

# **Future demand for care home beds in Herefordshire**

Version 1.1

Herefordshire Council Intelligence Unit

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## SUMMARY

- The total need for care home beds, for people aged 65 and over, is projected to increase from around 1,550 in 2018 to around 2,000 in 2028 (an increase of 450 over this 10-year period); and to around 2,650 people by 2038 (an increase of 1,150 over this 20-year period).
- The total need for care home beds for people aged under 65 will remain static at around 500 people over the next 20 years - around 170 who are Herefordshire Council (HC) funded and around 320 who are non-HC funded.
- For all age groups, as of 2018, 40% of care home beds were HC-funded. Assuming there is no change in the age distribution of financial status over the next 20 years, this proportion will remain unchanged over the projection period.
- For all age groups, as of 2018, 61% of HC funded care home beds were residential and 39% were nursing; compared with 53% and 47% of non-HC funded beds respectively. These proportions will remain unchanged over the next 20 years.
- For people aged 65 and over, demand for just over a third of all care home beds (36%) are for people living in the Hereford & surrounds area, just under a quarter (23%) are located in each of the north and south Herefordshire areas and 18% were located in the East Herefordshire area. The relative proportions of need across the county will remain unchanged throughout the projection period.
- Around 80% of people aged 65 and over in a care home, within Herefordshire, are estimated to have some form of dementia.

## COUNTY-LEVEL PROJECTIONS

These estimates of future demand for care home beds assume that -

- the number of beds available in 2018 were adequate to meet demand
- all care home beds are at a hundred per cent occupancy of permanent residents (i.e. no short-stay clients are included)
- there will be no changes to the eligibility criteria or other policies that would affect trends in residential and nursing home placements in the future
- no new prevention schemes will be implemented over the projection period
- there will be no meaningful changes to net migration of the population of interest over the projection period

The current level of need for HC-funded beds was determined using data extracted from Herefordshire Council's adult social care client database (Mosaic). Information about the current level of need for non-HC funded beds was determined from CQC records and historical data from the 2011 Census.

National age-specific dementia prevalence<sup>1</sup> and the proportion of people with dementia living in care homes<sup>2</sup> were applied to the projected resident population of Herefordshire to estimate the number of people in care homes who will have dementia.

Table 1 on the next page provides the projected number of beds required by people aged 65 and over, per year up to 2041; broken down by HC-funded, non-HC funded, residential and nursing. Also shown is the projected number of people in care homes who will have dementia. Projected trends are illustrated in Charts 1 and 2.

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<sup>1</sup> [Dementia UK: Update, 2014. Alzheimer's Society](#)

<sup>2</sup> [Dementia UK, 2007. Alzheimer's Society](#)

*Table 1. Future requirement for care home beds for people aged 65 and over in Herefordshire and the estimated number of people in care homes with dementia.*

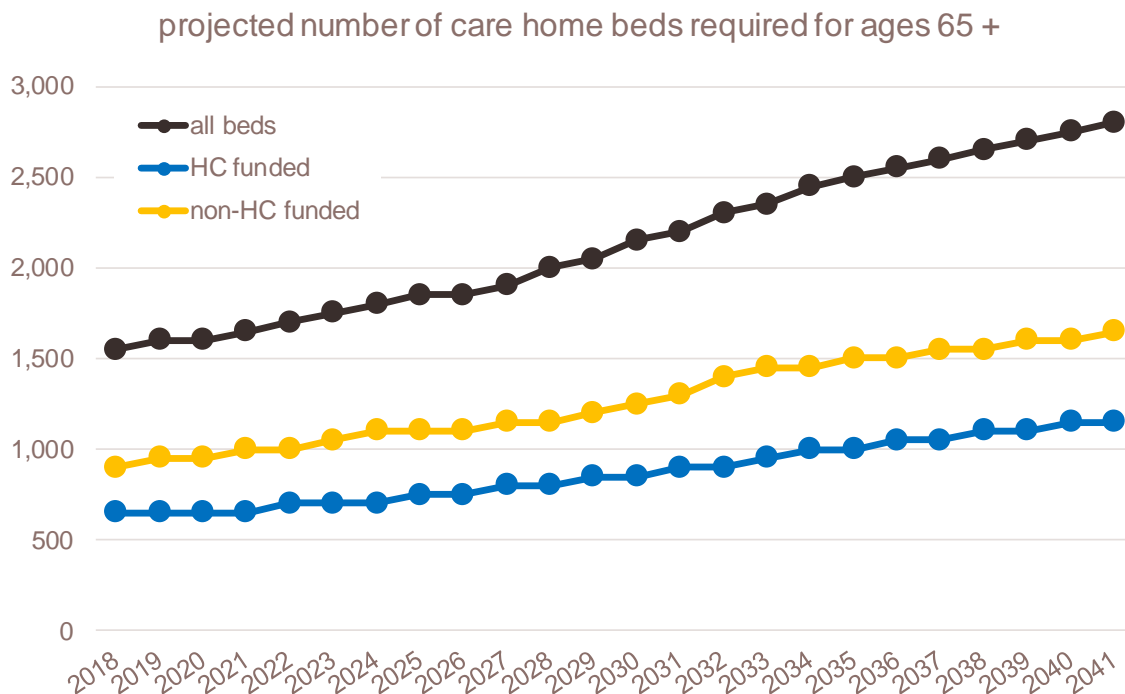
Notes -

(1) *Figures are rounded to the nearest 50 to avoid implying spurious accuracy.*

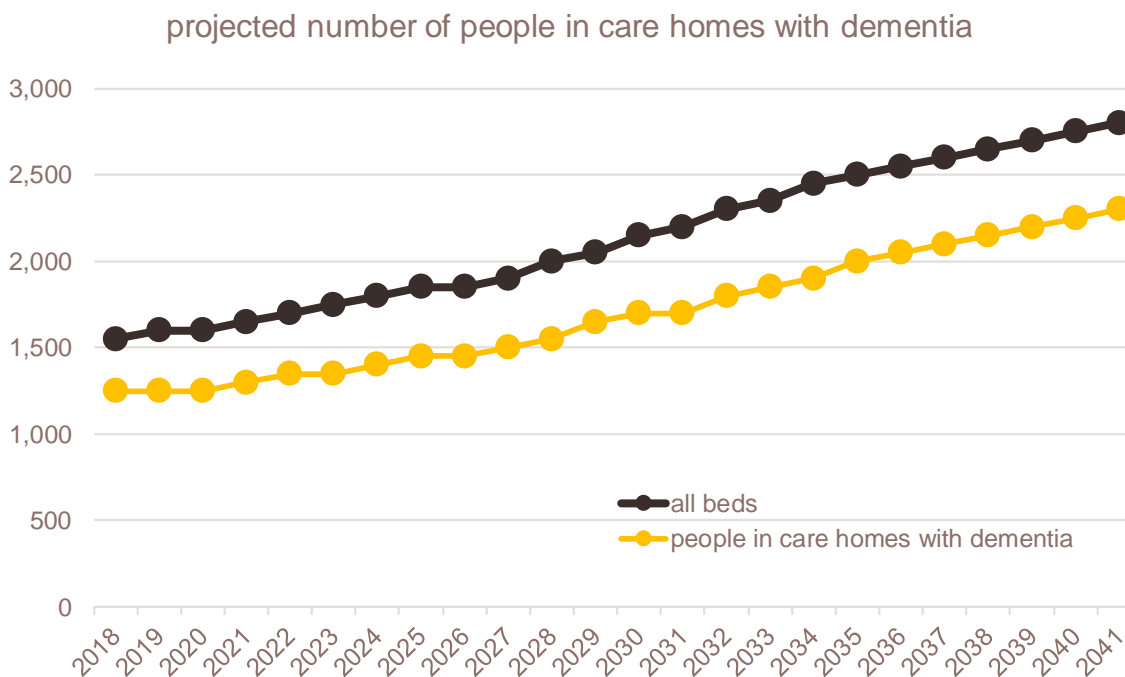
(2) *Figures for each type of care home may not sum exactly to the total number of care homes due to rounding.*

year	all beds	estimated number with dementia	total Herefordshire Council funded beds	council residential beds	council nursing beds	total non-council funded beds	non-council residential beds	non-council nursing beds
2018	1,550	1,050	650	350	300	900	400	500
2019	1,600	1,100	650	350	300	950	400	500
2020	1,600	1,100	650	350	300	950	450	550
2021	1,650	1,150	650	350	300	1,000	450	550
2022	1,700	1,200	700	350	300	1,000	450	550
2023	1,750	1,200	700	400	350	1,050	450	600
2024	1,800	1,250	700	400	350	1,100	450	600
2025	1,850	1,250	750	400	350	1,100	500	600
2026	1,850	1,300	750	400	350	1,100	500	600
2027	1,900	1,350	800	400	350	1,150	500	650
2028	2,000	1,400	800	450	350	1,150	500	650
2029	2,050	1,450	850	450	400	1,200	550	700
2030	2,150	1,500	850	450	400	1,250	550	700
2031	2,200	1,550	900	500	400	1,300	600	750
2032	2,300	1,600	900	500	450	1,400	600	750
2033	2,350	1,650	950	500	450	1,450	650	800
2034	2,450	1,700	1,000	550	450	1,450	650	800
2035	2,500	1,750	1,000	550	450	1,500	650	850
2036	2,550	1,800	1,050	550	450	1,500	650	850
2037	2,600	1,800	1,050	600	500	1,550	650	850
2038	2,650	1,850	1,100	600	500	1,550	700	900
2039	2,700	1,900	1,100	600	500	1,600	700	900
2040	2,750	1,900	1,150	600	500	1,600	700	900
2041	2,800	1,950	1,150	600	500	1,650	700	900

**Chart 1. Projected number of care home beds required for people aged 65 and over.**  
Note - these figures are rounded to the nearest 50 to avoid implying spurious accuracy



**Chart 2. Projected number of people aged 65 and over in care homes with dementia.**  
Note - these figures are rounded to the nearest 50 to avoid implying spurious accuracy



Around 150 (31%) of people in a HC-funded residential care home and around 20 (8%) in a HC-funded nursing care home are aged under 65; compared with around 240 (37%) and 90 (18%) of people in non HC-funded residential and nursing care homes respectively. These numbers will remain static over the next 20 years.

## **SUB COUNTY-LEVEL PROJECTIONS**

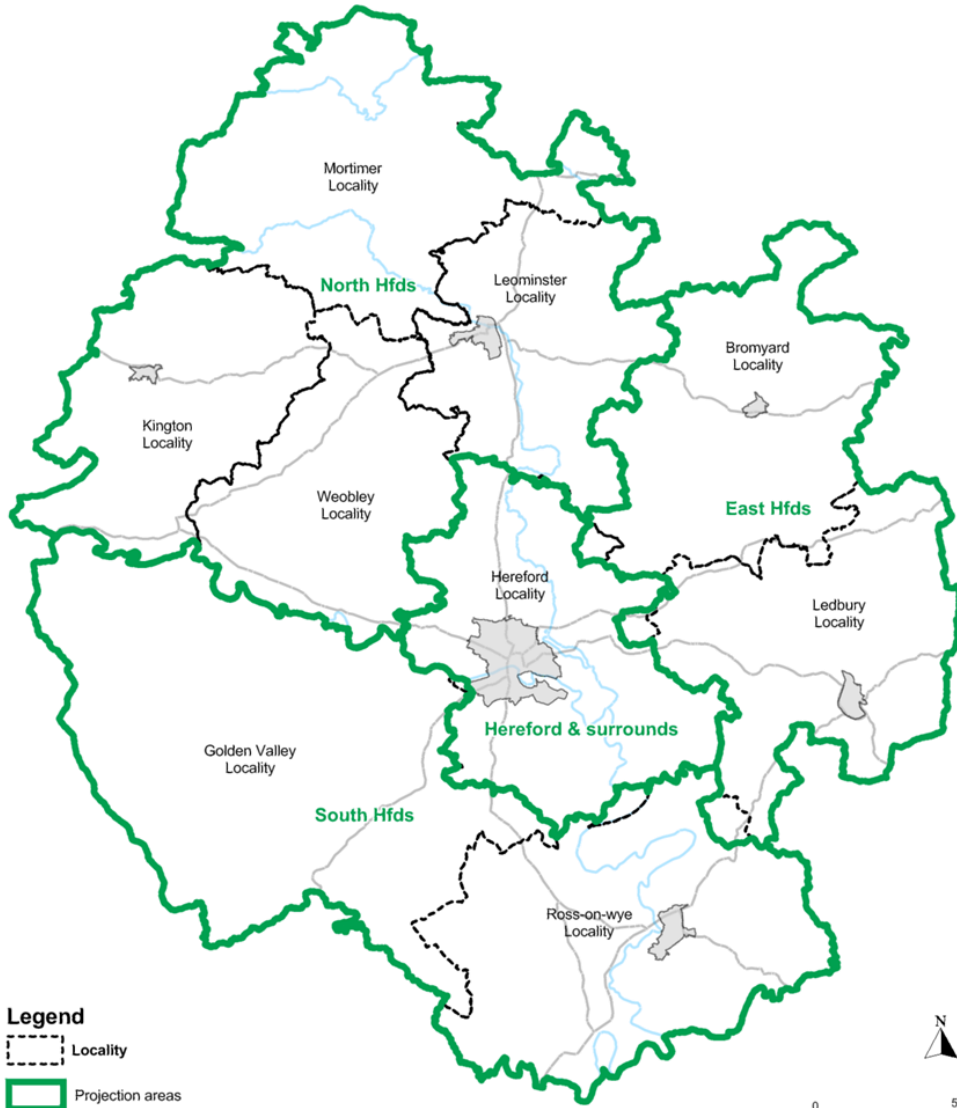
Indicative estimates of demand for care home beds across the county, over the next 20 years, were generated by applying countywide prevalence rates to Primary Care Network (PCN) populations.

Tables 3 to 8 provide the projected number of beds required, for selected years, up to 2038 for all care homes in each PCN; broken down by HC-funded, non-HC authority funded, residential and nursing. Also shown is the projected number of people in care homes who will have dementia.

Table 2. Composition of PCNs.

Primary care network	Constituent corporate localities
North Hfds	Kington; Leominster; Mortimer; Weobley
Hereford & surrounds	Hereford
East Hfds	Bromyard; Ledbury
South Hfds	Golden Valley; Ross-on-Wye

Figure 1. Areas used for projections and their constituent corporate localities.



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Note – figures shown in tables 3 to 8 are rounded to the nearest 10, but cannot be assumed to be accurate to this level. These figures are indicative and should only be used to look at general trends and identify areas of particularly high or low demand.

Table 3. Future requirement for all care home (local authority & non-local authority funded) beds in Herefordshire localities; for people aged 65 and over

Area	2018	2019	2020	2021	2022	2023	2028	2033	2038
North Hfds	360	370	370	380	400	410	470	560	620
Hereford & surrounds	550	560	580	580	600	620	680	810	900
East Hfds	280	290	300	300	320	330	380	450	510
South Hfds	360	360	370	380	390	400	460	550	620
<b>total</b>	<b>1,540</b>	<b>1,580</b>	<b>1,610</b>	<b>1,650</b>	<b>1,700</b>	<b>1,740</b>	<b>1,980</b>	<b>2,370</b>	<b>2,650</b>

Table 4. Future requirement for Herefordshire Council funded residential home beds in Herefordshire localities; for people aged 65 and over

Area	2020	2020	2020	2020	2020	2020	2030	2030	2040
North Hfds	80	80	80	80	90	90	100	120	140
Hereford & surrounds	120	120	130	130	130	130	150	170	200
East Hfds	60	60	70	70	70	70	80	100	120
South Hfds	80	80	80	80	80	90	100	120	140
<b>total</b>	<b>340</b>	<b>340</b>	<b>350</b>	<b>360</b>	<b>370</b>	<b>380</b>	<b>440</b>	<b>510</b>	<b>590</b>

Table 5. Future requirement for Herefordshire Council funded nursing home beds in Herefordshire localities; for people aged 65 and over

Area	2020	2020	2020	2020	2020	2020	2030	2030	2040
North Hfds	70	70	70	70	70	80	90	100	120
Hereford & surrounds	100	110	110	110	110	110	130	150	170
East Hfds	50	60	60	60	60	60	70	90	100
South Hfds	70	70	70	70	70	70	90	100	120
<b>total</b>	<b>290</b>	<b>300</b>	<b>300</b>	<b>310</b>	<b>320</b>	<b>330</b>	<b>370</b>	<b>440</b>	<b>500</b>

Table 6. Future requirement for non-Herefordshire Council funded residential home beds in Herefordshire localities; for people aged 65 and over

Area	2020	2020	2020	2020	2020	2020	2030	2030	2040
North Hfds	100	100	100	100	100	110	120	150	160
Hereford & surrounds	150	150	160	160	160	170	180	220	230
East Hfds	70	80	80	80	80	90	100	120	130
South Hfds	90	100	100	100	100	100	120	150	160
<b>total</b>	<b>410</b>	<b>420</b>	<b>430</b>	<b>440</b>	<b>450</b>	<b>460</b>	<b>510</b>	<b>630</b>	<b>680</b>

*Table 7. Future requirement for all non-Herefordshire Council funded nursing home beds in Herefordshire localities; for people aged 65 and over*

Area	2020	2020	2020	2020	2020	2020	2030	2030	2040
North Hfds	120	120	120	130	130	140	160	190	210
Hereford & surrounds	180	180	190	190	200	200	220	270	300
East Hfds	90	90	100	100	110	110	120	150	170
South Hfds	120	120	120	130	130	130	150	190	210
<b>total</b>	<b>500</b>	<b>510</b>	<b>530</b>	<b>540</b>	<b>570</b>	<b>580</b>	<b>660</b>	<b>790</b>	<b>880</b>

*Table 8. Estimated number of clients with dementia in all care homes in Herefordshire localities; for people aged 65 and over*

Area	2020	2020	2020	2020	2020	2020	2030	2030	2040
North Hfds	280	290	290	300	310	320	370	440	510
Hereford & surrounds	440	440	450	460	470	480	540	630	730
East Hfds	230	230	240	240	250	260	300	360	420
South Hfds	280	280	290	290	300	310	360	430	500
<b>total</b>	<b>1,230</b>	<b>1,250</b>	<b>1,270</b>	<b>1,290</b>	<b>1,330</b>	<b>1,360</b>	<b>1,570</b>	<b>1,850</b>	<b>2,170</b>

## APPENDICES

### 1. METHODOLOGY

Projections of future demand for care home beds were generated by applying prevalence rates by single year of age and gender to projected estimates of the future resident population for each year, up to 2031<sup>3</sup>. Prevalence rates are defined as the number of people in care homes as a proportion of the resident population. Prevalence rates for HC funded and non-HC funded beds were based on different assumptions –

HC funded prevalence rates were defined as the annual average of the monthly number of clients in care homes, using snapshots extracted from Herefordshire Council's adult social care database (i.e. Mosaic) from January to December 2018, as a proportion of the most up to date estimate of the resident population<sup>4</sup>, by single year of age.

<sup>3</sup> [2016-based Subnational population projections. Office for National Statistics © Crown copyright 2018; Sub-Locality Population & Household Forecasts. Edge Analytics, for Herefordshire Council, February 2019](#)

<sup>4</sup> [The Office for National Statistics' Mid-2018 Population Estimates](#)

In the absence of any administrative data for non-HC funded care home placements, non-HC funded prevalence rates were estimated by combining historical data from the 2011 Census<sup>5</sup> with more recent data on the current number of beds from the Care Quality Commission (CQC) directory<sup>6</sup>. The number of non-HC beds was calculated by generating estimates for the combined number of HC and non-HC funded beds for five-year age bands and subtracting the number of HC-funded beds. Note that this group includes NHS funded and placements by other local authorities as well as self-funders.

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## 2. NOTE ON FUTURE POPULATION SCENARIOS

These estimates of future demand for care home beds are an update to unpublished figures produced in March 2018; incorporating the recent sub-county population projections commissioned from Edge Analytics<sup>7</sup> that consider how the population would change if recent trends in births, deaths and migration were to continue. They do *not* take into account local plans for anticipated levels of future housing development, since such plans tend to adopt optimistic housing growth targets as well as incorporating speculative planning permissions. However, if required, dwelling-led estimates can serve as upper limits to demand and for identifying areas around the county most likely to be impacted by future housing development.

The dwelling-led scenario would generate a requirement for a further 500 beds over the next 10 years for people aged over 65 and over for all care home bed types; which is a further 50 beds on top of the 450 stated elsewhere in this report. A further 50 beds would be required over the next 10 years for people aged under 65 as opposed to no change required as stated elsewhere in this report.

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<sup>5</sup> [2011 Census, Office for National Statistics © Crown Copyright Reserved. Table DC4210EWIa - Communal establishment management and type by sex by age](#)

<sup>6</sup> [CQC database at 1st July 2018](#)

<sup>7</sup> For further information about the future population estimates of Herefordshire and areas around the county see <https://understanding.herefordshire.gov.uk>

### 3. PROJECTED VERSUS OBSERVED NUMBERS OF CLIENTS

Chart 3. Projected and observed number of HC-funded care home beds required, per year, from 2008 up to 2041.

