

PP0812

# PROPOSED ABERDEENSHIRE LOCAL DEVELOPMENT PLAN 2020 RESPONSE FORM

As part of the production of the Local Development Plan, a 'Main Issues Report' was published in January 2019. The responses from these consultations have helped to inform the content of the Proposed Local Development Plan ("the Proposed Plan").

The Aberdeenshire Local Development Plan will direct decision-making on land-use planning issues and planning applications in Aberdeenshire for the 10-year period from 2021 to 2031. The Proposed Plan was agreed by Aberdeenshire Council in March 2020 as the settled view of the Council. However, the Proposed Plan will be subjected to an independent examination and is now open for public comment.

## **This is your opportunity to tell us if anything should be changed in the Proposed Plan, and why.**

When writing a response to the Proposed Plan it is important to specifically state the modification(s) that you would wish to see to the Plan.

This is the only remaining opportunity to comment on the Proposed Plan. The reasons for any requested changes will be analysed and reported to Scottish Ministers. They will then appoint a person known as a Reporter to conduct a public examination of the Proposed Plan, focusing particularly on any unresolved issues and the changes sought.

Ministers expect representations (or responses) to be concise (no more than 2000 words) and accompanied by limited supporting documents. It is important to ensure that all of the information that you wish to be considered is submitted during this consultation period as there is no further opportunity to provide information, unless specifically asked.

Please email comments to [ldp@aberdeenshire.gov.uk](mailto:ldp@aberdeenshire.gov.uk) or send this form to reach us by 31 July 2020\*.

We recommend that you keep a copy of your representation for your own records.

*\*UPDATE 16 June 2020: Consultation period was extended from 17 July 2020 for a further two-week period.*



## ACCESSIBILITY

If you need information from this document in an alternative language or in a Large Print, Easy Read, Braille or BSL, please telephone 01467 536230.

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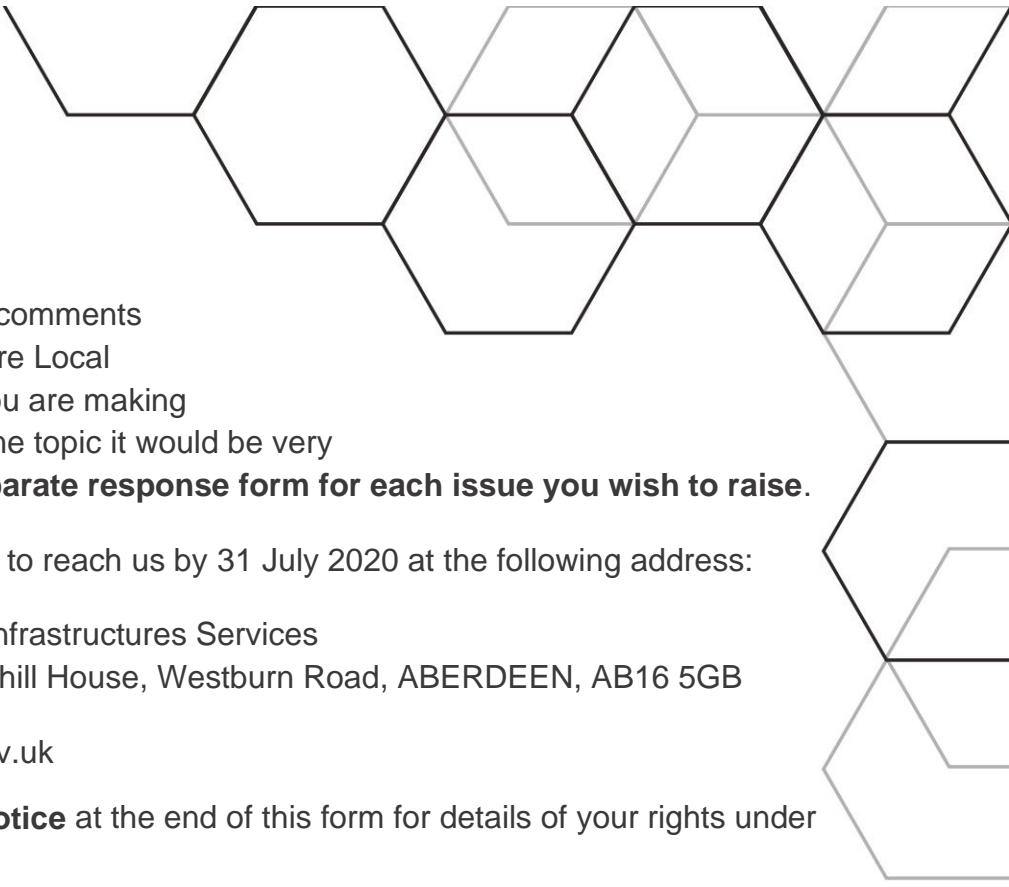
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Aberdeenshire Local Development Plan  
Woodhill House, Westburn Road, Aberdeen, AB16 5GB

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Email: [ldp@aberdeenshire.gov.uk](mailto:ldp@aberdeenshire.gov.uk)  
Web: [www.aberdeenshire.gov.uk/ldp](http://www.aberdeenshire.gov.uk/ldp)  
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If you wish to contact one of the area planning offices, please call 01467 534333 and ask for the relevant planning office or email [planning@aberdeenshire.gov.uk](mailto:planning@aberdeenshire.gov.uk).



Please use this form to make comments on the Proposed Aberdeenshire Local Development Plan 2020. If you are making comments about more than one topic it would be very helpful if you could fill in **a separate response form for each issue you wish to raise**.

Please email or send the form to reach us by 31 July 2020 at the following address:

Post: Planning Policy Team, Infrastructures Services  
Aberdeenshire Council, Woodhill House, Westburn Road, ABERDEEN, AB16 5GB

Email: [ldp@aberdeenshire.gov.uk](mailto:ldp@aberdeenshire.gov.uk)

Please refer to our **Privacy Notice** at the end of this form for details of your rights under the Data Protection Act.

## YOUR DETAILS

Title:	Mr
First Name:	Malcolm
Surname:	Smith
Date:	
Postal Address:	TMS Planning Services Ltd, [REDACTED] [REDACTED]
Postcode:	[REDACTED]
Telephone Number:	[REDACTED]
Email:	[REDACTED]

Are you happy to receive future correspondence only by email? Yes

Are you responding on behalf of another person? Yes

If yes who are you representing?

Glenisla Developments Limited

Tick the box if you would like to subscribe to the Aberdeenshire LDP eNewsletter:

*An acknowledgement will be sent to this address soon after the close of consultation.*

# YOUR COMMENTS

Please provide us with your comments below. We will summarise comments and in our analysis will consider every point that is made. Once we have done this we will write back to you with Aberdeenshire Council's views on the submissions made. We will publish your name as the author of the comment, but will not make your address public.

**Modification that you wish to see** (please make specific reference to the section of the Proposed Plan you wish to see modified if possible, for example Section 9, paragraph E1.1):

## **Policy R2 Development Proposals Elsewhere in the Countryside**

The following text (subject to any alterations deemed appropriate by the Reporter) should be added to Policy R2: -

### **Special needs and age exclusive retirement housing**

R2.20 The development of new homes in order to meet defined housing needs not presently being met on allocated sites or elsewhere in settlements may be supported in accessible locations within the defined countryside subject to the need for the development being established, the scale/nature of the development being compatible with both the subject site and the surrounding area, and required infrastructure/services being available/able to be made available. Provision for age exclusive retirement housing (60+), with or without additional support services, may be supported but only where the form of the housing proposed is specifically designed for retirement living and the age exclusive restriction is binding for future occupation.

**Reason for change:**

The underlying rationale for the current submission, that related to a policy framework for the provision of age exclusive retirement housing in appropriate locations, is the lack of suitable homes in the current residential market and in new development in Aberdeenshire in order to meet the needs of an expanding ageing population. This is a national issue not presently being addressed to any material extent at any level of government, but one widely recognised as needing to be addressed, including through the planning process. In support of the case, a report has been commissioned from residential experts, Christie and Co, which, while looking at the potential for this use on a specific site near Drumoak which is subject to a separate representation to the emerging LDP, speaks to the central issues of the increasing ageing population and the failure to address housing related issue for this growing demographic. The general findings of the report (copy attached) have wide application and the following extracts from the report's conclusions are of specific relevance to this policy representation.

The Christie and Co report sets out the following broad conclusions: -

- Headline demographics indicate a higher than average proportion of elderly residents in Aberdeenshire;
- With regard to demand for age exclusive housing, we believe there is an established need given the limited provision. In addition to this, commissioning policy promotes alternative housing options for downsizers and elderly residents looking to retain their independence; and
- In summary, we believe there is a good scope for age exclusive housing at this location given the favourable demographics and shortfalls of existing provision within the catchment.

In effect, there is both an underlying demand and a strong supporting case for this type of development in Aberdeenshire, such specialised (and required) development being in very short supply and having a rising demand. The Christie and Co report also confirms that the age group of 60+ is projected to increase by over 13% in the period to 2030. This again shows increasing demand for suitable housing and residential environments for the increasing ageing demographic.

Against this background, Aberdeenshire Council's Local Housing Strategy 2018-2023 confirms the Councils objectives of delivering, among others, (Table 1 of the Strategy refers): -

- A well-functioning housing system;
- High quality sustainable homes;
- Sustainable communities;
- Homes that meet people's needs; and
- Support for independent living

The Local Development Plan and other council policies and initiatives are key elements to facilitate all of these objectives, with the former being tasked with identifying sites to support the delivery of the Council's land use strategy. The Aberdeenshire Council Plan 2017-2022 identifies the right mix of housing across Aberdeenshire as a priority, in effect ensuring the delivery of housing to meet the wide range of needs within local communities. The Key Findings from the Aberdeenshire Housing Needs and Demands Assessment (HMDA) include:

- Significant increases in older age groups, particularly over 75s in Aberdeenshire (and the related impacts on the need for suitable housing provision);
- Future housing supply across all tenures subject to market conditions and build-out rate of developers; and
- Under occupation is high and is estimated at 41%. This is even more pronounced in properties with 3 or more bedrooms, rising to 70%.

The HNDA also identifies increasing demand from more elderly and small households and confirms that the development of additional affordable housing is an integral part of the housing strategy moving forwards. The HNDA makes no recommendations related to the enhanced provision of housing for “older age groups” in private sector housing leaving this, in conjunction with the Local Development Plan, for the private market to deliver (which it doesn't).

The increase in the number of older people and of people living with dementia is also a policy focus at the Scottish national level. The Scottish Government's strategy for housing for older people (Scottish Government Age, Home and Community: A Strategy for Housing for Scotland's Older People: 2012 – 21) and the national Dementia Strategy (Scottish Government/COSLA/Alzheimers Scotland - Scotland's National Dementia Strategy 2017-2020) recognise the benefits of enabling people to live Independently at home for as long as possible. Their housing strategy for older people identifies various measures to enable people to live independently including the provision of new housing suited to their needs but recognises that the supply of such housing, housing specifically designed to meet the needs of the increasingly elderly population, many with complex care issues who require additional support, is limited and that there is little new development addressing these needs. Arising from this, the scope for independent living with support is more limited and therefore care home living and hospital stays, sometimes extended stays, become more likely. Care Home living and hospital stays are also at significantly greater cost than care in the community/care at home, particularly where the latter is delivered in adaptable/purpose-built houses designed to suit the needs of the occupants. There are also matters of independence, quality of life, and dignity to be considered, people want to live at home for as long as possible but some houses will not lend themselves to this outcome and sourcing suitable houses, in size and cost, is difficult due to limited supply and, resulting from this, where available, are at higher than average market costs.

Larger multi-bedroomed homes (whether or not new build), often on more than 1 level, are far less likely to be suited to the needs of the growing mature demographic. That is not to say that many cannot happily reside in current “mainstream” housing, rather it highlights that many would greatly benefit from single level living and not all of this can be delivered in high density flatted development as appears to be the current market approach (McCarthy Stone). The “burden” of providing suitable housing for the increasingly elderly population, often in well sized 2 bedroomed bungalow units, is falling on the public sector which is simply unable to provide the range and amount of housing to meet existing and increasing needs, nor would many of the persons in need of such housing qualify for a council house or one provided by a Registered Social Landlord. There is a gap in the market presently that, with the increase in the number of elderly households, will only become greater over time, that is unless there is positive provision for an appropriate form of deliverable development suitable for this growing group in society. There is no provision in the emerging LDP presently to support this housing need, albeit Aberdeenshire Council identify the benefits of allocating a site in the LDP for live/work unit development?

Older people can often afford to purchase a suitable property to meet their needs (downsizing from the family home as an example), the problem is that new build, energy efficient and flexibly designed properties to suit the increasing number of elderly residents are in very short supply and there are effectively no specific allocations in the emerging LDP supporting the delivery of such homes in the private market. The private market is simply not delivering these homes through mainstream development.

There are an extensive range of new housing allocations in the LDP, some sizeable, and yet not even a proportion of the new market housing in these developments, or others, are required to provide homes specifically to address the increasing needs of the growing elderly population. This is a national problem which can be directly addressed by actions at the more local level and one where a Local Development Plan delivering the Council's wider policy and land use objectives can assist by making positive provision (an example of which is set out below). LDP support for new housing for sale to meet all community requirements, including the elderly, should be forthcoming through the planning process.

There have been an array of studies looking at housing provision/delivery including the specific challenges of delivering modern well-constructed/insulated properties for Scotland's increasingly elderly population. The national dementia strategy identifies a commitment to examine the potential of housing specially developed to meet the needs of people with dementia. In all cases the underlying delivery failures, including those within the planning system, are identified. The private market is primarily aimed at returning profits, an outcome which is best served by building family sized homes on 2 or more levels in order to maximise the use of land relative to the amount of floorspace created. Indeed, a review of new private housing development marketing largely shows an array of 3, 4 and 5 bedroomed family homes over 2 or 3 levels with little or no provision of bungalows. Building single level properties is less cost efficient and ultimately less profitable and therefore the relatively modest bungalows with small gardens suitable for more elderly occupants are simply not built on a regular basis or in anything like the quantity required. Where does the planning system intervene to ensure that the community as a whole are best served by new development – it patently doesn't.

In Aberdeenshire there are some examples of retirement living developments, but these are limited and do not meet underlying need by some distance. Much more requires to be done.

Altering Policy R2 as proposed, allows the potential for new development proposals to progress through the planning system in order to deliver well-located, well-designed development meeting genuine and increasing needs of the growing numbers of elderly residents in suitable, accessible locations, and within attractive, safe, secure, and supportive environments. The consented houses would be designed to be adaptable to the needs of individual occupants where their needs alter. The development package being proposed adds to one allowing residents to live longer in their own homes, with care as required, and within an environment suited to their needs. As set out above, such development is in short supply and needs a policy framework in order to allow existing limited provision to be added to and improved upon.

## **DOCUMENTS**

Desktop Market Analysis – Christie and Co.





# PRIVACY NOTICE

## LOCAL DEVELOPMENT PLAN PUBLIC COMMENT

The Data Controller of the information being collected is Aberdeenshire Council.

The Data Protection Officer can be contacted at Town House, 34 Low Street, Banff, AB45 1AY.

Email: [dataprotection@aberdeenshire.gov.uk](mailto:dataprotection@aberdeenshire.gov.uk)

Your information is being collected to use for the following purposes:

- To provide public comment on the Aberdeenshire Local Development Plan. The data on the form will be used to inform Scottish Ministers and individual(s) appointed to examine the Proposed Local Development Plan 2020. It will inform the content of the Aberdeenshire Local Development Plan 2021.

### Your information is:

Being collected by Aberdeenshire Council	X
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### The Legal Basis for collecting the information is:

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Where the Legal Basis for processing is either Performance of a Contract or Legal Obligation, please note the following consequences of failure to provide the information:

It is a Statutory Obligation under Section 18 of the Town and Country (Scotland) Act 1997, as amended, for Aberdeenshire Council to prepare and publish a Proposed Local Development plan on which representations must be made to the planning authority within a prescribed period of time. Failure to provide details requested in the 'Your Details' section of this form will result in Aberdeenshire Council being unable to accept your representation.

Your information will be shared with the following recipients or categories of recipient:

Members of the public are being given this final opportunity to comment on the Proposed Aberdeenshire Local Development Plan. The reasons for any changes that the Council receives will be analysed and reported to Scottish Ministers. They will then appoint a person to conduct a public examination of the Proposed Plan, focusing particularly on the unresolved issues raised and the changes sought.

Your name and respondent identification number (provided to you by Aberdeenshire Council on receipt of your

submission) will be published alongside a copy of your completed response on the Proposed Local Development Plan website (contact details and information that is deemed commercially sensitive will not be made available to the public).

In accordance with Regulation 22 of the Town and Country (Development Planning) (Scotland) Regulations 2008 where the appointed person determines that further representations should be made or further information should be provided by any person in connection with the examination of the Proposed Plan the appointed person may by notice request that person to make such further representations or to provide such further information.

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Not applicable.

The retention period for the data is:

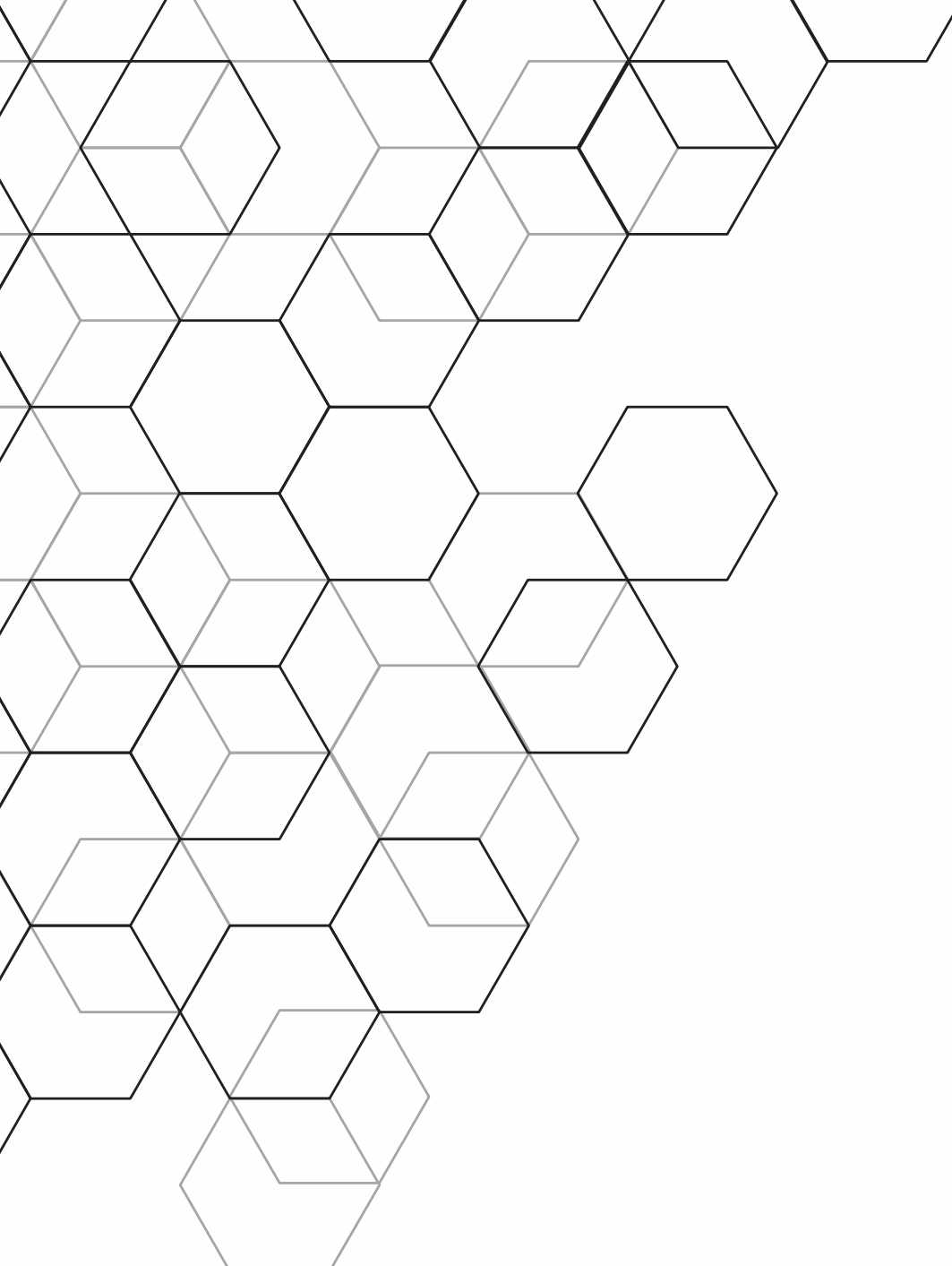
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Not applicable.

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- to data portability, where the legal basis specified above is:
  - (i) Consent; or
  - (ii) Performance of a Contract;
- to request rectification or erasure of your personal data, as so far as the legislation permits.



# Land at Drum, near Drumoak (adjacent to Drum Garden Centre), Banchory, Aberdeenshire AB31 5AN

## Desktop Market Analysis

Prepared for Glenisla Developments

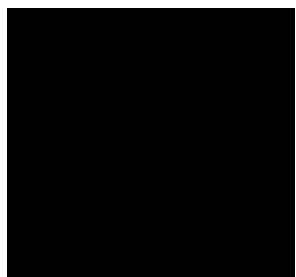
July 2020 – Strictly Private & Confidential

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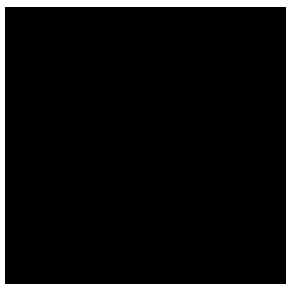
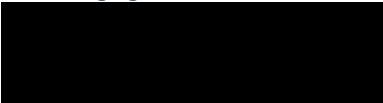
- Glenisla Developments (the "Client")

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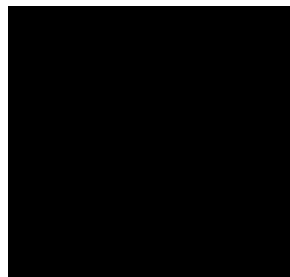
Should you have any questions regarding this report, please contact:



Managing Director - Care Consultancy



Associate Director



Consultant



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## Definitions and Abbreviations

We have used the following key definitions and abbreviations:

AHP	Average House Price
AHI	Average Household Income (per earner)
BM	Christie & Co Benchmark
C&Co	Christie & Co
CAGR	Compound Annual Growth Rate
CCG	Clinical Commissioning Group
CQC	Care Quality Commission
Effective beds	Capacity based on single occupancy rooms
EMC/Market Standard	Effective Market Capacity (Single occupancy en suite provision)
KPI	Key Performance Indicator
PB	Purpose Built
SEC1	Social Economic Class 1 (Large employers, higher professional, higher managerial and administrative occupations)

# Introduction

## Scope of Work

In accordance with our letter of engagement dated 20th July 2020, we have prepared a desktop market study analysis in respect of a proposed age exclusive development at Land at Drum, near Drumoak (adjacent to Drum Garden Centre), Banchory, Aberdeenshire AB31 5AN which is hereinafter referred to as the Property

The purpose of this report is to demonstrate need with associated commentary around the scheme through addressing the following:

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Development Site Review	<ul style="list-style-type: none"><li>• High level development site overview to provide background and a general introduction</li></ul>
Demographic Review	<ul style="list-style-type: none"><li>• Review of the demographic profile of the area with specific focus on the demand drivers for elderly care</li><li>• Age profile and demand projected to 2025 and 2030</li><li>• Affluence analysis</li></ul>
Existing Provision	<ul style="list-style-type: none"><li>• A review of existing age exclusive housing provision by build date and specification</li><li>• New potential age exclusive housing schemes based on known development proposals</li></ul>
Conclusions	<ul style="list-style-type: none"><li>• General commentary, conclusions and recommendations around the proposed development</li></ul>

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# Key Data Sources and Methodology

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## Demographic Information

- We have utilised the latest 2011 census data sourced from the Office of National Statistics which has been analysed on a postcode specific basis and extrapolated using updated population growth estimates and projections to 2020, 2025 and 2030
- Affluence analysis has been assessed having regard to the employment and income profile of the working population in the relevant postcode areas using the SEC 1 classification (large employers, higher managerial and administrative occupations and higher professional occupations), average house price data from Land Registry and average household income (per paycheck) data from CACI
- Our catchment area is dependent on the site location and the number of elderly residents per sq km

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## Planning Data

- We have reviewed planning applications for new age exclusive developments where an application has been submitted. Our principal data source for this is Glenigan together with internet based research. We reserve the right to amend our analysis in the event that any new applications are submitted

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## Supply Assessment

- Data for our supply assessment analysis has been obtained from the directory at HousingCare.org. Our assessment assumes that this data is accurate and we reserve the right to amend our analysis in the event of any subsequent changes

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## Assessment of Need

- For age exclusive housing targeting the downsizer market there is no defined assessment for need given that the housing option is driven by a mix of lifestyle choice and the often distinct requirements of households for accommodation more suited to their individual needs. We have therefore leveraged demographic data as well as wider literature on demand drivers for age exclusive housing to come up with a reasoned conclusion

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## General

- This assessment has been prepared on a desktop basis only. We reserve the right to amend our findings following more detailed investigations or in the event of any subsequent change to the information or market conditions. Market studies reflect a situation as at a particular point in time and should be subject to regular review

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## Restrictions & Confidentiality

- This Report is provided solely for the purpose stated previously. It is confidential to and for the use only of the Client to whom it is addressed and any subsequent party that are specifically granted reliance by Christie & Co. No responsibility is accepted to any third party for the whole or any part of its contents. Any such parties rely upon this report at their own risk. Neither the whole nor any part of this report or any reference to it may be included now, or at any time in the future, in any published document, circular or statement, nor published, referred to or used in any way without our written approval of the form and context in which it may appear. The Report and Appendices are governed by UK law and any dispute thereon will be adjudicated upon only in the courts of the UK
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# Executive Summary

A good opportunity for new age exclusive housing at this location given the favourable demographics and lack of modern provision

<b>BACKGROUND &amp; SITE OVERVIEW</b>	<ul style="list-style-type: none"><li>• We understand that Glensia Developments are looking to develop a retirement living scheme which will initially provide 50 age exclusive bungalows in Drumoak, Aberdeenshire. Age exclusive housing is designed, built and let/sold exclusively to older people (typically 55+)</li><li>• The Property is located adjacent to the Drum Garden Centre in Drumoak, a village approximately 14.3 miles to the west of Aberdeen. The site is accessible via the A93 main road which leads directly into Aberdeen. Public transport links include regular bus services which operate from Banchory to Aberdeen. The closest national railway service is Portlethen Railway Station (c.14 miles away). Key amenities include the Glen O'Dee Hospital which is located c9.2 miles west of the Property. The setting of the site is a rural urban fringe</li><li>• Upon evaluating the population dynamics of the area, we believe that the most likely catchment area is a 16km (10 mile) radius and have thus profiled competitors that fall within this distance</li></ul>
<b>DEMOGRAPHICS</b>	<ul style="list-style-type: none"><li>• We observe a high proportion of 60+ residents within the 16km catchment, which is in line with the target market for 'downsizers' who are likely to want to move into age exclusive housing. (the Property). The population of people aged 60+ in the catchment is forecasted to grow by 13.3% by 2030. We do draw attention to the low population density within the catchment</li><li>• Wealth is exhibited through both average household income (AHI) and household ownership. We observe that a high proportion of residents within the 16km catchment (39.5%) own their house outright which is materially above regional and UK benchmarks. Further to this AHI indicators are also strong indicating a good degree of affluence within the catchment</li></ul>
<b>DEMAND</b>	<ul style="list-style-type: none"><li>• Demand for age exclusive housing is driven by the chosen lifestyle choice of the user, often people who are approaching retirement/looking to downsize. 'Downsizers' often do not require any care provision but rather are wanting to move into more appropriate housing which can cater for their bespoke needs</li><li>• The latest national commissioning policy documents within Scotland state that there needs to be more 'varied housing options' for people approaching retirement and looking to downsize</li></ul>
<b>SUPPLY</b>	<ul style="list-style-type: none"><li>• Existing supply consists of 28 age exclusive schemes providing 801 units. We note the majority of schemes are located in and around the Aberdeen area. Our qualitative review of existing provision revealed that over 59% of schemes only have 1 bedroom whilst the latest market standards indicate downsizers prefer larger schemes. Further to this, a significant proportion of schemes were built pre 2000 and therefore are likely to be dated in design</li><li>• Our review of incoming planning applications revealed two other age exclusive schemes within the supply pipeline amounting to an additional 144 units within the catchment. Gordon Investment Corporation are developing a 49 unit scheme c2.5km away, whilst Cults Property Development Company are planning to deliver a larger 95 unit scheme on Inchgarth Road, Aberdeen</li></ul>
<b>OVERALL</b>	<ul style="list-style-type: none"><li>• We believe there is a good opportunity for age exclusive housing at this location given the high proportion of 60+ residents within the catchment, the mixed nature of existing provision and local commissioning policies which promote housing schemes for downsizers</li></ul>

Source: Christie & Co

Land at Drum, near Drumoak (adjacent to Drum Garden Centre), Banchory, Aberdeenshire AB31 5AN | July 2020

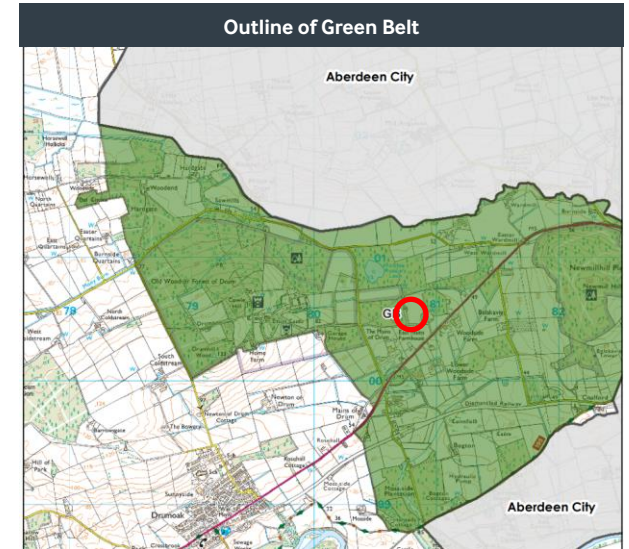
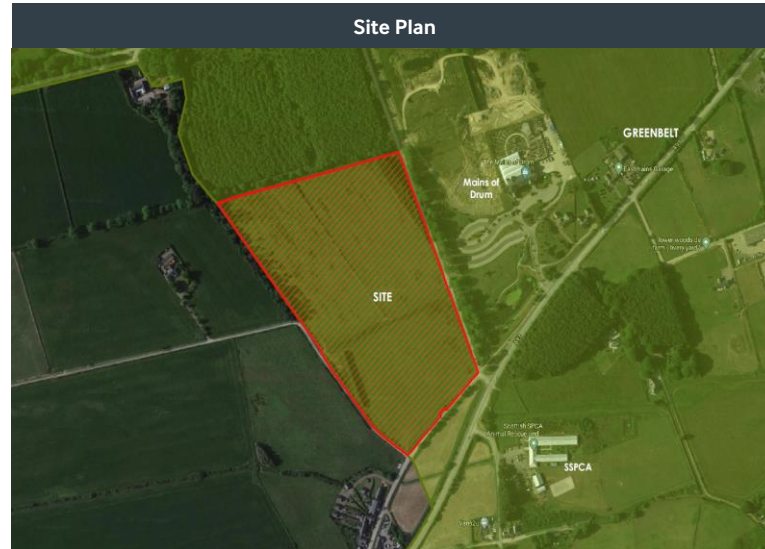
# 1. The Site and Catchment Area

# Introduction – The Proposed Development

A potential opportunity for a phased development of age exclusive bungalows in Drumoak, Aberdeenshire

## Key Observations

- The adjoining plan shows the outline of the potential site which has been identified for development
- The site is approximately 22.9 acres and is currently situated on the Green Belt. We have identified the location of the proposed Property relative to the Green Belt. We understand that the exclusion of the site from the Green Belt is to be considered through the LDP process
- We understand that Glensia Developments are considering the opportunity to develop age exclusive housing, in the form of 50 bungalows with on-site management and resident support also being provided
- The bungalows will be either 2 or 3 bed units and will be designed to a high specification with each unit between 75m<sup>2</sup> - 95m<sup>2</sup> bungalows, 2 and 3 beds. Each bungalow will have gardens and optional garages



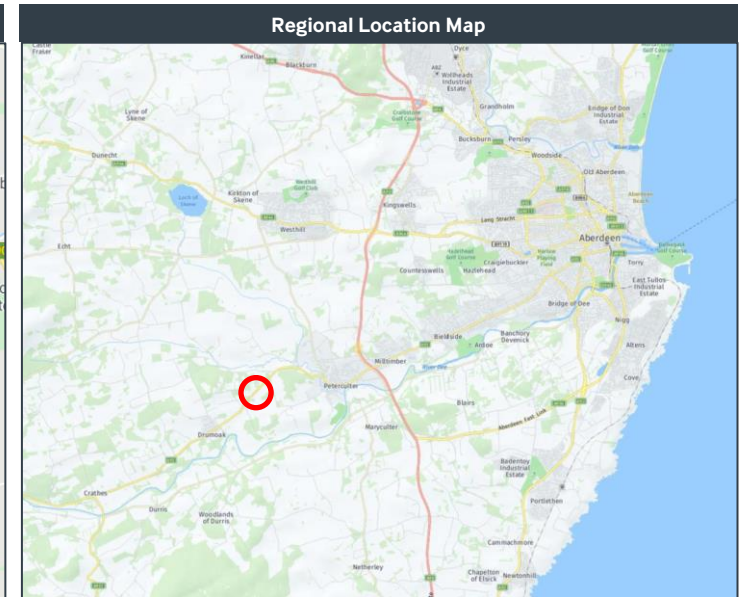
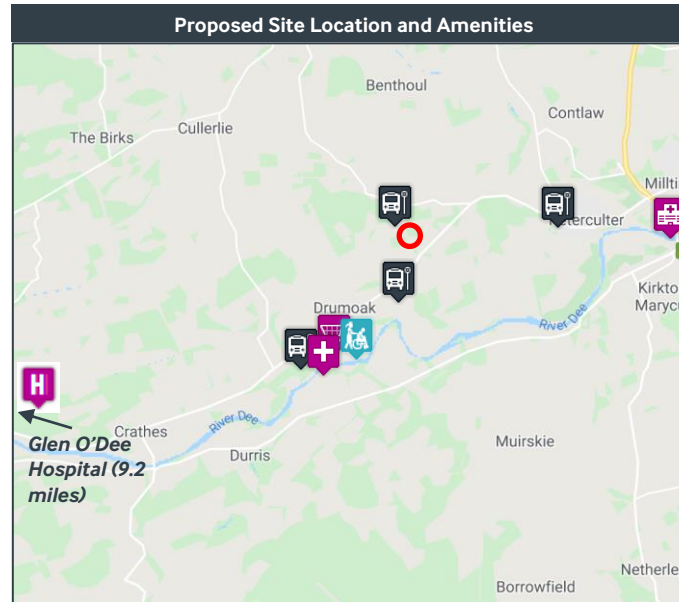
○ Site

# Location and Accessibility

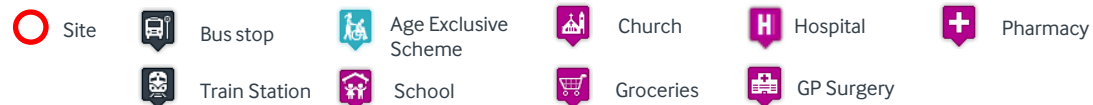
The Property is positioned in Drumoak just off the A93 which is c. 14 miles west of Aberdeen

## Key Observations

- Drumoak is village located between Aberdeen to the east and Banchory, the gateway to Royal Deeside, to the west.
- Aberdeen is located approximately 14.3 miles to the east
- There are several bus stops in close proximity offering routes to Aberdeen from Banchory including the 201, 202 & 203
- Portlethen Railway Station is the closest station to the Property, approximately 14 miles away
- In terms of accessibility the Property can be reached via the A93 which runs directly to Aberdeen on the east and Banchory to the west. We note that new developments and road improvements have recently been implemented, most notably the Property will benefit from the new Aberdeen Bypass, improving access to Aberdeen Airport and routes to the south
- The adjoining maps show the positioning of the site relative to its immediate and wider area with the plan to the left showing the positioning of local amenities including Glen O’Dee Hospital which is located 9.2 miles west of the site



Sources: Google Maps, Christie & Co Analysis

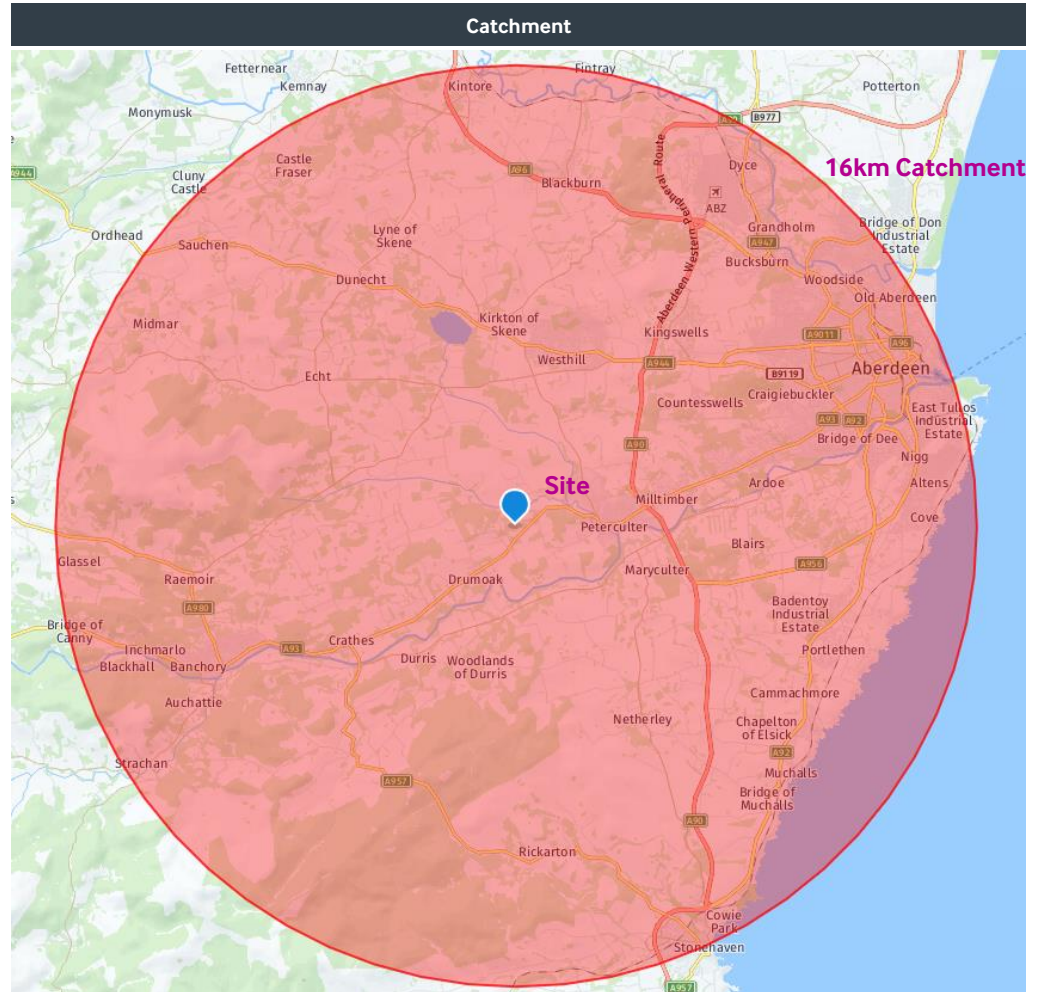


# Defining the Catchment Area

Our analysis reflects a catchment of 16km (10m) for the age exclusive housing and we do draw attention to the low elderly population density

## Key Observations

- In order to undertake our analysis and reach conclusions relative to demand, supply and need, it is necessary to define the likely catchment area for the proposed scheme
- In determining the catchment area we are guided by our experience of market practice and other similar schemes. Key factors include the nature of the development proposed, the type of location and elderly population density
- From a density and demographic perspective, we have utilised the latest 2011 census data sourced from the Office of National Statistics which has been analysed on a postcode specific basis and extrapolated using updated population growth estimates and projections to 2020, 2025 and 2030
- We have adopted a 16km (10 mile) catchment which covers an area of relatively low population density bearing in mind the rural and small town character of much of the area along with Aberdeen City which is close by and readily accessible to the site reflecting the likelihood that the scheme will draw residents from Aberdeen



Sources: Google, Christie & Co Analysis

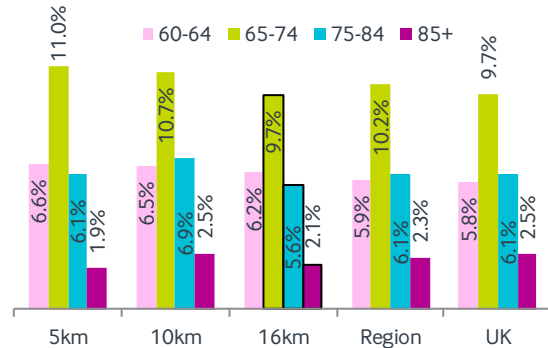
Land at Drum, near Drumoak (adjacent to Drum Garden Centre), Banchory, Aberdeenshire AB31 5AN | July 2020

## 2. Market Study

# Demographics – Age and Affluence Profiles

We observe a high proportion of 60+ residents within a 16km catchment

**Age Profile**  
Proportion of Age - 2020

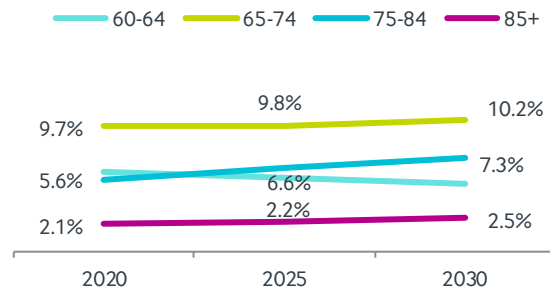


**Density of Elderly Residents per sq km - 2020**

	5km	10km	16km
60+	36	14	5

Most likely catchment area: 16km

**Age Projections to (16km)**



**Affluence Profile**  
Affluence Indicators in Catchment Area

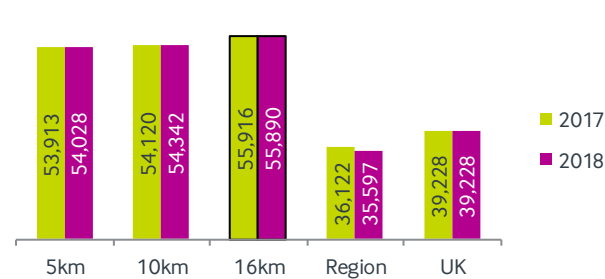
	5km	10km	16km	Region	UK
SEC1*	18.1%	18.0%	18.3%	9.6%	11.0%
AHI** (€000's)	54	54	56	36	39
AHP (€000's)	-	-	-	146	299

\*Social Economic Class 1 (Large Employers, higher professional, higher managerial and administrative occupations)  
 \*\*Average Household Income (per earner)  
 \*\*\*Average House Prices  
 Note: AHP provided for England and Wales only

**Household Ownership**

	5km	10km	16km	Region	UK
Owned Outright	40.1%	41.9%	39.5%	28.4%	31.0%
Owned with Mortgage or Loan	36.1%	35.0%	40.9%	34.7%	34.1%
Rented	23.8%	23.1%	19.6%	36.9%	34.9%

**Average Household Income**



**Summary (vs UK Benchmarks)**

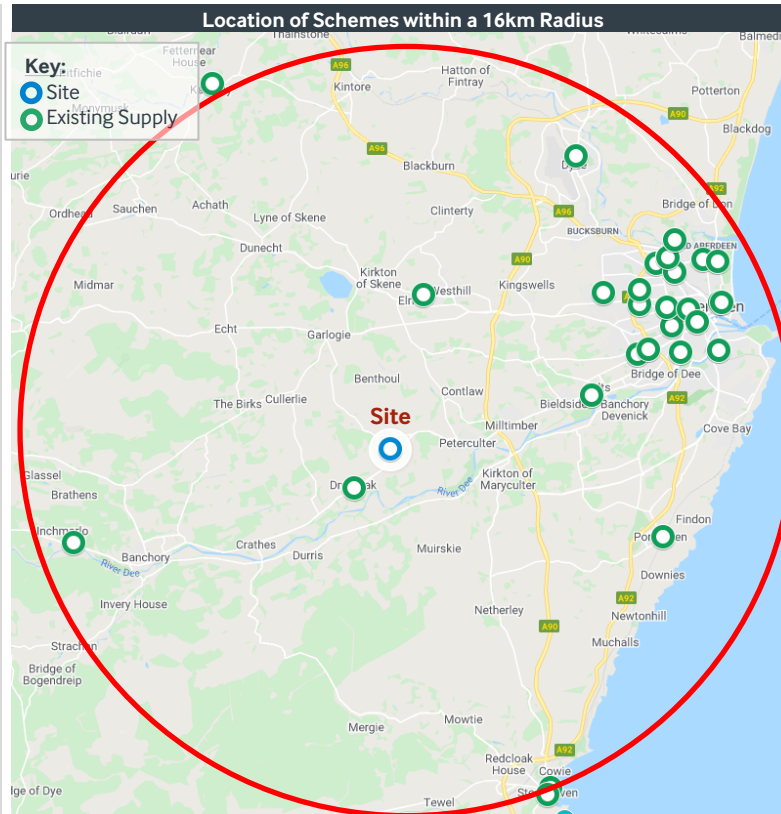
5km	
Proportion of Age Profile	Above Average
Growth of 60+ to 2025	7.0%
Growth of 60+ to 2030	14.3%
SEC1 (%)	Above Average
Average Household Income	Above Average
Average House Price	-
Household Ownership	Above Average
10km	
Proportion of Age Profile	Above Average
Growth of 60+ to 2025	7.7%
Growth of 60+ to 2030	15.7%
SEC1 (%)	Above Average
Average Household Income	Above Average
Average House Price	-
Household Ownership	Above Average
16km	
Proportion of Age Profile	Above Average
Growth of 60+ to 2025	6.3%
Growth of 60+ to 2030	13.3%
SEC1 (%)	Above Average
Average Household Income	Above Average
Average House Price	-
Household Ownership	Above Average
Overall - Age	Above Average
Overall - Affluence	Above Average

# Existing Age Exclusive Schemes within the Catchment

There is limited existing provision within the immediate locality of the proposed site with most of the provision located in and around Aberdeen

## Key Observations

- Using the ARCO and Elderly Accommodation Counsel (EAC) databases, we have undertaken research to establish the extent of age exclusive housing provision
- The main headline is that there is very limited provision within the immediate locality. The closest scheme is Keithmuir Lane (c.2.31km distant)
- Most of the existing provision is situated in and around Aberdeen with a total of 28 schemes and 801 units within the 16km catchment
- The largest scheme is Inchmarlo Retirement Village which includes age exclusive housing



Schemes within a 16km Radius			
Distance (km)	Postcode	Name	Total Units
2.31	AB31 5ED	Keithmuir Lane	12
6.87	AB32 6YN	Blackhills Place & Westdyke Aven	10
8.65	AB15 9LY	Rorie Court	27
11.05	AB15 7UF	Craigton Park	24
11.17	AB16 6QF	Regensburg Court	52
11.60	AB15 7FJ	Thorngrove Court	12
11.81	AB12 4PT	Portlethen	12
12.14	AB15 5PF	Raeden Court	62
12.41	AB16 5TR	Stockethill Crescent	14
12.82	AB10 7GW	Balmoral Court	53
12.91	AB10 6XF	Albyn Lane flats	6
13.05	AB15 5FH	Beechgrove Terrace	15
13.68	AB24 4LZ	Mosman Gardens	22
13.86	AB25 1GT	Stevenson Court	18
13.96	AB11 6DD	Dee Court	20
14.16	AB25 3QB	Cattofield Square	16
14.05	AB31 4AL	Inchmarlo Retirement Village	190
14.23	AB24 4FE	Fountville Court	16
14.26	AB24 4AP	Tanfield Court	9
14.35	AB11 8EJ	Oscar Road	8
14.75	AB21 7BJ	Dyce	8
14.89	AB24 2YX	Meadow Court	52
15.16	AB24 5HA	South Constitution Street	24
15.22	AB24 5HF	Constitution Lane	8
15.38	AB24 3UW	Bede House Court	23
15.89	AB24 1TF	Seaview House	54
15.63	AB39 2QD	Bruce Court	26
15.85	AB39 2BL	Cameron Street	8
			<b>801</b>

Sources: Google, Housing Care, C&Co Analysis, Glenigan

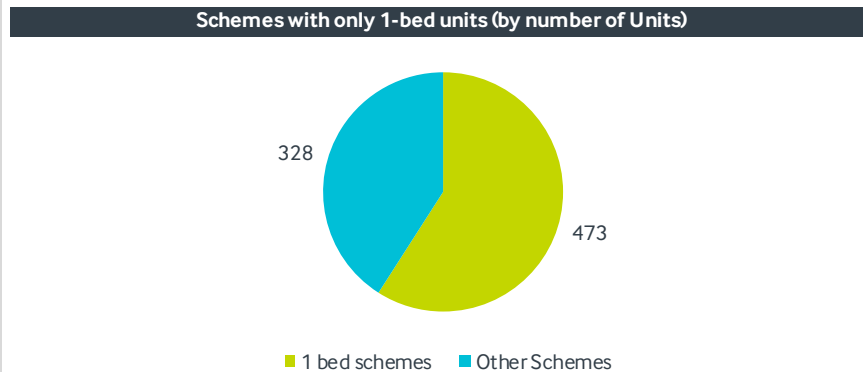
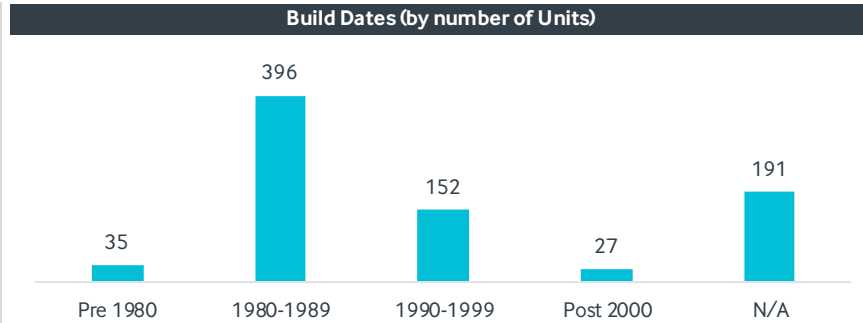


# Specification & Age of Existing Schemes

A high proportion of the existing specialist housing was constructed before 2000 and offers accommodation providing only 1 bedroom

## Key Observations

- The neighbouring charts provide a breakdown of existing age exclusive specialist housing by type and year built
- Our research into existing supply shows that a significant proportion of the exiting specialist housing provision was built prior to 2000. This indicates that the design will be dated and is likely to lack modern design features
- Furthermore, there is a notable number of units which provide one bedroom accommodation only. One of the key trends in the sector is that elderly people downsizing into such schemes generally seek additional space in the form of an extra bedroom
- We also note that many 'Age Exclusive' schemes are conventional houses with only a restriction on the age of occupants. Therefore many are not designed for people to 'age' and do not incorporate the HAPPI design principles. The proposed scheme will incorporate these design features



Source: Housing Care, C&Co Analysis

Sources: Housing our Ageing Population: Panel for Innovation (HAPPI)

# Incoming supply

There are two comparable age exclusive housing schemes in the development pipeline amounting to 144 units

## Key Observations

- We have provided a schedule of incoming developments which are directly comparable to the proposed Property as well as other housing with care schemes of interest
- There are two age exclusive housing schemes within the supply pipeline amounting to 144 units
- The closest development to the proposed Property is a 49 unit scheme developed by Gordon Investment Corporation and is located c2.5km away



Incoming Supply - Glenigan							
ID	Distance (km)	ATCF	Developer	Location	Postcode	Housing Type	Units
1	2.5		Gordon Investment Corporation Limited	Cornyaugh Road, Peterculter	AB14 0XD	Age Exclusive Housing	49
2	9.2		Cults Property Development Company Ltd	Inchgarth Road, Aberdeen	AB15 9NJ	Age Exclusive Housing	95
Other development schemes coming into the area							
3	5.3		Private Client	Binghill Road	AB13 0JL	Extra care	60
4	5.9		CALA Homes (North) Limited	Milltimber	AB13 0HQ	Residential housing	550
5	9.7		First Endeavour LLP	Countesswells Road, Aberdeen	AB15 8AT	Extra care	81
6	14.5		Dandara Group	South Esplanade West	AB11 9AD	Residential housing	350

Sources: Google, Glenigan

# Proposed Age Exclusive Demand Consideration

We believe there is a good level of demand for age exclusive housing at this location given the underlying demographics as well as commissioning policy which is geared towards promoting independent living as well as alternative housing options in line with the offering of the proposed development

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## Background

- We understand that Glenisla Developments are looking to develop a retirement housing scheme of 50 age exclusive bungalows at this site. As a concept, assisted or retirement living is very much an emerging market with most of the development being concentrated in highly affluent locations, which is the case for the proposed Property

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## Demand for Age Exclusive Housing

- The demographics for the location support the need for additional age exclusive housing which is geared more towards the 55+ age profile, unlike extra care and purpose built retirement housing where the average age tends to be 70 years plus. The population projections for the catchment outlined earlier indicate that this population cohort will increase significantly over the next 10 years. The number of people aged 60+ within our catchment is projected to increase by 13.3% to 2030
- Demand for age exclusive housing is primarily a lifestyle based choice with the main appeal from a demand perspective being economics and the ability for households to secure a property suitable for their present and future needs. Age exclusive accommodation is seen as an affordable (and desirable) way to downsize in later life. Such schemes are often situated in attractive rural areas with a reasonable range of amenities either on site or within a short driving distance (such as the proposed development). A further driver is the need to release under-occupied larger houses which many elderly people live within. These “undownsized” properties create accommodation related challenges for younger “working age” adults where there is an insufficient number of bedrooms for the average size of household. These and related trends are illustrated well within a recently published report “Housing for an Ageing Population” by CASS Business School and the Centre for the Study of Financial Innovation
- There has been a plethora of literature around the demand drivers for alternative elderly housing including Housing Lin’s *Bungalow Living – an attractive alternative for downsizers* and Knight Frank’s *Retirement Housing Report* which further revealed that 60% of people would want to move into an age exclusive bungalow in later life

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## Shortcomings with Existing Provision

- We note however that there are currently 801 age exclusive units. A significant proportion of this supply was built prior to 2000 and is therefore outdated in its design. Furthermore, the majority of provision relates to bedroom schemes rather than larger schemes which are more in demand

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## Commentary on Commissioning Policy

- We have reviewed some of the latest commissioning documents including: Age, Home and Community: A Strategy for Housing for Scotland’s Older People 2012-21. The report highlights the need for more ‘varied housing provision’ which helps to promote the independence of older people who may want to ‘downsize’ or move into more appropriate housing
- We recommend engagement with local health commissioners for adult social care to provide further clarification over the type of accommodation prioritised

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Sources: Age, Home and Community: A Strategy for Housing for Scotland’s Older People 2012-21, Knight Frank; Retirement Housing (2014), Christie & Co

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## 3. Conclusions

# Conclusions

We are of the opinion that there is good scope for an age exclusive scheme like the proposed given the favourable demographic indicators, mixed nature of existing provision and commissioning policies which favour housing schemes geared towards downsizers

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## Overall Conclusions

- Headline demographics indicate a high proportion of elderly residents within our 16km catchment, above both regional and national benchmarks. This is especially notable within the more localised 5km and 10km areas. We also note that the proportion of the population in the 60+ age cohort is especially high which is aligned with the target age group for the proposed scheme
  - We consider existing provision within the catchment to be mixed. There is a total of 801 units within the 16km catchment of which 59% of provision relates to one bedroom schemes. In addition to this, a significant proportion of the existing age exclusive schemes were built pre 2000, indicating they are likely to be outdated in design
  - With regard to demand for age exclusive housing, we believe there is an established need given the limited provision within the immediate area and dated stock within the wider catchment. In addition to this, commissioning policy promotes alternative housing options for downsizers and elderly residents looking to retain their independence
  - In summary, we believe there is a good scope for age exclusive housing at this location given the favourable demographics and shortfalls of existing provision within the catchment
-

Land at Drum, near Drumoak (adjacent to Drum Garden Centre), Banchory, Aberdeenshire AB31 5AN | July 2020

# Appendix 1 – Existing & Proposed Supply within the catchment

## Existing Supply within the Catchment

Distance (km)	Name	Operator	Postcode	Built	Total Units	Bed Number
2.31	Keithmuir Lane	Grampian Housing Association	AB31 5ED	-	12	1
6.87	Blackhills Place & Westdyke Avenue	Aberdeenshire Council	AB32 6YN	-	10	1
8.65	Rorie Court	Aberdeen City Council	AB15 9LY	2011	27	1
11.05	Craigton Park	Aberdeen City Council	AB15 7UF	1990	24	1
11.17	Regensburg Court	Aberdeen City Council	AB16 6QF	1988	52	1
11.60	Thorngrove Court	Aberdeen City Council	AB15 7FJ	1964	12	1
11.81	Portlethen	Grampian Housing Association	AB12 4PT	-	12	1
12.14	Raeden Court	Blackwood Homes and Care	AB15 5PF	1983	62	1, 2 & 3
12.41	Stockethill Crescent	Castlehill Housing Association Ltd	AB16 5TR	-	14	1 & 2
12.82	Balmoral Court	Aberdeen City Council	AB10 7GW	1989	53	1
12.91	Albyn Lane flats	Castlehill Housing Association Ltd	AB10 6XF	-	6	1
13.05	Beechgrove Terrace	Aberdeen Soroptimist Housing Society Ltd	AB15 5FH	1987	15	1
13.68	Mosman Gardens	Hanover (Scotland) Housing Association	AB24 4LZ	1994	22	1 & 2
13.86	Stevenson Court	Grampian Housing Association	AB25 1GT	-	18	1
13.96	Dee Court	Castlehill Housing Association Ltd	AB11 6DD	-	20	1
14.16	Cattofield Square	Castlehill Housing Association Ltd	AB25 3QB	-	16	1 & 2
14.05	Inchmarlo Retirement Village	Inchmarlo Retirement Village	AB31 4AL	1986	190	1, 2 & 3
14.23	Fountville Court	Castlehill Housing Association Ltd	AB24 4FE	-	16	1
14.26	Tanfield Court	Castlehill Housing Association Ltd	AB24 4AP	-	9	1
14.35	Oscar Road	Grampian Housing Association	AB11 8EJ	-	8	1
14.75	Dyce	Grampian Housing Association	AB21 7BJ	-	8	1
14.89	Meadow Court	Aberdeen City Council	AB24 2YX	1990	52	1
15.16	South Constitution Street	Aberdeen City Council	AB24 5HA	1985	24	1 & 2
15.22	Constitution Lane	Aberdeen City Council	AB24 5HF	-	8	1
15.38	Bede House Court	Aberdeen City Council	AB24 3UW	1964	23	1
15.89	Seaview House	Aberdeen City Council	AB24 1TF	1991	54	1
15.63	Bruce Court	Grampian Housing Association	AB39 2QD	-	26	1
15.85	Cameron Street	Grampian Housing Association	AB39 2BL	-	8	1
					801	

# Proposed Supply within the Catchment





Distance (km)	Operator/Developer	Location	Postcode	New units	Planning Description
2.5	Gordon Investment Corporation Limited	Cornyhaugh Road, Peterculter	AB14 0XD	49	Outline Plans Submitted
9.2	Cults Property Development Company Ltd	Inchgarth Road, Aberdeen	AB15 9NJ	95	Outline Plans Submitted
				144	



Land at Drum, near Drumoak (adjacent to Drum Garden Centre), Banchory, Aberdeenshire AB31 5AN | July 2020

## Appendix 2 – Types of Housing for Older People

# Types of Housing for Older People

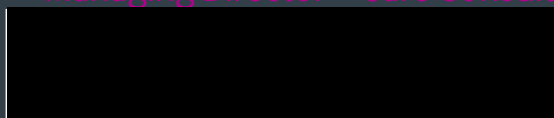
<b>Care Home</b>	<b>Nursing</b>	A nursing home will provide the same day-to-day care as a residential care home, but the care is supervised by registered nurses (24 hours). Nursing homes generally cater for residents with the highest acuity needs. Registered by the <b>Care Quality Commission (CQC), CIW, or the Care Inspectorate</b>	
	<b>Residential</b>	A care home is a residential setting where a number of older people live, usually in single rooms, and have access to on-site care services. A residential care home will not provide nursing but does provide 24 hour care and support with residents often having significant acuity needs and is required to be registered by the <b>CQC, CIW or Care Inspectorate</b>	
<b>Housing with Care</b>	<b>Retirement Village</b>	Large developments of independent living units with a village centre or clubhouse enabling independence and an active social life. In addition to social and leisure facilities there are add-on services including care and support with onsite care staff 24/7. Tenure varies, but most schemes are privately developed and operated. Retirement villages are typically leasehold, with some units being shared ownership or rental. May also be termed <b>Continuing Care Retirement Communities</b> or <b>Retirement Communities</b> .	
	<b>Extra Care</b>	Provide the highest level of domestic care for the elderly. The services are often registered to provide care, with staff on duty 24/7 with on site dining rooms and shared facilities. Sometimes called <b>Assisted Living</b>	
	<b>Enhanced Sheltered</b>	Similar to retirement housing with the additional benefit of access to a greater range on-site support, normally 24/7. Most schemes have a manager and alarm systems in the property, there may also be some personal care and home help services that can be arranged by the management, but not to the same level that is available within extra care or retirement villages.	
<b>Sheltered Housing</b>	Sheltered housing (also known as <b>Retirement Housing</b> ) generally means a self contained purpose designed flat or bungalow in a block or small estate (typically 15 – 40 units), where all the other residents are older people (usually over 55). Most have their own 'manager' or 'warden', either living on-site or nearby, but no other on site staff, and usually have some shared or communal facilities such as a lounge, laundry, guest flat and garden.		
<b>Age Exclusive</b>	Housing that may be designed or designated as being available exclusively to people over 55 plus years. Does not include on-site management like sheltered housing. Typically, this housing does not offer any shared facilities and may not have been originally designed for older people e.g. <b>Almshouses</b> .		

Source: EAC, Christie & Co

## Contact



Managing Director – Care Consultancy



Christie & Co London Corporate Office

