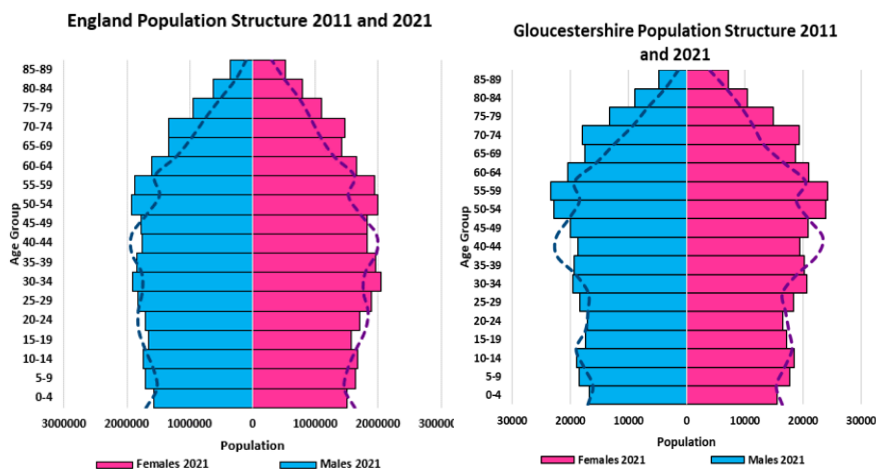


## Appendix 1 About Gloucestershire and its population



[Gloucestershire<sup>1</sup>](#) has a population of 646,627 and is made up of six districts: Gloucester, Cheltenham, Forest of Dean, Stroud, Tewkesbury, and Cotswolds. The county has a diverse population, which presents challenges for planning social care. The population pyramid indicates an ageing population, with more older individuals than younger ones. The gender distribution is almost equal, with slightly more females than males.

**Figure 1 – Population Age Pyramids – England & Gloucestershire 2011 & 2021**

Gloucestershire has a relatively affluent population, leading to longer and healthier lives compared to the national average. This results in a faster ageing rate compared to the rest of the country. Between 2010 and 2020, the number of residents over the age of 65 increased by 26.3%, which is higher than the South West region (24.19%) and England (22.19%).

While the working age population increased in the region and England, Gloucestershire saw a smaller increase. Additionally, there is a higher percentage of households not in work and a significant number of unemployed individuals. The county also experiences a net loss of young people, with Bristol attracting more young residents while Gloucestershire loses them.

The ageing population will bring benefits in terms of experience and resources, but it will also require more support from health and social care services. The slower increase in the county's working age population may result in a higher financial burden for them. Dependency ratios highlight this issue, with a higher ratio of dependents aged 65+ for every 100 working age people in Gloucestershire compared to England and the South West. Projections indicate that this situation will worsen, with more older people and fewer working age individuals by 2039.

Over half of Gloucestershire is designated as an Area of Natural Beauty. The county has good access to major motorways, making it convenient for travel to different regions. This makes it attractive for businesses and residents, but it also affects housing affordability. In 2022, the affordability ratio for purchasing a median priced property was higher in Gloucestershire compared to England and the region. The affordability ratio varies within the county, with Gloucester being the most affordable and Cotswold district being the least affordable. Holiday homes also impact house prices, accounting for a small percentage of the dwelling stock in Cotswold district.

### **A rural county**

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Gloucestershire has a large amount of its area classified as rural and 30.5% of the population live in rural areas. In 2021, there were 243 residents per square kilometre in Gloucestershire, which is lower than the national average. However, there is significant variation in population density between districts, with Cheltenham and Gloucester having much higher densities compared to Cotswolds.

As well as being one of our best assets, the rural nature of the county poses challenges for some residents, as it can make it difficult to access necessary services and employment opportunities. Additionally, the lack of access to a car or van is a particular challenge for 15% of Gloucestershire households. The recent cost of living pressures have worsened these issues for some residents.

#### A (mostly) affluent county

Gloucestershire is mostly an affluent county, ranking among the least deprived 20% of Local Authorities in England. However, there are pockets of need where residents' outcomes fall below national averages. About 3.1% of the population live in areas of high deprivation, with significant differences in life expectancy between the most and least deprived areas.

#### An ageing county, with a reducing workforce

The population of Gloucestershire has increased by 8.1% between 2011 and 2021, with Tewkesbury district being one of the fastest growing areas. This growth is likely due to internal migration of working age people within the county, rather than an influx of new residents.

Overall, Gloucestershire faces various challenges and disparities, as highlighted in Figure 2.

#### One Gloucestershire ICS Context

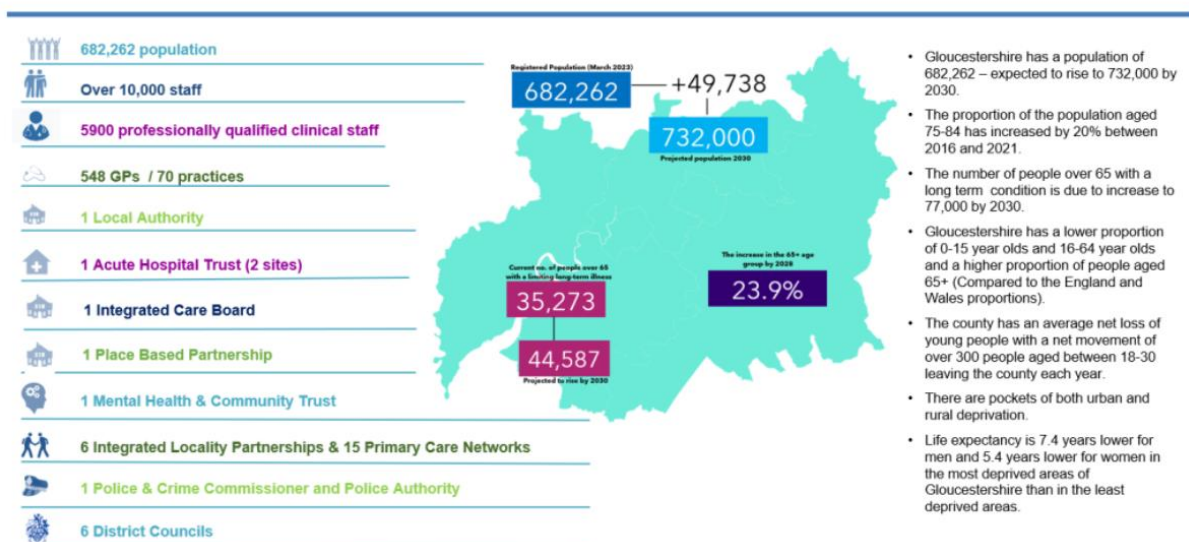


Figure 2 - About Gloucestershire (ICB Interim Strategy 2023)

#### Addressing the challenges

The urgent need to address significant future growth in Gloucestershire is driven by an aging population and increased dependency. To attract workers to the county, action must be taken



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now. Tackling inequalities and promoting good health and work are important for reducing the need for social care, benefiting the economy. These challenges align with the County Council's [Building Back Better](#) (Gloucestershire County Council, 2022), and our [One Gloucestershire Integrated Care](#) strategies – see Figure 2 (One Gloucestershire ICS, 2022). Linked to our current [Health and Wellbeing Strategy](#) (Gloucestershire Health and Wellbeing Board, 2020), the latter provides the local blueprint for delivering better health and care with and for the people in the county with a clear focus on prevention, ensuring independence, resilience and equity through working in collaboration with our communities.

The Council and its providers are currently facing various pressures, including flow, inflationary increases, cost of living, and recruitment and retention. The [Vision 2050<sup>2</sup>](#) (Gloucestershire County Council, n.d.) highlights the future predictions for adult social care and emphasizes the importance of taking action to address workforce challenges.

The prevalence of needs of the different vulnerable people in Gloucestershire are captured within the documents listed below.

- Population projections 2018 – 2043 (Gloucestershire County Council, 2018)
- Older Persons Prevalence of need 2020 (Gloucestershire County Council, 2020)
- Learning Disabilities and Autism Needs Analysis (Gloucestershire County Council, 2019)
- Physical Disabilities and Sensory Impairment Needs Analysis (Gloucestershire County Council, 2016)
- Mental Health and Wellbeing Needs Analysis (Gloucestershire County Council, 2017)
- Equality and Diversity Report (Gloucestershire County Council, 2023)
- Market Position Statement 2018-2019 (Gloucestershire County Council, 2018)
- Market Sustainability Plan 2023 (Gloucestershire County Council, 2023)

### **Factors Impacting on Social Care Provision in Gloucestershire**

**Older people** Two trends in ageing are likely to drive future demand for social services: firstly, the demographic ‘surge’ of people born in the 20 years after the second world war who are now reaching retirement; and secondly, the increased longevity of that population. The number of adults aged 18-64 years in Gloucestershire is projected to increase by 6.6% between 2018 and 2043, whilst the 65 and over age group is projected to increase by 52.5% during the same period. These increases are higher than the projected increases for these age groups in England over the same period.

**People with a disability** In Gloucestershire in 2021, an estimated 28,600 people aged 65 years and over have a long-term illness or disability that limits their day-to-day activities a lot. The number is predicted to increase by 26% to 36,000 people by 2030 with rates of increase highest in the 85 and over age group (up by 33%). It is estimated that in 2021 there were 3,450 people in Gloucestershire aged 18-64 who have a serious personal care need and 15,800 who have a moderate care need, as a result of a physical disability. Both numbers are expected to increase slightly between 2020 and 2025 and then to fall slightly between 2025 and 2030. Most of the increase is expected to be in the 55-64 age group.



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There has been a rise in the number of people with a neurological condition/Acquired Brain Injury who require support. The number of adults aged 18+ in Gloucestershire is projected to rise from 492,300 to 576,600 between 2015 and 2039, with the 18-64 age group predicted to grow by 1.8% and the over-65s by 66.6% in the same period. More than half of carers caring for people with a physical disability or sensory impairment are full time carers providing care for at least 35 hours each week.

**People with a learning disability** Estimated projections suggest that in 2023 there will be approximately 12,284 people aged 18+ living with a learning disability in Gloucestershire equating to 2.3% of the adult population. Of this group, about 2,503 are estimated to have moderate or severe learning disabilities, equating to 0.5% of the adult population<sup>3</sup>. In 2021/22 Gloucestershire GPs recorded that 0.7% of their registered patients were known to have a learning disability; this was higher than the England figure of 0.5%<sup>4</sup>. Those aged between 18 and 64 accounting for three-quarters of the total. The rate of increase in the next 10 years is predicted to be most steep in the older age groups. A higher percentage of care homes for people with learning disabilities are higher rated by CQC with all homes in Cheltenham and Cotswold rated as good or outstanding.

**People with Mental Health needs** The number of people in Gloucestershire diagnosed with schizophrenia, bipolar affective disorder or other psychoses has increased from 4,446 in 2012/13 to 5,177 in 2018/19, a rise of 16.4%. Following the pandemic there is an increase in some conditions such as disordered eating. Nearly six in ten carers caring for people with a mental health need have a long-term illness or disability. Compared to other carers, they are also more likely to experience mental health problems themselves.

**Carers** In the 2021 Census there were 51,862 unpaid carers 8.9% of the population (reduction from the 2011 census 62,644 unpaid carers (10.5% of the population), the majority of whom were aged 50 or over (64%). National studies show that 40% of unpaid carers look after a parent, 18% look after a spouse, partner, or cohabitee, and 17% look after a son or daughter. The ageing population is likely to lead to a substantial increase in the number of mutual carers as older couples provide care and support to each other. We expect the number of carers to rise by 50% in the next 5-10 years.

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<sup>1</sup> JSNA <https://www.gloucestershire.gov.uk/media/2122968/current-population-of-gloucestershire-2021.pdf>

<sup>2</sup> Gloucestershire County Council, Vision 2050 <https://www.gloucestershire.gov.uk/glos2050/what-is-the-vision/>

<sup>3</sup> Learning Disability Profile, OHID <https://fingertips.phe.org.uk/profile/learning-disabilities>

<sup>4</sup> National General Practice Profiles, OHID, <https://fingertips.phe.org.uk/profile/general-practice/data#page/4/gid/2000004/pat/223/ati/221/are/nE54000043/iid/200/age/1/sex/4/cat/-1/ctp/-1/yr/1/cid/4/tbm/1>