Supported and older persons' housing development survey

Key findings 2025

Introduction

Housing associations own or manage around three quarters of England's rented supported and specialist older persons' housing, helping half a million people to live independently in their communities. Nearly 75% of supported housing is provided by housing associations, not-for-profit providers of safe and affordable homes who are critical to delivering affordable housing for people with care and support needs across the country.

At the NHF, we survey our members annually to find out how many new supported and older persons' homes they plan to build, and what barriers they face delivering much needed new supported and older persons' homes. This year, we have also explored whether respondents would build more homes if these barriers were removed.

The government's Supported Housing Review 2023 showed that currently there is a shortfall in England of up to 325,000 homes. By 2040, between nearly 310,000 and 540,900 more spaces will be needed. This research aims to outline the main plans and barriers to delivering these homes for the future.

Summary

This year's survey presents a complex picture of the landscape for developing supported and older persons' housing. While most survey respondents have some plans to develop supported housing or housing for older people, many also pointed towards plans to close schemes or to the risk of schemes being decommissioned.

Most survey respondents cited barriers to developing future homes, but many also said that they would have further ambitions to build, regenerate or purchase homes if these obstacles were removed. This is a higher proportion than we've seen in previous years. Overcoming these barriers to development would have a significant impact for unlocking

new development and ensuring we have enough homes with support for the future generations that need them.

Our key findings from the survey, conducting in June 2025, include:

- **Survey respondents were concerned about the lack of additional funding for supported housing that was expected at the upcoming Spending Review.** Over half of survey respondents (54%, or 32 housing associations) felt that, if no additional funding for supported housing was be announced in the Spending Review, this would negatively impact the likelihood of their schemes closing.
- **Slightly more providers of supported housing for working-age people had plans to close schemes, or cited risks of closure, compared to providers of housing for older people.** One third of respondents providing housing for older people told us they were considering closing some of their housing for older people or already had plans for it to close (33%, or 13 housing providers). Almost half of respondents providing supported housing for working-age people said the same (47%, or 17 housing providers).
- **A reduction in support funding was the biggest risk to the closure of schemes**. The top three reasons contributing to the risk of schemes closing were: a reduction in support funding, no uprating of funding for support costs to match inflation and the costs of National Insurance Contributions. Other reasons included: supported or older persons' housing was operationally obsolete or no longer appropriately designed and rental income not covering the costs of running schemes.
- **Most providers had plans for new development, but the type of development varied.** Over two thirds of survey respondents providing housing for older people (62%) had development plans, but less than half (48%) had plans to build new housing. Over three quarters (78%) of respondents providing supported housing had development plans, and half (50%) had plans for new build.
- **In some instances, there were differences between providers of different sizes.** We saw differences in plans to build, purchase or regenerate housing, and/or the number of homes they had planned to develop. Larger providers of older people's housing had more plans to build, purchase or regenerate housing than smaller providers, but this size trend was not reflected in providers' plans for supported housing for working-age people.
- **Different types of housing favoured different development choices.** While new build was the most popular development choice overall, regeneration plans were more common for providers of older persons' housing, while purchasing

plans were more common for providers of supported housing for working-age people.

- **Significant barriers to developing supported and older persons' housing included:** capital grant funding being too low, building safety and decarbonisation costs being too high, disputes over Housing Benefit funding for rent/service charges and local authority decommissioning of services.
- **Despite the obstacles and challenges, the large majority of survey respondents said they would like to develop more housing if these barriers were removed (47 out of 54 providers or 87%).**

Survey respondents

We received 54 complete and eight partial responses to the survey. The 54 members who responded to the survey own or manage approximately 68,000 supported homes or homes for older people, making up 20% of all supported or older persons' homes in the sector[1]. Respondents provided different types of housing, including:

- Of complete responses, 25 were from small and 29 from large providers (providers who own more than 1,000 social homes).[2]
- 39 respondents to the survey provided housing for older people, and 36 provided supported housing for working-age people.
- Nearly half of respondents (21 providers) provided both types of housing. 18 providers only ran housing schemes for older people, and 15 only ran housing schemes for working-age people.

Main findings

1. Scheme closures

2025 Spending Review

When asked in June 2025, survey respondents were concerned about a lack of additional funding for supported housing in the upcoming Spending Review. Over half of survey respondents (54%, or 32 housing associations) felt that, if no additional funding for supported housing was be announced in the Spending Review, this could negatively impact the likelihood of their schemes closing.

A higher proportion of respondents providing supported housing for working-age people reported risks of closure or decommissioning compared to providers of housing for older people. However, a higher proportion of respondents providing housing for older people reported they might have to close more than one scheme.

Despite this, the total number of homes at risk was still higher for supported housing for working-age people. This could reflect the nature of provision, if survey respondents providing housing for working-age people have a greater proportion of homes or bedspaces for one person and therefore a greater concentration of homes within one scheme – or a more widespread risk of closure for supported housing for working-age people.

Key takeaways

After years of funding cuts, many supported housing providers are having to make difficult decisions about the future of vital services. In July 2025, the National Housing Federation surveyed members who provide supported housing to find out how many were at risk of closing schemes. We also surveyed members separately about their development plans for supported and older people's housing. Although the survey about development plans launched earlier than the July survey, in spring 2025, both surveys report a *similar proportion* of providers with schemes at risk of being closed or decommissioned—over half. In response to the spring 2025 survey, 54% of survey respondents or 32 housing associations felt that if no additional funding for supported housing was announced in the Spending Review, this would impact the likelihood of their schemes closing. From a larger sample of respondents in July, we found that 56% of respondents or 71 housing associations said that without an urgent commitment to long-term sustainable funding for supported housing, some of their supported housing schemes are likely to close or be decommissioned. These 71 providers told us that an estimated 50,000 homes could be at risk– equivalent to 1 in 10 across the sector. The following findings relate to the supported and older persons' housing development survey only.

Housing for older people

In total, 13 providers told us they were considering closing some of their housing for older people or had plans for it to close (providers could select more than one answer). This amounts to one third of the entire sample (33%).

- Four providers told us that one or more of their services would be decommissioned.
- Four providers told us that they were planning to dispose of some of their housing for older people.
- Six providers told us that they were considering disposing of homes or that these homes could be decommissioned.

Of nine providers who could estimate the number of schemes at risk, two thirds said they may have to close more than one scheme.

Supported housing (working-age)

In total, 17 providers told us they were considering closing some of their supported housing for working-age people or had plans for it to close (providers could select more than one answer). This was almost half of the entire sample (47%).

- Three providers told us that some of their supported housing would be decommissioned.
- Seven providers told us that they planned to dispose of some of their supported housing.
- Nine providers told us that they were considering disposing of homes or that these homes could be decommissioned.

Of nine providers who could estimate the number of schemes at risk, one third said they may have to close more than one scheme.

Client groups at risk of supported housing closures

- Supported housing for people with learning disabilities and/or autism was most at risk of closures—with nine providers (one quarter of the sample) saying that this type of housing may be affected.
- Supported housing for people with mental health problems was also at risk of closures. Six providers (one sixth of the sample) said that this type of provision may be affected by scheme closures.
- Supported housing for single homeless people was also at risk of closures, with five providers reporting that their schemes for single homeless people could be affected by closures.

The results from this question show that while a scheme being operationally obsolete was the most widespread issue across survey respondents, this did not necessarily make the most significant contribution to the reason for a scheme closing. Issues relating to increased costs and a lack of revenue funding had the most significant impact on providers' reporting scheme closures or the risk of decommissioning.

Reasons for scheme closures

Of the 24 providers in total who selected the top factors contributing to the closure of schemes:

- 17 selected that their supported or older persons’ housing was operationally obsolete or no longer appropriately designed.
- 15 selected that their rental income did not cover the costs of running their housing.
- 13 selected the impact of new regulation on the sector.
- 13 selected local authorities no longer commissioning their services.
- 10 selected a lack of local demand for their services.

Providers also rated these reasons in order of importance. Based on the average score for each reason, we can see how strongly providers felt about the reasons they had chosen. The most important reasons were:

- A reduction in support funding.
- No uprating of funding for support costs to match inflation.
- The costs of National Insurance Contributions.
- Rent not covering the costs of providing housing.
- The local authority no longer commissioning their services.

2. Development plans

Most providers across both types of housing had plans for new development. A slightly higher proportion of respondents providing supported housing for working-age people had plans for new development compared to providers of housing for older people. The type of development planned (new build, purchase or regeneration) varied slightly by provider type. While new build was the most popular option for both types of providers, regeneration plans were more common for providers of older persons’ housing, while purchasing plans were more common for providers of supported housing for working-age people.

There were also differences in upcoming development plans for providers of different sizes. For small providers of older persons’ housing, it was slightly less common to have plans to build new schemes, especially building more than one scheme. Fewer smaller providers of housing for older people had plans to regenerate homes compared to larger providers. For supported housing for working-age adults, there were fewer strong differences between large and small providers. An exception to this was plans for purchasing. Smaller providers were more likely to have plans to purchase and have plans to purchase more than one scheme. Although they were slightly more likely to have plans for regenerating supported housing, they were not likely to plan to regenerate more than one scheme.

Housing for older people

In total 24 providers had plans to build, purchase or regenerate housing for older people (respondents could select more than one answer). This means that over two thirds of the sample (62%) had some development planned, but less than half (48%) had plans to build new housing.

- 19 providers were planning to build new housing for older people.
- Of 15 providers who gave an estimate of how many homes they planned to build, over half planned to build more than one scheme.
- Four providers planned to purchase housing for older people.
- Only one provider planned to purchase more than one scheme.
- 12 providers planned to regenerate housing for older people.
- Of nine providers who gave an estimate of how many homes they planned to regenerate, seven planned to regenerate more than one scheme.

Supported housing (working-age)

In total 28 providers had plans to build, purchase or regenerate supported housing for people of working age. This means that over three quarters (78%) had some development planned, and half (50%) of supported housing providers had plans for new build.

- 18 providers were planning to build new supported housing.
- Of 16 providers who quantified how many new schemes they planned to build, half planned to build more than one scheme.
- 14 providers planned to purchase supported housing.
- Of 10 providers who told us how many schemes they planned to purchase, half planned to purchase more than one scheme.
- Seven providers planned to regenerate supported housing.
- Of four providers who provided the number of schemes they planned to regenerate, half planned to regenerate more than one scheme.

Development plans by client group (working-age residents)

- **Homes for adults with a learning disability and/or autism** – this was the type of housing with the most planned development. In total, 11 providers planned to build new homes. Five providers planned to purchase homes, and four had planned regeneration activity.
- **Homes for single homeless adults** - this type of housing had the second most planned development. Five providers planned to build new homes. Four providers planned to purchase homes, and three had planned regeneration activity.
- **Homes for adults with mental health problems** - thirdly, four providers had planned to build new homes for adults with mental health problems, one provider planned to purchase a scheme and one provider planned to regenerate a scheme.
- **Other types of housing** - no providers had any plans to build, purchase or regenerate housing for people with drug/alcohol misuse problems, or people with a history of offending.

Development plans by size of provider

To understand how the profile of survey respondents represents the sector overall, 199 out of 371 NHF members providing supported or older persons' housing own fewer than 1,000 homes (54%). Of complete responses, slightly less than half were from small providers (25 or 46%) and slightly over half (29 providers or 54%) were from large providers (providers who own more than 1,000 social homes).

- In some instances, there were differences between providers of different sizes for their plans to build, purchase or regenerate housing, and/or the number of homes they had planned to develop.
- Larger providers of older people's housing had more plans to build, purchase or regenerate housing than smaller providers, but this size trend was not reflected in providers' plans for supported housing for working-age people.

Housing for older people

Of 39 providers of housing for older people, 11 were small providers. This means small providers were slightly underrepresented in this sample. We found:

- Less than a quarter of housing providers with plans for new build were small providers (3/19).
- Overall, half of providers planned to build more than one scheme, but only one of these providers was a small provider (1/9).

- Of four housing associations who planned to purchase new housing for older people, one was a small provider.
- Of 12 housing associations who planned to regenerate their housing for older people, one was a small provider.

Supported housing for working-age adults

Of 36 providers of supported housing for working-age adults, 19 were small providers. This means they were proportionately represented in the sample. We found:

- Half of all providers of supported housing for working-age adults had plans to build, and half of these were small providers.
- For providers looking to build more than one supported housing scheme, half of these were also small providers.
- Most providers that planned to purchase schemes were small providers (11/14). Nearly all providers that planned to purchase more than one scheme were small providers (4/5).
- Most housing providers that planned to regenerate supported housing for working-age adults were small providers (5/7). However, no small providers planned to regenerate more than one scheme.

Key takeaways

Nearly all providers selected at least one important barrier to developing further supported housing or housing for older people, and the large majority of providers believed that capital grant being too low was a significant obstacle to development. The top barriers to development reported by providers (both with the most votes from providers and rated as the most important by providers who voted for that option) were all related to a lack of funding and/or costs that are too high. The most widely-reported issues faced by the most providers were generally also the issues that contribute the most to a lack of development- showing that these barriers are perceived in a similar way across different providers. Despite the obstacles and challenges, the large majority of survey respondents said they would like to develop more housing if these barriers were removed.

3. Barriers to development

Of 52 providers who selected their most significant barriers to developing further housing:

- 41 selected that capital grant was too low.
- 30 selected that rents were too low for development to be financially viable.
- 18 said that the costs of purchasing land were too high.
- 17 cited the costs of decarbonising their homes.
- 16 providers selected short-term contracts from local authorities, challenges with agreeing Housing Benefit funding for rents and/or service charges, and the costs of building safety work.

Providers also rated these reasons in order of importance. Based on the average score for each reason (rather than the number of providers who chose that reason), we can see how strongly providers felt about the reasons they had chosen. Based on importance, these were the reasons contributing most significantly to a lack of development:

- Capital grant funding is too low.
- Building safety costs are too high.
- Decarbonisation costs are too high.
- Disputes over Housing Benefit funding for rent/service charges.
- Local authority decommissioning of services.

Finally, respondents were asked whether they would have further ambitions to develop supported or older persons' housing, if these barriers were removed. 47 out of 54 providers said they would like to develop more housing if these barriers were removed (87%).

4. Comments and reflections from housing providers

Survey respondents had the opportunity to share further comments and thoughts on their closures and/or development plans. These comments provide useful additional context to the survey results, going into further detail about the challenges and barriers to developing new supported housing experienced by providers. These comments articulate that many of the same issues are affecting the day-to-day running of services now, such as increasing costs affecting multiple areas of the organisation. In some cases, providers are responding to limitations of grant funding flexibly through increased density of development sites and/ or mixed provision. However, several providers feel that the outlook for the sector is especially challenging. These responses from providers also help to demonstrate particular areas that can be addressed to improve the environment for developing supported and older persons' housing.

The balancing act: cost, density and demand

Two providers commented that supported and older persons' housing is more challenging to develop at scale than general needs housing due to the specialist nature of its provision. This specialist provision, including larger communal areas, means that fewer homes can be built on one site, and reduced site density has implications for scheme costs:

"Supported and older persons' housing typically involves much lower-density developments compared to general needs housing. This means that for any given development site, significantly fewer units can be delivered, resulting in higher build costs per unit and lower overall revenue."

These providers implied that these challenges were generally understood in the sector, with one commenting that this had "always" been the case.

One provider commented that funding constraints meant that they needed to centre their plans for development around spreading funding across as many of their sites as possible, and prioritising development that could produce a net increase in homes:

"…where there are sites with scope to increase the housing density these are being actively pursued with planning applications being progressed. This means that although we end up demolishing properties, we can provide additional homes in their place".

However, this provider felt that if these funding constraints weren't in place, they would have preferred not to demolish properties and rebuild, and instead wholescale regenerate their properties.

Responses from other providers could suggest the prohibitive impact of these challenges to development for the supported and older persons' housing sector. One provider commented that their organisation was not prioritising growth in their supported or older persons' housing at all, instead preferring to focus on general needs housing. Another commented that their future development pipeline also concentrated on general needs and shared ownership, with the exception of one retirement scheme. One provider shared an example of choosing to operate general needs housing over supported housing due to the intolerable level of risk involved. They had offered to purpose-build supported housing for young people in their area but procurement legislation meant that the local authority would need to put the service out to tender. They did not want to risk spending "a vast amount of resources" without a guarantee that they would be able to manage the service themselves once built. Instead, investing in general needs accommodation would mean they could manage the property themselves and have a greater degree of control.

On the other hand, these may not have to be in opposition to one another. One provider explained that combinations of different provision and/or tenure types was a way of overcoming these challenges and meeting demand:

"...there is potential to achieve additionality by diversifying the type of accommodation—thereby expanding the range of specialist housing options available".

However, these tenure mixes may not always be appropriate for all types of housing when considering safeguarding concerns and risks for certain client groups.

The outlook for the supported housing sector: high costs, high risk

Unfortunately, some providers felt that the current environment was particularly challenging to the development of supported and older persons' housing, beyond the 'usual' constraints and challenges associated with specialist provision. They were also experiencing challenges in current day-to-day operations:

"Supported Housing is in crisis and the government's current plans seem designed to turn this into a catastrophe. No rational organisation would invest in supported housing in such an environment".

This attitude was shared by another provider, who voiced that prohibitively high costs to the sector meant that only providers offering poor quality support and services were able to operate. In turn, this has negative outcomes for residents and for the reputation of the sector:

"The current environment for the development and operation of supported housing is extremely hostile [...] We believe the only services that can survive in such an environment are those with the lowest operational costs and poorest quality."

Providers listed several specific challenges that contributed to this "hostile" environment. One provider summarised the cumulative effect of these obstacles:

"offering little security [...] leaving us with little to no financial capacity – the balance sheet is stretched".

On the one hand, providers mentioned insufficient capital and revenue funding, including:

- A lack of capital funding to begin development.
- A lack of revenue funding to offer longer-term financial viability.
- Housing Benefit eligibility rules.

- Caps on rents and service charges.

Other providers mentioned increased costs to building new schemes and maintaining current schemes. These included:

- Energy efficiency standards.
- Decarbonisation and Net Zero.
- Awaab’s Law.
- Build inflation costs.
- Costs associated with improving ageing homes more generally.

Some also had concerns about the cost implications of the Supported Housing (Regulatory Oversight) Act— both in terms of operational running costs with increased resource activity, and the costs associated with applying for licences. There was ongoing uncertainty while the details of the proposals are yet to be announced:

“For a large provider… the cost of licensing could be extremely significant […] depending on what is defined as a single 'scheme'.”

Partnership working and risk-sharing

While providers mentioned uncertainty and a lack of security, these could be helped through effective partnership working and proportionate sharing of risk.

Unfortunately, providers sharing their experiences highlighted challenges when working with local authorities or forging new partnerships, rather than sharing positive examples.

One provider commented that their local authority did not have a Supported Housing Strategy, while another felt that the supported and older persons’ housing sector overall was misunderstood in their local area, with direct consequences for providers delivering and planning future supported housing:

“local authority strategic priorities are often outdated, incomplete, or fail to reflect the full breadth of the supported and older persons' housing sector. This creates a major challenge for registered providers, who are left to second-guess long-term needs and demand—an approach that undermines proactive planning and delivery of supported housing”.

Thirdly, one provider raised a challenge of engaging their local authority’s Adult Services Team in instances where their customers were no longer capable of living independently. This provider believed that adults were staying in their service longer than they should due to a gap in local authority provision and therefore missing out on the more intensive provision they needed.

One provider commented that a survey of this kind can be challenging to answer when housing providers do not always have direct control over whether their homes are decommissioned by local funders. And similarly, over factors such as operating costs or regeneration costs that would impact the likelihood of disposing of a scheme. This exposes another challenge to the sector of relying on local authority commissioning (funding) of support services and the uncertainty that results from it:

“this is not always in our control as LA funders (of support) are making decisions relating to decommissioning or funding which can lead to decommissioning responses so it is hard to make accurate projections”.

One provider reported that, as a charitable organisation, they were left vulnerable after fraudulent activity from a construction company meant that their planned new build of 15 homes was almost cancelled. They felt there were not many “reputable” and stable firms available that had the specialist skills to work with small housing providers. They believed that small organisations needed greater support to cope with these challenges:

“There needs to be funds to support the risk that both parties are taking. Locally provided supported housing is important and a lifeline to many, it needs to be supported”.

Although the scope of this survey does not consider the consequences of supported housing regeneration or closures (or the risk of closure) for residents, one provider reminded us that consulting, informing and supporting residents through these changes is an important part of the process:

“My other comment is around the resource needed to consult, support and move customers affected by decommissioning/remodelling and the time needed to do this effectively. This is quite often underestimated in project planning but is a huge issue for effected customers and needs to be done sensitively and over a reasonable timescale”.

This is an important reminder of the people who are relying on supported and older persons’ housing, to weather the current operational challenges and continue sustainably into the future.

Key takeaways

Unfortunately, it isn’t possible to directly compare the number of homes or respondents with homes at risk of closures from previous years due to question design. Having said this, financial viability and homes being inappropriately designed or operationally obsolete have consistently been factors that contribute the most to plans for scheme closures across several surveys. This year’s survey showed that the relatively new risk from the Supported Housing Regulatory Oversight Act was an important factor for survey respondents as the third most popular reason associated with scheme closures.

Despite this, much larger proportions of survey respondents reported plans to develop new homes in 2025 compared to results from any of our previous surveys (2021, 2022 and 2023). This year also saw the highest proportion of respondents with appetite for development (if barriers were removed) in any edition of the survey.

5. Comparison to previous years’ results

The risk of supported housing closures

It isn’t possible to directly compare the risk of supported housing closures from previous years, as these surveys included remodelling alongside decommissioning in the questions (we separated regeneration and closure/ decommissioning in this year’s survey). Previous surveys did not ask about additional risks of closure where these plans were not confirmed. We included it as an additional question in the current survey to more fully capture the state of the sector in the context of ongoing uncertainty we had heard from members. In previous years, financial viability and homes being inappropriately designed/ operationally obsolete were consistently the most commonly reported factors affecting scheme closures or remodelling, which we also saw in this year’s survey. However, this year we asked about the impact of proposed regulation (the Supported Housing Regulatory Oversight Act), and this was jointly the third most common reason.

Developing new homes

In 2025, much larger proportions of survey respondents reported plans to develop new homes, compared to results from any of our previous surveys (2021, 2022 and 2023). Although this is a positive result, it must be said that appetite for development in previous years left considerable room for improvement. In 2023, we saw the lowest proportions of respondents with plans for new development, with 39% of respondents providing older persons’ housing and 38% of respondents providing supported housing were planning further development.

Types of homes being developed

There has been a consistent trend in the types of provision with planned development in our survey results since 2021. Supported housing for adults with a learning disability and autism has remained the most planned development activity for the past three versions of the survey. In 2021, this was housing for single homeless people, which was the second largest option for planned development in 2025.

Barriers to development

In 2023, the key barriers to developing housing were: capital grants too low, a lack of available land/delays in planning applications and short-term contracts from commissioners. The top two factors had been consistent two years prior. While capital grant remains the top factor for the fourth year in a row, the 2025 survey is the first time that building safety costs and decarbonisation costs and Housing Benefit challenges were rated as the most important factors.

Appetite for development

This year saw the highest proportion of respondents with appetite for development (if barriers were removed) in any edition of the survey. In 2023, 61% of providers said that they would like to develop more homes if barriers did not exist—the lowest total from any of the surveys. This year, 87% of providers said they would like to develop more homes if barriers did not exist.

Conclusions

This year's survey presents a complex picture of the landscape for developing supported and older persons' housing. While most survey respondents have some plans for development, certainly a higher proportion than we found in previous surveys, new build did not make up the majority of development plans. This might not be surprising given the increased costs reported by respondents surrounding building materials, land shortages, and a lack of strategic engagement from local partners. It also demonstrates the resilience of providers and how they are responding to an increasingly challenging operating environment and considering options for purchase and regeneration to ensure future supply of homes.

It is also important to consider plans for new build, purchase and regeneration alongside plans to dispose of schemes, or the risk that schemes will be decommissioned. The fact that similar proportions of survey respondents had plans to build new homes as well as those responding that outcomes from the Spending Review would impact scheme closures point to the challenges of strategically planning to build, purchase and regeneration alongside managing an ageing portfolio of homes, with some that are increasingly costly to run and maintain. Unfortunately, this survey is not large enough in scope to produce reliable data for detailed estimates on net supply in the sector, but the information we have does raise the question of whether the sector will be able to develop new homes at a rate that would sustain their current supply of homes. This is without taking into account future demand for supported housing, which we know is set to increase.

Insufficient capital funding remains the key barrier to developing further supported and older persons' housing. However, in this survey, respondents highlighted challenges of sustainable revenue funding through local authority contracts and Housing Benefit administration. Concerningly, this is impacting current provision, with additional implications for the financial viability of future supported housing. Several providers highlighted concerns about the long-term stability of the sector and felt that it would be difficult for good quality provision to survive in a "hostile" environment. Although some providers are able to weather these challenges and have ambitious plans for further development, it is crucial that the operating environment allows for small and specialist providers, wherever they are in the country. This would ensure future supply of homes for their communities and retain the quality of their existing homes.

Positively, 87% of survey respondents had ambitions to develop further supported or older persons' housing if barriers were removed—the highest proportion we have ever seen in the four surveys of this kind. This shows that there are plenty of opportunities for improving the conditions to enable housing providers to invest in the future supply of homes. These include improved local authority partnership working, clarity and security from the government around capital funding as well as a sustainable level of revenue funding to provide good quality services day-to-day.

Although the scope of this survey is limited, it provides useful insight into the attitudes and ambitions of providers of supported and older persons' housing for current challenges as well as future barriers and opportunities to development. We anticipate that this will provide useful context for further, more detailed research into sustainable funding models for the supported and older persons' housing sector and support out conversations with National Housing Federation members providing these types of housing as to how we can continually advocate for the vital work they do in supporting people to live healthy, independent lives.