



FLINTSHIRE'S RESIDENTIAL CARE SECTOR REVIEW 2024-2034

Contemporary and Projected Challenges, and Options Going Forward



*Preliminary Report – Pending Welsh Government projection updates
due summer 2025*

June 2024



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Summary

The purpose of this report is to review and update the residential care review completed in 2016, and to examine the changes the residential care sector, locally and nationally, is projected to experience by the year 2034. It will assess the current state of Flintshire's market as well as predict the likely situation in 2034 and offer recommendations to manage and mitigate the forecasted risks.

Following on from the 2021 Census, the latest Welsh Government population projections are due **in summer 2025**. These will be a complete rebasing of population statistics based on the Census results. Following the release of this data, more accurate predictions of future demand will be produced, and an updated report will be completed.

Updates since last review

Home Closures

There have been three general nursing home closures between 2019 and 2023, which has reduced available placements by 140 (107 general nursing placements and 33 residential placements). Another home closed but reopened the following year, further evidencing the instability of the market.

- Coed Duon, Holywell, closed in 2019 reducing capacity by a total of 34 beds (23 nursing and 11 residential)
- The Cottage, Mold, closed in 2022 reducing capacity by a total of 52 beds (42 nursing and 10 residential)
- Morfa Newydd, Greenfield, closed in 2023 reducing capacity by a total of 54 beds (42 nursing and 12 residential)
- Allerton Lodge, Holywell, closed in 2017 but reopened in 2018, which led to a reduction of 19 residential placements during the period of closure.

Capital Builds and New Services

There has been an overall increase in general residential and EMI residential provision since 2019 due to the following developments.

- Re-opening of Aston Hall Residential Home in 2018 which has provided an additional 29 residential placements.
- Opening of the Oaks Care Home in 2020 which has provided an additional 25 EMI residential placements.
- Expansion of Marleyfield House in 2021 (in-house care home) which has increased the number of placements available to 64, including 16 short-term discharge to recover and assess placements.



- Ty Treffynnon was opened in 2020 at the site of Coed Duon as step down facility to support during the COVID pandemic. This has since been closed.

Variations in Market Provisions

Rhiwlas Care Home has changed from providing both general nursing and general residential care, to solely providing general residential care. This has resulted in Flintshire's overall capacity receiving a further decrease of 43 general nursing placements, but an increase of 37 general residential placements.

Sycamore Lodge Residential Home has changed from solely providing EMI residential to solely providing general residential, simultaneously reducing EMI residential and increasing general residential by 16 placements.

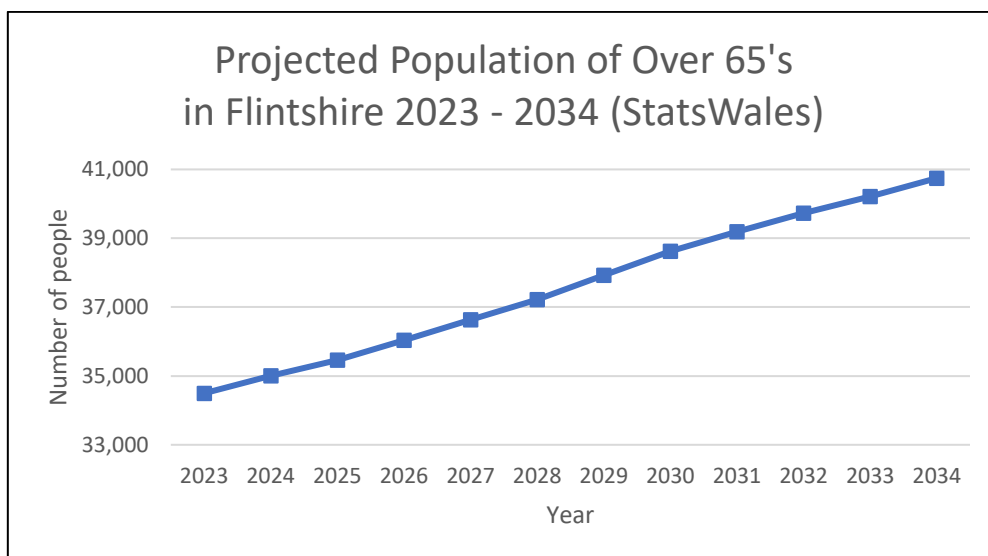
Ty Cerrig, The Glynne and Haulfyn have also changed from solely providing EMI residential care to providing both general residential and EMI residential, resulting in 65 placements now have dual capacity.

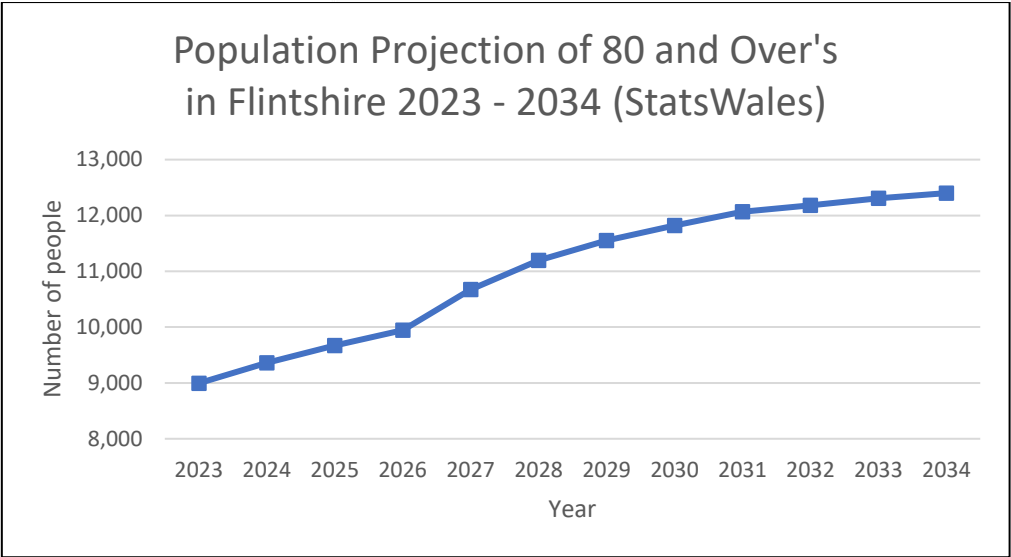
Population Projections

Population Projections in Flintshire

According to the 2021 Census, as of 21 March 2021 the total population in Flintshire aged 65 and over was 33,229 and total population aged 80 and over was 8,309.

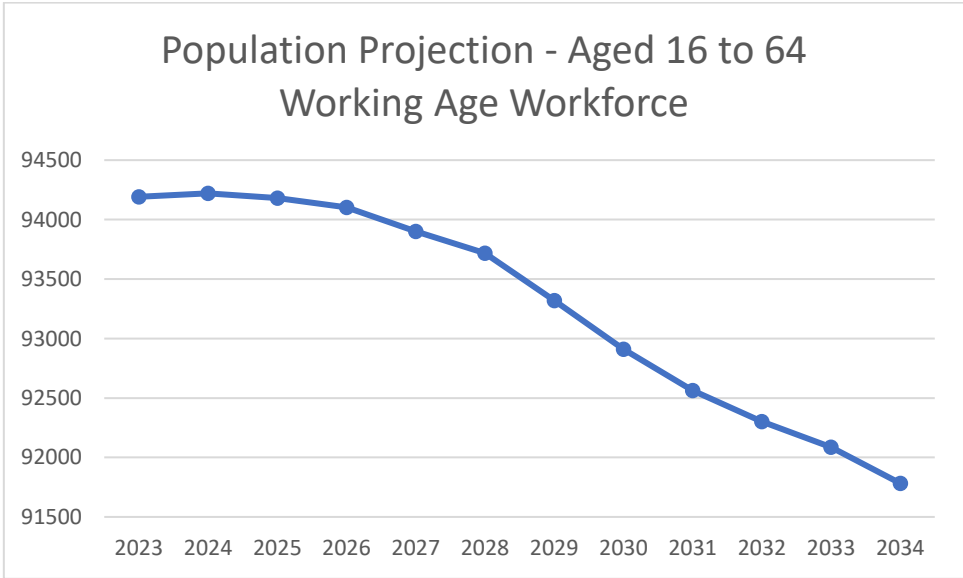
Using Welsh Government population projections, we can report the number of people aged 65 and over in Flintshire is expected to increase by 18.11% (6,248) between 2023 and 2034, whilst the number of people aged 80 and over is expected to increase by 37.86% (3,405).





The proportion of older people in the population is projected to continue to increase until 2040. The changes are then predicted to begin levelling off as can be seen in [Appendix A](#).

In contrast, during the same period, the working age population is due to decrease by 2,407, which is another factor to be taken into consideration.



Source StatsWales, 2023, 2018-based local authority population projections for Wales, 2018 to 2043. Welsh Government: Cardiff.

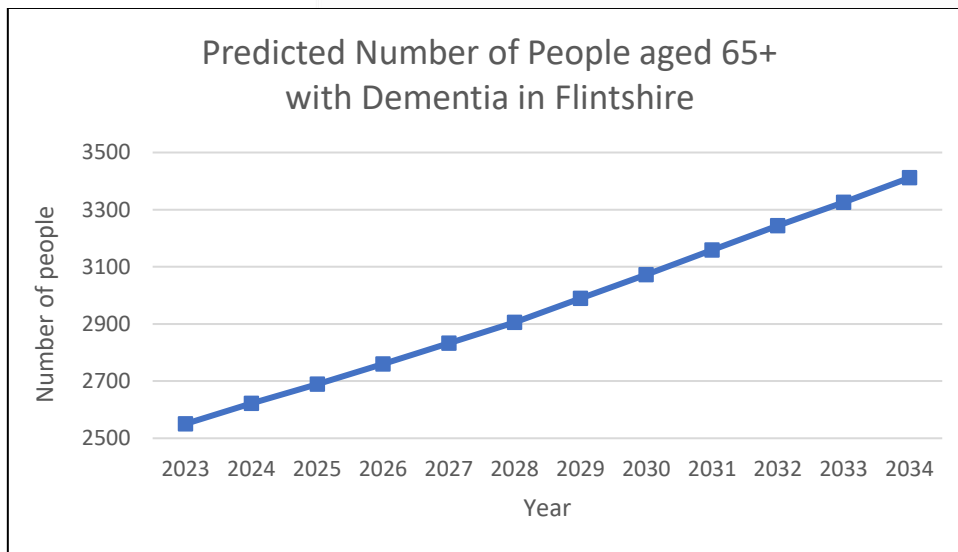
Dementia Projections

Projected increase in the number of people living with dementia in Flintshire

As people live longer, it is estimated that the number of cases of dementia will increase, as age is the biggest known risk factor.



The chart below shows the projected increase in the number of older people with dementia in Flintshire between 2023 and 2034. There is predicted to be a 33.71% increase by 2034 (860 people).



Projected number of people aged 65+ years in Flintshire, 2023 to 2034
Source: Social Care Data Wales.

The Regional Partnership Board have advised the Welsh Government’s new sub-national projections are due in summer 2024 and the RPB will be able to provide an update on projections of dementia following the publication of this data. However, we do know that as the number of people in the older age groups is likely to continue to increase, then the number of people with dementia within the population is also likely to increase.

Cost Projections for Wales

The projected increase in the number of older people with dementia in Wales by 2040 is 70% ([Appendix B](#)), with costs across the sectors predicted to increase on average by 157%. ([Appendix C](#)).

The majority of the cost of dementia care in Wales lies with Social Care, which is predicted to see an increase of 176% to £2.1 billion ([Appendix C](#))

Current Capacity in Flintshire

Historically there has been a shortage of placements in Flintshire which has led to placements out of county.

There has been an overall increase in residential provision since the last report, however Flintshire continues to have a shortage of Nursing and Nursing EMI placements for Older People.



The introduction of the Regulation and Inspection of Social Care (Wales) Act 2016 has meant the type of services provided by Care Homes can be more varied and fluid, which allows placements to change category dependant on demand.

For the purposes of market analysis and reporting, the information in this report has been split into the four traditional categories of care.

Capacity in Flintshire to support older people (65+) in long term care (2023)

Total 25 homes
 3 Local Authority owned offering in-house provision
 22 Independently owned homes
 Total 736 placements

The table below illustrates an estimate of the market, dual category beds have been split evenly for the purpose of reporting.

Flintshire Placements	Residential Care	Residential EMI	Nursing Care	Nursing EMI
	371	218	103	44

Flintshire currently commission 38% of placements in independently owned homes in the county and fund 116 placements in other counties (as at 01 October 2023).

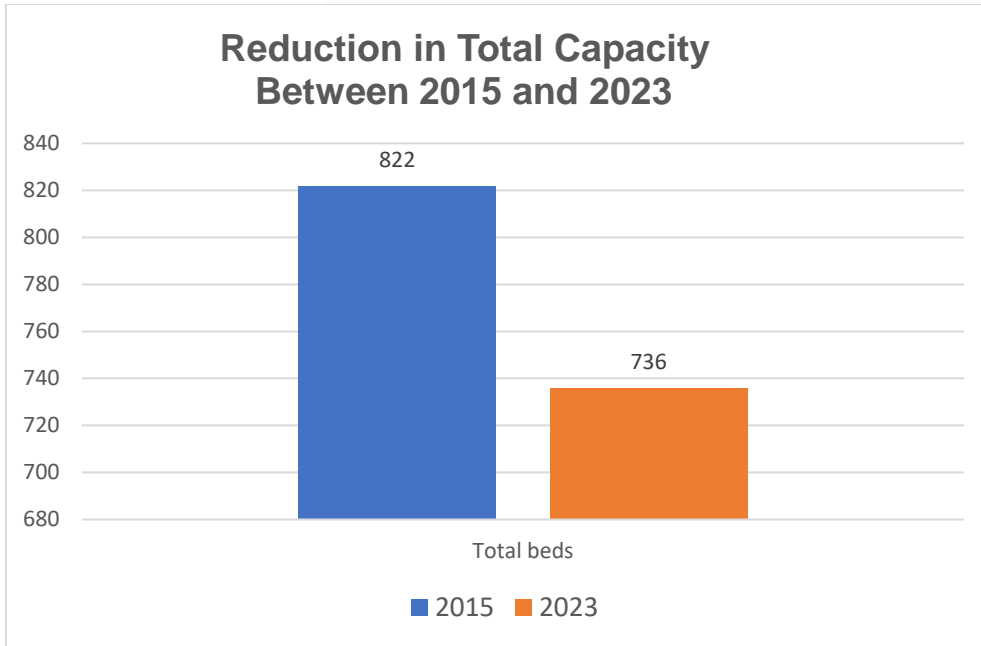
Out of County Placements	Residential Care	Residential EMI	Nursing Care	Nursing EMI
29		43	11	33

Comparison with 2015

Capacity in Flintshire to support older people (65+) in long term care (2015)

Total 26 homes
 3 Local Authority owned offering in-house provision
 23 Independently owned homes
 Total 822 placements

Comparison	Total Capacity
2015	822
2023	736
Decrease	-86



Split by Category	Residential Care	Residential EMI	Nursing Care	Nursing EMI
2015	316	238	230	38
2023	371	218	103	44
Increase / Decrease	+55	-20	-127	+6

The figures above show a reduction in EMI residential placements in 2023, however 65 placements are dual category and can provide both residential or EMI residential care, based on demand. The 65 placements have been split evenly for the purpose of reporting.

As you can see, Flintshire have 127 less Nursing placements in 2023 compared to 2015, and despite the increase of in-house provision, the overall capacity across the county has decreased by 86 placements.

Demand

With population forecasts predicting Flintshire’s older population will continue to increase over the next 10+ years, together with the increasing number of people with dementia, it is safe to assume the number of people with significant health and social care needs will increase.

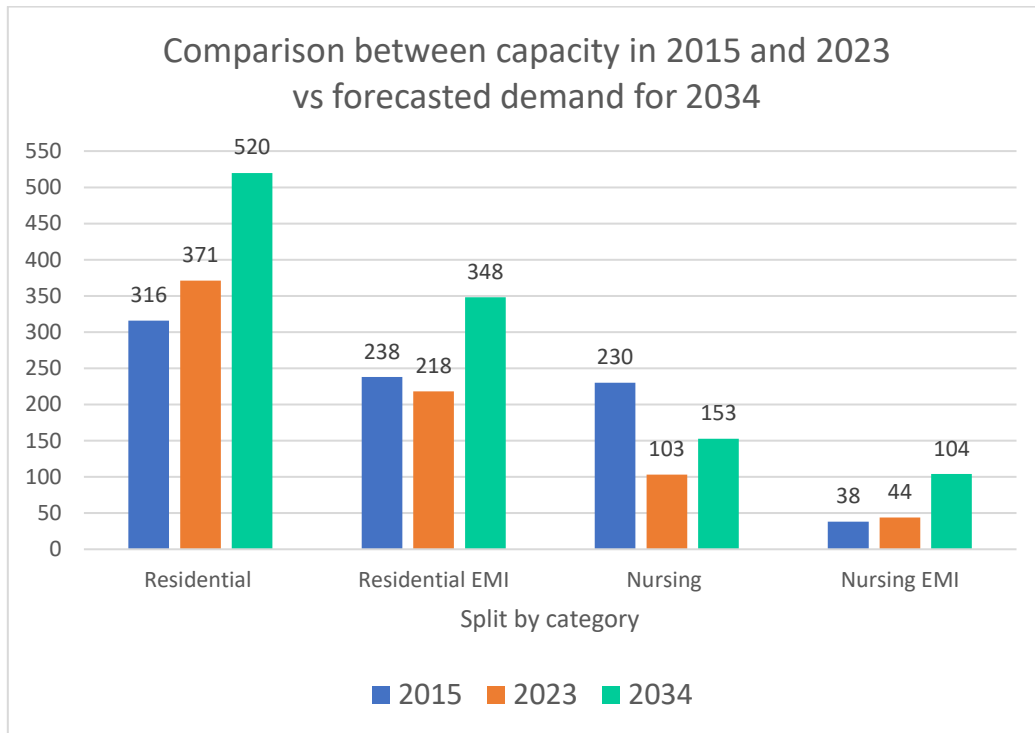
Forecast for Flintshire

By using the population projections for Flintshire and dementia prevalence figures from Dementia UK update 2014, Alzheimer’s Society, we can calculate an at-risk population, the demographic most at risk of having significant health and social care needs and therefore will require residential based services.



The estimated increase in the at-risk population between 2023 and 2024 is 35%. ([Appendix D](#)). Therefore, the estimated increase in demand for residential based placements for the same period is 35%.

The graph below shows a comparison of capacity in Flintshire between 2015 and 2023, compared to the forecasted demand for care in 2034.



Based on the increase in forecasted demand, it is predicted Flintshire will have a shortfall of 389 placements by 2034 ([Appendix E](#)).

Shortfall in placements	Residential Care	Residential EMI	Nursing - General	Nursing EMI	Total
	149	130	50	60	389

This is based on the assumption that all Flintshire homes remain open with the same levels of capacity, and the placements Flintshire fund in other counties remain available.

Future Proposals

Plans in Progress

- Plans are currently in place for an additional 25 residential placements in the proposed Croes Atti Newydd development in Flint (in-house care home). This will be an increase of 13 long term residential/EMI residential placements, as



12 placements are due to be designated to support the discharge to assess and recover programme developed with the Health Board.

- An additional 47 placements (27 nursing and 20 EMI nursing) will be made available when The Cottage in Mold reopens (independent care home). This is anticipated July 2024 subject to completion of building works and CIW registration.

Potential Options Under Consideration

- Expansion of the in-house care home Llys Gwenffrwd in Holywell.
- Development of a fourth in-house care home within Flintshire.

Additional information

Extra Care Schemes

To date, Flintshire County Council have developed 4 Extra Care Schemes offering enhanced housing and support services, to enable individuals to remain in the community for longer.

The current provisions are 239 apartments, including 30 specially adapted for people living with dementia (the actual number of people supported in extra care will be greater than this as some apartments are 2 bedroom).

- Llys Eleanor (Shotton) – 50 apartments for individuals aged 60 years and over with an assessed support need.
- Llys Jasmine (Mold) – 61 apartments for individuals aged 65 years and over with an assessed support need, including 15 specially adapted for people living with dementia.
- Llys Raddington (Flint) – 73 apartments for individuals aged 60 years and over with an assessed support need, including 15 specially adapted for people living with dementia.
- Plas Yr Ywen (Holywell) – 55 apartments for individuals aged 50 years and over with an assessed support need.

Extra Care Schemes	July 2015	August 2023	Total increase
Number of apartments	111	239	128

Although these are not care home placements, the additional support Extra Care can provide individuals in the community may delay the need for residential based services, which will influence Flintshire’s capacity.



At the point where residential based services may be required, the length of time a placement is needed is likely to be shortened, however, the needs of the individual are likely to be higher and require more specialist support.

Residential and Nursing Fee Rates / Increases

Over recent years Flintshire County Council have worked closely with providers and have applied significant increases to their fee rates to help the market become more sustainable and with the intention to reduce further home closures. The fee increases take into consideration the Welsh Government's policy around real living wage, the cost of care, and the standard inflationary increases all businesses face.

Category	2015/16 rate	2023/24 rate	% increase
Residential Care	£ 465.90	£ 727.55	56.16 %
Residential EMI	£ 509.72	£ 821.58	61.18 %
Nursing	£ 523.83	£ 852.94	62.83 %
Nursing EMI	£ 549.00	£ 915.61	66.78 %

Conclusion

Flintshire's older population continues to rise significantly, and it is reasonable to assume the number of people with significant health and social care needs will also increase. The projections identified in this report support the need for Flintshire's current plans for future developments, and the potential options under consideration.

However, with a predicted shortfall of 389 placements by 2034, it is evident further action is needed for Flintshire to be able to meet the increasing demand and support its aging population, and considerations need to be taken into how we might meet the predicted shortfall in placements for Flintshire as a whole.

We need to consider what services we can develop to enable people to remain in the community as long as possible, whilst considering ways to influence the independent market to meet the growing demand and finding ways to address the predicted shortfall.

We also need to be conscious of the stability of the market, as the predicted shortfall is based on the current capacity continuing to be available with no further home closures.

Potential considerations could include.

- In addition to the Croes Atti Newydd development, expansion of the third in-house care home in Holywell, to support Flintshire in meeting the shortfall in residential and residential EMI placements.
- Development of a fourth in-house care home within Flintshire, to support in meeting the predicted shortfall in residential based placements.
- Encouraging market development in the sector for the areas we have a shortfall, for example considering changes in category of care to meet demand.



- Partnership working and cross sector collaboration with the Local Health Board for the delivery of additional nursing placements.
- Additional Extra Care facilities to assist in supporting people to live longer in the community.
- Other community based social enterprises and/or in house developments to delay the need for residential based services.

There has been a particular reduction in nursing placements since 2015 and Flintshire cannot afford for this pattern to continue. Gwynedd Council are in a similar position to Flintshire as there is also an under-provision of nursing home placements in the county. Gwynedd Council are proposing to develop an in-house nursing home, in partnership with Betsi Cadwalader University Health Board, and this is potentially an option Flintshire could also consider.

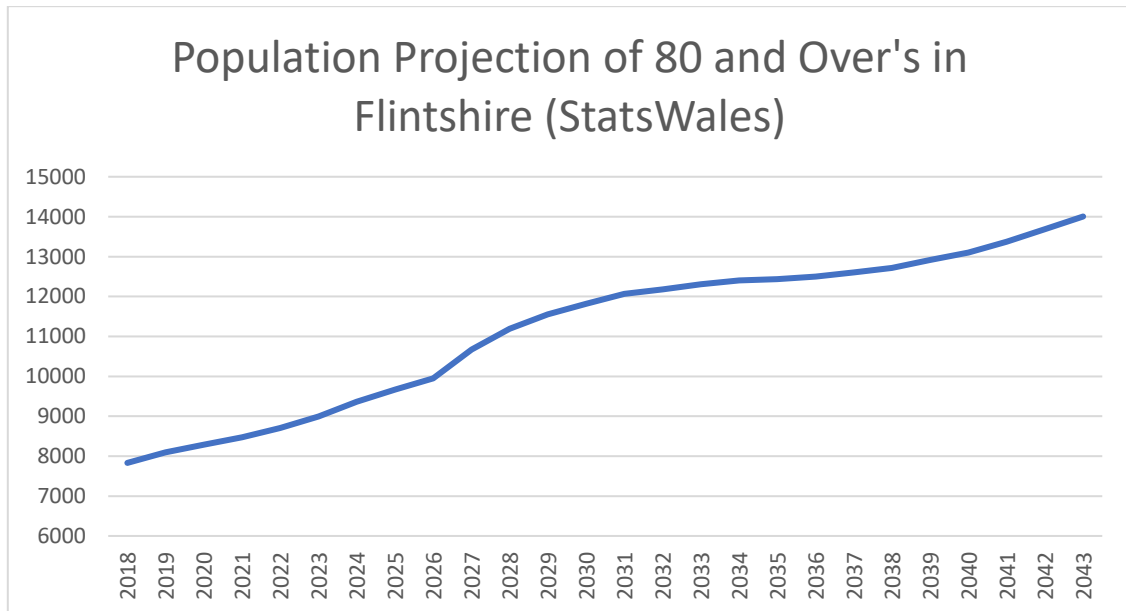
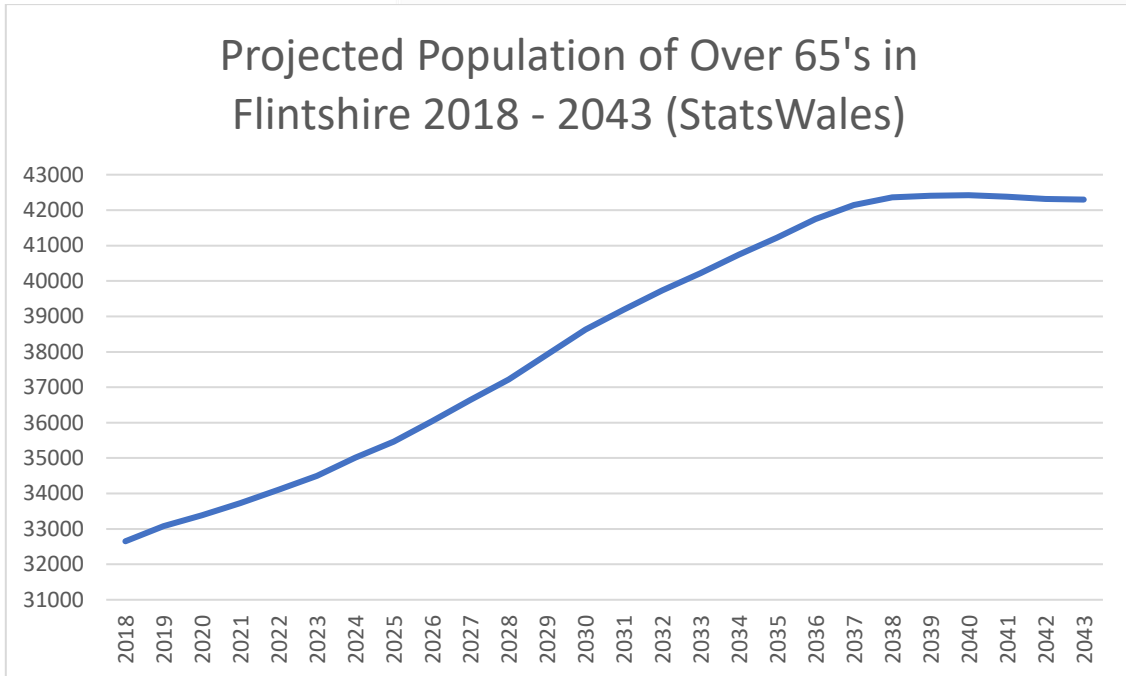
Welsh Government are in the process of consulting on the legislative changes being proposed by the Rebalancing Care and Support Programme. Once agreed, Flintshire will need to work with any changes the legislation introduces.



Appendices

Appendix A

Population Projections in Flintshire



Source StatsWales, 2023, 2018-based local authority population projections for Wales, 2018 to 2043. Welsh Government: Cardiff.



Appendix B

Projected number of older people in Wales with dementia 2019–2040

2019	2020	2025	2030	2040	% Change
46,800	48,100	55,700	64,200	79,700	70%

Source: CARE POLICY AND EVALUATION CENTRE CPEC. Research at LSE, 2019, Projections of older people with dementia and costs of dementia care in the United Kingdom, 2019–2040.

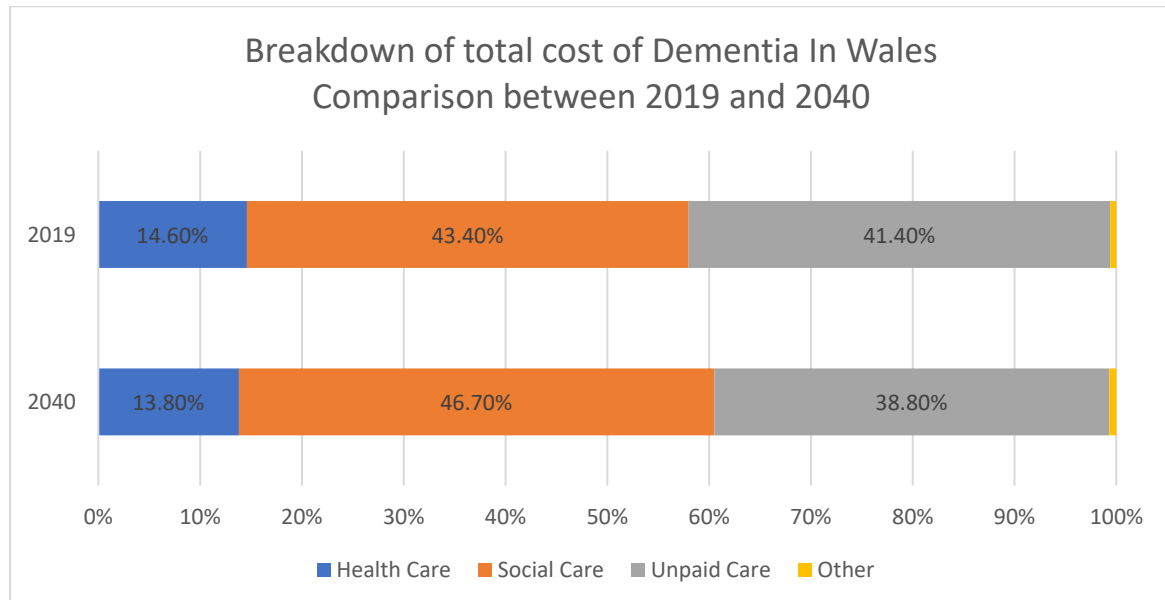
Appendix C

Cost Projections for Wales

	2019 £million	2020 £million	2025 £million	2030 £million	2040 £million	% Change
Healthcare	260	270	330	410	630	143%
Social Care	770	830	1060	1350	2130	176%
Unpaid Care	740	770	950	1190	1770	141%
Other	9	12	16	20	30	221%
Total	1780	1880	2350	2980	4560	157%

Source: CARE POLICY AND EVALUATION CENTRE CPEC. Research at LSE, 2019, Projections of older people with dementia and costs of dementia care in the United Kingdom, 2019–2040.

Cost comparison between 2019 and 2040



Source: CARE POLICY AND EVALUATION CENTRE CPEC. Research at LSE, 2019, Projections of older people with dementia and costs of dementia care in the United Kingdom, 2019–2040.



Appendix D

Demand forecasts for Flintshire (Calculations)

Dementia Prevalence rates - consensus estimates of prevalence of dementia (Prince, 2014), (Alzheimer’s Society, Dementia UK Update 2014).

Age Group	Prevalence Rates
65-69	1.7%
70-74	3.0%
75-79	6.0%
80-84	11.1%
85-89	18.3%
90-94	29.9%
95+	41.1%

Age Group	2023 Population Estimates	Number of people with Dementia	2034 Population Estimates	Number of people with Dementia
65-69	8,859	151	11,059	188
70-74	8,676	260	9,841	295
75-79	7,967	478	7,445	447
Total		889		930

Calculation of at-risk population

Number of people with of dementia aged 65-79 (population estimates x prevalence rates) + population aged 80 and over

	Numbers of people	2023	2034	Change number	% increase of at risk population
Aged 65-79 with Dementia		889	930	41	
Aged 80+		8,995	12,400	3,405	
Total		9,884	13,330	3,446	35%

Therefore the increase in the at risk population by 2034 is 35%

*Numbers rounded to the nearest whole number



Appendix E

Forecast of demand for placements by 2034

	Total Res	Total Res EMI	Total Nurs	Total Nurs EMI	Totals
Flintshire Capacity 2023	371	218	103	44	736
Less Vacancies	-15	-3	-1	0	-19
Plus FCC Funded Placements Out of County	29	43	11	33	116
Demand in 2023	385	258	113	77	833
x 35% increase in at risk population	135	90	40	27	292
Forecasted Demand for 2034	520	348	153	104	1125
Less Flintshire Capacity at in 2023	371	218	103	44	736
Shortfall in placements by 2034	149	130	50	60	389

In order to accurately reflect the current market provisions, we have calculated the average number of vacancies for a 5 week period from 30 August 2023 to 02 October 2023, rounded to the nearest whole number, and used these figures in our calculations.