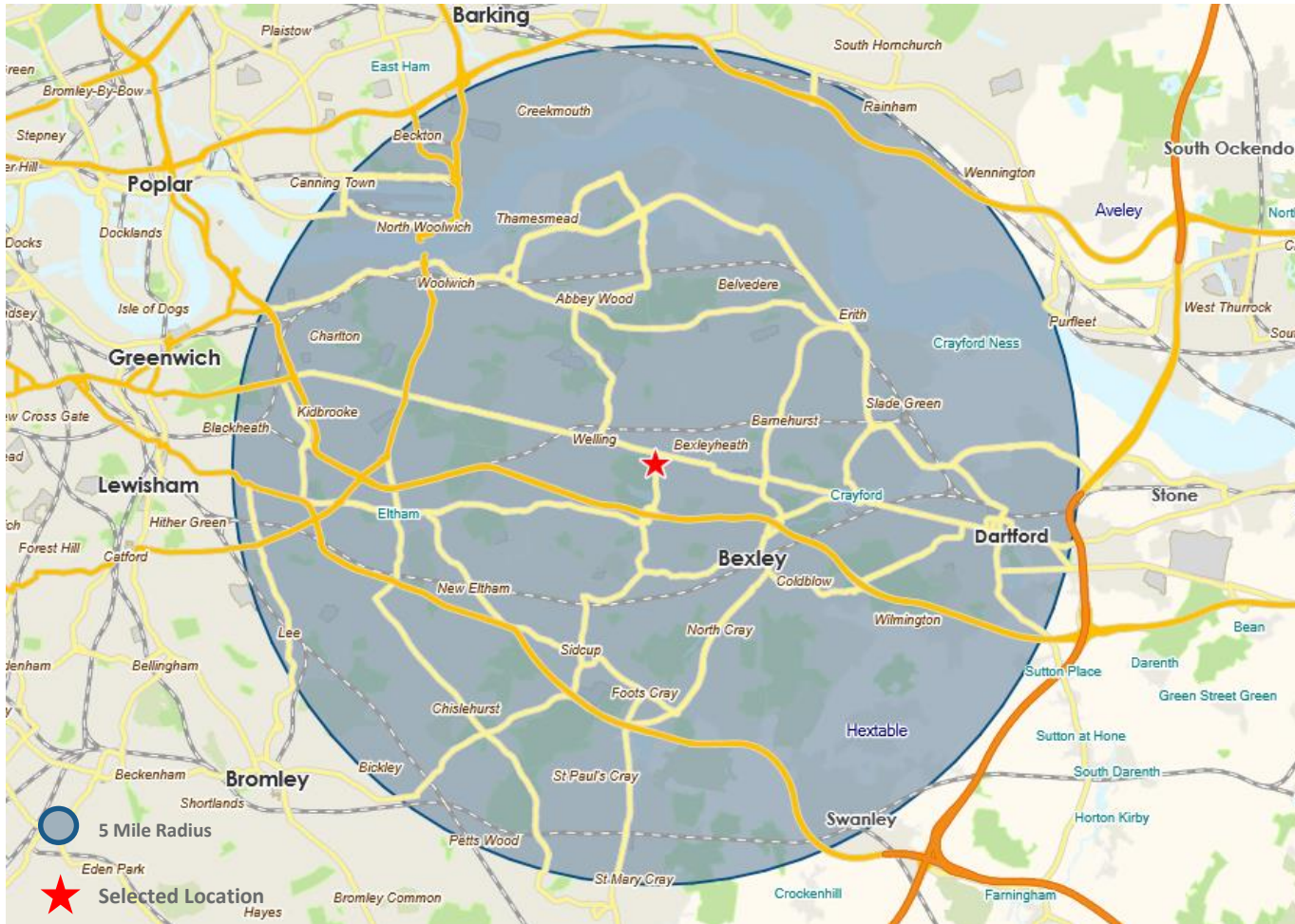
The Property comprises four semi-detached residential dwellings, it is proposed to develop a new 70 bed care home providing specialist dementia and elderly care.

The site is located in Bexleyheath at the junction of Danson Park and Park View Road. Danson Park is one of four historic parks in Bexleyheath and is designated Grade II on the Historic England parks and gardens of special historic interest register.

The site is bordered by residential housing with exception of the Danson Park which runs along the western boundary of the site. Further north is Crook Log Leisure Centre which was completed in 2005.

The map demonstrates the 5 mile radius from the property on which the catchment area analysis is based which is considered an acceptable parameter for a catchment area within the wider healthcare market.

AFFLUENCE

THE FOLLOWING MAP AND CHART ILLUSTRATES THE AFFLUENCE PROFILE AS SUGGESTED BY ACORN CATEGORIES.
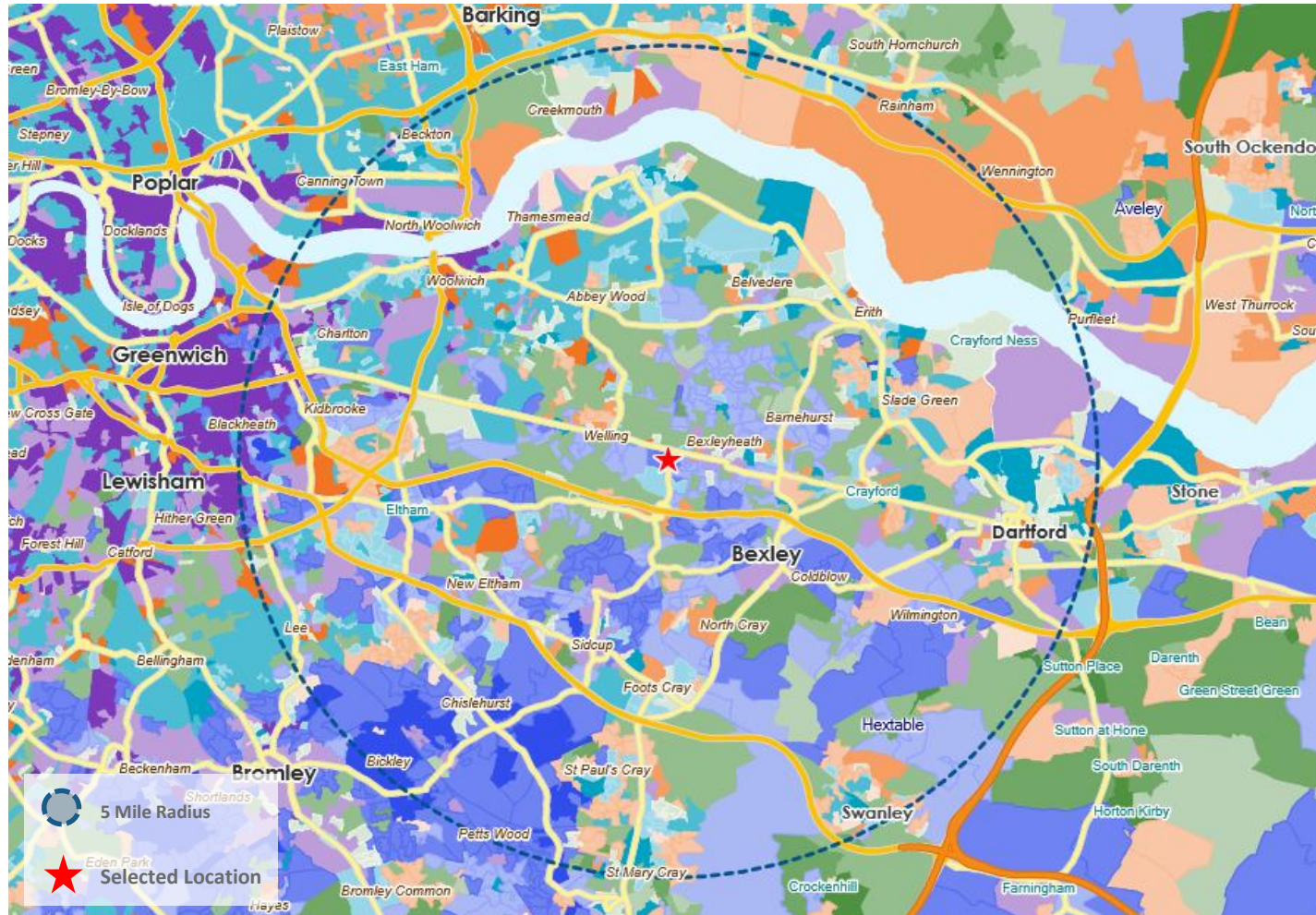

Within the map, the blue areas are those in the most successful and wealthy Acorn groups, the orange representing the weaker dominant classifications.

The area immediately surrounding the proposed development is predominantly medium to high affluence although there is a pocket of deprivation immediately south of the site. We note mixed affluence to the northern fringes of the catchment although this falls on the northern bank of the river and it is unlikely that any population here would consider care homes within Bexley as such we have analysed based solely upon the London Borough of Bexley in addition.

Bexley itself appears generally affluent reflecting almost two times the number of people in the category "Mature Money", the category typically considered to be private pay residents.
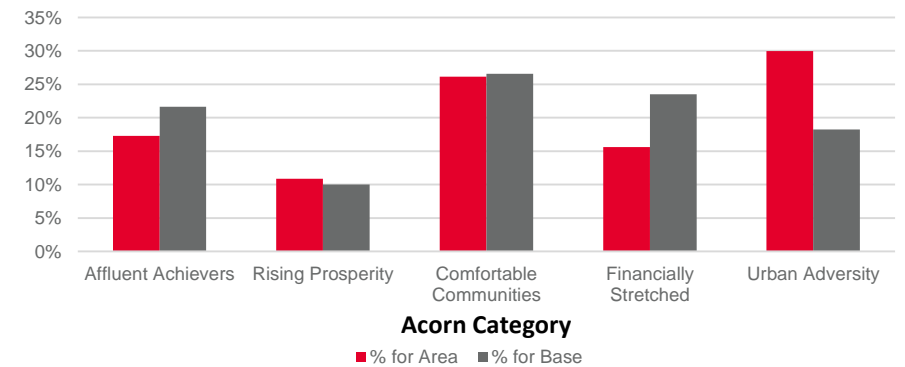
The local tone of affluence is average with most broadly in line with typical although we note higher levels of urban adversity, it is likely that those falling within this group would benefit from any job creation from a new care facility.

Looking more closely at Bexley as a borough, the affluence suggests strong support for a purpose built care home as private pay residents are more likely to demand higher quality accommodation.

AGE PROFILE

We set out in the following chart a summary of the population breakdown for the 5 mile catchment together with the base data for comparison purposes and the expected change for the catchment over time.

The catchment has a younger than average age profile however this is not unusual for urban areas which have undergone substantial development.

As is the case across the UK, this is projected to increase over the next 5 and 10 years indicating an increasing need for appropriate designed accommodation for older people.

In addition, the above-average proportion of the working age demographic facilitates the need for heightened job creation in the area.

2018 Population by Age - % for Area & % for Base

Legend: ■ % for Area ■ % for Base ▬ % for Area (2023) ▬ % for Area (2028)
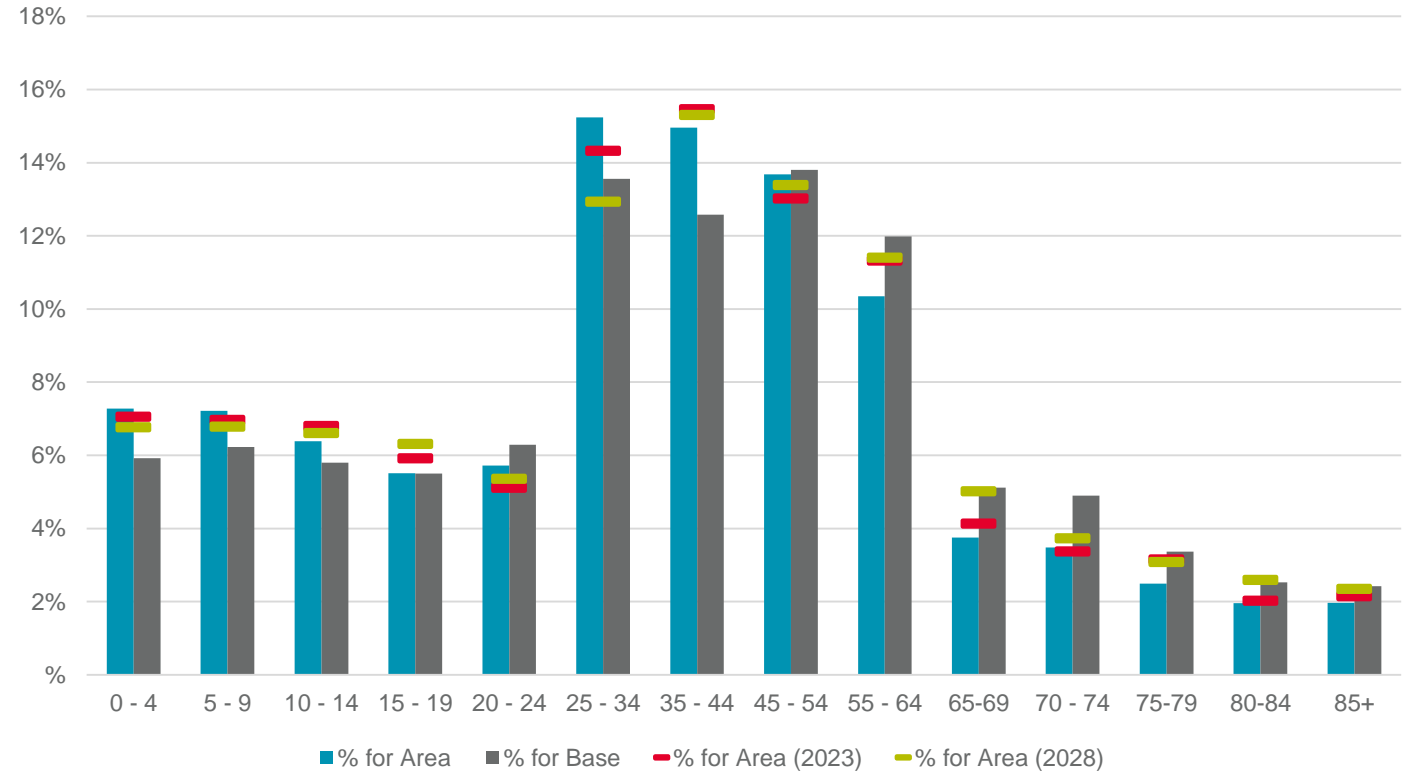
03

CATCHMENT SUPPLY

5 MILE RADIUS

WE PROVIDE BELOW A TABLE SHOWING OUR UNDERSTANDING OF THE EXISTING CARE PROVISION WITHIN A 5 MILE DRIVE TIME CATCHMENT OF THE PROPERTY:

	Homes	Registered Beds	Ave. Reg	Max Reg	Min Reg.	Rooms	Single Rooms	En-Suite
Care Home	23	895	38.9	131	3	846	94.2%	81.1%
Nursing Home	31	2,001	64.5	120	16	1,954	97.6%	88.6%
Grand Total	**54**	**2,896**	**53.6**	**131**	**3**	**2,800**	**96.6%**	**86.3%**

In our assessment of bed supply, we have removed homes providing specialist care.

There are 2,896 registered beds (2,001 nursing and 895 residential) within the 5 mile Catchment Area.

Of the above, there are 14 homes that are registered for under 30 beds totalling 203 beds, the majority of these are converted stock, which lack the operational efficiencies of purpose built care homes.

According to Laing and Buisson's Care of Older People Market Survey, the focus on improving economies of scales has seen an increase in the average size of independent sector care homes leading to higher barriers to entry for owner/manager operators.

The increases have been driven by corporate providers who consider care homes with 60 plus beds as being the most economic and by the exit of small business providers of uneconomic care homes of 30 or less beds.

We would therefore anticipate many of the smaller or older homes to continue to exit the market over the next few years due to lack of economies of scale. This would equate to a supply of 2,693 beds as shown in the table below:

2018	
Current bed supply	2,896
Loss of beds in homes with registrations of 30 beds and under	203
Net bed supply	**2,693**

Further these homes with lower registrations are likely on smaller plots and it would not be viable to redevelop the site as operators are generally looking for plots in excess of an acre to develop homes with registrations of 60 beds plus.

Areas which lack appropriate bed stock now and with too few beds in the pipeline will see this issue compounded in years to come against a backdrop of increasing numbers of older people as set out below.

Within our analysis, we have determined the following bed demand based on the national likelihood of requirement for some form of care in either a care home or long stay hospital bed (source: Laing and Buisson, Care of Older People), we have then forecast figures against the projected ageing population for the next five and ten years assuming the current bed supply remains the same:

Age	Risk of living in a care home	2018	2023	2028
65 - 74	0.57%	288	299	348
75 - 84	3.60%	1,120	1,302	1,426
85+	14.70%	2,022	2,206	2,413
Total demand		**3,430**	**3,806**	**4,188**
Adjusted bed supply		2,693	2,693	2,693
New beds required		**737**	**1,113**	**1,495**

Assuming bed supply remains the same, this would result in a shortfall of **1,495** beds by 2028.

If granted planning permission, the successful home is unlikely to commence trade until 2021. Assuming a steady year on year increase between 2018 and 2023, the likely bed demand in 2021 will be **c. 3,656** beds or a shortfall of **963.**

The current bed supply does not meet the demand and in order to meet projected demand in 2023, supply would need to increase by over 40%.

It is important to note that even without removing those beds in homes with registrations under 30, the current supply of 2,896 beds does not meet the current demand of 3,430 beds.

ANALYSIS OF LONDON BOROUGH OF BEXLEY SUPPLY

WE HAVE ALSO ASSESSED THE BED SUPPLY WITHIN THE BOUNDARIES OF THE LONDON BOROUGH OF BEXLEY AS A COMPARISON AND A SUMMARY OF EXISTING CARE PROVISION (AGAIN EXCLUDING SPECIALIST HOMES) FOLLOWS:
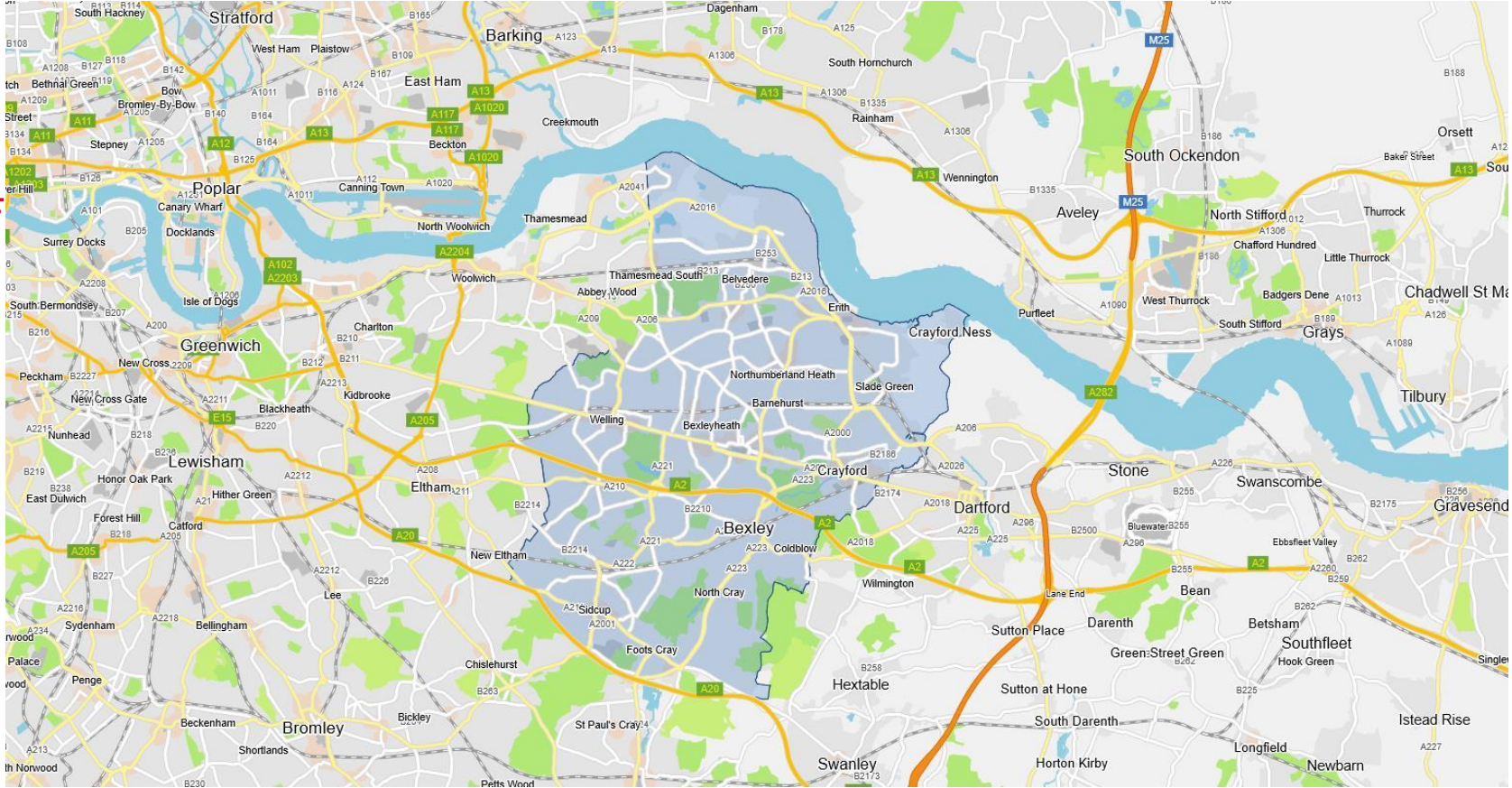
CATCHMENT SUPPLY

LONDON BOROUGH OF BEXLEY

	Homes	Registered Beds	Ave. Reg	Max Reg	Min Reg.	Rooms	Single Rooms	En-Suite
Care Home	10	571	57.1	131	4	525	91.2%	93.1%
Nursing Home	12	764	63.7	120	16	743	97.2%	96.2%
Grand Total	**22**	**1335**	**60.7**	**131**	**4**	**1268**	**94.7%**	**95.0%**

There are 1,335 registered beds (764 nursing and 571 residential) within the Borough.

Of the above, there are 5 homes that are registered for under 30 beds totalling 70 beds. Some of these homes will struggle to achieve the efficiencies required for a viable business and as many are conversions, further extensions on often already tight sites are difficult.

We have summarised the loss of beds below assuming that these smaller homes will continue to exit the market in coming years.

This would equate to a supply of 1,265 beds as shown in the table below:

2018	
Current bed supply	1,335
Loss of beds in homes with registrations of 30 beds and under	70
Net bed supply	**1,265**

As per the catchment, we have set out below the forecast bed demand against the current supply.

Age	Risk of living in a care home	2018	2023	2028
65 - 74	0.57%	130	131	151
75 - 84	3.60%	512	579	622
85+	14.70%	974	1,067	1,153
Total demand		1,616	1,778	1,926
Adjusted bed supply		1,265	1,265	1,265
New beds required		**351**	**513**	**661**

Assuming bed supply remains the same, this would result in a shortfall of 661 beds by 2028.

If granted planning permission, the successful home is unlikely to commence trade until 2021. Again, assuming a steady year on year increase between 2018 and 2023, the likely bed demand in 2021 will be c. 1,713 beds i.e. a shortfall of 448.

The above table shows a significant shortfall of beds in the Borough, such that to meet the demand in 2023, the current stock would need to increase by 40%.

Again, a shortfall exists even without discounting loss of those beds in homes with registrations of 30 beds and under.

04

CARE HOME DEMAND

The 2018 Joint Strategic Needs Assessment Bexley states that the current care home market is supported by block contracts with three large providers and one smaller provider whilst the remaining provision is managed by way of spot placements.

The report went on to state that it was estimated that 50% of residents in care homes were self-funders.

It was recognised that more work was required to raise standards and improve the quality of the care home provision in the Borough with 40% of homes rated as 'Requires Improvement' by the CQC compared to the average in England at 19%. Whilst this is not necessarily linked to the quality of the accommodation itself, it is widely recognised that delivery of care is more challenging if there are spatial/layout restrictions.

Bexley was found to have one of the highest rates of delayed transfers of care from hospital, attributable to social care. Again, whilst not the only solution and whilst we are aware that a concerted effort has been made to reduce these figures, appropriate accommodation in the market such as a care home even if on a temporary basis can assist in reducing delays in discharge.

In 2018, the London Borough of Bexley published their report "Ageing Well" setting our the partnership approach to the care of older people.

The report recognised Bexley had the third largest population of older people of all the London Boroughs with those over 65 years making up 16% of the population (JSNA Bexley).

It is estimated that the over 65 year old population in Bexley increased from 37,507 in 2011 to 40,964 in 2017. This is predicted to reach 51,043 by 2030, which is equivalent to a further 24.6% increase in the older population. A more rapid increase in the older age groups (75+) is also projected. The latter being at increased risk of requiring care within a registered setting.

The elderly population is not evenly distributed across Bexley wards. The wards with highest numbers of older people are predominantly clustered in the southern half of the borough with Brampton, Sidcup, Longlands, St Mary's and Blendon and Penhill wards having 20% or more of their population aged 65+. The proposed development located in the centre of the ward is well placed to service these wards.

CARE HOME DEMAND

DEMENTIA

With particular focus on dementia, the JSNA Bexley stated the following:

The latest predictions show that there are estimated to be 2,654 people aged 65+ living with dementia in Bexley; this is expected to rise to 4,659 in the next 20 years.

Whilst more is being done to support individuals to stay in their own homes for longer, the number of people with a dementia diagnosis is increasing and ensuring appropriate care settings will be key in supporting them in later life.
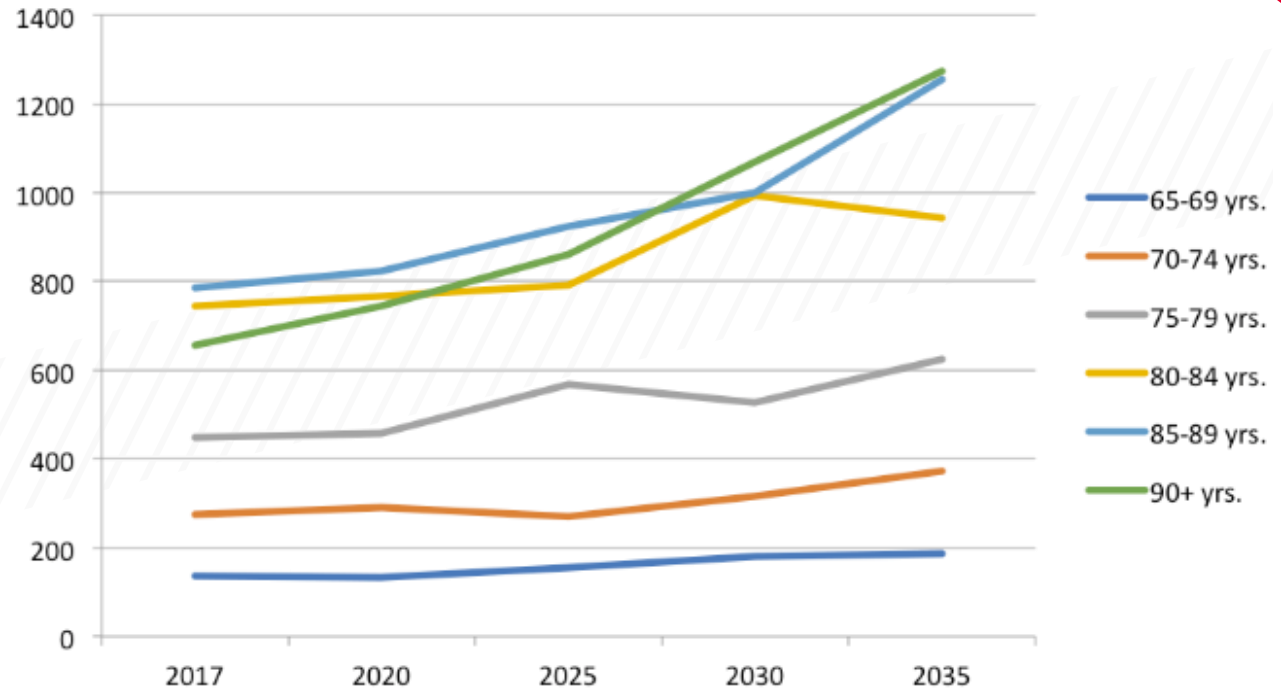
Source: Pansi data November 2017

CARE HOME DEMAND

QUALITATIVE ANALYSIS

The statistics can only provide part of the picture however, it is often deceiving to base analysis purely on the number of beds available against likely demand.

We have therefore undertaken qualitative analysis to provide additional insight into the current and likely future provision.

While the Care Standards Act 2000 specified standards for the physical environment within care homes, the subsequent Health and Social Care Act 2008 is far less prescriptive. This Act, which came into effect on 1 October 2010 for homes in England, does not have specified standards, and the assessment of the suitability of the accommodation in relation to delivered care outcomes is performed by the CQC.

Despite the absence of prescribed standards, the market continues to assess existing homes in relation to established benchmarks in terms of size (e.g. minimum 12 sq m for single bedrooms and 4.1 sq m per bed for communal space) and facilities (e.g. en-suite bedrooms and a range of day space). Indeed anything less than this is seen as sub-standard in the current market, lacking both appeal and longevity.

Of the existing homes within the Bexley, 5 homes totalling 377 beds were purpose built in the 1970s, 80s and 90s. Whilst the homes are purpose built, they are the first generation of purpose built properties and were constructed before the prescriptive space standards set out within the Care Standards Act 2000, it is therefore likely that many of the bedrooms are under 12 sq m. The majority will have en suites but will be limited to WC and basin rather than a full wet room that is standard in the latest developments.

Current market expectations are for much larger bedrooms with wet room en suites. Further, day space is limited in comparison to the more modern homes which offer a full range of amenities and day space provision. This can include, but is not limited to, café or bistro areas, private dining facilities, cinema rooms, activity areas, libraries and designated internet access facilities.

Of the existing homes, only five homes (336 beds) were constructed in the last 10 years and only two homes (146 beds) in the last five years, this means a very limited supply of modern accommodation in an affluent area which is likely to demand such quality accommodation.

HOUSING DEMAND

The London Plan para 3.14A and Policy 3.3 specifies that minimum housing supply targets for each borough are set out from 2015 until 2025. For Bexley, this target is 446 dwellings per annum.

Policy 3.3Da states that boroughs should draw on housing benchmarks (Bexley – 446 dwellings per annum) in developing their Local Development Framework (LDF) housing targets, augmented where possible with extra housing capacity to close the gap between identified housing need and supply in line with the requirement of the NPPF.

In addition, it is stated that boroughs should take account of the potential sources of supply including provision from non-self contained accommodation.

Local residents moving into a care home, would typically vacant their current homes. This is of benefit to the individual who will be accommodated in a setting more appropriate for their care needs.

Further, it is estimated that 53% of UK households aged 65 and over are under-occupying their property, those who might be better accommodated within a residential care setting will therefore release more units to the local housing stock.

A number of those eligible for Local Authority care funding will be vacating social housing thus relieving some pressures seen in the housing register and waiting times.

PIPELINE

WE SET OUT POTENTIAL FUTURE COMPETITION AS DERIVED FROM THE GLENIGAN PLANNING DATABASE, USING A 5 MILE RADIUS.

We note neither development lies within the Borough boundaries though they are within 5 miles of the proposed site.

BRUNEL WAY, DARTFORD

PLOT 16A THE BRIDGE, BRUNEL WAY, DARTFORD, KENT, DA1 5FW

CLIENT: TBC

START DATE: 16/11/2019
END DATE: 16/12/2020

CONSTRUCTION OF THREE STOREY CARE HOME (C2 USE CLASS)

LANGLEY COURT

THE WOODLANDS, HILDA MAY AVENUE, SWANLEY, KENT, BR8 7BT

CLIENT: OAKLAND CARE HOMES

START DATE: 27/11/2019
END DATE: 27/12/2020

DEMOLITION OF EXISTING BUILDING AND A 75 BEDROOM CARE HOME

DEMAND & SUPPLY

CONCLUSIONS

Reduction in Current Stock

Those homes with registrations of 30 beds or under are likely to fall out of the market as they struggle to achieve economies of scale.

It is likely that the remaining existing stock, particularly those converted homes and first generation purpose built homes with rooms smaller than 12 sq m and without en suites will gradually become redundant due to spatial restrictions, inefficiencies and inability to compete with more modern facilities.

Pipeline

There is limited pipeline proposed as demonstrated by our analysis and the existing stock is currently struggling to meet the standards of quality accommodation increasingly expected by relatives and prospective residents.

Motivations

As with all Adult Social Services team, they will be keen to avoid placements further afield and reduce delays in discharge.

Considering current stock and pipeline it is likely that the search for a suitable care home may necessitate in placements further afield.

Bed Requirement

Further, the undersupply within both the catchment and the borough will increase as more existing homes close and not enough new homes are built. Population growth continues to add to this pressure.

05

SUMMARY

Supply and demand

The statistics are highly supportive of a new care home within the catchment particularly on the basis of quality of the existing accommodation which is dated and do not always conform to the modern standards.

With an ageing population, this requirement will increase in the coming years. With no new homes proposed, the undersupply of beds in the Borough is likely to reach 661 by 2028.

Further, the proposed home will relieve pressures on both housing and bed demand within the catchment.

Quality

The catchment has an affluence population and expectations for quality care accommodation will be high. This is not currently met within the existing stock.

Modern purpose built homes provide good sized bedrooms, en-suite wetrooms together with a range of day space beyond the standard dining and lounge areas.

The existing stock is dated at present with many being of the first generation of purpose built homes. Bedrooms within these homes are often smaller than the current expectations and lacking in en-suite wetrooms. Further, they do not provide the day space amenities found in more modern facilities.

Futureproofing

A number of smaller homes will fall out of the market over the next decade either because their low registration cannot provide economies of scale or the inability to compete against the market expectation for quality accommodation thus putting pressure on the demand for beds in the area.

Given the affluence within the catchment, the market will move increasingly towards modern accommodation which will see fee increases for the limited number of existing modern purpose built beds as well as placements further afield.

Having assessed the existing stock, we would anticipate a strong demand for a modern purpose built facility providing residential, nursing and dementia care within the catchment.

APPENDIX A – DEMOGRAPHIC REPORTS: LONDON BOROUGH OF BEXLEY

CACI

EXECUTIVE SUMMARY

Area: Bexley
Base: United Kingdom

ACORN		Profile	Area %	Base %	Index	0	100	200
2018 Households by Acorn Category		99,680						
1	Affluent Achievers	24,648	24.7	21.6	114			
2	Rising Prosperity	4,456	4.5	10.0	45			
3	Comfortable Communities	37,525	37.6	26.6	142			
4	Financially Stretched	14,454	14.5	23.5	62			
5	Urban Adversity	18,570	18.6	18.3	102			
6	Not Private Households	27	0.0	0.1	50			
2018 Households by Key Acorn Groups								
C	Mature Money	17,294	17.3	9.5	183			
I	Comfortable Seniors	2,070	2.1	3.0	69			

POPULATION

Aged		2018	2023	2028
	65 - 74	20,928	21,134	24,325
	75 - 84	13,809	15,612	16,762
	85+	6,217	6,812	7,357

DEMAND

Risk of living in a care home or long stay hospital, by age

Age	65-74	75-84	85+
%	0.62%	3.71%	15.67%

Bed Requirement based on 2018 Population Projections*		2018	2023	2028
Aged	65 - 74	130	131	151
	75 - 84	512	579	622
	85+	974	1,067	1,153
Total Requirement		**1,616**	**1,778**	**1,926**

* Estimated general old age bed requirements - includes people in nursing and residential homes, NHS long stay hospitals and units for older and older mentally ill people

Prevelance of Dementia, by age

Age	60-64	65-69	70-74	75-79	80-84	85-89	90-94	95+
%	0.90%	1.70%	3.00%	6.00%	11.10%	18.30%	29.90%	41.10%

		2018	2023	2028
Aged	60 - 64	111	134	147
	65 - 69	181	194	234
	70 - 74	309	292	316
	75 - 79	459	566	540
	80 - 84	684	687	861
	85 - 89**	762	835	902
	90 - 94**	483	530	572
	95+**	179	196	212
Total		**3,168**	**3,433**	**3,784**

**Population bands 85+ are calculated based on a UK ratio of 85-89 (67%), 90-94 (26%) and 95+ (7%)

ACORN HOUSEHOLD REPORT

Area: Bexley
Base: United Kingdom

NAVIGATION

Use the Navigation bar above to navigate through this document.

INTERPRETING THE REPORT

The Acorn report describes the relationship between the selected Area profile and the Base area by comparing the penetration of each Acorn Type in the area with the penetration of each Acorn Type in the base.

PERCENTAGE OF PROFILE

Counts of the population within each Acorn Type are shown as raw counts and as percentages of the total volume.

INDEX

The index shows how the percentage of a Type in the area compares with the percentage of that Type in the base. Differences between these two percentages are measured by the Index in the following way.
- An index of 100 indicates that the representation of that Acorn Type is the same in the area as the base.
- An index of over 100 shows above average representation (e.g. 140 shows that this type has a 40% over representation in the file when compared to the base).
- An index of under 100 shows below average representation.

ADDITIONAL INFORMATION

Click on the documents below for more information on Acorn.

User Guide

Technical Guide

Online Microsite

CACI

acorn

ACORN - WHAT IS IT?

Area: Bexley
Base: United Kingdom

Acorn is a geodemographic segmentation of the UK's population. It segments households, postcodes and neighbourhoods into 6 categories, 18 groups and 62 types. By analysing significant social factors and population behaviour, it provides precise information and an in-depth understanding of the different types of people.

Acorn provides a detailed understanding of the people who interact with your organisation. It helps you learn about their relationship with you. This knowledge gives you the opportunity to target, acquire and develop profitable customer relationships and improve service delivery.

The User Guide (available to download at www.caci.co.uk/acorn) looks at each Acorn type across a wide range of demographic, behavioural and attitudinal attributes. The descriptions of each category, group and type provide an overview of the wider range of topics for which information is available.

Acorn draws on a wide range of data sources, both commercial and public sector Open Data and administrative data. These include the Land Registry, Registers of Scotland, commercial sources of information on age of residents, ethnicity profiles, benefits data, population density, and data on social housing and other rental property. In addition CACI has created proprietary databases, including the location of prisons, traveller sites, age-restricted housing, care homes, high-rise buildings and student accommodation. In addition we utilise the traditional inputs of the Census of Population and large-volume lifestyle surveys.

Acorn Category	Acorn Group	Acorn Type	
1 **Affluent Achievers**	**1.A Lavish Lifestyles**	1.A.1	Exclusive enclaves
		1.A.2	Metropolitan money
		1.A.3	Large house luxury
	1.B Executive Wealth	1.B.4	Asset rich families
		1.B.5	Wealthy countryside commuters
		1.B.6	Financially comfortable families
		1.B.7	Affluent professionals
		1.B.8	Prosperous suburban families
		1.B.9	Well-off edge of towners
	1.C Mature Money	1.C.10	Better-off villagers
		1.C.11	Settled suburbia, older people
		1.C.12	Retired and empty nesters
		1.C.13	Upmarket downsizers
2 **Rising Prosperity**	**2.D City Sophisticates**	2.D.14	Townhouse cosmopolitans
		2.D.15	Younger professionals in smaller flats
		2.D.16	Metropolitan professionals
		2.D.17	Socialising young renters
	2.E Career Climbers	2.E.18	Career driven young families
		2.E.19	First time buyers in small, modern homes
		2.E.20	Mixed metropolitan areas
3 **Comfortable Communties**	**3.F Countryside Communities**	3.F.21	Farms and cottages
		3.F.22	Larger families in rural areas
		3.F.23	Owner occupiers in small towns and villages
	3.G Successful Suburbs	3.G.24	Comfortably-off families in modern housing
		3.G.25	Larger family homes, multi-ethnic areas
		3.G.26	Semi-professional families, owner occupied neighbourhoods
	3.H Steady Neighbourhoods	3.H.27	Suburban semis, conventional attitudes
		3.H.28	Owner occupied terraces, average income
		3.H.29	Established suburbs, older families
	3.I Comfortable Seniors	3.I.30	Older people, neat and tidy neighbourhoods
		3.I.31	Elderly singles in purpose-built accommodation
	3.J Starting Out	3.J.32	Educated families in terraces, young children
		3.J.33	Smaller houses and starter homes
4 **Financially Stretched**	**4.K Student Life**	4.K.34	Student flats and halls of residence
		4.K.35	Term-time terraces
		4.K.36	Educated young people in flats and tenements
	4.L Modest Means	4.L.37	Low cost flats in suburban areas
		4.L.38	Semi-skilled workers in traditional neighbourhoods
		4.L.39	Fading owner occupied terraces
		4.L.40	High occupancy terraces, culturally diverse family areas
	4.M Striving Families	4.M.41	Labouring semi-rural estates
		4.M.42	Struggling young families in post-war terraces
		4.M.43	Families in right-to-buy estates
		4.M.44	Post-war estates, limited means
	4.N Poorer Families	4.N.45	Pensioners in social housing, semis and terraces
		4.N.46	Elderly people in social rented flats
		4.N.47	Low income older people in smaller semis
		4.N.48	Pensioners and singles in social rented flats
5 **Urban Adversity**	**5.O Young Hardship**	5.O.49	Young families in low cost private flats
		5.O.50	Struggling younger people in mixed tenure
		5.O.51	Young people in small, low cost terraces
	5.P Struggling Estates	5.P.52	Poorer families, many children, terraced housing
		5.P.53	Low income terraces
		5.P.54	Multi-ethnic, purpose-built estates
		5.P.55	Deprived and ethnically diverse in flats
		5.P.56	Low income large families in social rented semis
	5.Q Difficult Circumstances	5.Q.57	Social rented flats, families and single parents
		5.Q.58	Singles and young families, some receiving benefits
		5.Q.59	Deprived areas and high-rise flats
6 **Not Private Households**	**6.R Not Private Households**	6.R.60	Active communal population
		6.R.61	Inactive communal population
		6.R.62	Business areas without resident population

CACI

acorn

ACORN CATEGORY PROFILE - HOUSEHOLDS

Area: Bexley
Base: United Kingdom
Year: 2018

Acorn Category Description		Area Profile	% for Area	% for Base	Index 0	100	200
1	Affluent Achievers	24,648	24.7	21.6	114		
2	Rising Prosperity	4,456	4.5	10.0	45		
3	Comfortable Communities	37,525	37.6	26.6	142		
4	Financially Stretched	14,454	14.5	23.5	62		
5	Urban Adversity	18,570	18.6	18.3	102		
6	Not Private Households	27	0.0	0.1	50		

Total households — 99,680

Acorn Category Profile - % for Area & % for Base
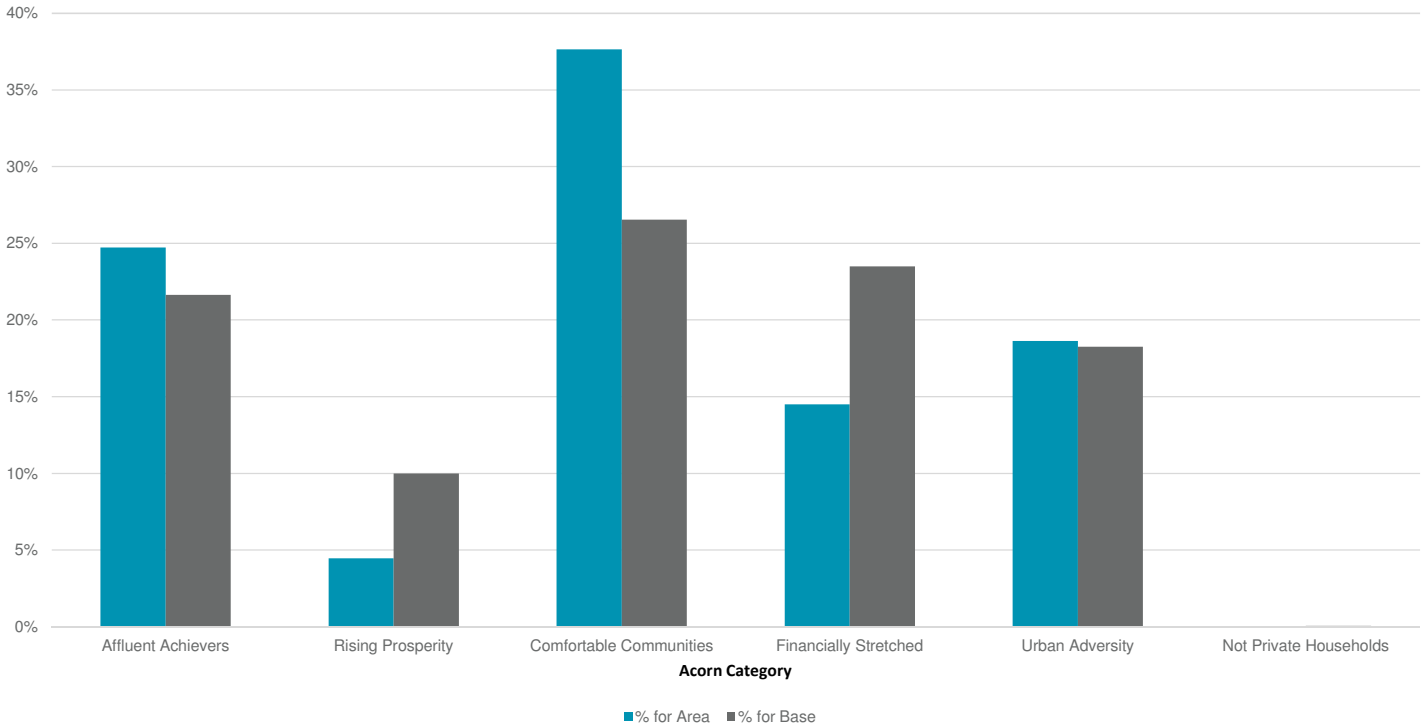
Legend: ■ % for Area ■ % for Base

Acorn Category

ACORN GROUP PROFILE - HOUSEHOLDS

Area: Bexley
Base: United Kingdom
Year: 2018

Acorn Group Description		Area Profile	% for Area	% for Base	Index 0	100	200
1. Affluent Achievers							
1.A	Lavish Lifestyles	201	0.2	1.1	18		
1.B	Executive Wealth	7,153	7.2	11.0	65		
1.C	Mature Money	17,294	17.3	9.5	183		
2. Rising Prosperity							
2.D	City Sophisticates	0	0.0	3.9	0		
2.E	Career Climbers	4,456	4.5	6.1	73		
3. Comfortable Communities							
3.F	Countryside Communities	0	0.0	6.2	0		
3.G	Successful Suburbs	1,571	1.6	5.7	28		
3.H	Steady Neighbourhoods	27,608	27.7	7.4	373		
3.I	Comfortable Seniors	2,070	2.1	3.0	69		
3.J	Starting Out	6,276	6.3	4.2	151		
4. Financially Stretched							
4.K	Student Life	1,548	1.6	2.2	71		
4.L	Modest Means	4,688	4.7	7.8	60		
4.M	Striving Families	5,865	5.9	7.7	77		
4.N	Poorer Pensioners	2,353	2.4	5.9	40		
5. Urban Adversity							
5.O	Young Hardship	5,202	5.2	6.2	85		
5.P	Struggling Estates	4,910	4.9	6.6	75		
5.Q	Difficult Circumstances	8,458	8.5	5.5	155		
6. Not Private Households							
6.R	Not Private Households	27	0.0	0.1	50		
Total households		**99,680**					

% for Base

ACORN TYPE PROFILE - HOUSEHOLDS

Area: Bexley
Base: United Kingdom
Year: 2018

Acorn Type Description		Area Profile	% for Area	% for Base	Index	0	100	200
1. Affluent Achievers								
1.A	**Lavish Lifestyles**							
1.A.1	Exclusive enclaves	0	0.0	0.1	0			
1.A.2	Metropolitan money	0	0.0	0.1	0			
1.A.3	Large house luxury	201	0.2	0.9	23			
1.B	**Executive Wealth**							
1.B.4	Asset rich families	620	0.6	2.5	24			
1.B.5	Wealthy countryside commuters	0	0.0	2.3	0			
1.B.6	Financially comfortable families	212	0.2	2.2	10			
1.B.7	Affluent professionals	476	0.5	0.9	56			
1.B.8	Prosperous suburban families	5,533	5.6	1.5	364			
1.B.9	Well-off edge of towners	312	0.3	1.7	19			
1.C	**Mature Money**							
1.C.10	Better-off villagers	47	0.0	2.8	2			
1.C.11	Settled suburbia, older people	15,432	15.5	3.0	525			
1.C.12	Retired and empty nesters	113	0.1	2.5	5			
1.C.13	Upmarket downsizers	1,702	1.7	1.3	134			
2. Rising Prosperity								
2.D	**City Sophisticates**							
2.D.14	Townhouse cosmopolitans	0	0.0	0.7	0			
2.D.15	Younger professionals in smaller flats	0	0.0	1.3	0			
2.D.16	Metropolitan professionals	0	0.0	0.8	0			
2.D.17	Socialising young renters	0	0.0	1.0	0			
2.E	**Career Climbers**							
2.E.18	Career driven young families	322	0.3	1.9	17			
2.E.19	First time buyers in small, modern homes	4,059	4.1	3.2	129			
2.E.20	Mixed metropolitan areas	75	0.1	1.1	7			
3. Comfortable Communities								
3.F	**Countryside Communities**							
3.F.21	Farms and cottages	0	0.0	1.5	0			
3.F.22	Larger families in rural areas	0	0.0	1.6	0			
3.F.23	Owner occupiers in small towns and villages	0	0.0	3.2	0			
3.G	**Successful Suburbs**							
3.G.24	Comfortably-off families in modern housing	600	0.6	2.5	24			
3.G.25	Larger family homes, multi-ethnic areas	643	0.6	0.9	76			
3.G.26	Semi-professional families, owner occupied neighbourhoods	328	0.3	2.4	14			
3.H	**Steady Neighbourhoods**							
3.H.27	Suburban semis, conventional attitudes	5,116	5.1	3.5	147			
3.H.28	Owner occupied terraces, average income	15,630	15.7	1.6	988			
3.H.29	Established suburbs, older families	6,862	6.9	2.4	292			
3.I	**Comfortable Seniors**							
3.I.30	Older people, neat and tidy neighbourhoods	1,203	1.2	2.5	49			
3.I.31	Elderly singles in purpose-built accommodation	867	0.9	0.5	169			
3.J	**Starting Out**							
3.J.32	Educated families in terraces, young children	4,400	4.4	2.0	217			
3.J.33	Smaller houses and starter homes	1,876	1.9	2.1	88			
4. Financially Stretched								
4.K	**Student Life**							
4.K.34	Student flats and halls of residence	0	0.0	0.3	0			
4.K.35	Term-time terraces	0	0.0	0.3	0			
4.K.36	Educated young people in flats and tenements	1,548	1.6	1.6	97			
4.L	**Modest Means**							
4.L.37	Low cost flats in suburban areas	3,934	3.9	1.2	326			
4.L.38	Semi-skilled workers in traditional neighbourhoods	529	0.5	2.7	19			
4.L.39	Fading owner occupied terraces	225	0.2	2.8	8			
4.L.40	High occupancy terraces, culturally diverse family areas	0	0.0	1.0	0			
4.M	**Striving Families**							
4.M.41	Labouring semi-rural estates	161	0.2	1.6	10			
4.M.42	Struggling young families in post-war terraces	2,775	2.8	1.7	169			
4.M.43	Families in right-to-buy estates	2,687	2.7	2.1	127			
4.M.44	Post-war estates, limited means	242	0.2	2.3	11			
4.N	**Poorer Pensioners**							
4.N.45	Pensioners in social housing, semis and terraces	166	0.2	0.9	18			
4.N.46	Elderly people in social rented flats	1,513	1.5	1.1	138			
4.N.47	Low income older people in smaller semis	266	0.3	2.3	12			
4.N.48	Pensioners and singles in social rented flats	408	0.4	1.6	26			
5. Urban Adversity								
5.O	**Young Hardship**							
5.O.49	Young families in low cost private flats	2,801	2.8	2.1	135			
5.O.50	Struggling younger people in mixed tenure	2,184	2.2	1.8	125			
5.O.51	Young people in small, low cost terraces	217	0.2	2.3	9			
5.P	**Struggling Estates**							
5.P.52	Poorer families, many children, terraced housing	984	1.0	1.8	56			
5.P.53	Low income terraces	1,686	1.7	1.0	176			
5.P.54	Multi-ethnic, purpose-built estates	49	0.0	1.2	4			
5.P.55	Deprived and ethnically diverse in flats	692	0.7	0.9	80			
5.P.56	Low income large families in social rented semis	1,499	1.5	1.8	83			
5.Q	**Difficult Circumstances**							
5.Q.57	Social rented flats, families and single parents	3,863	3.9	1.5	262			
5.Q.58	Singles and young families, some receiving benefits	1,088	1.1	2.0	56			
5.Q.59	Deprived areas and high-rise flats	3,507	3.5	2.0	173			
6. Not Private Households								
6.R	**Not Private Households**							
6.R.60	Active communal population	16	0.0	0.0	58			
6.R.61	Inactive communal population	11	0.0	0.0	42			
6.R.62	Business areas without resident population	0						
	Total households	99,680						

ACORN TOP 3 GROUPS - HOUSEHOLDS

Area: Bexley
Base: United Kingdom
Year: 2018

1.

Acorn Group H - Steady Neighbourhoods

Index = 373
Area % = 27.7

These home-owning families, often middle–aged, are living comfortably in suburban and urban locations. They mainly own older, lower priced, three bedroom terraced or semi-detached homes, which they may have occupied for many years. Families might include young children, teenagers or young adults who have not yet left home. These areas will also include some empty nesters.

People typically have GCSE and A level qualifications although some have degrees. They tend to be employed in a range of middle management and clerical roles or as shop workers and semi-skilled manual workers and overall household incomes are around the national average.

Their spending, and interaction with financial services broadly mirrors the national average. Most in this group have some small savings, an ISA and perhaps a few shares.

Although they do generally use the internet, few of these people will go online extensively on a regular basis.

They are more likely to read the Daily Mirror, Daily Express or Daily Star than a broadsheet paper. Celebrity, travel, cooking and glossy women's magazines may be popular with some.

These working families form the bedrock of many towns across Britain.

2.

Acorn Group C - Mature Money

Index = 183
Area % = 17.3

These people tend to be older empty nesters and retired couples. Many live in rural towns and villages, others live in the suburbs of larger towns. They are prosperous and live in larger detached or semi-detached houses or bungalows. Many have two cars, others may have down-sized to live in good quality apartments. Some will own second homes.

These are high income households and even those that have retired have good incomes. Employment is typically in managerial and professional roles. A good number own their homes outright and with many having no mortgage to pay are able to invest their money in a wide range of financial products.
While some might have a DAB radio these people do not generally favour new technology and are less likely than average to have a smartphone or tablet PC. Some may prefer free digital TV services to Sky or cable options.
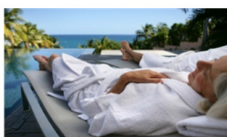
In their leisure time they enjoy gardening, walking, photography or golf. They appreciate good food and wine and will go on regular holidays.   They often shop at Waitrose, M&S and John Lewis and may well read the Daily Telegraph, Times, Mail and Express.

These older, affluent people have the money and the time to enjoy life.

3.

Acorn Group Q - Difficult Circumstances

Index = 155
Area % = 8.5

Generally these are streets with a higher proportion of younger people. Although all age groups may be represented those aged under 35 and with young children are more prevalent. There are twice as many single parents compared to the national average.

The bulk of the housing is flats rented from the council or housing association although there may also be some socially rented terraced housing. Generally these are small flats and a good proportion of Britain's high rise blocks make up a small part of this group.

These are relatively deprived neighbourhoods. The numbers claiming Job Seeker's Allowance, Income Support, and Employment and Support Allowance are all at their highest levels in this group. There may be high level s of long term unemployment and of households relying entirely on state benefits.

Educational qualifications are usually low. Those in work are likely to be employed in routine or semi-skilled manual jobs perhaps in factories or shops.

Incomes may be particularly low and nearly half these people may not earn enough to pay tax. It is rare for these people to have a credit card or to have savings. Loans, which some will have difficulty repaying are more typical. One in ten might have debts in excess of their annual income.

There might be a higher than usual proportion of people with health problems, including asthma and diabetes.

Leisure interests include computer games, football, gambling, bingo and television. The tabloids are favoured reading.

Many people are enduring hardship and for them, life is a struggle.

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POPULATION PROJECTIONS 2018 - 2028

Area:	Bexley
Base:	United Kingdom
Year:	2018

2018 POPULATION

	Area Profile	Area %	Base %	Index av=100	0	100	200
0 - 4	16,233	6.5	5.9	110			
5 - 9	17,087	6.8	6.2	110			
10 - 14	15,963	6.4	5.8	110			
15 - 19	14,228	5.7	5.5	104			
20 - 24	14,346	5.8	6.3	91			
25 - 34	34,065	13.7	13.6	101			
35 - 44	33,287	13.3	12.6	106			
45 - 54	34,960	14.0	13.8	102			
55 - 64	28,323	11.4	12.0	95			
65-69	10,621	4.3	5.1	83			
70 - 74	10,307	4.1	4.9	84			
75-79	7,646	3.1	3.4	91			
80-84	6,163	2.5	2.5	98			
85+	6,217	2.5	2.4	103			
Total population	**249,446**						

2023 POPULATION

	Area Profile	Area %	Base %	Index av=100	0	100	200
0 - 4	16,850	6.4	5.7	112			
5 - 9	17,782	6.8	5.9	115			
10 - 14	18,066	6.9	6.2	111			
15 - 19	16,080	6.1	5.8	106			
20 - 24	13,465	5.1	5.6	91			
25 - 34	34,536	13.1	13.1	100			
35 - 44	36,604	13.9	13.0	108			
45 - 54	33,501	12.7	12.4	103			
55 - 64	32,327	12.3	12.9	95			
65-69	11,393	4.6	5.3	86			
70 - 74	9,741	3.9	4.8	82			
75-79	9,427	3.8	4.4	86			
80-84	6,185	2.5	2.8	90			
85+	6,812	2.7	2.7	100			
Total population	**262,769**						

2028 POPULATION

	Area Profile	Area %	Base %	Index av=100	0	100	200
0 - 4	16,951	6.2	5.5	111			
5 - 9	18,261	6.7	5.7	116			
10 - 14	18,649	6.8	5.9	116			
15 - 19	17,991	6.6	6.2	106			
20 - 24	14,834	5.4	5.9	91			
25 - 34	32,371	11.8	12.0	98			
35 - 44	38,695	14.1	13.0	108			
45 - 54	35,316	12.9	11.9	108			
55 - 64	33,036	12.0	12.8	94			
65-69	13,790	5.5	6.1	91			
70 - 74	10,535	4.2	5.0	84			
75-79	9,005	3.6	4.3	84			
80-84	7,757	3.1	3.6	85			
85+	7,357	2.9	3.1	94			
Total population	**274,548**						

2018 - 2028 POPULATION CHANGE

	Area Profile	Area %	Base %	Index av=100	0	100	200
Total population 2018	**249,446**						
Total population 2028	**274,548**						
Change in total population	**25,102**						
0 - 4	718	4.4	-1.7	0			
5 - 9	1,174	6.9	-3.4	0			
10 - 14	2,686	16.8	6.4	**262**			
15 - 19	3,763	26.4	17.6	**150**			
20 - 24	488	3.4	-1.1	0			
25 - 34	-1,694	-5.0	-7.3	0			
35 - 44	5,408	16.2	8.5	**191**			
45 - 54	356	1.0	-9.3	0			
55 - 64	4,713	16.6	12.2	**137**			
65-69	3,169	29.8	18.9	**158**			
70 - 74	228	2.2	2.2	100			
75-79	1,359	17.8	27.8	64			
80-84	1,594	25.9	43.9	59			
85+	1,140	18.3	29.2	63			
Total population	**25,102**	**10.1**	**5.0**				

2017 Population by Age - % for Area & % for Base

Legend: ■ % for Area ■ % for Base ▬ % for Area (2022) ▬ % for Area (2027)
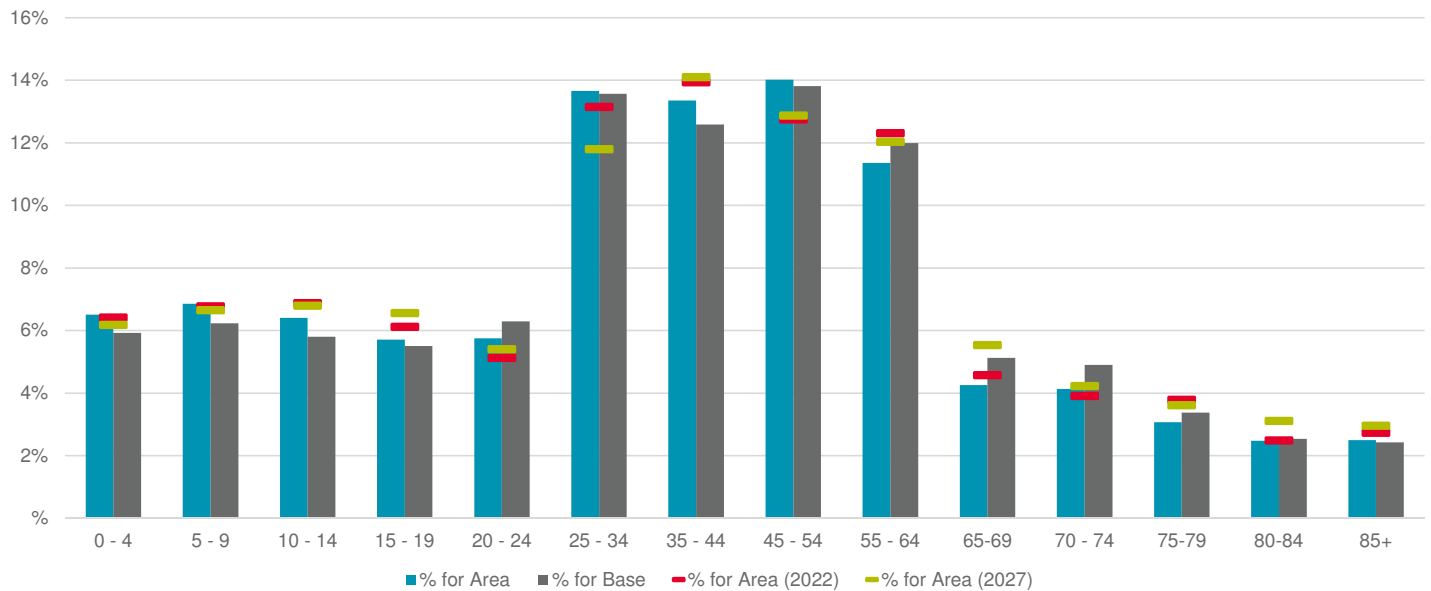
APPENDIX A – DEMOGRAPHIC REPORTS: 5 MILE RADIUS

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EXECUTIVE SUMMARY

Area: Circle, 5.0 Miles, DA 6 8HB
Base: United Kingdom

ACORN		Profile	Area %	Base %	Index	0	100	200
2018 Households by Acorn Category		283,902						
1	Affluent Achievers	49,121	17.3	21.6	80			
2	Rising Prosperity	30,916	10.9	10.0	109			
3	Comfortable Communities	74,256	26.2	26.6	99			
4	Financially Stretched	44,310	15.6	23.5	66			
5	Urban Adversity	85,156	30.0	18.3	164			
6	Not Private Households	143	0.1	0.1	94			
2018 Households by Key Acorn Groups								
C	Mature Money	26,769	9.4	9.5	99			
I	Comfortable Seniors	3,516	1.2	3.0	41			

POPULATION

Aged		2018	2023	2028
	65 - 74	50,543	52,427	61,085
	75 - 84	31,118	36,160	39,622
	85+	13,756	15,006	16,415

DEMAND

Risk of living in a care home or long stay hospital, by age

Age	65-74	75-84	85+
%	0.57%	3.60%	14.70%

Bed Requirement based on 2018 Population Projections*

Aged		2018	2023	2028
	65 - 74	288	299	348
	75 - 84	1,120	1,302	1,426
	85+	2,022	2,206	2,413
Total Requirement		3,430	3,806	4,188

* Estimated general old age bed requirements - includes people in nursing and residential homes, NHS long stay hospitals and units for older and older mentally ill people

Prevelance of Dementia, by age

Age	60-64	65-69	70-74	75-79	80-84	85-89	90-94	95+
%	0.90%	1.70%	3.00%	6.00%	11.10%	18.30%	29.90%	41.10%

Aged		2018	2023	2028
	60 - 64	283	343	383
	65 - 69	446	491	596
	70 - 74	730	707	781
	75 - 79	1,046	1,323	1,291
	80 - 84	1,519	1,567	2,010
	85 - 89**	1,687	1,840	2,013
	90 - 94**	1,069	1,167	1,276
	95+**	396	432	472
Total		7,176	7,869	8,822

**Population bands 85+ are calculated based on a UK ratio of 85-89 (67%), 90-94 (26%) and 95+ (7%)

ACORN HOUSEHOLD REPORT

Area: Circle, 5.0 Miles, DA 6 8HB
Base: United Kingdom

NAVIGATION

Use the Navigation bar above to navigate through this document.

INTERPRETING THE REPORT

The Acorn report describes the relationship between the selected Area profile and the Base area by comparing the penetration of each Acorn Type in the area with the penetration of each Acorn Type in the base.

PERCENTAGE OF PROFILE

Counts of the population within each Acorn Type are shown as raw counts and as percentages of the total volume.

INDEX

The index shows how the percentage of a Type in the area compares with the percentage of that Type in the base. Differences between these two percentages are measured by the Index in the following way.
- An index of 100 indicates that the representation of that Acorn Type is the same in the area as the base.
- An index of over 100 shows above average representation (e.g. 140 shows that this type has a 40% over representation in the file when compared to the base).
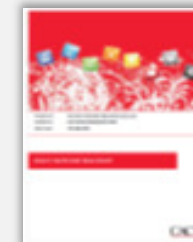- An index of under 100 shows below average representation.

ADDITIONAL INFORMATION
Click on the documents below for more information on Acorn.

User Guide

Technical Guide

Online Microsite

CACI

ACORN - WHAT IS IT?

Area: Circle, 5.0 Miles, DA 6 8HB
Base: United Kingdom

Acorn is a geodemographic segmentation of the UK's population. It segments households, postcodes and neighbourhoods into 6 categories, 18 groups and 62 types. By analysing significant social factors and population behaviour, it provides precise information and an in-depth understanding of the different types of people.

Acorn provides a detailed understanding of the people who interact with your organisation. It helps you learn about their relationship with you. This knowledge gives you the opportunity to target, acquire and develop profitable customer relationships and improve service delivery.

The User Guide (available to download at www.caci.co.uk/acorn) looks at each Acorn type across a wide range of demographic, behavioural and attitudinal attributes. The descriptions of each category, group and type provide an overview of the wider range of topics for which information is available.

Acorn draws on a wide range of data sources, both commercial and public sector Open Data and administrative data. These include the Land Registry, Registers of Scotland, commercial sources of information on age of residents, ethnicity profiles, benefits data, population density, and data on social housing and other rental property. In addition CACI has created proprietary databases, including the location of prisons, traveller sites, age-restricted housing, care homes, high-rise buildings and student accommodation. In addition we utilise the traditional inputs of the Census of Population and large-volume lifestyle surveys.

| Acorn Category	Acorn Group	Acorn Type	
1 **Affluent Achievers**	**1.A Lavish Lifestyles**	1.A.1	Exclusive enclaves
		1.A.2	Metropolitan money
		1.A.3	Large house luxury
	1.B Executive Wealth	1.B.4	Asset rich families
		1.B.5	Wealthy countryside commuters
		1.B.6	Financially comfortable families
		1.B.7	Affluent professionals
		1.B.8	Prosperous suburban families
		1.B.9	Well-off edge of towners
	1.C Mature Money	1.C.10	Better-off villagers
		1.C.11	Settled suburbia, older people
		1.C.12	Retired and empty nesters
		1.C.13	Upmarket downsizers
2 **Rising Prosperity**	**2.D City Sophisticates**	2.D.14	Townhouse cosmopolitans
		2.D.15	Younger professionals in smaller flats
		2.D.16	Metropolitan professionals
		2.D.17	Socialising young renters
	2.E Career Climbers	2.E.18	Career driven young families
		2.E.19	First time buyers in small, modern homes
		2.E.20	Mixed metropolitan areas
3 **Comfortable Communties**	**3.F Countryside Communities**	3.F.21	Farms and cottages
		3.F.22	Larger families in rural areas
		3.F.23	Owner occupiers in small towns and villages
	3.G Successful Suburbs	3.G.24	Comfortably-off families in modern housing
		3.G.25	Larger family homes, multi-ethnic areas
		3.G.26	Semi-professional families, owner occupied neighbourhoods
	3.H Steady Neighbourhoods	3.H.27	Suburban semis, conventional attitudes
		3.H.28	Owner occupied terraces, average income
		3.H.29	Established suburbs, older families
	3.I Comfortable Seniors	3.I.30	Older people, neat and tidy neighbourhoods
		3.I.31	Elderly singles in purpose-built accommodation
	3.J Starting Out	3.J.32	Educated families in terraces, young children
		3.J.33	Smaller houses and starter homes
4 **Financially Stretched**	**4.K Student Life**	4.K.34	Student flats and halls of residence
		4.K.35	Term-time terraces
		4.K.36	Educated young people in flats and tenements
	4.L Modest Means	4.L.37	Low cost flats in suburban areas
		4.L.38	Semi-skilled workers in traditional neighbourhoods
		4.L.39	Fading owner occupied terraces
		4.L.40	High occupancy terraces, culturally diverse family areas
	4.M Striving Families	4.M.41	Labouring semi-rural estates
		4.M.42	Struggling young families in post-war terraces
		4.M.43	Families in right-to-buy estates
		4.M.44	Post-war estates, limited means
	4.N Poorer Families	4.N.45	Pensioners in social housing, semis and terraces
		4.N.46	Elderly people in social rented flats
		4.N.47	Low income older people in smaller semis
		4.N.48	Pensioners and singles in social rented flats
5 **Urban Adversity**	**5.O Young Hardship**	5.O.49	Young families in low cost private flats
		5.O.50	Struggling younger people in mixed tenure
		5.O.51	Young people in small, low cost terraces
	5.P Struggling Estates	5.P.52	Poorer families, many children, terraced housing
		5.P.53	Low income terraces
		5.P.54	Multi-ethnic, purpose-built estates
		5.P.55	Deprived and ethnically diverse in flats
		5.P.56	Low income large families in social rented semis
	5.Q Difficult Circumstances	5.Q.57	Social rented flats, families and single parents
		5.Q.58	Singles and young families, some receiving benefits
		5.Q.59	Deprived areas and high-rise flats
6 **Not Private Households**	**6.R Not Private Households**	6.R.60	Active communal population
		6.R.61	Inactive communal population
		6.R.62	Business areas without resident population

ACORN CATEGORY PROFILE - HOUSEHOLDS

Area: Circle, 5.0 Miles, DA 6 8HB
Base: United Kingdom
Year: 2018

Acorn Category Description		Area Profile	% for Area	% for Base	Index 0	100	200
1	Affluent Achievers	49,121	17.3	21.6	80		
2	Rising Prosperity	30,916	10.9	10.0	109		
3	Comfortable Communities	74,256	26.2	26.6	99		
4	Financially Stretched	44,310	15.6	23.5	66		
5	Urban Adversity	85,156	30.0	18.3	164		
6	Not Private Households	143	0.1	0.1	94		
	Total households	**283,902**					

Acorn Category Profile - % for Area & % for Base
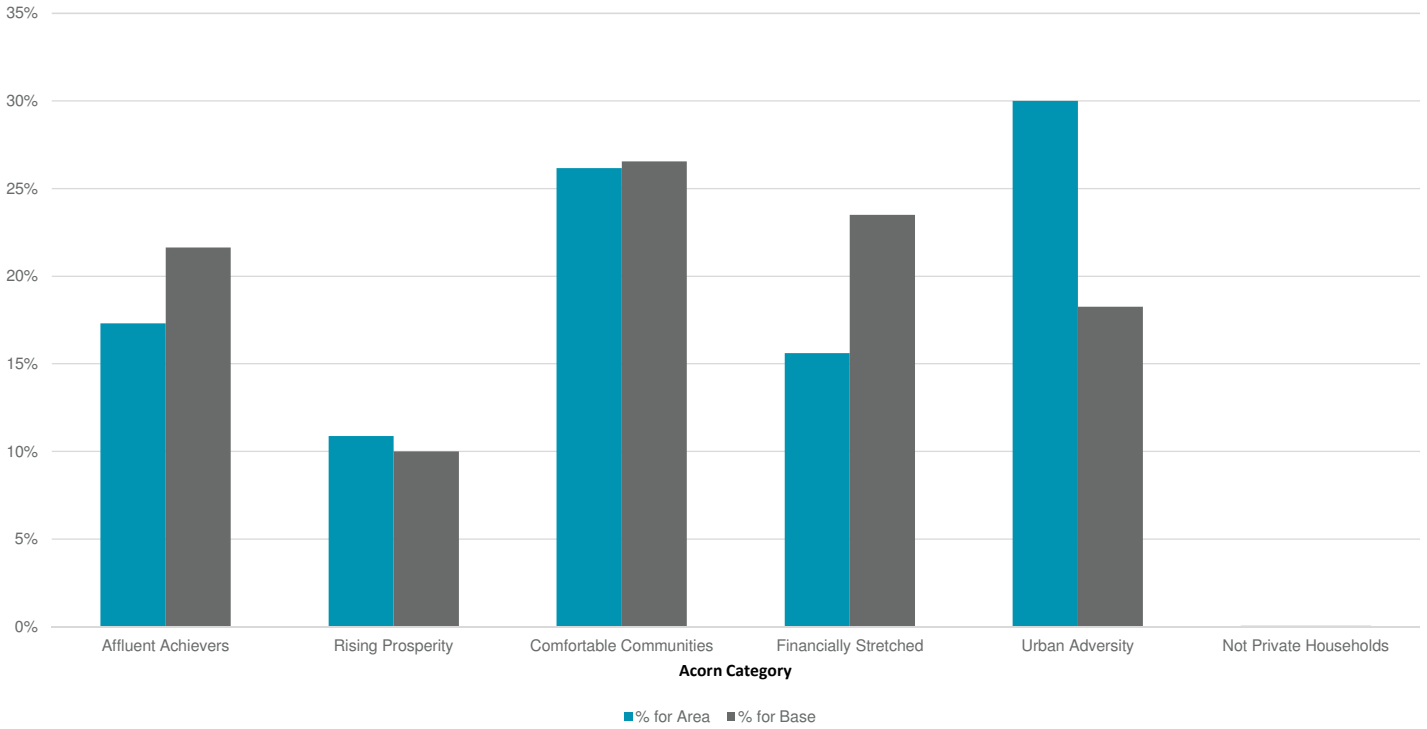
■ % for Area ■ % for Base

ACORN GROUP PROFILE - HOUSEHOLDS

Area: Circle, 5.0 Miles, DA 6 8HB
Base: United Kingdom
Year: 2018

Acorn Group Description		Area Profile	% for Area	% for Base	Index 0	100	200
1. Affluent Achievers							
1.A	Lavish Lifestyles	2,831	1.0	1.1	91		
1.B	Executive Wealth	19,521	6.9	11.0	62		
1.C	Mature Money	26,769	9.4	9.5	99		
2. Rising Prosperity							
2.D	City Sophisticates	9,878	3.5	3.9	90		
2.E	Career Climbers	21,038	7.4	6.1	121		
3. Comfortable Communities							
3.F	Countryside Communities	351	0.1	6.2	2		
3.G	Successful Suburbs	4,939	1.7	5.7	30		
3.H	Steady Neighbourhoods	47,323	16.7	7.4	224		
3.I	Comfortable Seniors	3,516	1.2	3.0	41		
3.J	Starting Out	18,127	6.4	4.2	153		
4. Financially Stretched							
4.K	Student Life	8,128	2.9	2.2	131		
4.L	Modest Means	8,287	2.9	7.8	38		
4.M	Striving Families	20,069	7.1	7.7	92		
4.N	Poorer Pensioners	7,826	2.8	5.9	47		
5. Urban Adversity							
5.O	Young Hardship	11,371	4.0	6.2	65		
5.P	Struggling Estates	41,999	14.8	6.6	224		
5.Q	Difficult Circumstances	31,786	11.2	5.5	204		
6. Not Private Households							
6.R	Not Private Households	143	0.1	0.1	94		
Total households		**283,902**					

ACORN TYPE PROFILE - HOUSEHOLDS

Area: Circle, 5.0 Miles, DA 6 8HB
Base: United Kingdom
Year: 2018

Acorn Type Description		Area Profile	% for Area	% for Base	Index 0	100	200
1. Affluent Achievers							
1.A	**Lavish Lifestyles**						
1.A.1	Exclusive enclaves	145	0.1	0.1	65		
1.A.2	Metropolitan money	134	0.0	0.1	32		
1.A.3	Large house luxury	2,552	0.9	0.9	103		
1.B	**Executive Wealth**						
1.B.4	Asset rich families	2,163	0.8	2.5	30		
1.B.5	Wealthy countryside commuters	24	0.0	2.3	0		
1.B.6	Financially comfortable families	491	0.2	2.2	8		
1.B.7	Affluent professionals	4,069	1.4	0.9	167		
1.B.8	Prosperous suburban families	11,576	4.1	1.5	268		
1.B.9	Well-off edge of towners	1,198	0.4	1.7	25		
1.C	**Mature Money**						
1.C.10	Better-off villagers	603	0.2	2.8	8		
1.C.11	Settled suburbia, older people	22,890	8.1	3.0	273		
1.C.12	Retired and empty nesters	172	0.1	2.5	2		
1.C.13	Upmarket downsizers	3,104	1.1	1.3	86		
2. Rising Prosperity							
2.D	**City Sophisticates**						
2.D.14	Townhouse cosmopolitans	2,221	0.8	0.7	109		
2.D.15	Younger professionals in smaller flats	3,819	1.3	1.3	102		
2.D.16	Metropolitan professionals	298	0.1	0.8	13		
2.D.17	Socialising young renters	3,540	1.2	1.0	121		
2.E	**Career Climbers**						
2.E.18	Career driven young families	869	0.3	1.9	16		
2.E.19	First time buyers in small, modern homes	13,706	4.8	3.2	153		
2.E.20	Mixed metropolitan areas	6,463	2.3	1.1	210		
3. Comfortable Communities							
3.F	**Countryside Communities**						
3.F.21	Farms and cottages	0	0.0	1.5	0		
3.F.22	Larger families in rural areas	0	0.0	1.6	0		
3.F.23	Owner occupiers in small towns and villages	351	0.1	3.2	4		
3.G	**Successful Suburbs**						
3.G.24	Comfortably-off families in modern housing	1,696	0.6	2.5	24		
3.G.25	Larger family homes, multi-ethnic areas	1,647	0.6	0.9	68		
3.G.26	Semi-professional families, owner occupied neighbourhoods	1,596	0.6	2.4	24		
3.H	**Steady Neighbourhoods**						
3.H.27	Suburban semis, conventional attitudes	6,612	2.3	3.5	67		
3.H.28	Owner occupied terraces, average income	29,382	10.3	1.6	652		
3.H.29	Established suburbs, older families	11,329	4.0	2.4	169		
3.I	**Comfortable Seniors**						
3.I.30	Older people, neat and tidy neighbourhoods	2,176	0.8	2.5	31		
3.I.31	Elderly singles in purpose-built accommodation	1,340	0.5	0.5	92		
3.J	**Starting Out**						
3.J.32	Educated families in terraces, young children	14,441	5.1	2.0	250		
3.J.33	Smaller houses and starter homes	3,686	1.3	2.1	61		
4. Financially Stretched							
4.K	**Student Life**						
4.K.34	Student flats and halls of residence	328	0.1	0.3	37		
4.K.35	Term-time terraces	0	0.0	0.3	0		
4.K.36	Educated young people in flats and tenements	7,800	2.7	1.6	172		
4.L	**Modest Means**						
4.L.37	Low cost flats in suburban areas	6,215	2.2	1.2	181		
4.L.38	Semi-skilled workers in traditional neighbourhoods	1,163	0.4	2.7	15		
4.L.39	Fading owner occupied terraces	700	0.2	2.8	9		
4.L.40	High occupancy terraces, culturally diverse family areas	209	0.1	1.0	7		
4.M	**Striving Families**						
4.M.41	Labouring semi-rural estates	613	0.2	1.6	13		
4.M.42	Struggling young families in post-war terraces	10,877	3.8	1.7	232		
4.M.43	Families in right-to-buy estates	6,762	2.4	2.1	112		
4.M.44	Post-war estates, limited means	1,817	0.6	2.3	28		
4.N	**Poorer Pensioners**						
4.N.45	Pensioners in social housing, semis and terraces	774	0.3	0.9	30		
4.N.46	Elderly people in social rented flats	3,669	1.3	1.1	117		
4.N.47	Low income older people in smaller semis	1,057	0.4	2.3	16		
4.N.48	Pensioners and singles in social rented flats	2,326	0.8	1.6	53		
5. Urban Adversity							
5.O	**Young Hardship**						
5.O.49	Young families in low cost private flats	5,131	1.8	2.1	87		
5.O.50	Struggling younger people in mixed tenure	5,333	1.9	1.8	107		
5.O.51	Young people in small, low cost terraces	907	0.3	2.3	14		
5.P	**Struggling Estates**						
5.P.52	Poorer families, many children, terraced housing	2,186	0.8	1.8	44		
5.P.53	Low income terraces	23,548	8.3	1.0	864		
5.P.54	Multi-ethnic, purpose-built estates	2,918	1.0	1.2	85		
5.P.55	Deprived and ethnically diverse in flats	9,106	3.2	0.9	369		
5.P.56	Low income large families in social rented semis	4,241	1.5	1.8	83		
5.Q	**Difficult Circumstances**						
5.Q.57	Social rented flats, families and single parents	14,033	4.9	1.5	334		
5.Q.58	Singles and young families, some receiving benefits	4,264	1.5	2.0	77		
5.Q.59	Deprived areas and high-rise flats	13,489	4.8	2.0	233		
6. Not Private Households							
6.R	**Not Private Households**						
6.R.60	Active communal population	113	0.0	0.0	144		
6.R.61	Inactive communal population	30	0.0	0.0	41		
6.R.62	Business areas without resident population	0					
	Total households	283,902					

ACORN TOP 3 GROUPS - HOUSEHOLDS

Area: Circle, 5.0 Miles, DA 6 8HB
Base: United Kingdom
Year: 2018

1.

Acorn Group H - Steady Neighbourhoods

Index = 224
Area % = 16.7

These home-owning families, often middle–aged, are living comfortably in suburban and urban locations. They mainly own older, lower priced, three bedroom terraced or semi-detached homes, which they may have occupied for many years. Families might include young children, teenagers or young adults who have not yet left home. These areas will also include some empty nesters.

People typically have GCSE and A level qualifications although some have degrees. They tend to be employed in a range of middle management and clerical roles or as shop workers and semi-skilled manual workers and overall household incomes are around the national average.

Their spending, and interaction with financial services broadly mirrors the national average. Most in this group have some small savings, an ISA and perhaps a few shares.

Although they do generally use the internet, few of these people will go online extensively on a regular basis.
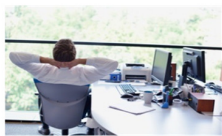
They are more likely to read the Daily Mirror, Daily Express or Daily Star than a broadsheet paper. Celebrity, travel, cooking and glossy women's magazines may be popular with some.

These working families form the bedrock of many towns across Britain.

2.

Acorn Group P - Struggling Estates

Index = 224
Area % = 14.8

These are low income families living on traditional urban estates. While typically two-thirds rent their homes from the council or housing association some have bought their houses, typically under right to buy, or from a prior tenant who has done so. Since house prices are low the few homeowners may include a number of first time buyers.

A substantial proportion of the housing will be flats or terraced houses although there may also be some semi-detached estates. Small properties are more typical but the larger families may be housed in three bedroom houses. Either way there may be some element of overcrowding.

There may be a high proportion of children and the level of single parent households may be double the national average. Childless couples and pensioners are relatively rare.
As is typical of more urban locations the population may include some minority ethnic groups.

Jobs reflect the generally lower educational qualifications and tend to be of a routine nature, perhaps in factories, shops or other manual occupations.

Incomes are low and the numbers claiming Job Seeker's Allowance is typically double the UK average. The numbers claiming income support, disability and other benefits are similarly high. Many will have been refused credit and people having difficulties with debts are likely to be double the average.

Money is tight and shopping tends to focus on cheaper stores, fast food outlets and inexpensive food.

3.

Acorn Group Q - Difficult Circumstances

Index = 204
Area % = 11.2

Generally these are streets with a higher proportion of younger people. Although all age groups may be represented those aged under 35 and with young children are more prevalent. There are twice as many single parents compared to the national average.

The bulk of the housing is flats rented from the council or housing association although there may also be some socially rented terraced housing. Generally these are small flats and a good proportion of Britain's high rise blocks make up a small part of this group.

These are relatively deprived neighbourhoods. The numbers claiming Job Seeker's Allowance, Income Support, and Employment and Support Allowance are all at their highest levels in this group. There may be high level s of long term unemployment and of households relying entirely on state benefits.

Educational qualifications are usually low. Those in work are likely to be employed in routine or semi-skilled manual jobs perhaps in factories or shops.

Incomes may be particularly low and nearly half these people may not earn enough to pay tax. It is rare for these people to have a credit card or to have savings. Loans, which some will have difficulty repaying are more typical. One in ten might have debts in excess of their annual income.

There might be a higher than usual proportion of people with health problems, including asthma and diabetes.

Leisure interests include computer games, football, gambling, bingo and television. The tabloids are favoured reading.

Many people are enduring hardship and for them, life is a struggle.

POPULATION PROJECTIONS 2017 - 2027

Area:	Circle, 5.0 Miles, DA 6 8HB
Base:	United Kingdom
Year:	2018

2018 POPULATION

	Area Profile	Area %	Base %	Index av=100	0	100	200
0 - 4	50,844	7.3	5.9	123			
5 - 9	50,412	7.2	6.2	116			
10 - 14	44,598	6.4	5.8	110			
15 - 19	38,484	5.5	5.5	100			
20 - 24	39,947	5.7	6.3	91			
25 - 34	106,454	15.2	13.6	112			
35 - 44	104,502	15.0	12.6	119			
45 - 54	95,596	13.7	13.8	99			
55 - 64	72,276	10.3	12.0	86			
65-69	26,212	3.8	5.1	73			
70 - 74	24,331	3.5	4.9	71			
75-79	17,429	2.5	3.4	74			
80-84	13,689	2.0	2.5	77			
85+	13,756	2.0	2.4	81			
Total population	**698,530**						

2023 POPULATION

	Area Profile	Area %	Base %	Index av=100	0	100	200
0 - 4	52,127	7.1	5.7	123			
5 - 9	51,497	7.0	5.9	118			
10 - 14	50,280	6.8	6.2	110			
15 - 19	43,753	5.9	5.8	102			
20 - 24	37,784	5.1	5.6	90			
25 - 34	105,907	14.3	13.1	109			
35 - 44	114,290	15.5	13.0	119			
45 - 54	96,283	13.0	12.4	105			
55 - 64	83,713	11.3	12.9	88			
65-69	28,859	4.1	5.3	78			
70 - 74	23,568	3.4	4.8	70			
75-79	22,043	3.2	4.4	72			
80-84	14,117	2.0	2.8	73			
85+	15,006	2.1	2.7	79			
Total population	**739,227**						

2028 POPULATION

	Area Profile	Area %	Base %	Index av=100	0	100	200
0 - 4	52,367	6.8	5.5	122			
5 - 9	52,511	6.8	5.7	119			
10 - 14	51,149	6.6	5.9	112			
15 - 19	48,850	6.3	6.2	103			
20 - 24	41,460	5.4	5.9	90			
25 - 34	100,040	12.9	12.0	108			
35 - 44	118,385	15.3	13.0	118			
45 - 54	103,568	13.4	11.9	112			
55 - 64	88,213	11.4	12.8	89			
65-69	35,051	5.0	6.1	82			
70 - 74	26,034	3.7	5.0	75			
75-79	21,518	3.1	4.3	71			
80-84	18,104	2.6	3.6	71			
85+	16,415	2.3	3.1	75			
Total population	**773,665**						

2018 - 2028 POPULATION CHANGE

	Area Profile	Area %	Base %	Index av=100	0	100	200
Total population 2018	**698,530**						
Total population 2028	**773,665**						
Change in total population	**75,135**						
0 - 4	1,523	3.0	-1.7	0			
5 - 9	2,099	4.2	-3.4	0			
10 - 14	6,551	14.7	6.4	229			
15 - 19	10,366	26.9	17.6	153			
20 - 24	1,513	3.8	-1.1	0			
25 - 34	-6,414	-6.0	-7.3	0			
35 - 44	13,883	13.3	8.5	156			
45 - 54	7,972	8.3	-9.3	0			
55 - 64	15,937	22.1	12.2	181			
65-69	8,839	33.7	18.9	178			
70 - 74	1,703	7.0	2.2	316			
75-79	4,089	23.5	27.8	84			
80-84	4,415	32.3	43.9	73			
85+	2,659	19.3	29.2	66			
Total population	**75,135**	**10.8**	**5.0**				

2018 Population by Age - % for Area & % for Base

Legend: ■ % for Area ■ % for Base ▬ % for Area (2023) ▬ % for Area (2028)
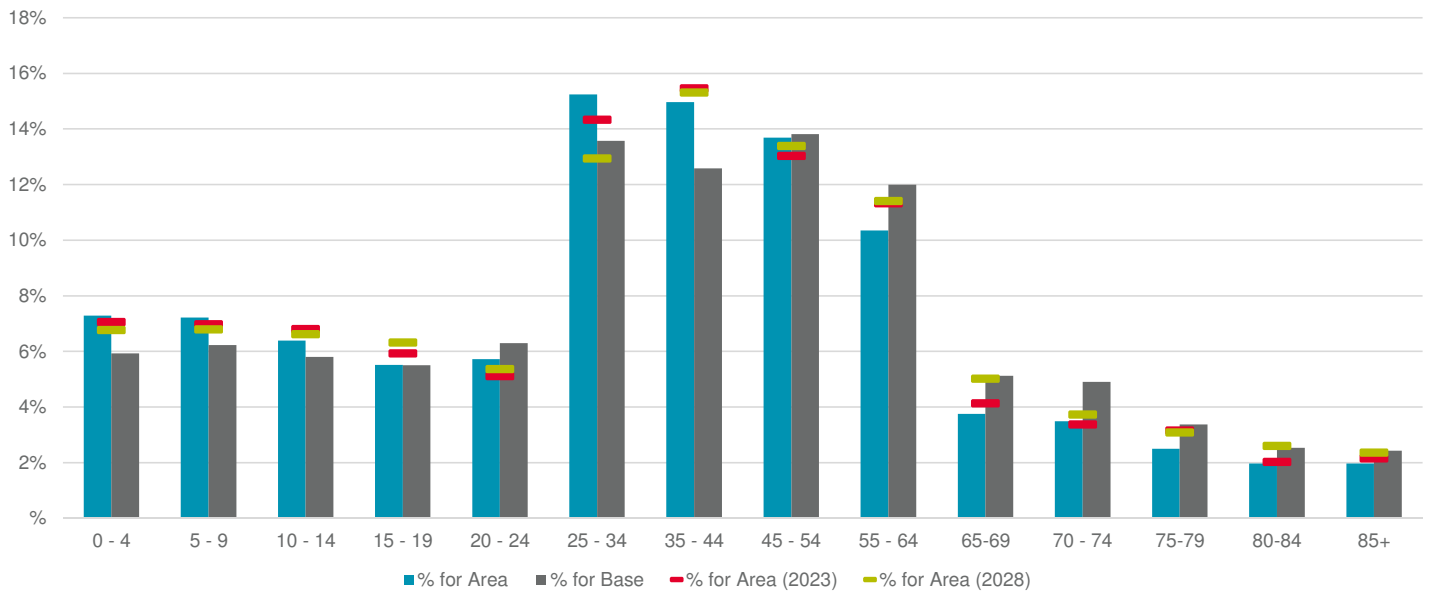
APPENDIX B – BEXLEY JOINT STRATEGIC NEEDS ASSESSMENT

☰

Older People

Adult social care outcomes

The adult social care outcomes framework (ASCOF) measures how well care and support services achieve the outcomes that matter most to service users. Table 21 shows the latest, 2017/18, ASCOF data for Bexley:

- Bexley has an excellent track record for helping people with a learning disability into paid employment. In 2016/17, we were the best in London and nationally for this measure. This has fallen to 16.8% in 2017/18 but still remains at a high level.

- In 2017/18, there was a 10% reduction in the rate of new admissions to residential and nursing care homes for older people (aged 65+) but the rate still remains high compared to the London average.

- Of those older people who were discharged from hospital into reablement services, 90.4% were still at home 91 days later. This was an improvement of 5.6% compared to Bexley's performance in 2016/17. This represents good performance, given that achieving independence for this cohort has become more challenging.

- There was an improvement, compared with 2016/17, in the proportion of service users who said they feel safe. Of those who said that they did not feel safe, the main concerns related to fear of falls, general feelings of safety, consistency of care from paid carers and mental health (including memory loss). Common reasons for feeling vulnerable were related to going out of the house and being alone.

- Only 44.5% of service users said they have as much social contact as they would like.

- Adult social care service users had higher levels of satisfaction with their care and support in 2017/18, compared with the year before.

- Bexley's outcomes on indicators relating to self-directed support and direct payments were worse than the London average in 2016/17. During 2017/18, there has been modest improvement in the proportion of people receiving self-directed support and deterioration in the uptake of direct payments. Ideally, the Council want more people to take direct payments. This is the purest form of personalisation, which involves giving people a cash payment so that they have maximum choice and control over their own care and support.

Indicator	What does good look like?	Bexley 2016/17	London 2016/17	Bexley Provisional 2017/18		Change from 2016/17	RAG Rating
People who use services who feel safe	Higher is better	68.3	65.5	70.8	✅	3.7%	G
Older people still at home 91 days after discharge from hospital into reablement	Higher is better	85.6	85.5	90.4	✅	5.6%	G
People who use services who have control over their daily lives	Higher is better	76	72.6	75.4	❌	-0.8%	G
People who use services who had as much social contact as they would like	Higher is better	45.7	41	44.5	❌	-2.6%	G
Adults with a learning disability in paid employment	Higher is better	20.6	7.2	16.8	❌	-18.4%	G
Service users who say that those services have made them feel safe and secure	Higher is better	75.1	82.2	84.2	✅	12.1%	G
Adults with a learning disability who live in their own home or with their family	Higher is better	69.6	71.3	74.6	✅	7.2%	G
Social care-related quality of life	Higher is better	18.9	18.6	18.7	❌	-1.1%	G
Carers who receive direct payments	Higher is better	23	78.3	28.9	✅	25.7%	R
Carers who receive self-directed support	Higher is better	81.9	88.7	94.2	✅	15.0%	R

| Indicator	What does good look like?	Bexley 2016/17	London 2016/17	Bexley Provisional 2017/18		Change from 2016/17	RAG Rating
Older Adults (65+): New admissions to residential and nursing care homes per 100,000 population	Lower is better	520.2	438.1	468.2	✅	-10.0%	R
Younger adults (aged 18-64): New admissions to residential and nursing care homes per 100,000 population	Lower is better	13.5	8.6	12.6	✅	-6.7%	R
People who use services who receive self-directed support	Higher is better	76.9	87.1	80.4	✅	4.6%	R
People who use services who receive direct payments	Higher is better	13.8	27.5	11.6	❌	-15.9%	R
Proportion of new service users who received a short term service where the sequel was either no ongoing support or support of a lower level	Higher is better	60.4	76.3	55.1	❌	-8.8%	R
Delayed transfers of care from hospital (DToC Beds) that are attributable to adult social care, per 100,000 population	Lower is better	4.4	N/A	2.9	✅	-34.1%	Not rated yet
Total Delayed transfers of care from hospital (DToC Beds), per 100,000 population	Lower is better	9.1	N/A	6.5	✅	-28.6%	Not rated yet
Delayed transfers of care from hospital attributable to ASC per 100,000 population (Patient Snapshot)	Lower is better	7.1	3.8	No longer reported		No longer reported	No longer reported
Delayed transfers of care from hospital, per 100,000 population (Patient Snapshot)	Lower is better	12.2	8.6	No longer reported		No longer reported	No longer reported

Change from previous year symbols:

✅ indicator improved from previous year   ➖ indicator was similar to previous year or no change   ❌ indicator deteriorated from previous year

Adult social care service users

2017/18.

More females receive services than males. 61% of people who received adult social care in 2017/18 were female and 39% were male. Females aged 65 and over accounted for 41% of the 6,053 people who received adult social care in 2017/18. Males aged 65 and over accounted for only 20% of total service users. The client profile reflects greater life expectancy among women.
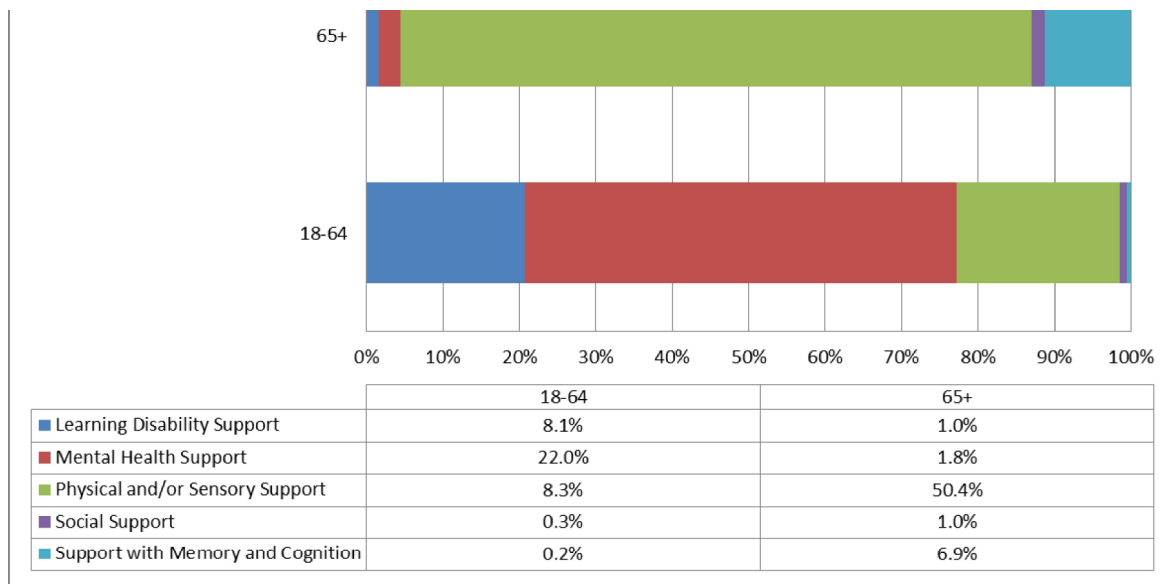
Figure 93: Adult Social Care service users by age and gender, 2017/18
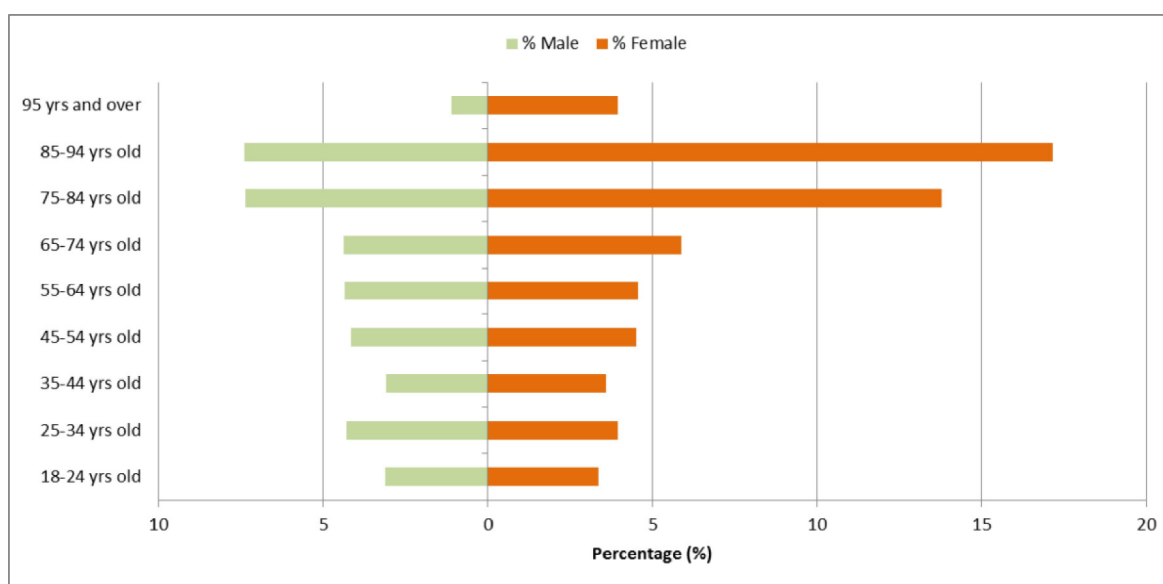
Source: London Borough of Bexley, Adult Social Care Information System, April 2018

About 85% of service users receive community-based services. 5,143 people (85%) received their care and support at home or in the community during 2017/18. The remaining 15% received residential (573 people in 2017/18) or nursing care (337 people in 2017/18).

The majority of needs relate to frailty, physical disability and personal care support. Physical support for older adults is the most common type of care, making up 50.4% of all care provided during the year and reflecting the frailty of older service users. This is followed by support with memory and cognition (6.9%) and mental health support (1.8%). Mental health support was the most common type of care given to adults under 65, making up 22% of all care, followed by physical support (8.3%) and learning disability support (8.1%)

	18-64	65+
■ Learning Disability Support	8.1%	1.0%
■ Mental Health Support	22.0%	1.8%
■ Physical and/or Sensory Support	8.3%	50.4%
■ Social Support	0.3%	1.0%
■ Support with Memory and Cognition	0.2%	6.9%

Source: London Borough of Bexley, Adult Social Care Information System, April 2018

The majority of service users are currently white, reflecting the lower ethnic diversity among the older population. In 2016/17, 80.6% of adult social care service users were White, 10.9% were from Black and Minority Ethnic (BME) groups, and 8.6% were not recorded. This compares to an estimated 79.9% White and 20.1% BME population aged 18+ in Bexley.

Data on the ethnicity of service users aged 65 and over shows that 87% were White, 6.2% were from BME groups and 6.8% were not recorded. This compares to an estimated 92.4% White and 7.6% BME population aged 65+ in Bexley.

Table 22: Ethnicity of service users compared to Bexley population, 2017

Ethnicity	GLA 2016-based projections (18+)		GLA 2016-based projections (65+)		ASC service users 2017/18 (18+)		ASC service users 2017/18 (65+)	
	%	Number	%	Number	%	Number	%	Number
White	79.9	151,658	92.4	37,537	80.6%	4,876	87.0%	3,217
Mixed	2.0	3,693	0.6	246	0.9%	54	0.3%	12
Asian or Asian British	8.3	15,789	4.4	1,806	4.0%	245	3.3%	123
Black or Black British	9.0	17,084	2.1	842	4.5%	275	2.0%	73
Other ethnic group	0.8	1,553	0.5	184	1.4%	84	0.5%	20
Not Known	-	-	-	-	8.6%	519	6.8%	251
Total	100	189,777	100	40,615	100	6,053	100	3,696

GLA 2016-based Demographic Projections, 2017 and LB Bexley ASC Information System, April 2018

of awareness of services and how such services can support independence.
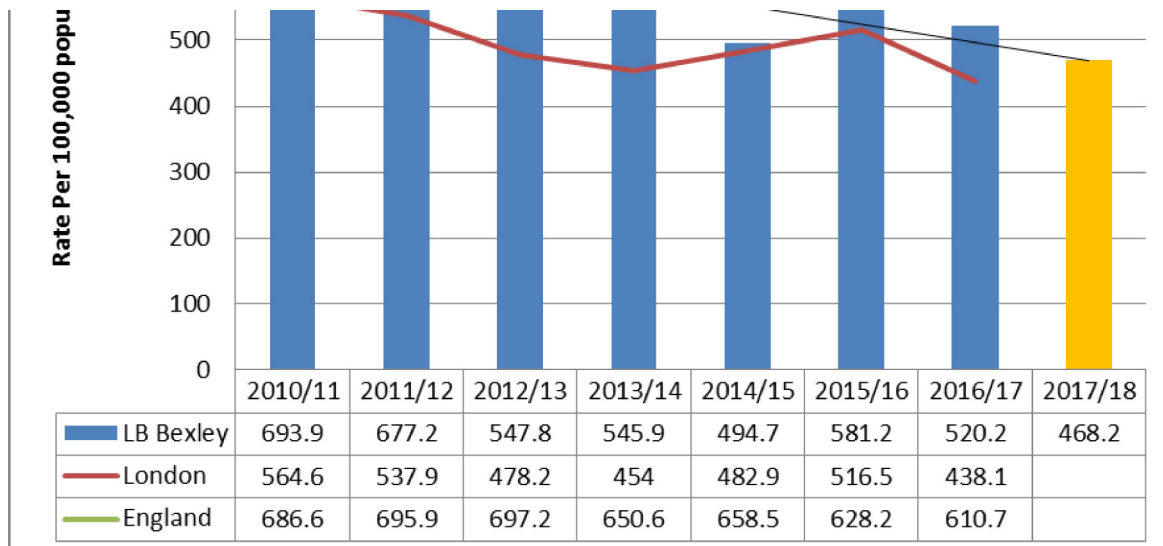
Residential and Nursing Care

In Bexley, our aim is to support more people to live in their own homes for longer, delaying the point at which they enter residential care and in some cases preventing this all together. Therefore, a lower rate of new admissions to residential and nursing care is better.

New admissions to residential and nursing care for older people (65+)

Data on new admissions to residential and nursing care for older people aged 65 and over shows that there were 468.2 admissions per 100,000 (65+) population in 2017/18 (Figure 95). This is lower than the position in 2016/17 (520.2) and lower than 2010/11 (693.9).

The overall number of people aged 65+ in receipt of residential or nursing care, commissioned by the Council, has fallen from 792 older people in 2012/13 to 772 in 2016/17 – an average of 744 older people in residential or nursing care each year.

Figure 95: Long-term support needs of older adults met by admission to residential or nursing care homes

	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18
LB Bexley	693.9	677.2	547.8	545.9	494.7	581.2	520.2	468.2
London	564.6	537.9	478.2	454	482.9	516.5	438.1	
England	686.6	695.9	697.2	650.6	658.5	628.2	610.7	

Source: ASCOF time series 2010/11 to 2016/17, NHS Digital and LB Bexley ASC Information System, April 2018

New admissions to residential and nursing care for younger adults

Data for younger adults aged 18 to 64 years shows that new admissions have risen from a rate of 2.8 per 100,000 (18-64) population in 2013/14 to 13.5 per 100,000 population in 2016/17 (Figure 96), primarily the result of young people moving from childhood to adulthood, with ongoing and often complex care and support needs. In 2017/18, we have seen a reduction in the rate to 12.6 per 100,000 population. A lower rate of new admissions to residential and nursing care is better.

Figure 96: Long-term support needs of younger adults met by admission to residential or nursing care homes
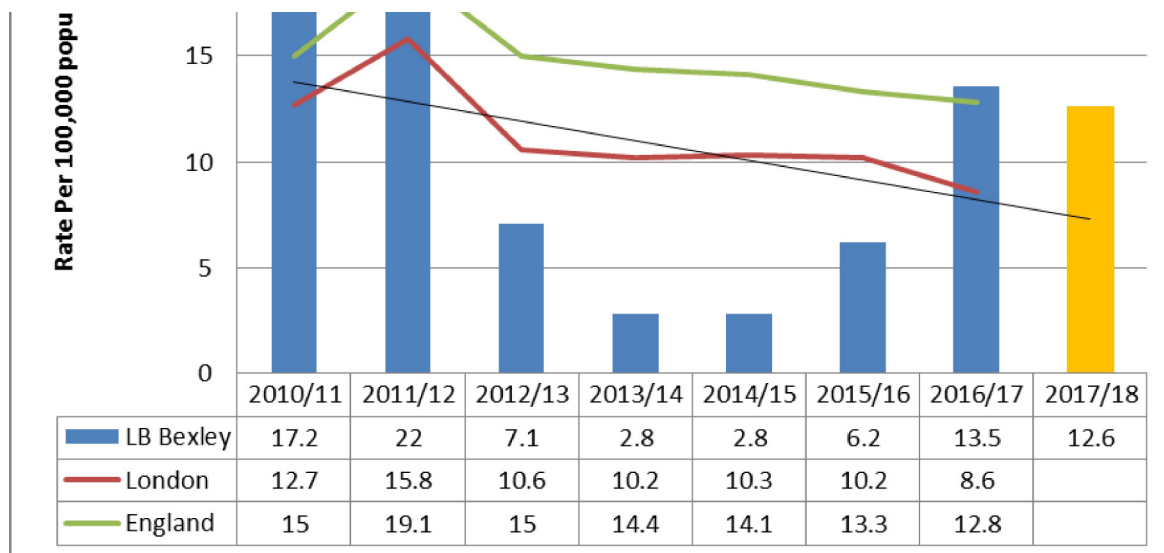
	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18
LB Bexley	17.2	22	7.1	2.8	2.8	6.2	13.5	12.6
London	12.7	15.8	10.6	10.2	10.3	10.2	8.6	
England	15	19.1	15	14.4	14.1	13.3	12.8	

Source: ASCOF time series 2010/11 to 2016/17, NHS Digital and LB Bexley ASC Information System, April 2018

The overall number of people aged 18-64 in receipt of residential or nursing care, commissioned by the Council, has fallen from 240 younger adults in 2012/13 to 194 in 2016/17 – an average of 194 younger adults in residential or nursing care each year. A key priority is to develop the market to ensure that there are alternatives to residential care, including sufficient supported living accommodation, so that younger people with care and support needs are not faced with spending their whole adult life in a care home.

Reduced lengths of stay in care homes

There is some evidence that service users are being supported in the community for longer and being placed later, reducing their length of stay in care homes. Average lengths of stay in residential and nursing care for all adults have fallen from an average of 70 weeks in 2016/17 to 62 weeks in 2017/18 (as at October 2017).

Care home market

Further work is needed to understand the factors affecting the size of the self-funding population, such as general population ageing, the level of asset ownership among older people, and access to information and advice about the options available. We are looking at ways to help our residents to avoid making decisions about long term care from a

The current care home market in Bexley is supported by block contracts[1] with three large providers and one smaller provider. The rest of the provision is managed under spot

[1] A block contract guarantees a given volume of business (e.g., a certain number of care home beds) to a service provider, usually over a set period of time, and in advance of the service being delivered.

contracting arrangements[1]. However, local authorities in London only commission about 42% of older adults' residential and nursing care home beds. The remaining placements are mainly filled by people who choose to go into a care home on a private basis and self-fund their own care. Based on local ASC data, there were estimated to be 534 self funders in older adult care homes in Bexley in 2015, equivalent to a 50% market share of older adult bed capacity in the Borough.

Home Care in Bexley

Home Care is an important service that supports over 2000 people a year to live, as independently as possible in their own home. Currently, home care in Bexley is provided by 50 agencies, which provide a range of support to people at home, depending on their needs. This includes traditional home care services, reablement to support people to recover from a crisis and regain skills, and support on discharge from hospital. A small number of people have 24 hour live in care to assist them to manage at home and avoid long term admission to residential care.

Quality of provision

CQC inspection findings for Bexley[2] show that further work is needed to raise standards and improve the quality of care home and domiciliary care provision in the Borough.

Figure 97: CQC ratings of care homes and domiciliary care provision in Bexley and England

**[2] State of Care 2016/17
(http://www.cqc.org.uk/sites/default/files/20170731_SoC_LA_Bexley_v2.pdf)**, Local
authority CQC ratings summary for Bexley, July 2017

CQC ratings for active locations and registered providers, 31 July 2017
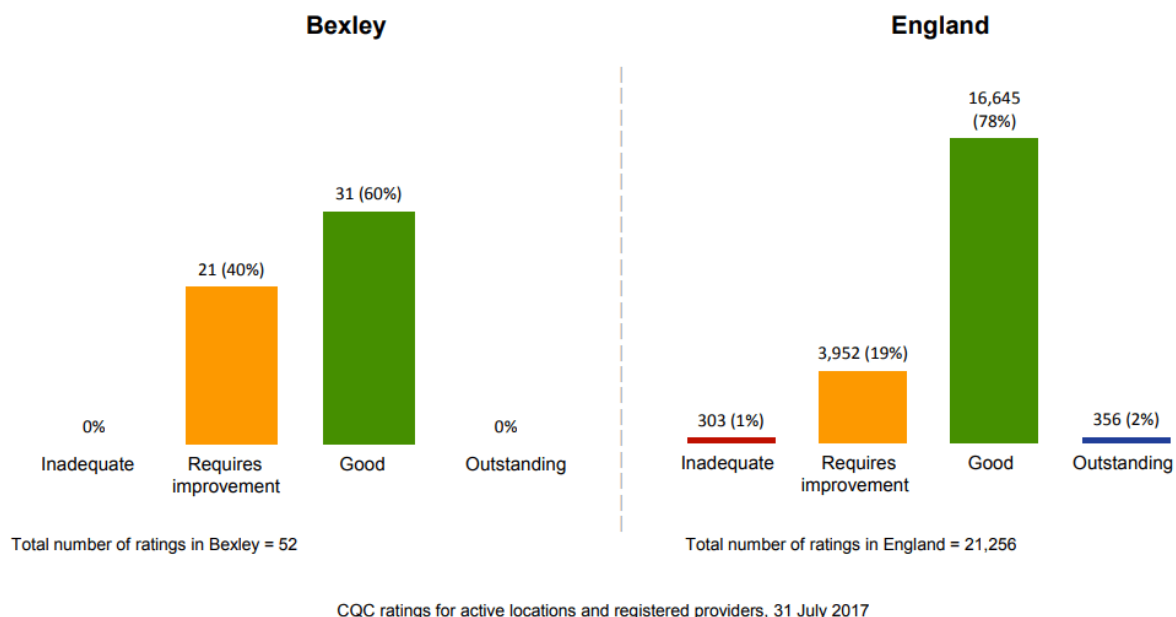
Source: CQC Ratings, July 2017

Delayed transfers of care from hospital

A 'delayed transfer of care' occurs when a patient is ready to leave a hospital but is still
occupying a bed due to non-clinical reasons. NHS England is responsible for monitoring
delayed transfers of care nationally.

The proportion of delayed transfers due to social care has increased since 2014 but a
significant proportion of delays (53.2% in 2017/18) are still attributed to the NHS.
Delayed transfers can be the result of delayed processes within the NHS, social care, or
across both sectors and can occur for a number of reasons, including waiting for
assessment and onwards care, patient choice, waiting for equipment to be installed, and
housing issues.

Delayed transfers of care from hospital, attributable to both the NHS and social care,
increased year-on-year in the period 2012/13 to 2015/16 but fell by 9% in 2016/17,
reflecting system-wide efforts to reduce DToC, see Figures 98-99 for details.
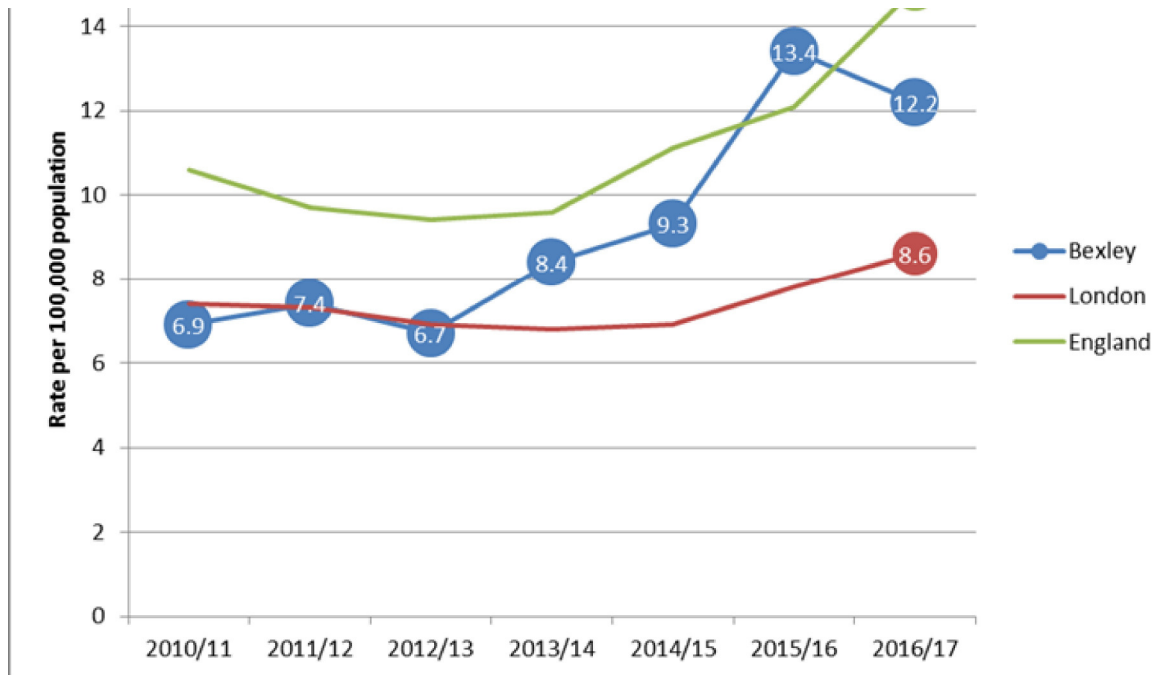
Source: Delayed Transfers of Care Statistics, NHS England

Figure 99: Delayed transfers of care from hospital by London LA, 2016/17
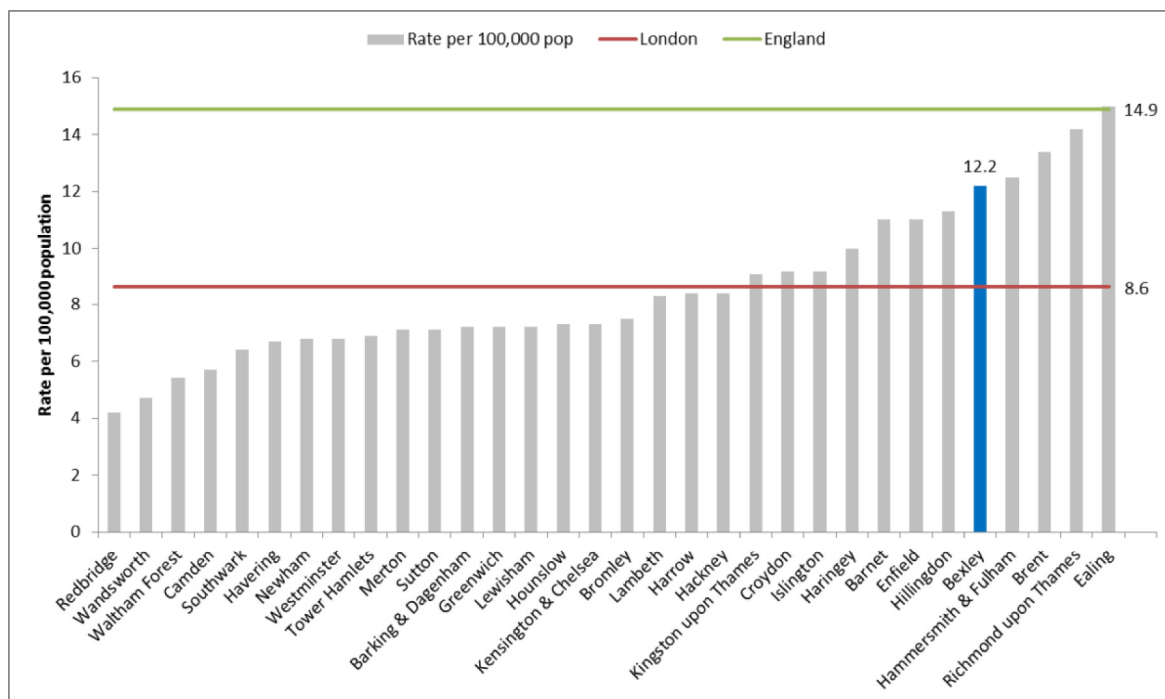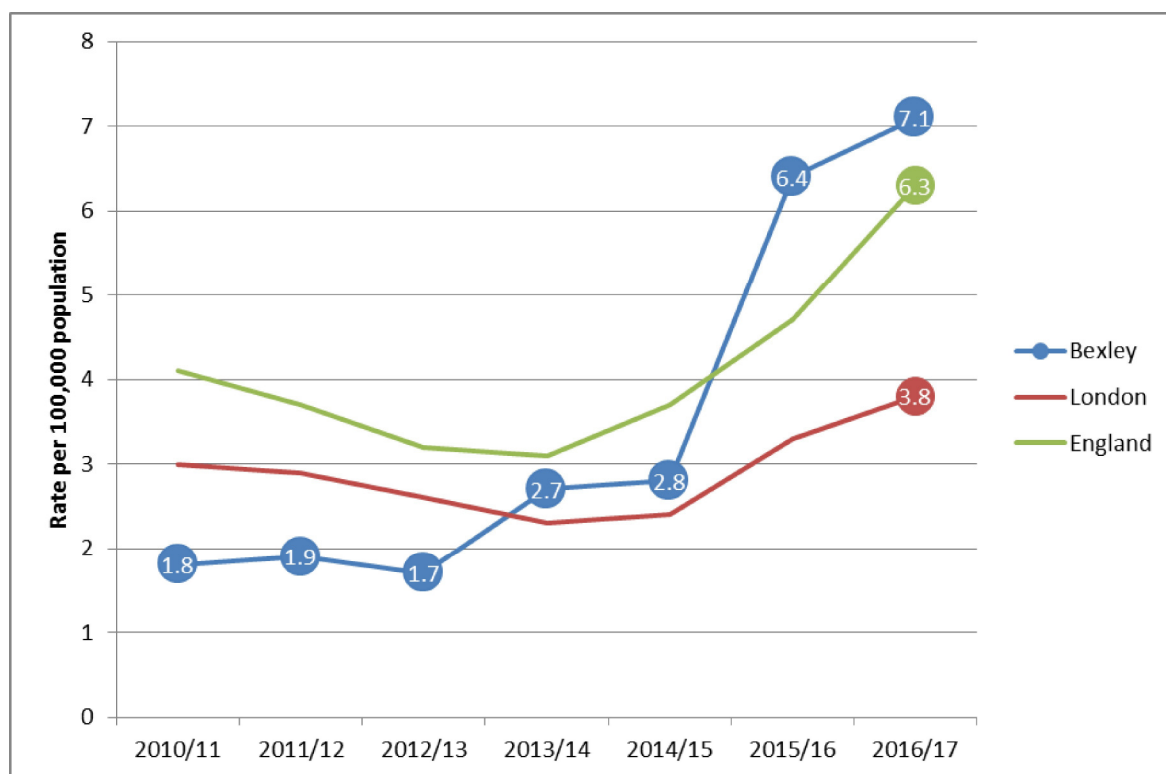

Source: Delayed Transfers of Care Statistics, NHS England

per 100,000, see Figures 100–101.

[1] Measured as the average number of delayed transfers of care (for those aged 18 and over) that are attributable to adult social care, per 100,000 population.

Figure 100: Delayed transfers of care from hospital attributable to social care, 2010/11 – 2016/17

Source: Delayed Transfers of Care Statistics, NHS England

Figure 101: Delayed transfers of care from hospital attributable to social care by London LA, 2016/17
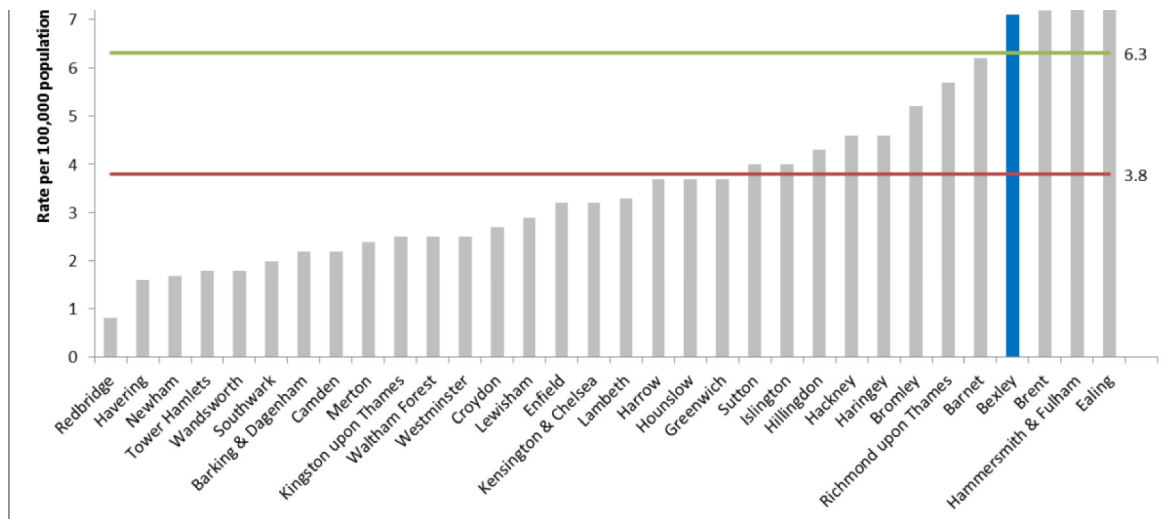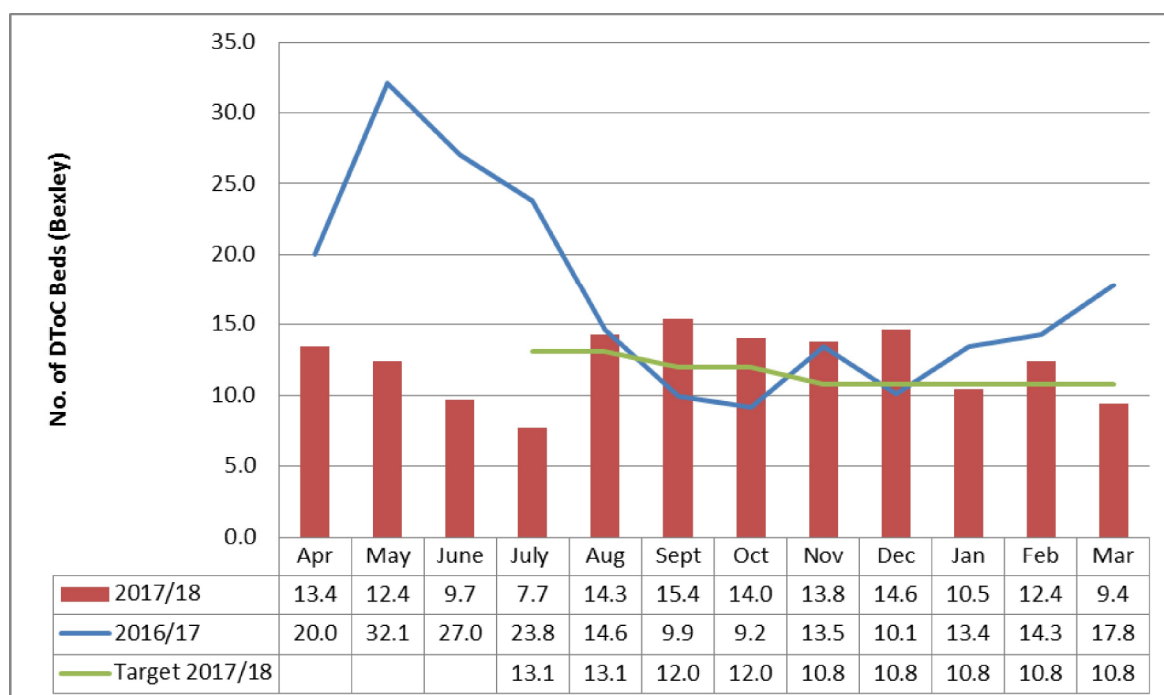
Source: Delayed Transfers of Care Statistics, NHS England

One of the reasons for the spike after 2014/15 relates to data quality and the robustness of procedures at the time for securing sign-off of delayed transfers of care. Ensuring that the hospitals' DToC submissions are signed off by a social worker has not been prioritised in previous years and it has been challenging to get to the position where a 'ready for discharge' list is recognised as accurate by all parties. Significant work has been undertaken by all partners to address this, which has led to improvements over the course of 2017/18.

It has also been widely recognised that the system has been under significant pressure over the last few years, facing unprecedented demand throughout the year. Reducing delayed transfers of care is a key national priority and all local areas have been set the challenge of delivering ambitious targets to deliver this. A&E Delivery Boards have implemented significant work to streamline processes and pathways. A Patient Flow Manager is employed by Bexley CGG to address 'blockages' across the whole Bexley system and ensure a 'pull through' approach. Through our Better Care Fund Plan, we are also supporting the delivery of the High Impact Change Model for managing transfers of care.

Delays also occur in non-acute, mental health settings. In 2017/18, non-acute delays accounted for 45% of all delays. This is being addressed through a range of actions including weekly bed management meetings between ward staff and the commissioner to

Figure 102: The average daily number of beds occupied by Bexley patients delayed in hospital, 2017/18

	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar
2017/18	13.4	12.4	9.7	7.7	14.3	15.4	14.0	13.8	14.6	10.5	12.4	9.4
2016/17	20.0	32.1	27.0	23.8	14.6	9.9	9.2	13.5	10.1	13.4	14.3	17.8
Target 2017/18				13.1	13.1	12.0	12.0	10.8	10.8	10.8	10.8	10.8

Source: Delayed Transfers of Care Statistics, NHS England

In April 2017, a new method of calculating DToC was introduced. Data on the number of patients delayed on the last Thursday of the month is no longer being collected. This measure has been replaced by a similar measure called DToC Beds. The DToC Beds figure is calculated by dividing the number of delayed days during the month by the number of calendar days in the month. It provides a similar figure to the patient snapshot but is more representative of the entire month rather than providing a view on one particular day. This means that DToC performance from 2017/18 onwards is not directly comparable with previous years.

Personal Budgets and Direct Payments

The ASCOF handbook of definitions[1] states that "research has indicated that personal budgets impact positively on well-being, increasing choice and control, reducing cost implications and improving outcomes. Bexley has one of the worst rates of personal budgets and direct payments for both service users and carers.

support as at 31 March 2017 (76.9%). This was below the England average of 89.4% and London average of 88.1%.

277 people with mental health needs represented a significant proportion (17%) of those in receipt of long-term community-based support. As these clients are in receipt of commissioned services, they are not currently counted as receiving self-directed support.

[1] Department of Health, **Adult social care outcomes framework: handbook of definitions (https://www.gov.uk/government/publications/adult-social-care-outcomes-framework-handbook-of-definitions)**

The remaining 6% (107 people) received other commissioned services such as learning disability employment support and prevention services.

Figure 103: Proportion of people using social care who receive self-directed support, 2016/17
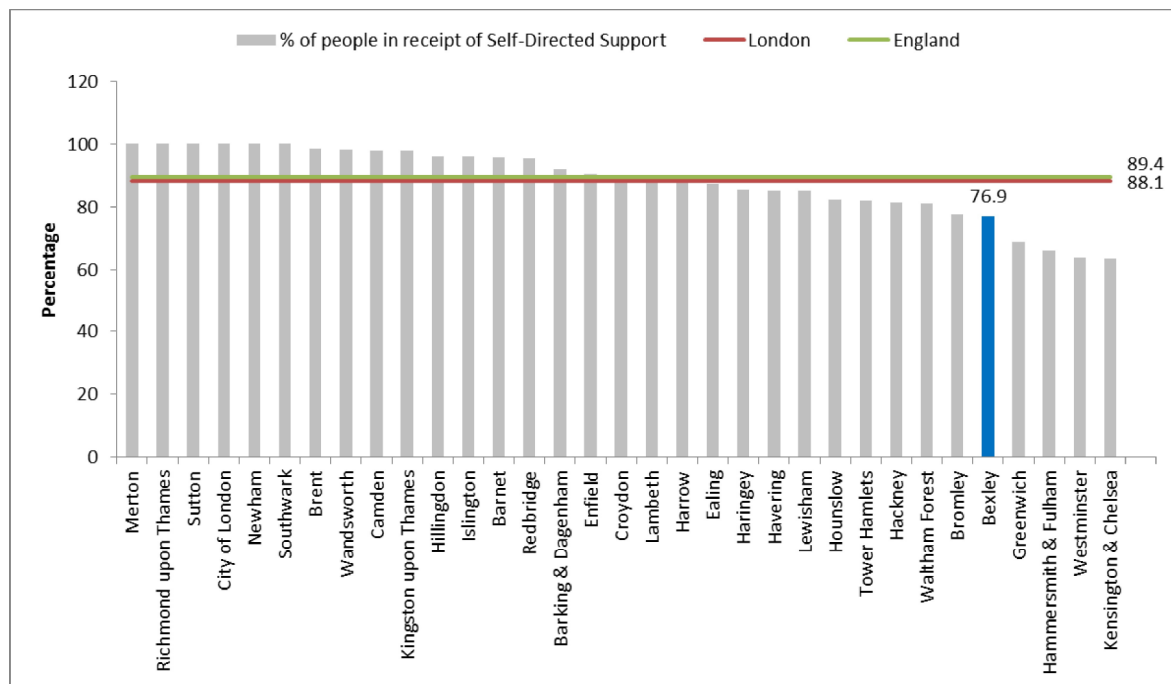
Source: Adult Social Care Outcomes Framework 2016/17, NHS Digital

Figure 104: Proportion of people using social care who receive direct payments by local authority, 2016/17
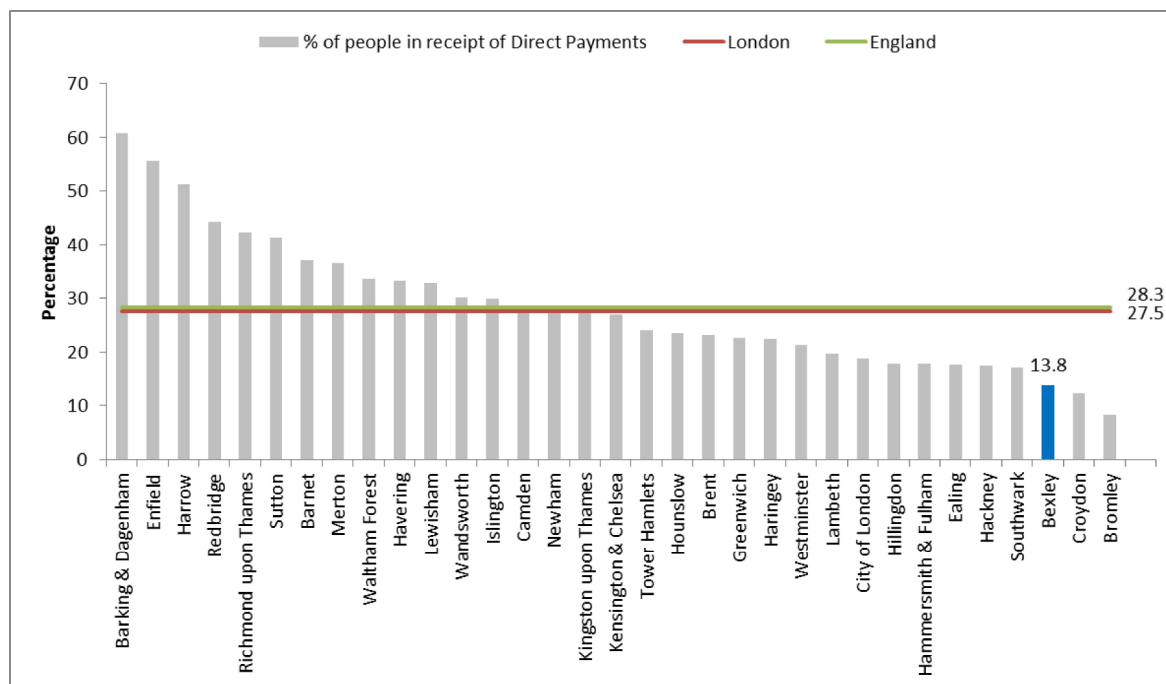
Source: Adult Social Care Outcomes Framework 2016/17, NHS Digital

Recommendations

A more detailed analysis and understanding is recommended of the factors contributing to:

- the low numbers of residents who have a Personal Budget for their social care needs.

- the low take-up of Direct Payments.

- It is recommended that approaches be considered to broaden the reach of reablement and rehabilitation services, particularly for those returning from a hospital stay.

- Work with care home and domiciliary care providers to understand the problems facing the local care market and to improve the quality of service provided.

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