

Planning profile for accommodation with care for older people

Waverley Borough

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Extra care housing

Need for extra care housing in the Waverley Borough area

Based on the [2022-based sub-national population projections](#) published by the ONS on 24 June 2025, the future need for extra care housing (as defined in Surrey County Council's Planning Guidance) is set out below for 2025, 2030 and 2035:

Year	75+ population projection	Affordable need (10 per 1,000 75+)	Market need (35 per 1,000 75+)	Total need (45 per 1,000 75+)
2025	16,780	168	587	755
2030	18,279	183	640	823
2035	20,020	200	701	901

As at 1 April 2025, the following extra care housing settings were either open or with full planning permission in the Waverley Borough area to help meet this need:

Setting name	Status	Postcode	Tenure	No. of units
Pepperpot House	Operational	GU7 1NS	Market	52
Headway House	Planning approved	GU9 7XG	Market	65

Based on this level of recognised provision, the gap in meeting current and future needs for extra care housing are set out as follows:

Year	Affordable Projected (oversupply)/ need for additional units	Market Projected (oversupply)/ need for additional units	Total Projected oversupply)/ need for additional units
2025	168	470	638
2030	183	523	706
2035	193	584	777

As stated in the Planning Guidance for Accommodation with Care for Older People, Surrey County Council's Right Homes Right Support Strategy is highly ambitious in increasing the availability of affordable extra care housing. In consideration of this strategic shift the affordable need figures should be regarded as conservative.

Residential and nursing care homes

Calculated need for residential care home provision in the Waverley Borough area, up to 2035

As of 1 April 2025:

- The Waverley Borough area had a supply of 582 residential care home beds against a 75+ population of 16,780. This provides a prevalence rate of 34.68 beds per 1,000 of the 75+ population.
- In comparison, England had a supply of 204,293 residential care home beds against a 75+ population of 5,573,643. This provides a prevalence rate of 36.65 beds per 1,000 of the 75+ population.

This means that the current amount of residential care provision in the Waverley Borough area is similar to the England average.

The table below sets out the future local need for additional residential care home beds in 2030 and 2035, based on the operational provision in April 2025 and with adjustments for the future delivery of affordable extra care housing in Surrey:

Year	Waverley 75+ population	No. of beds to reflect England ratio in 2025	Reduction due to delivery of new affordable extra care housing	Projected (oversupply) / need for additional beds in Waverley
2030	18,279	670	(58)	30
2035	20,020	734	(58)	94

As illustrated by the following table, the Waverley Borough area has a relatively high prevalence rate of residential care provision in comparison to almost all of its neighbouring authorities. This suggests that future market-led development in this area is likely to lead to an influx of residents from other areas.

Neighbouring authority area	2025 prevalence rate	2030 Projected (oversupply) / need for additional beds	2035 Projected (oversupply) / need for additional beds
Guildford	25.63	161	205
Mole Valley	20.25	188	228
Chichester	39.25	14	100
East Hampshire	30.24	193	287
Hart	33.52	78	120
Horsham	9.63	615	712
Rushmoor	23.71	133	157

Calculated need for nursing care home provision in the Waverley Borough area, up to 2035

As of 1 April 2025:

- The Waverley Borough area had a supply of 1,100 nursing care home beds against a 75+ population of 16,780. This provides a prevalence rate of 65.55 beds per 1,000 of the 75+ population.
- In comparison, England had a supply of 212,440 nursing care home beds against a 75+ population of 5,573,643. This provides a prevalence rate of 38.12 beds per 1,000 of the 75+ population.

This means that the current amount of nursing care home provision in the Waverley Borough area is high in comparison to the England average.

The table below sets out the future local need for additional nursing care home beds in 2030 and 2035, based on the operational provision in April 2025:

Year	Waverley 75+ population	No. of beds to reflect England ratio in 2025	Projected (oversupply) / need for additional beds in Waverley
2030	18,279	697	(403)
2035	20,020	763	(337)

As illustrated by the following table, the Waverley Borough area has a very high prevalence rate of nursing care provision in comparison to neighbouring authorities. This suggests that future market-led development in this area is likely to lead to an influx of residents from other areas.

Neighbouring authority area	2025 prevalence rate	2030 Projected (oversupply) / need for additional beds	2035 Projected (oversupply) / need for additional beds
Guildford	39.10	25	70
Mole Valley	60.40	(231)	(189)
Chichester	39.20	46	135
East Hampshire	37.23	101	198
Hart	41.28	5	50
Horsham	58.98	(316)	(215)
Rushmoor	41.22	2	27