

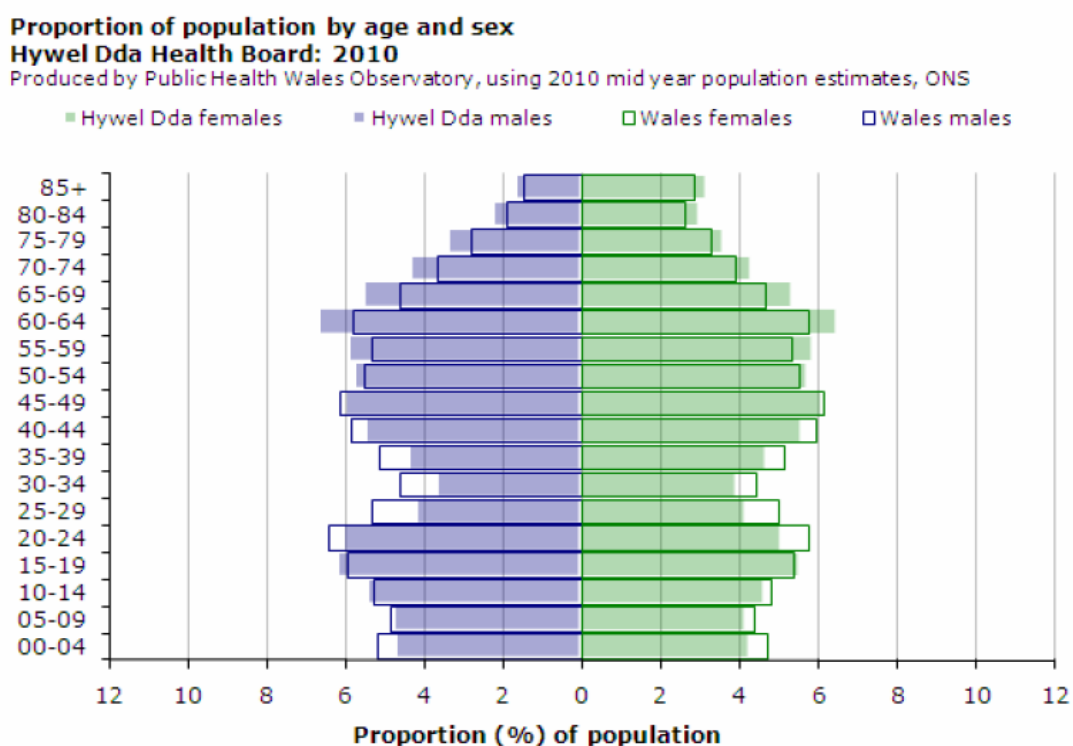
## Appendix A

# Population Needs Analysis

## 1 What does our population look like?

Figure 1 below shows the population pyramid for the resident population of Hywel Dda for 2010. The population is divided up into 5 year age groups and into males and females. The percentage of the population in each age and sex group is shown<sup>1</sup>.

**Figure 1 – Population pyramid for Hywel Dda by age and sex, 2010<sup>2</sup>.**



The generally broad shape all the way up the pyramid shows that death rates are low<sup>3</sup>. The figure also shows that more women are living to an older age than men. The age/sex structure for Hywel Dda is different to that of Wales as a whole. At the top end of the pyramid, above the age of fifty, the Hywel Dda bars extend further than those for Wales, showing that there are more older people in Hywel Dda than the Wales average. There are lower proportions of people aged 0-9 and 20-44 years. The table below shows that across the three local authorities in Hywel Dda the percentages of the population aged 65 and over are similar<sup>4</sup>.

Table 1: population estimates and percentages of population aged 65 and over 2010

<sup>1</sup> Public Health Wales (2012). Director of Public health Annual Report. Hywel Dda Health Board.

<sup>2</sup> Public Health Wales (2012). Director of Public health Annual Report. Hywel Dda Health Board.

<sup>3</sup> Public Health Wales (2012). Director of Public health Annual Report. Hywel Dda Health Board.

<sup>4</sup> Public Health Wales (2012). Older People Indicators 2012. Heywel Dda Health Board.

| Local authority | Over 65s | % over 65 |
|-----------------|----------|-----------|
| Ceredigion      | 16,400   | 21.3      |
| Pembrokeshire   | 25,500   | 21.8      |
| Carmarthenshire | 37,900   | 21.0      |
| Hywel Dda       | 79,800   | 21.3      |
| Wales           | 558,100  | 18.6      |

By GP cluster all but North Ceredigion have a higher than the Wales percentage of patients aged 65 and over. Ceredigion also has the highest (in the South) and lowest (in the North) proportion of patients aged 65 and over.

Figure 2: Percentage of patients aged 65+, GP clusters in Hywel Dda HB, 2012<sup>5</sup>

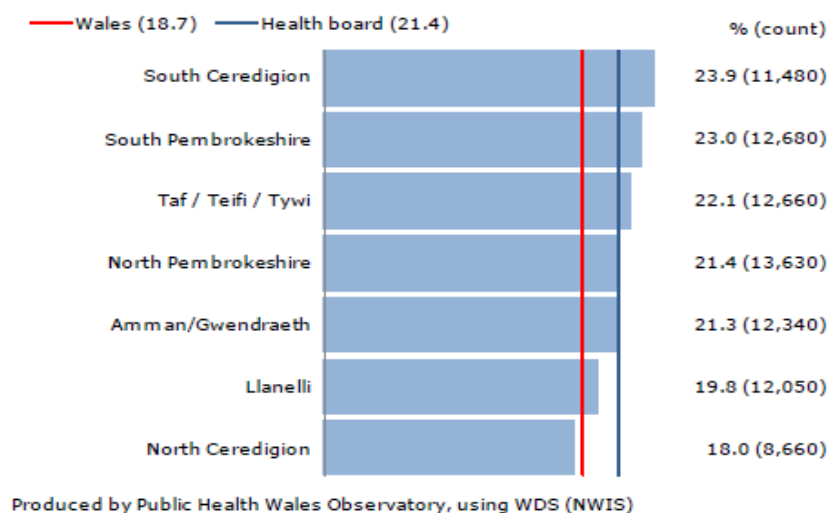
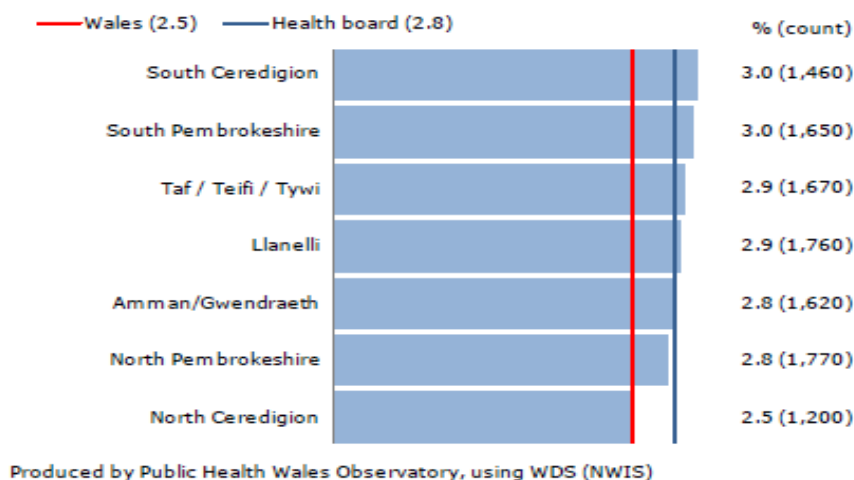


Figure 3: Percentage of patients aged 85+, GP clusters in Hywel Dda HB, 2012<sup>6</sup>



<sup>5</sup> Public Health Wales (2012). Older People Indicators 2012. Hywel Dda Health Board.

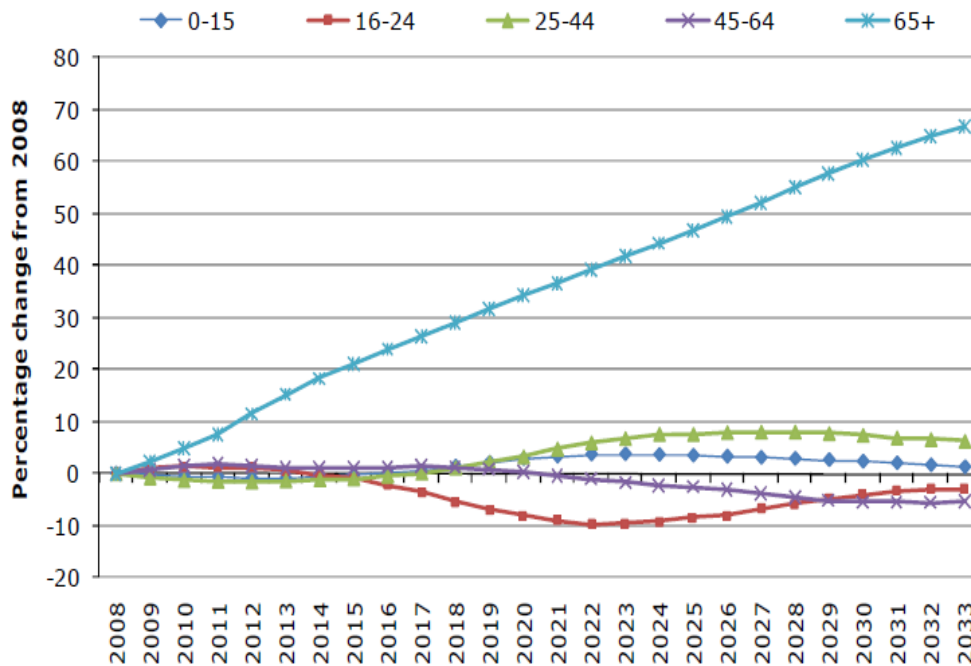
<sup>6</sup> Public Health Wales (2012). Older People Indicators 2012. Hywel Dda Health Board.

## 2 What will our population look like in 2033?

Figure 4 below shows population projections for Hywel Dda up until the year 2033<sup>7</sup>.

**Figure 4 – Population projections for Hywel Dda Health Board, all people, 2008-33. 2008-based population projections for Hywel Dda Health Board, persons: 2008 to 2033**

Produced by the Public Health Wales Observatory, using data from the Welsh Assembly Government



The projections show that, if current trends continue, the population will stay relatively stable for all the age groups under 64 years old. However, for the over 65s, the population is set to increase dramatically, with a 50% increase from the 2008 figures by the year 2026. The biggest increase is for the age group 85 and over. Projections for Hywel Dda Health Board suggest an 84% increase in people 85 and over by 2030<sup>8</sup>. This compares with an 80% increase across Wales. However, by local authority the projected increase reflects variation with Pembrokeshire seeing the largest increase at 93%, Ceredigion 84% and Carmarthenshire 77%. Across the region further breakdown of those 85 and over shows that the biggest increase will be for men (127% increase in men 85+ in 2030 compared to 62% for women). See Appendix one for more detail.

Figure 5 shows the proportion of the population aged over 65 in different areas across Hywel Dda. Each of the three counties have areas where the proportions are high including New Quay in Ceredigion, Fishguard in Pembrokeshire and Llangunnor in Carmarthenshire<sup>9</sup>.

**Figure 5 – Proportion of the population aged 65 and over at MSOA level within Hywel Dda, 2010.**

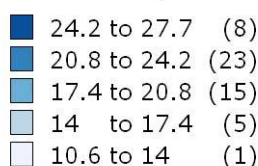
<sup>7</sup> Public Health Wales (2012). Director of Public health Annual Report. Hywel Dda Health Board.

<sup>8</sup> www.daffodilcymru.org.uk version 5.0.

<sup>9</sup> Public Health Wales (2012). Director of Public health Annual Report. Hywel Dda Health Board.

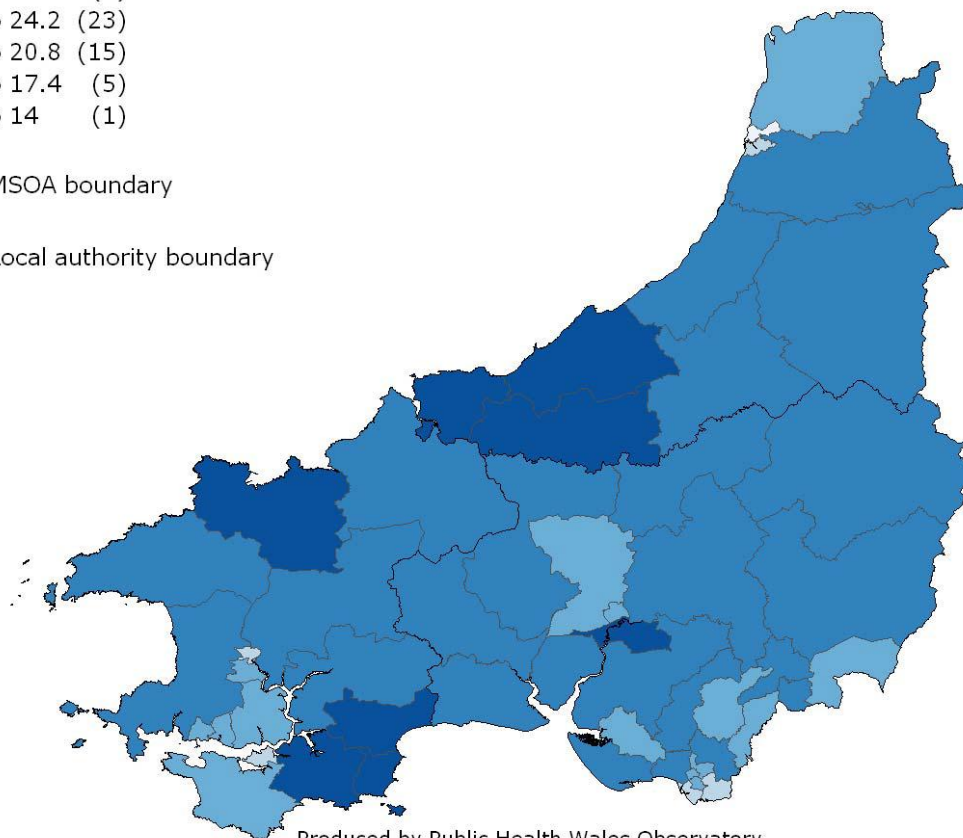
**Proportion population aged 65 and over, 2010**

MSOA, Percentage; source: ONS



 MSOA boundary

 Local authority boundary



Produced by Public Health Wales Observatory  
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### 3 What factors affect our population's health?

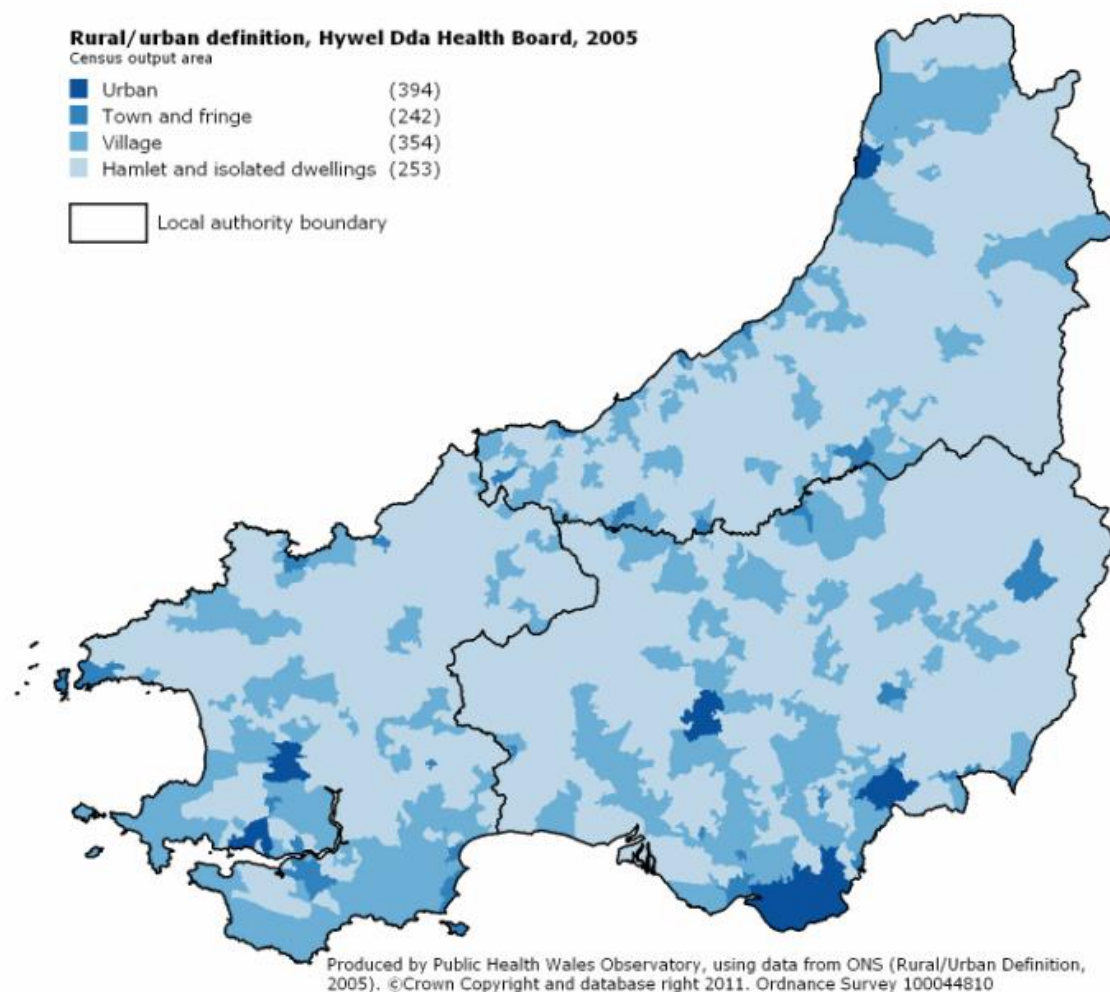
#### 3.1 Rurality

The Hywel Dda area is home to about 13% of the total population of Wales, though it covers roughly a quarter of the landmass. Hywel Dda is the second most sparsely populated health board area in Wales and a lot of the area is classified as rural. In figure 6, town and fringe, Village and Hamlet and isolated dwellings are all classed as rural<sup>10</sup>.

Many people associate a rural environment with better health – beautiful scenery, fresh air and green countryside. However this is not always the case as there can be hidden poverty. Rural health is affected by many factors including income, housing, education, deprivation and access to services. Key for rural communities is the issue of delivering quality services meeting appropriate Royal College standards while trying to maintain accessible services close to the patient.

**Figure 6** – Rural/Urban definition, Hywel Dda, 2005.

<sup>10</sup> Public Health Wales (2012). Director of Public health Annual Report. Hywel Dda Health Board.



### 3.2 Older People

The population of Hywel Dda has a higher proportion of older people than the Wales average, and that already high proportion is predicted to increase dramatically in the coming years (see sections above). This change in the profile of the population will have an impact on health, and the health and social care services that the health board and its partner local authorities will need to provide. As well as the challenge of promoting healthy ageing to a growing proportion of older people, an ageing population brings with it the challenges of managing a higher burden of disease. Many conditions are much more common in older people, including dementia (see below). Adding to the challenge in Hywel Dda is its rurality. This can greatly affect some of the wider determinants of health including physical and social isolation, access to transport services, housing and lower than average earnings, and these may impact disproportionately on rural communities. The ageing population is an added challenge in rural areas<sup>11</sup>.

<sup>11</sup> Public Health Wales (2012). Director of Public health Annual Report. Hywel Dda Health Board.

## 4 Demand for services

The numbers of older people receiving services across Hywel Dda is predicted to increase. In terms of older people in receipt of residential services, this is set to increase significantly over the next 15 years. The number of older people receiving residential services in 2030 is expected to increase by 42% for those aged 75-84 years and by 71% for those aged 85 and over<sup>12</sup>. In Pembrokeshire the increase for those aged 85 and over is predicted to be even higher at 81%.

The number of people who may need support to live independently is also predicted to increase. This could reflect those in the older people population who may require support in the future either as a self funder or through the local authority. Overall, in the over 65 population the percentage of people who may be unable to manage at least one domestic task, activity or self care activity is predicted to increase by between 37% and 41%. However, the percentage significantly increases for those over 80 years (between 60% and 74%). Pembrokeshire again sees a higher predicted increase in number of people aged 85 and over who may be unable to manage at least one domestic task, activity or self care activity compared to Carmarthenshire and Ceredigion. See appendix two for more detail on demand for services across Hywel Dda and appendix three by local authority.

In terms of service provision, the number of people receiving community services across the region is predicted to increase (highest increase for those aged 85 and over at 76%). In Pembrokeshire and Ceredigion is even higher (at 81% and 78% respectively) compared with Carmarthenshire which is slightly lower at 71%. Carmarthenshire however provides significantly higher number of hours of homecare both by local authority and by independent sector under local authority contract (see appendix three for more detail).

## 5 Dementia

Dementia is a condition that in the majority of cases starts after the age of 65 years, although it can affect younger people<sup>13</sup>. It is important to support people to maintain their independence and wellbeing and it is possible for people to have a good quality of life for many years after the onset of dementia. Support for carers' wellbeing is also very important. Many unpaid carers (such as family members) of people with dementia are older people themselves and around two thirds have a health problem or disability. Carers may experience deterioration in their own mental health and wellbeing and depression, emotional and physical exhaustion and general poor health are common. Dementia is one of the major causes of disability in later life. More deprived populations have a lower disability-free life expectancy than the least deprived. The number of people with dementia will increase along with the increasing older population.

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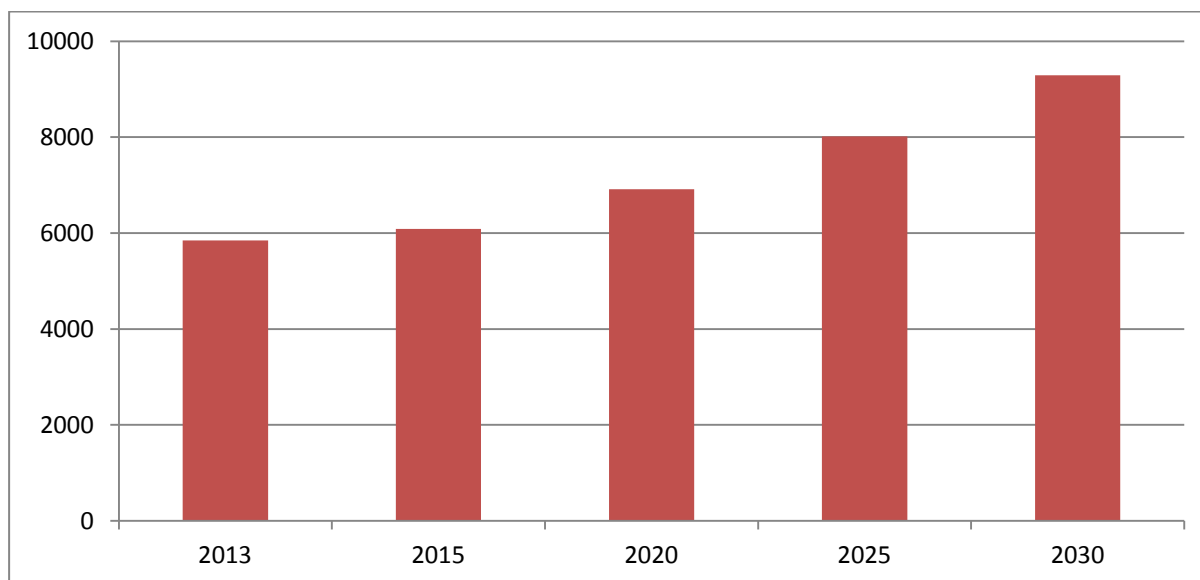
<sup>12</sup> [www.daffodilcymru.org.uk](http://www.daffodilcymru.org.uk) version 5.0.

<sup>13</sup> Public Health Wales (2012). Director of Public health Annual Report. Hywel Dda Health Board.



It is estimated that there were 5848 people in Hywel Dda aged 65 and over with dementia in 2013 and this is set to increase to 9292 by 2030 (an increase of 59%)<sup>14</sup>. Figure 7 illustrates the future estimates.

**Figure 7** – Estimate of number of people aged 65 and over with dementia, Hywel Dda, 2013-30<sup>15</sup>



Pembrokeshire has a slightly higher estimated increase in number of people over 65 with dementia at 62% compared to Ceredigion (59%) and Carmarthenshire (57%)<sup>16</sup>. Estimates across Hywel Dda GP locality clusters show that North Pembrokeshire has the highest number of people over 65 with dementia (931) and South Ceredigion the lowest number (767)<sup>17</sup>, see appendix four for more detail.

## 6 Falls

Falls in older people are a common cause of injury, harm and use of health and social care services. Older people are more at risk of falling and sustaining injuries and many of the causes are preventable. In Hywel Dda it is estimated that 33,100 to 66,200 people over 60 years suffer a fall each year and half of these people fall more than once<sup>18</sup>. Figure 7 shows the rate of admissions for falls occurring in the Hywel Dda population, by county. The rate in Ceredigion is significantly higher than the rate in Pembrokeshire, although not significantly different to the rate in Carmarthenshire. The rates have been standardised to take into account difference in age structure between the three counties. This is based on the resident population in each county, but they could have been admitted to any hospital.

**Figure 7** - Rates per 100,000 people, all ages, of any mention of falls on admitting

<sup>14</sup> www.daffodilcymru.org.uk version 5.0.

<sup>15</sup> www.daffodilcymru.org.uk version 5.0.

<sup>16</sup> www.daffodilcymru.org.uk version 5.0.

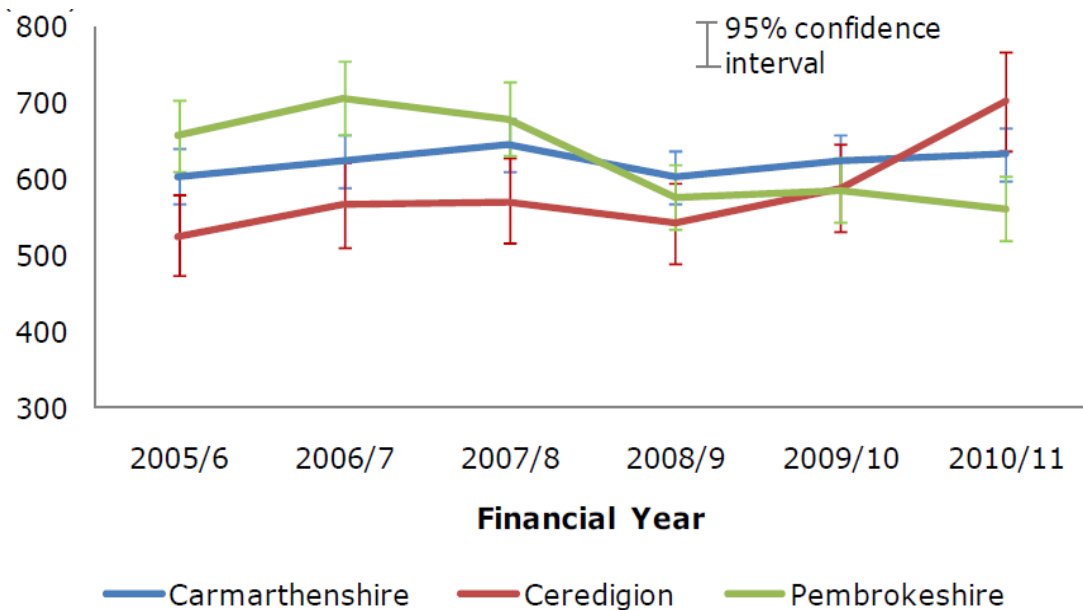
<sup>17</sup> Data produced by Public Health Wales Observatory, using data from the Alzheimer's Society (2007) Dementia UK & GP Practice Populations (WDS).

<sup>18</sup> Public Health Wales (2012). Director of Public health Annual Report. Hywel Dda Health Board.

episode, Hywel Dda, 2005-11.

### Hospital admissions with any mention of falls on the admitting episode, European age standardised rates per 100,000 (95% CIs), financial years 2005/6 - 2010/11

Produced by Public Health Wales Observatory, using PEDW (NWIS), MYE (ONS)



## 7 Carers

The number of people in Hywel Dda under 65 years of age who provide unpaid care is predicted to decrease over the next 10-15 years. However, for those aged over 65 it is predicted to increase<sup>19</sup>. There is a similar pattern reflected at local authority level for Ceredigion and Pembrokeshire. In Carmarthenshire the number of people aged 16-24 years providing unpaid care is predicted to decrease with all other age groups predicted to increase. Data from the ONS shows the percentage of unpaid care provided by residents across local authorities (see appendix five). There was a difference between the percentage of unpaid care provided by residents in the 3 local authorities. In 2011 Ceredigion was ranked lowest at 19/22 of the local authorities with 11.3%, Pembrokeshire was ranked 11/22 with 12.4% and Carmarthenshire was ranked one of the highest at 3/22 with 13.1%.

## 8 Self funders

Most local authorities have little knowledge of people who pay for their own care in their area despite this group of people accessing a range of services and forming a significant part of the total care market<sup>20</sup>. The Local Government Information Unit (LGiU) report 'Independent Aging'<sup>21</sup> estimated that an average of 41% of people entering residential care each year self-fund, and of those, 25% will run out of money and therefore fall back on state funding.

<sup>19</sup> www.daffodilcymru.org.uk version 5.0.

<sup>20</sup> IPC (2011). People who pay for care: quantitative and qualitative analysis of self-funders in the social care market.

<sup>21</sup> LGiU (2011). Independent Ageing: Council support for care self funders.



Estimating the precise numbers of self-funders in an inexact science for a variety of reasons:

- The service provided (often by non-registered providers) may not be regarded by the purchaser or provider as 'care' (e.g. help around the house).
- People in receipt of council funded services may top this up through informal care or buying additional hours from registered providers. Consequently there may be some element of double counting.
- Providers may not always be able to identify which care is self-funded or paid for using a direct payment.
- Providers may be unable (or unwilling) to provide information on the numbers of people who self-fund.
- Comparison between local authorities is difficult because of the potential differences in data collected and methods used.

However a market survey questionnaire was circulated to care home providers in each county asking for the percentage of self-funders. The data from those that responded suggests that Carmarthenshire and Pembrokeshire have a similar rate of self-funders (34% and 33%) while Ceredigion has a lower number (23%). Furthermore, there is a calculation for estimating the number of self-funders in care homes<sup>22</sup> which takes into account the number of beds funded by NHS continuing care. Using this calculation estimated self-funders similar for Ceredigion at 21.5%, but higher for Carmarthenshire (43%) and Pembrokeshire (41%).

#### Overall messages for the market position statement

- Hywel Dda has a higher proportion of older people than the Wales average.
- The older population is set to increase dramatically over the next 10-15 years. The biggest increase being for the age group 85 and over (a predicted increase of 84% by 2030).
- The number of people with dementia is also predicted to increase across the region (increase of 59% by 2030).
- A significant proportion of the older people population provide unpaid care which is expected to increase compared with a decrease in the number of people under 65 who provide unpaid care.
- A significant proportion of people receiving care are self funders (23%-34%).
- The demand for services is expected to increase dramatically over the next 10-15 years (as would be expected with the increase in number of older people).

<sup>22</sup> IPC (2013). DCMQC East Midlands: Understanding the self-funding market in social care – a toolkit for commissioners.

## Annex 1

Tables in appendix one show the predicted number of people by age group to 2030 and the percentage change<sup>23</sup>.

Pembrokeshire: Population aged 18 and over, by age, projected to 2030

| Age                               | 2020   |          | 2025   |          | 2030   |          |
|-----------------------------------|--------|----------|--------|----------|--------|----------|
|                                   | Number | % change | Number | % change | Number | % change |
| People aged 18-24                 | 7860   | -16%     | 7130   | -24%     | 7790   | -17%     |
| People aged 25-34                 | 14470  | 16%      | 13810  | 11%      | 12140  | -3%      |
| People aged 35-44                 | 12570  | -7%      | 14310  | 6%       | 15610  | 16%      |
| People aged 45-54                 | 15770  | -10%     | 13760  | -22%     | 13480  | -23%     |
| People aged 55-64                 | 17720  | 5%       | 18240  | 8%       | 16560  | -2%      |
| People aged 65-69                 | 8170   | -9%      | 8190   | -9%      | 9250   | 3%       |
| People aged 70-74                 | 8550   | 27%      | 7620   | 13%      | 7670   | 14%      |
| People aged 75-79                 | 6320   | 18%      | 7620   | 42%      | 6840   | 28%      |
| People aged 80-84                 | 4530   | 17%      | 5280   | 36%      | 6450   | 66%      |
| People aged 85 and over           | 4730   | 28%      | 5760   | 56%      | 7120   | 93%      |
| Total population aged 18 and over | 100700 | 2%       | 101710 | 3%       | 102910 | 5%       |

Carmarthenshire: Population aged 18 and over, by age, projected to 2030

| Age                      | 2020   |          | 2025   |          | 2030   |          |
|--------------------------|--------|----------|--------|----------|--------|----------|
|                          | Number | % change | Number | % change | Number | % change |
| People aged 18-24        | 13500  | -9%      | 12980  | -12%     | 14190  | -4%      |
| People aged 25-34        | 23050  | 14%      | 22540  | 12%      | 20930  | 4%       |
| People aged 35-44        | 20290  | -4%      | 22760  | 7%       | 24850  | 17%      |
| People aged 45-54        | 24510  | -7%      | 22160  | -16%     | 21830  | -17%     |
| People aged 55-64        | 26720  | 8%       | 27450  | 11%      | 25650  | 3%       |
| People aged 65-69        | 11990  | -6%      | 12520  | -2%      | 13790  | 8%       |
| People aged 70-74        | 12180  | 28%      | 11310  | 19%      | 11860  | 24%      |
| People aged 75-79        | 9210   | 22%      | 10930  | 45%      | 10230  | 35%      |
| People aged 80-84        | 6300   | 15%      | 7660   | 39%      | 9200   | 67%      |
| People aged 85 and over  | 6430   | 18%      | 7650   | 40%      | 9630   | 77%      |
| Total population aged 18 | 154170 | 4%       | 157960 | 7%       | 162150 | 9%       |

<sup>23</sup> www.daffodilcymru.org.uk version 5.0

|          |  |  |  |  |  |  |
|----------|--|--|--|--|--|--|
| and over |  |  |  |  |  |  |
|----------|--|--|--|--|--|--|

Ceredigion: Population aged 18 and over, by age, projected to 2030

| Age                               | 2020   |          | 2025   |          | 2030   |          |
|-----------------------------------|--------|----------|--------|----------|--------|----------|
|                                   | Number | % change | Number | % change | Number | % change |
| People aged 18-24                 | 11740  | -8%      | 11590  | -9%      | 11800  | -8%      |
| People aged 25-34                 | 8550   | 30%      | 9320   | 42%      | 8340   | 27%      |
| People aged 35-44                 | 6400   | -12%     | 6310   | -14%     | 7960   | 9%       |
| People aged 45-54                 | 8260   | -13%     | 7210   | -24%     | 6630   | -30%     |
| People aged 55-64                 | 9980   | 1%       | 9770   | -2%      | 8770   | -12%     |
| People aged 65-69                 | 4770   | -12%     | 4840   | -10%     | 4980   | -8%      |
| People aged 70-74                 | 5040   | 30%      | 4440   | 15%      | 4520   | 17%      |
| People aged 75-79                 | 3750   | 23%      | 4520   | 48%      | 4010   | 31%      |
| People aged 80-84                 | 2660   | 17%      | 3160   | 39%      | 3850   | 70%      |
| People aged 85 and over           | 2700   | 21%      | 3280   | 46%      | 4120   | 84%      |
| Total population aged 18 and over | 63850  | 2%       | 64430  | 2%       | 64990  | 3%       |

## Annex 2

The tables in appendix two show predicted number of people receiving services or who may need support<sup>24</sup> (either as a self funder or from the local authority).

| Hywel Dda  | 2015  | 2020  | 2025   | 2030   | % increase from 2015-2030 |
|--|-------|-------|--------|--------|---------------------------|
| <b>Receiving residential services</b>  |       |       |        |        |                           |
| People aged 65-74 receiving residential services                                     | 196   | 202   | 194    | 207    | 6%                        |
| People aged 75-84 receiving residential services                                     | 474   | 542   | 648    | 671    | 42%                       |
| People aged 85 and over receiving residential services                               | 992   | 1,158 | 1,394  | 1,744  | 76%                       |
| <b>Unable to managed at least one mobility activity on their own</b>                 |       |       |        |        |                           |
| People aged 65-69 unable to manage at least one mobility activity on their own       | 2,351 | 2,121 | 2,177  | 2,387  | 2%                        |
| People aged 70-74 unable to manage at least one mobility activity on their own       | 2,845 | 3,371 | 3,058  | 3,162  | 11%                       |
| People aged 75-79 unable to manage at least one mobility activity on their own       | 2,742 | 3,223 | 3,855  | 3,521  | 28%                       |
| People aged 80-84 unable to manage at least one mobility activity on their own       | 2,920 | 3,215 | 3,855  | 4,664  | 60%                       |
| People aged 85 and over unable to manage at least one mobility activity on their own | 5,315 | 6,141 | 7,324  | 9,143  | 72%                       |
| <b>Unable to manage at least one self care activity on their own</b>                 |       |       |        |        |                           |
| People aged 65-69 unable to manage at least one self care activity on their own      | 5,394 | 4,868 | 4,997  | 5,481  | 2%                        |
| People aged 70-74 unable to manage at least one self care activity on their own      | 5,360 | 6,352 | 5,762  | 5,958  | 11%                       |
| People aged 75-79 unable to manage at least one self care activity on their own      | 5,633 | 6,602 | 7,897  | 7,214  | 28%                       |
| People aged 80-84 unable to manage at least one self care activity on their own      | 5,342 | 5,883 | 7,053  | 8,532  | 60%                       |
| People aged 85 and over unable to  | 7,834 | 9,047 | 10,785 | 13,463 | 72%                       |

<sup>24</sup> www.daffodilcymru.org.uk version 5.0.

| <b>Hywel Dda</b>   | <b>2015</b> | <b>2020</b> | <b>2025</b> | <b>2030</b> | <b>% increase from 2015-2030</b> |
|--|-------------|-------------|-------------|-------------|----------------------------------|
| manage at least one self care activity on their own                              |             |             |             |             |                                  |
| <b>Unable to manage at least one domestic task on their own</b>                  |             |             |             |             |                                  |
| People aged 65-69 unable to manage at least one domestic task on their own       | 6,107       | 5,514       | 5,681       | 6,229       | 2%                               |
| People aged 70-74 unable to manage at least one domestic task on their own       | 6,688       | 7,927       | 7,191       | 7,448       | 11%                              |
| People aged 75-79 unable to manage at least one domestic task on their own       | 7,296       | 8,558       | 10,236      | 9,351       | 28%                              |
| People aged 80-84 unable to manage at least one domestic task on their own       | 6,715       | 7,391       | 8,864       | 10,722      | 60%                              |
| People aged 85 and over unable to manage at least one domestic task on their own | 9,157       | 10,629      | 12,731      | 15,909      | 74%                              |
| <b>Receiving community based services</b>  |             |             |             |             |                                  |
| People aged 18-64 receiving community based services                             | 2,229       | 2,216       | 2,195       | 2,167       | -3%                              |
| People aged 65-74 receiving community based services                             | 995         | 1,022       | 986         | 1,050       | 6%                               |
| People aged 75-84 receiving community based services                             | 2,111       | 2,418       | 2,889       | 2,992       | 42%                              |
| People aged 85 and over receiving community based services                       | 2,474       | 2,887       | 3,476       | 4,348       | 76%                              |

## Annex 3

The tables in appendix three show predicted number of people receiving services or who may need support<sup>25</sup> (either as a self funder or from the local authority).

| <b>CARMARTHENSHIRE</b>   | <b>2015</b> | <b>2020</b> | <b>2025</b> | <b>2030</b> | <b>% increase from 2015-2030</b> |
|--|-------------|-------------|-------------|-------------|----------------------------------|
| <b>Receiving residential services</b>  |             |             |             |             |                                  |
| People aged 65-74 receiving residential services                                 | 88          | 91          | 90          | 97          | 10%                              |
| People aged 75-84 receiving residential services                                 | 232         | 268         | 321         | 335         | 44%                              |
| People aged 85 and over receiving residential services                           | 491         | 561         | 667         | 839         | 71%                              |
| <b>Unable to manage at least one domestic task on their own</b>                  |             |             |             |             |                                  |
| People aged 65-69 unable to manage at least one domestic task on their own       | 2,868       | 2,650       | 2,798       | 3,067       | 7%                               |
| People aged 70-74 unable to manage at least one domestic task on their own       | 3,181       | 3,740       | 3,476       | 3,692       | 16%                              |
| People aged 75-79 unable to manage at least one domestic task on their own       | 3,418       | 4,079       | 4,839       | 4,531       | 33%                              |
| People aged 80-84 unable to manage at least one domestic task on their own       | 3,152       | 3,450       | 4,206       | 5,047       | 60%                              |
| People aged 85 and over unable to manage at least one domestic task on their own | 4,347       | 4,938       | 5,843       | 7,344       | 69%                              |
| <b>Unable to manage at least one activity on their own</b>                       |             |             |             |             |                                  |
| People aged 65-69 unable to manage at least one activity on their own            | 1,105       | 1,020       | 1,068       | 1,175       | 6%                               |
| People aged 70-74 unable to manage at least one activity on their own            | 1,353       | 1,591       | 1,479       | 1,566       | 16%                              |

<sup>25</sup> [www.daffodilcymru.org.uk](http://www.daffodilcymru.org.uk) version 5.0.



| <b>CARMARTHENSHIRE</b>  | <b>2015</b> | <b>2020</b> | <b>2025</b> | <b>2030</b> | <b>% increase from 2015-2030</b> |
|---|-------------|-------------|-------------|-------------|----------------------------------|
| People aged 75-79 unable to manage at least one activity on their own                 | 1,284       | 1,535       | 1,821       | 1,705       | 33%                              |
| People aged 80-84 unable to manage at least one activity on their own                 | 1,371       | 1,501       | 1,829       | 2,195       | 60%                              |
| People aged 85 and over unable to manage at least one activity on their own           | 2,528       | 2,857       | 3,365       | 4,224       | 67%                              |
| <b>Unable to manage at least one self care activity on their own</b>                  |             |             |             |             |                                  |
| People aged 65-69 unable to manage at least one self care activity on their own       | 2,536       | 2,341       | 2,452       | 2,698       | 6%                               |
| People aged 70-74 unable to manage at least one self care activity on their own       | 2,550       | 2,999       | 2,786       | 2,949       | 16%                              |
| People aged 75-79 unable to manage at least one self care activity on their own       | 2,639       | 3,148       | 3,735       | 3,497       | 33%                              |
| People aged 80-84 unable to manage at least one self care activity on their own       | 2,508       | 2,746       | 3,347       | 4,017       | 60%                              |
| People aged 85 and over unable to manage at least one self care activity on their own | 3,726       | 4,209       | 4,956       | 6,220       | 67%                              |
| <b>Receiving community based services</b>   |             |             |             |             |                                  |
| People aged 18-64 receiving community based services                                  | 1,078       | 1,080       | 1,079       | 1,074       | 0%                               |
| People aged 65-74 receiving community based services                                  | 477         | 493         | 486         | 524         | 10%                              |
| People aged 75-84 receiving community based services                                  | 964         | 1,113       | 1,334       | 1,394       | 45%                              |
| People aged 85 and over receiving community based services                            | 1,237       | 1,414       | 1,682       | 2,117       | 71%                              |

| <b>CEREDIGION</b>  | <b>2015</b> | <b>2020</b> | <b>2025</b> | <b>2030</b> | <b>% increase from 2015-2030</b> |
|--|-------------|-------------|-------------|-------------|----------------------------------|
| <b>Receiving residential services</b>  |             |             |             |             |                                  |
| People aged 65-74 receiving residential services                                 | 44          | 44          | 42          | 43          | -2%                              |
| People aged 75-84 receiving residential services                                 | 98          | 113         | 136         | 139         | 42%                              |
| People aged 85 and over receiving residential services                           | 223         | 259         | 315         | 396         | 78%                              |
| <b>Unable to manage at least one domestic task on their own</b>                  |             |             |             |             |                                  |
| People aged 65-69 unable to manage at least one domestic task on their own       | 1,192       | 1,052       | 1,068       | 1,109       | -7%                              |
| People aged 70-74 unable to manage at least one domestic task on their own       | 1,294       | 1,537       | 1,362       | 1,387       | 7%                               |
| People aged 75-79 unable to manage at least one domestic task on their own       | 1,427       | 1,663       | 1,996       | 1,777       | 25%                              |
| People aged 80-84 unable to manage at least one domestic task on their own       | 1,305       | 1,460       | 1,738       | 2,103       | 61%                              |
| People aged 85 and over unable to manage at least one domestic task on their own | 1,788       | 2,067       | 2,503       | 3,141       | 76%                              |
| <b>Unable to manage at least one activity on their own</b>                       |             |             |             |             |                                  |
| People aged 65-69 unable to manage at least one activity on their own            | 461         | 405         | 412         | 425         | -8%                              |
| People aged 70-74 unable to manage at least one activity on their own            | 551         | 655         | 579         | 590         | 7%                               |
| People aged 75-79 unable to manage at least one activity on their own            | 537         | 626         | 750         | 668         | 24%                              |
| People aged 80-84 unable to manage at least one activity on their own            | 567         | 635         | 756         | 915         | 61%                              |
| People aged 85 and over unable to manage at least one activity on their own      | 1,036       | 1,194       | 1,439       | 1,804       | 74%                              |

| <b>CEREDIGION</b>   | <b>2015</b> | <b>2020</b> | <b>2025</b> | <b>2030</b> | <b>% increase from 2015-2030</b> |
|---|-------------|-------------|-------------|-------------|----------------------------------|
| <b>Unable to manage at least one self care activity on their own</b>                  |             |             |             |             |                                  |
| People aged 65-69 unable to manage at least one self care activity on their own       | 1,057       | 930         | 944         | 975         | -8%                              |
| People aged 70-74 unable to manage at least one self care activity on their own       | 1,038       | 1,234       | 1,092       | 1,113       | 7%                               |
| People aged 75-79 unable to manage at least one self care activity on their own       | 1,102       | 1,284       | 1,541       | 1,371       | 24%                              |
| People aged 80-84 unable to manage at least one self care activity on their own       | 1,038       | 1,162       | 1,383       | 1,674       | 61%                              |
| People aged 85 and over unable to manage at least one self care activity on their own | 1,527       | 1,758       | 2,119       | 2,656       | 74%                              |
| <b>Receiving community based services</b>   |             |             |             |             |                                  |
| People aged 18-64 receiving community based services                                  | 335         | 330         | 324         | 319         | -5%                              |
| People aged 65-74 receiving community based services                                  | 148         | 150         | 142         | 146         | -1%                              |
| People aged 75-84 receiving community based services                                  | 294         | 338         | 405         | 415         | 41%                              |
| People aged 85 and over receiving community based services                            | 416         | 483         | 588         | 739         | 78%                              |

| <b>PEMBROKESHIRE</b>   | <b>2015</b> | <b>2020</b> | <b>2025</b> | <b>2030</b> | <b>% increase from 2015-2030</b> |
|--|-------------|-------------|-------------|-------------|----------------------------------|
| <b>Receiving residential services</b>  |             |             |             |             |                                  |
| People aged 65-74 receiving residential services                                 | 65          | 66          | 62          | 67          | 3%                               |
| People aged 75-84 receiving residential services                                 | 143         | 162         | 193         | 198         | 38%                              |
| People aged 85 and over receiving residential services                           | 277         | 334         | 406         | 502         | 81%                              |
| <b>Unable to manage at least one domestic task on their own</b>                  |             |             |             |             |                                  |
| People aged 70-74 unable to manage at least one domestic task on their own       | 2,213       | 2,649       | 2,353       | 2,368       | 7%                               |
| People aged 75-79 unable to manage at least one domestic task on their own       | 2,450       | 2,816       | 3,400       | 3,043       | 24%                              |
| People aged 80-84 unable to manage at least one domestic task on their own       | 2,258       | 2,481       | 2,920       | 3,572       | 58%                              |
| People aged 85 and over unable to manage at least one domestic task on their own | 3,022       | 3,623       | 4,385       | 5,424       | 79%                              |
| <b>Unable to manage at least one activity on their own</b>                       |             |             |             |             |                                  |
| People aged 65-69 unable to manage at least one activity on their own            | 784         | 696         | 697         | 788         | 1%                               |
| People aged 70-74 unable to manage at least one activity on their own            | 940         | 1,125       | 1,000       | 1,006       | 7%                               |
| People aged 75-79 unable to manage at least one activity on their own            | 921         | 1,062       | 1,284       | 1,148       | 25%                              |
| People aged 80-84 unable to manage at least one activity on their own            | 982         | 1,079       | 1,270       | 1,553       | 58%                              |
| People aged 85 and over unable to manage at least one activity on their own      | 1,752       | 2,091       | 2,519       | 3,115       | 78%                              |
| <b>Unable to manage at least one self care activity on their own</b>             |             |             |             |             |                                  |

| <b>PEMBROKESHIRE</b>  | <b>2015</b> | <b>2020</b> | <b>2025</b> | <b>2030</b> | <b>% increase from 2015-2030</b> |
|---|-------------|-------------|-------------|-------------|----------------------------------|
| People aged 65-69 unable to manage at least one self care activity on their own       | 1,800       | 1,597       | 1,600       | 1,808       | 0%                               |
| People aged 70-74 unable to manage at least one self care activity on their own       | 1,772       | 2,119       | 1,884       | 1,896       | 7%                               |
| People aged 75-79 unable to manage at least one self care activity on their own       | 1,892       | 2,171       | 2,620       | 2,346       | 24%                              |
| People aged 80-84 unable to manage at least one self care activity on their own       | 1,796       | 1,975       | 2,323       | 2,842       | 58%                              |
| People aged 85 and over unable to manage at least one self care activity on their own | 2,581       | 3,080       | 3,709       | 4,587       | 78%                              |
| <b>Receiving community based services</b>   |             |             |             |             |                                  |
| People aged 18-64 receiving community based services                                  | 817         | 806         | 793         | 773         | -5%                              |
| People aged 65-74 receiving community based services                                  | 371         | 378         | 358         | 383         | 3%                               |
| People aged 75-84 receiving community based services                                  | 852         | 962         | 1,144       | 1,178       | 38%                              |
| People aged 85 and over receiving community based services                            | 820         | 988         | 1,203       | 1,488       | 81%                              |

Hours of home care provided by local authority<sup>26</sup>

|                 | <b>Hours of homecare provided by the local authority</b> | <b>Hours of homecare provided by the independent sector under contract</b> |
|-----------------|--|--|
| Ceredigion      | 34,221   | 109,037  |
| Pembrokeshire   | 44,754   | 517,863  |
| Carmarthenshire | 367,736  | 649,319  |

<sup>26</sup> <https://statswales.wales.gov.uk/Catalogue/Health-and-Social-Care/Social-Services/Adult-Services/Service-Provision/HomeCare-by-LocalAuthority-Measure> accessed 26.02.15

## Annex 4

The tables in appendix four show the predicted number of people with dementia.

Number of people over aged 65 and over with dementia<sup>27</sup>

|                 | 2013 | 2015 | 2020 | 2025 | 2030 |
|-----------------|------|------|------|------|------|
| Hywel Dda       | 2848 | 6085 | 6915 | 8012 | 9292 |
| Ceredigion      | 1140 | 1187 | 1350 | 1567 | 1811 |
| Carmarthenshire | 2783 | 2876 | 3242 | 3753 | 4371 |
| Pembrokeshire   | 1925 | 2022 | 2323 | 2692 | 3110 |

Number of people over aged 65 and over with dementia<sup>28</sup>

| Hywel Dda GP cluster | 2012 |
|----------------------|------|
| Amman/Gwendraeth     | 839  |
| Llanelli             | 875  |
| North Ceredigion     | 603  |
| South Ceredigion     | 767  |
| North Pembrokeshire  | 931  |
| South Pembrokeshire  | 860  |
| Taf/Teifi/Tywi       | 871  |

<sup>27</sup> www.daffodilcymru.org.uk version 5.0.

<sup>28</sup> Data produced by Public Health Wales Observatory, using data from the Alzheimer's Society (2007) Dementia UK & GP Practice Populations (WDS).



## Annex 5

Tables in appendix five show the predicted number of unpaid carers<sup>29</sup>.

People aged 16 and over predicted to provide unpaid care

| Hywel Dda  | 2015   | 2020   | 2025   | 2030   | % increase from 2015-2030 |
|--|--------|--------|--------|--------|---------------------------|
| People aged 16-24 providing 1-19 hours of unpaid care        | 1,751  | 1,586  | 1,561  | 1,650  | -7%                       |
| People aged 25-64 providing 1-19 hours of unpaid care        | 19,885 | 20,112 | 20,043 | 19,522 | -2%                       |
| People aged 65-74 providing 1-19 hours of unpaid care        | 3,694  | 3,792  | 3,659  | 3,896  | 10%                       |
| People aged 75-84 providing 1-19 hours of unpaid care        | 1,312  | 1,503  | 1,796  | 1,860  | 47%                       |
| People aged 85 and over providing 1-19 hours of unpaid care  | 234    | 273    | 329    | 411    | 83%                       |
| People aged 16-24 providing 20-49 hours of unpaid care       | 386    | 349    | 344    | 363    | -7%                       |
| People aged 25-64 providing 20-49 hours of unpaid care       | 4,563  | 4,616  | 4,600  | 4,480  | -2%                       |
| People aged 65-74 providing 20-49 hours of unpaid care       | 1,127  | 1,157  | 1,116  | 1,188  | 10%                       |
| People aged 75-84 providing 20-49 hours of unpaid care       | 533    | 610    | 729    | 755    | 47%                       |
| People aged 85 and over providing 20-49 hours of unpaid care | 107    | 124    | 150    | 187    | 83%                       |
| People aged 16-24 providing 50+ hours of unpaid care         | 289    | 262    | 258    | 273    | -7%                       |
| People aged 25-64 providing 50+ hours of unpaid care         | 7,702  | 7,790  | 7,764  | 7,562  | -2%                       |
| People aged 65-74 providing 50+ hours of unpaid care         | 3,011  | 3,091  | 2,983  | 3,176  | 10%                       |
| People aged 75-84 providing 50+ hours of unpaid care         | 2,011  | 2,304  | 2,753  | 2,851  | 47%                       |
| People aged 85 and over providing 50+ hours of unpaid care   | 478    | 558    | 672    | 841    | 84%                       |
| Total population aged 16 and over providing unpaid care      | 47,083 | 48,127 | 48,757 | 49,015 | 5%                        |

<sup>29</sup> www.daffodilcymru.org.uk version 5.0

## People aged 16 and over predicted to provide unpaid care

| <b>Carmarthenshire</b>                                       | <b>2015</b> | <b>2020</b> | <b>2025</b> | <b>2030</b> | <b>% increase from 2015-2030</b> |
|--|-------------|-------------|-------------|-------------|----------------------------------|
| People aged 16-24 providing 1-19 hours of unpaid care        | 908         | 832         | 830         | 893         | -3%                              |
| People aged 25-64 providing 1-19 hours of unpaid care        | 9,841       | 10,009      | 10,046      | 9,871       | 1%                               |
| People aged 65-74 providing 1-19 hours of unpaid care        | 1,664       | 1,722       | 1,697       | 1,828       | 15%                              |
| People aged 75-84 providing 1-19 hours of unpaid care        | 565         | 653         | 782         | 818         | 49%                              |
| People aged 85 and over providing 1-19 hours of unpaid care  | 98          | 112         | 133         | 168         | 77%                              |
| People aged 16-24 providing 20-49 hours of unpaid care       | 197         | 180         | 180         | 193         | -4%                              |
| People aged 25-64 providing 20-49 hours of unpaid care       | 2,389       | 2,430       | 2,439       | 2,396       | 1%                               |
| People aged 65-74 providing 20-49 hours of unpaid care       | 576         | 596         | 588         | 633         | 15%                              |
| People aged 75-84 providing 20-49 hours of unpaid care       | 259         | 300         | 359         | 375         | 49%                              |
| People aged 85 and over providing 20-49 hours of unpaid care | 50          | 57          | 67          | 85          | 77%                              |
| People aged 16-24 providing 50+ hours of unpaid care         | 163         | 150         | 149         | 161         | -3%                              |
| People aged 25-64 providing 50+ hours of unpaid care         | 4,129       | 4,199       | 4,215       | 4,141       | 1%                               |
| People aged 65-74 providing 50+ hours of unpaid care         | 1,631       | 1,688       | 1,664       | 1,792       | 15%                              |
| People aged 75-84 providing 50+ hours of unpaid care         | 1,020       | 1,178       | 1,412       | 1,476       | 49%                              |
| People aged 85 and over providing 50+ hours of unpaid care   | 241         | 275         | 327         | 412         | 77%                              |
| Total population aged 16 and over providing unpaid care      | 23,731      | 24,381      | 24,888      | 25,242      | 8%                               |

## People aged 16 and over predicted to provide unpaid care

| <b>Ceredigion</b>  | <b>2015</b> | <b>2020</b> | <b>2025</b> | <b>2030</b> | <b>% increase from 2015-2030</b> |
|--|-------------|-------------|-------------|-------------|----------------------------------|
| People aged 16-24 providing 1-19 hours of unpaid care        | 325         | 301         | 298         | 305         | -6%                              |
| People aged 25-64 providing 1-19 hours of unpaid care        | 3,611       | 3,638       | 3,573       | 3,474       | -5%                              |
| People aged 65-74 providing 1-19 hours of unpaid care        | 732         | 744         | 704         | 721         | 3%                               |
| People aged 75-84 providing 1-19 hours of unpaid care        | 303         | 348         | 417         | 426         | 47%                              |
| People aged 85 and over providing 1-19 hours of unpaid care  | 48          | 55          | 67          | 85          | 85%                              |
| People aged 16-24 providing 20-49 hours of unpaid care       | 72          | 67          | 66          | 67          | -7%                              |
| People aged 25-64 providing 20-49 hours of unpaid care       | 743         | 749         | 735         | 715         | -5%                              |
| People aged 65-74 providing 20-49 hours of unpaid care       | 195         | 198         | 187         | 192         | 3%                               |
| People aged 75-84 providing 20-49 hours of unpaid care       | 95          | 110         | 131         | 134         | 47%                              |
| People aged 85 and over providing 20-49 hours of unpaid care | 21          | 24          | 29          | 37          | 85%                              |
| People aged 16-24 providing 50+ hours of unpaid care         | 54          | 50          | 49          | 50          | -7%                              |
| People aged 25-64 providing 50+ hours of unpaid care         | 1,216       | 1,225       | 1,203       | 1,170       | -5%                              |
| People aged 65-74 providing 50+ hours of unpaid care         | 477         | 485         | 459         | 470         | 3%                               |
| People aged 75-84 providing 50+ hours of unpaid care         | 392         | 450         | 540         | 552         | 48%                              |
| People aged 85 and over providing 50+ hours of unpaid care   | 88          | 102         | 125         | 157         | 85%                              |
| Total population aged 16 and over providing unpaid care      | 8,372       | 8,546       | 8,583       | 8,555       | 3%                               |

## People aged 16 and over predicted to provide unpaid care

| <b>Pembrokeshire</b>   | <b>2015</b> | <b>2020</b> | <b>2025</b> | <b>2030</b> | <b>% increase from 2015-2030</b> |
|--|-------------|-------------|-------------|-------------|----------------------------------|
| People aged 16-24 providing 1-19 hours of unpaid care        | 514         | 444         | 426         | 454         | -15%                             |
| People aged 25-64 providing 1-19 hours of unpaid care        | 6,432       | 6,463       | 6,419       | 6,172       | -4%                              |
| People aged 65-74 providing 1-19 hours of unpaid care        | 1,298       | 1,325       | 1,253       | 1,341       | 8%                               |
| People aged 75-84 providing 1-19 hours of unpaid care        | 445         | 502         | 597         | 615         | 44%                              |
| People aged 85 and over providing 1-19 hours of unpaid care  | 88          | 107         | 130         | 160         | 93%                              |
| People aged 16-24 providing 20-49 hours of unpaid care       | 116         | 100         | 96          | 103         | -14%                             |
| People aged 25-64 providing 20-49 hours of unpaid care       | 1,433       | 1,439       | 1,430       | 1,375       | -4%                              |
| People aged 65-74 providing 20-49 hours of unpaid care       | 356         | 363         | 344         | 368         | 8%                               |
| People aged 75-84 providing 20-49 hours of unpaid care       | 178         | 201         | 239         | 246         | 44%                              |
| People aged 85 and over providing 20-49 hours of unpaid care | 36          | 44          | 53          | 66          | 94%                              |
| People aged 16-24 providing 50+ hours of unpaid care         | 72          | 62          | 59          | 63          | -15%                             |
| People aged 25-64 providing 50+ hours of unpaid care         | 2,361       | 2,372       | 2,356       | 2,265       | -4%                              |
| People aged 65-74 providing 50+ hours of unpaid care         | 905         | 923         | 873         | 935         | 8%                               |
| People aged 75-84 providing 50+ hours of unpaid care         | 598         | 676         | 804         | 827         | 44%                              |
| People aged 85 and over providing 50+ hours of unpaid care   | 149         | 180         | 219         | 271         | 94%                              |
| Total population aged 16 and over providing unpaid care      | 14,981      | 15,201      | 15,298      | 15,261      | 3%                               |

Percentage increase in the total provision of unpaid care between 2001 and 2011<sup>30</sup>

|                       | 2011 (%) | 2001 (%) | 2011 (Rank) | 2001 (Rank) | Change 2001-2011 (%) |
|-----------------------|----------|----------|-------------|-------------|----------------------|
| Monmouthshire         | 12.6     | 11.3     | 9           | 14          | 11.2                 |
| Powys                 | 12.1     | 11.2     | 14          | 17          | 8.7                  |
| Ceredigion            | 11.3     | 10.4     | 19          | 20          | 8.7                  |
| Denbighshire          | 12.4     | 11.5     | 12          | 13          | 8.2                  |
| Isle of Anglesey      | 11.5     | 10.8     | 17          | 19          | 6.7                  |
| The Vale of Glamorgan | 12.3     | 11.6     | 13          | 11          | 6.2                  |
| Gwynedd               | 10.2     | 9.6      | 21          | 22          | 6.1                  |
| Conwy                 | 11.8     | 11.2     | 15          | 15          | 5.1                  |
| Flintshire            | 11.6     | 11.1     | 16          | 18          | 4.5                  |
| Pembrokeshire         | 12.4     | 11.9     | 11          | 10          | 4.3                  |
| Torfaen               | 13.1     | 12.6     | 2           | 3           | 3.6                  |
| Neath Port Talbot     | 14.6     | 14.1     | 1           | 1           | 3.5                  |
| Carmarthenshire       | 13.1     | 12.6     | 3           | 4           | 3.3                  |
| Caerphilly            | 12.7     | 12.3     | 5           | 9           | 3.3                  |
| Bridgend              | 12.9     | 12.6     | 4           | 5           | 2.3                  |
| Newport               | 11.4     | 11.2     | 18          | 16          | 1.6                  |
| Rhondda Cynon Taf     | 12.6     | 12.5     | 7           | 7           | 1.1                  |
| Merthyr Tydfil        | 12.6     | 12.6     | 8           | 6           | 0.4                  |
| Blaenau Gwent         | 12.5     | 12.5     | 10          | 8           | 0.4                  |
| Swansea               | 12.7     | 12.7     | 6           | 2           | 0.0                  |
| Cardiff               | 10.1     | 10.2     | 22          | 21          | -0.9                 |
| Wrexham               | 11.2     | 11.6     | 20          | 12          | -3.0                 |

<sup>30</sup> ONS - <http://www.ons.gov.uk/ons/rel/census/2011-census-analysis/provision-of-unpaid-care-in-england-and-wales--2011/art-provision-of-unpaid-care.html#tab-Welsh-Unitary-Authority-Comparisons---A-comparison-of-care-provision-between-2001-2011> accessed 26.02.15.