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Horizon scanning 2026–2035: what will shape health and social care in Cardiff and Vale

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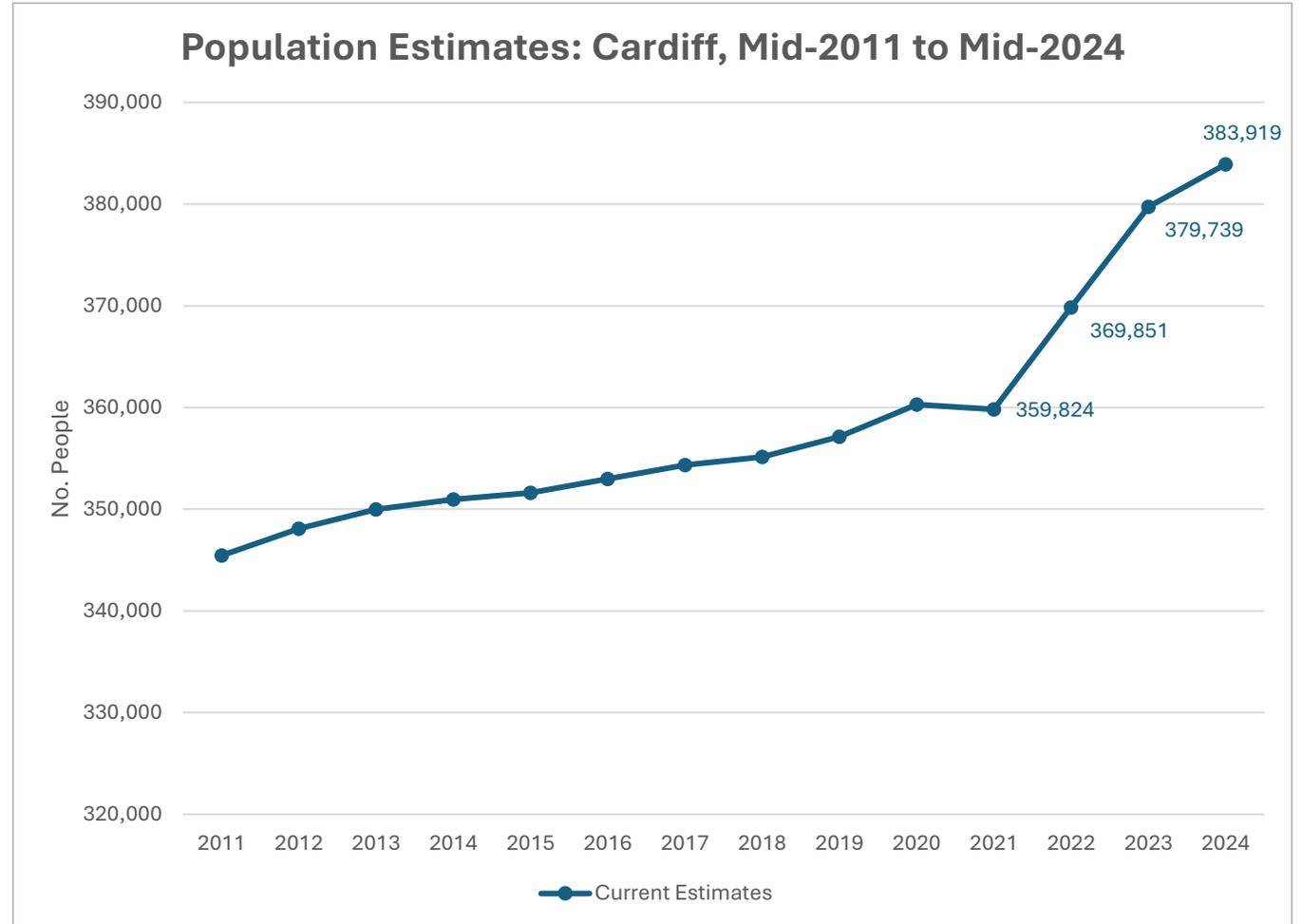
Total Population: 2011 - 2024

Cardiff:

- Overall: 383,919
- Steady growth 2011-2021
- Then rapid growth 2022-24

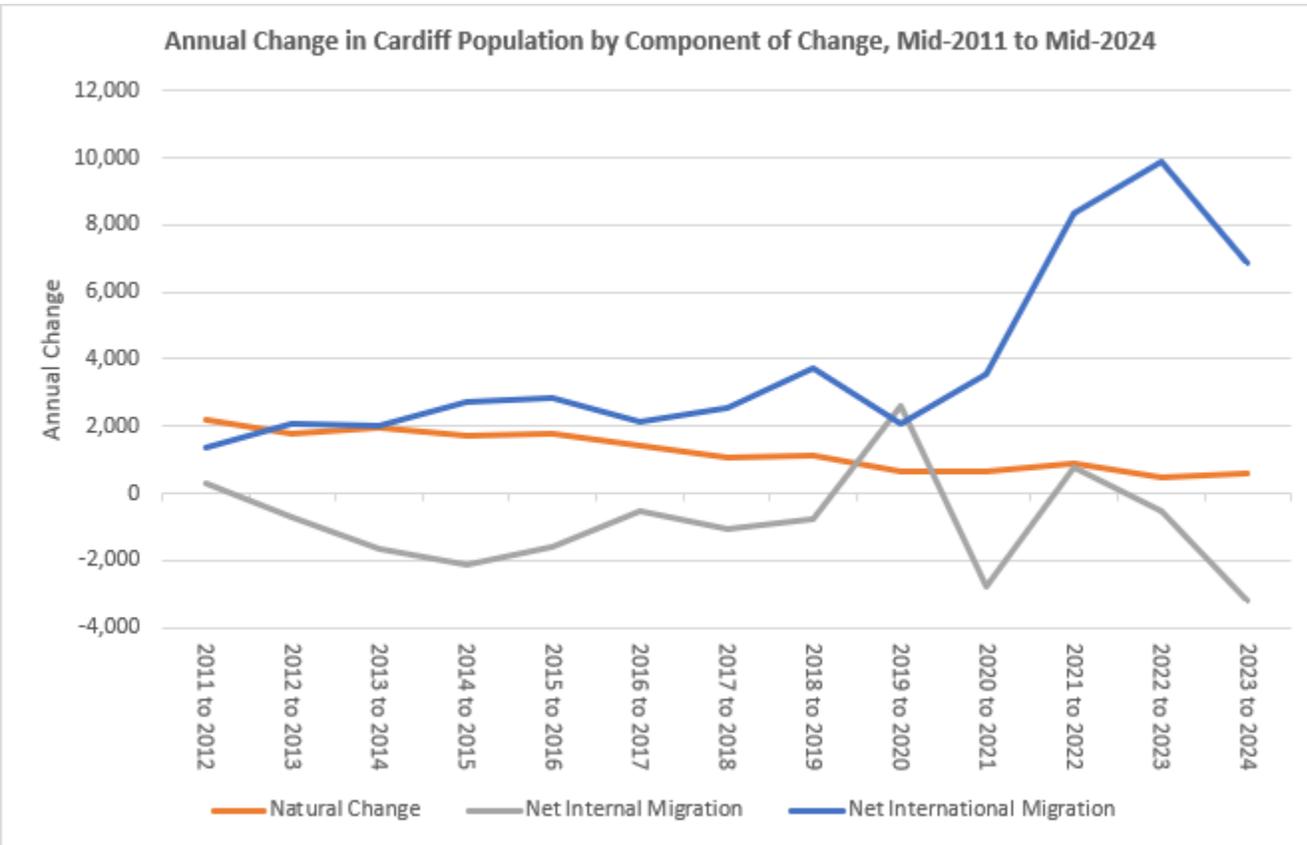
Vale of Glamorgan:

- Overall: 135,743.
- Steady growth year on year over the past decade (from 126,000 in 2015)



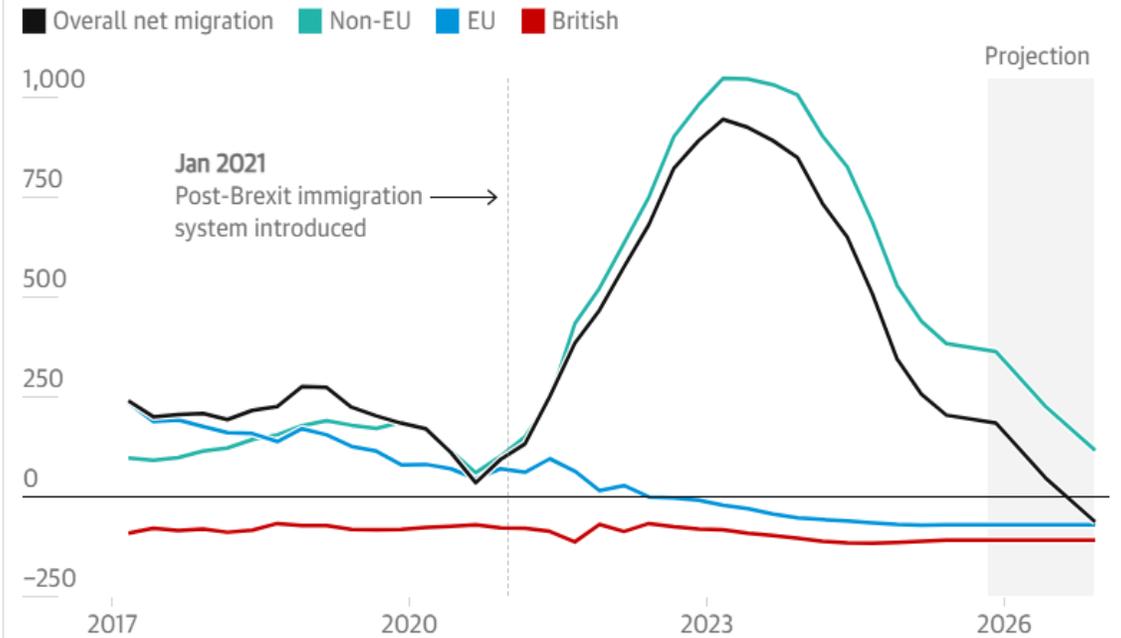
Source: Mid-Year Population Estimates, ONS

International Immigration



Net migration could become negative by the end of 2026

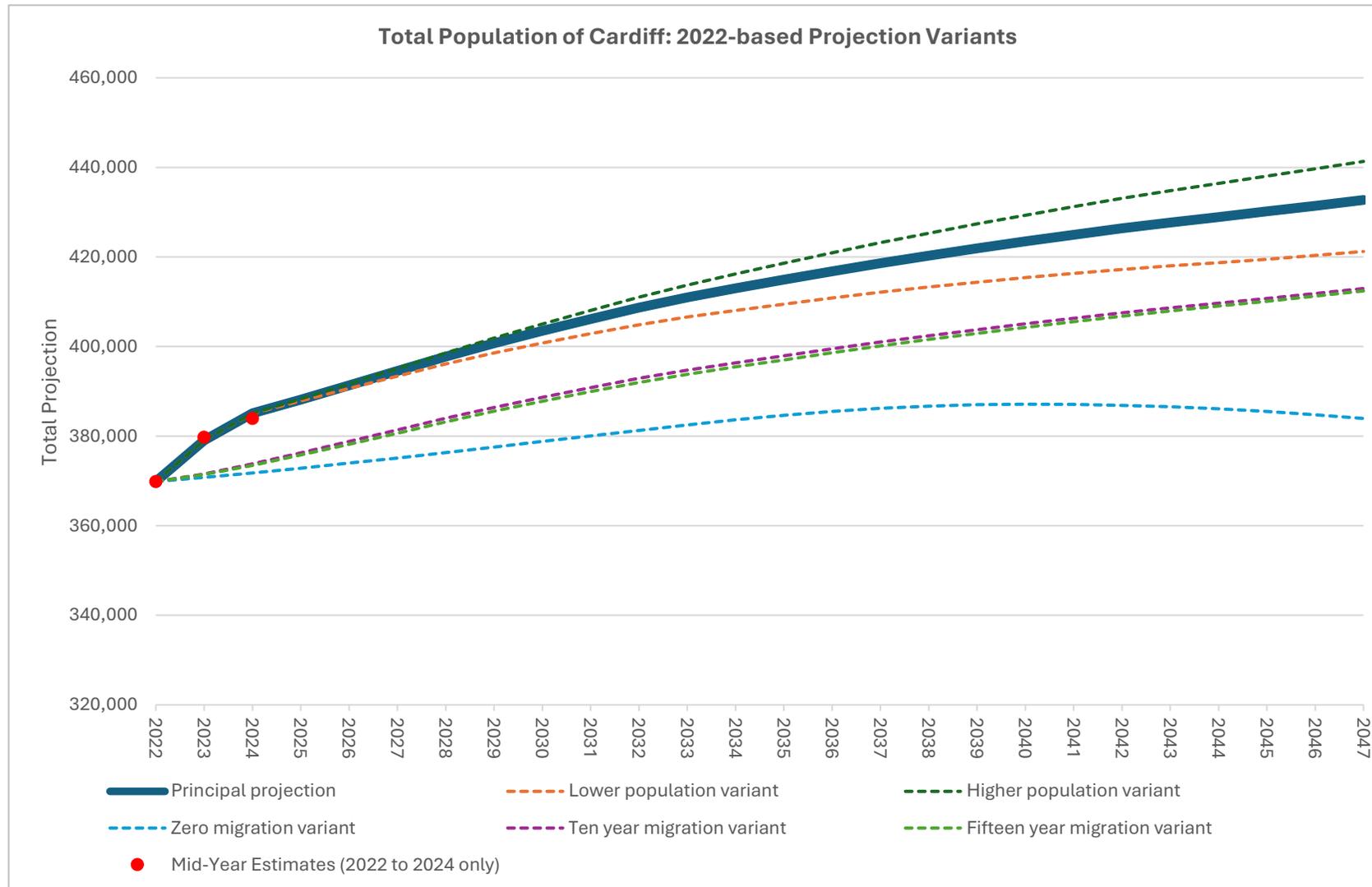
Net migration to the UK, thousand people



Guardian graphic. Source: ONS, projected data by James Bowes, Warwick University

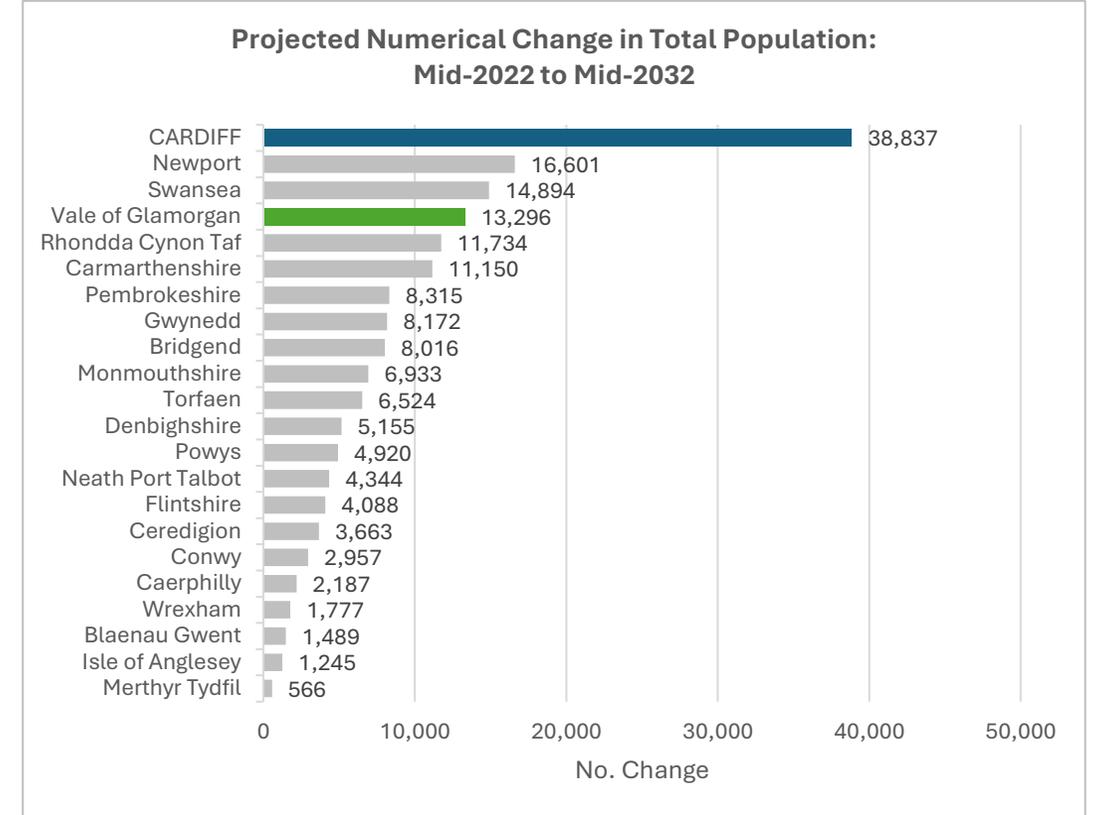
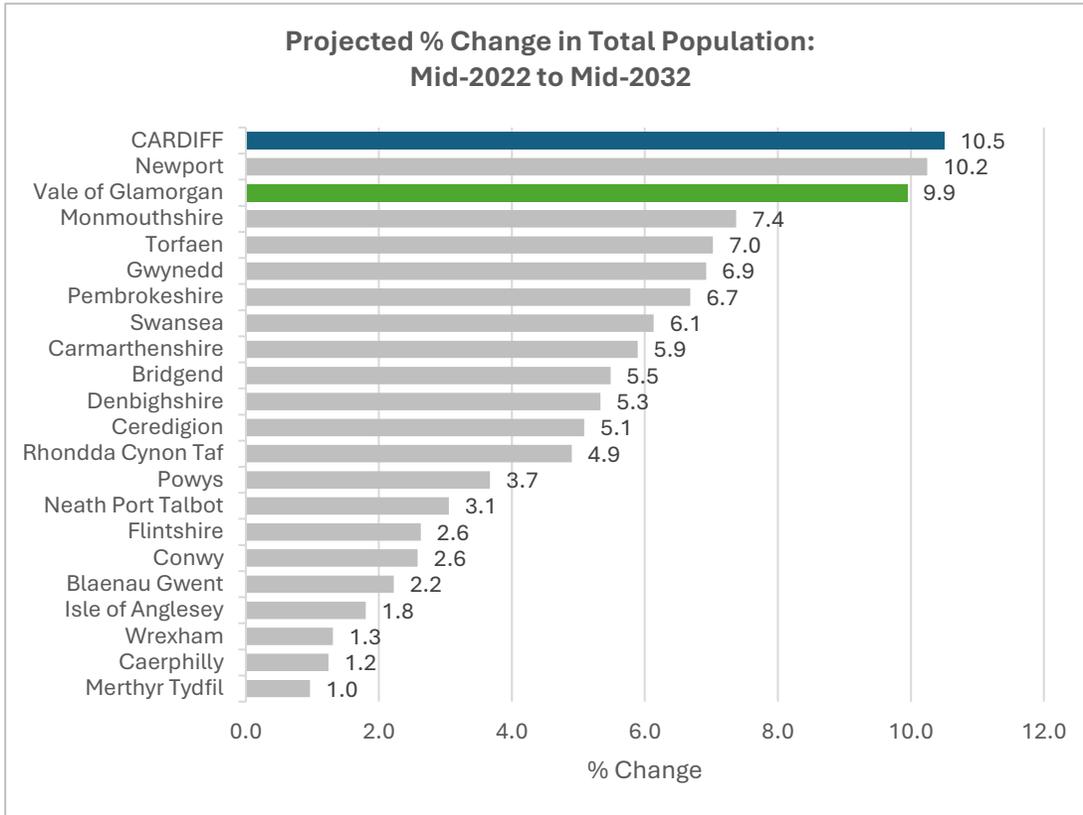


Cardiff Total Population: Looking ahead

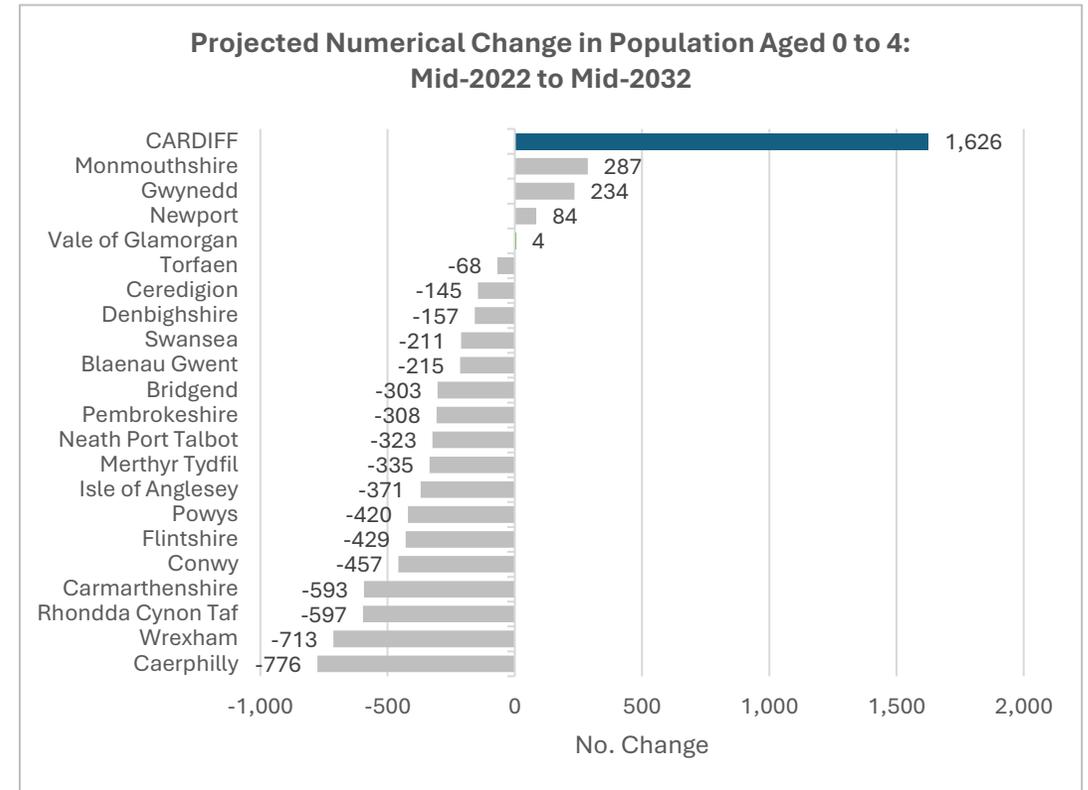
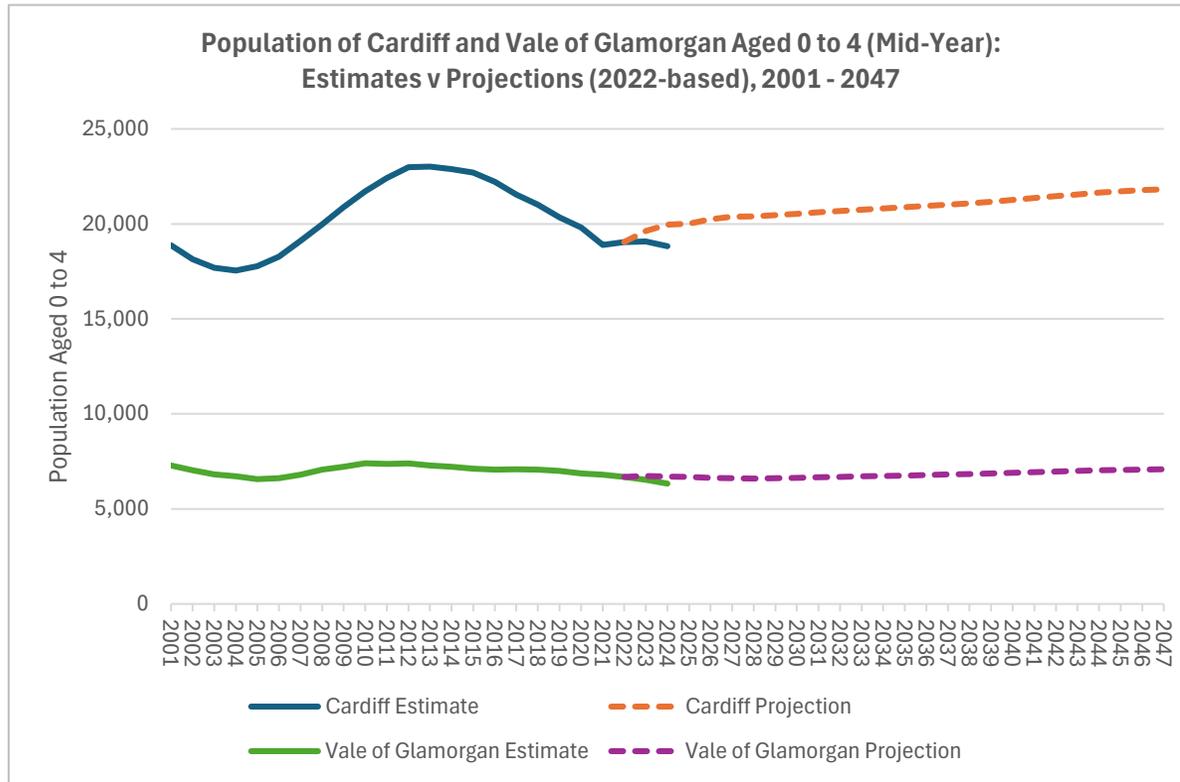


Source: 2022-based Population Projections, Welsh Government/
Mid-Year Population Estimates, ONS

Change Mid-2022 to Mid-2032: Total Population Growth

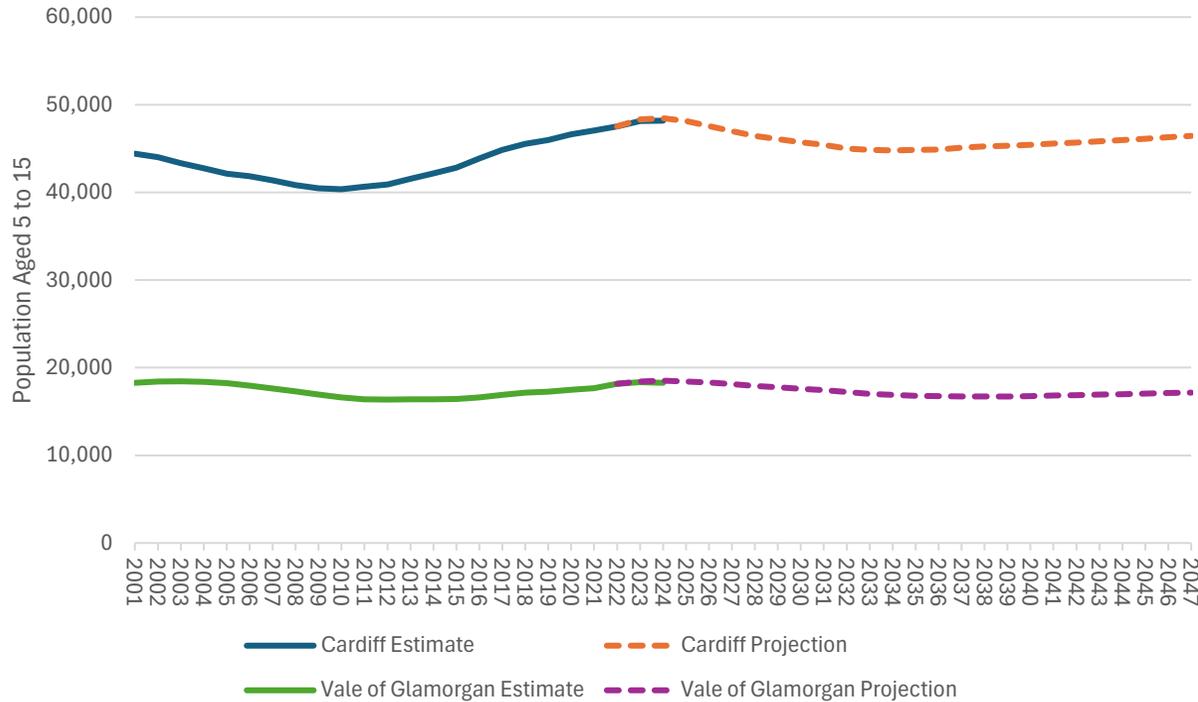


Estimated & Projected Cardiff and Vale of Glamorgan Population: Aged 0 - 4

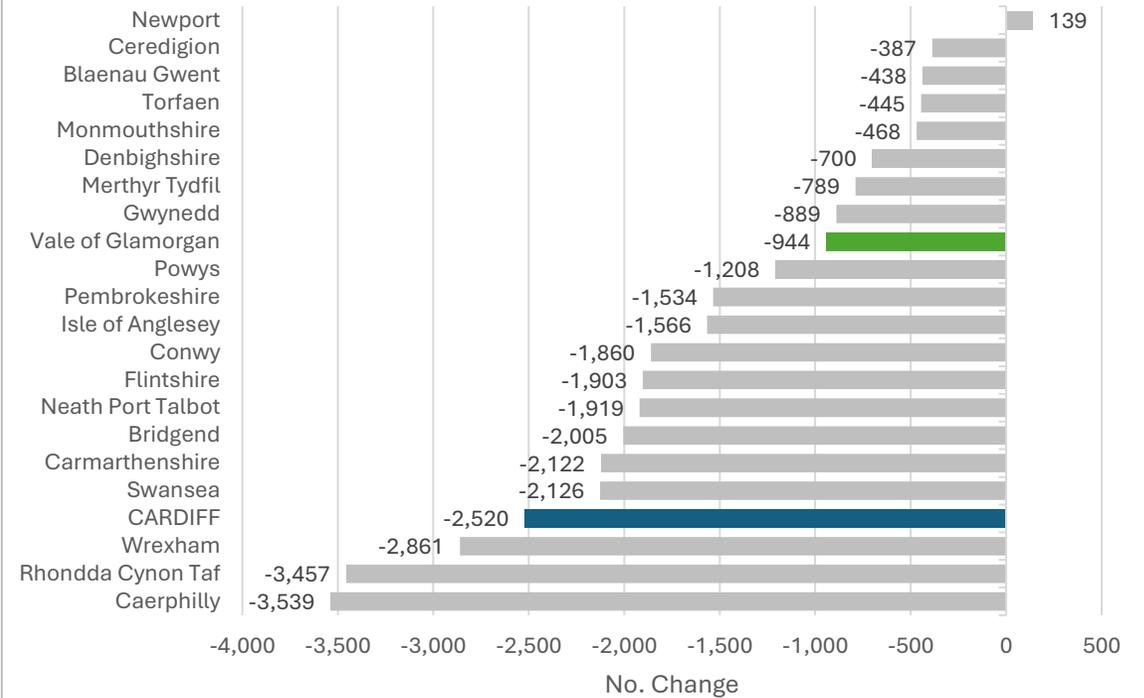


Estimated & Projected Cardiff and Vale of Glamorgan Population: Aged 5 to 15

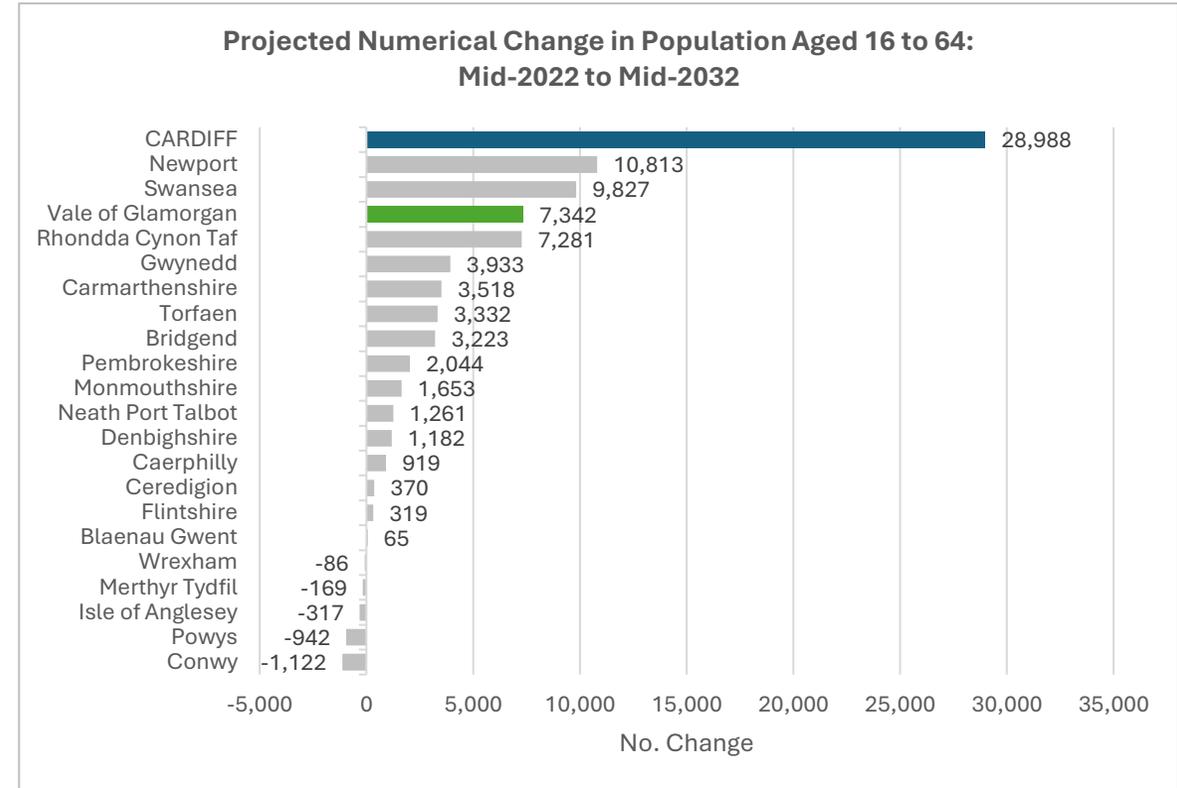
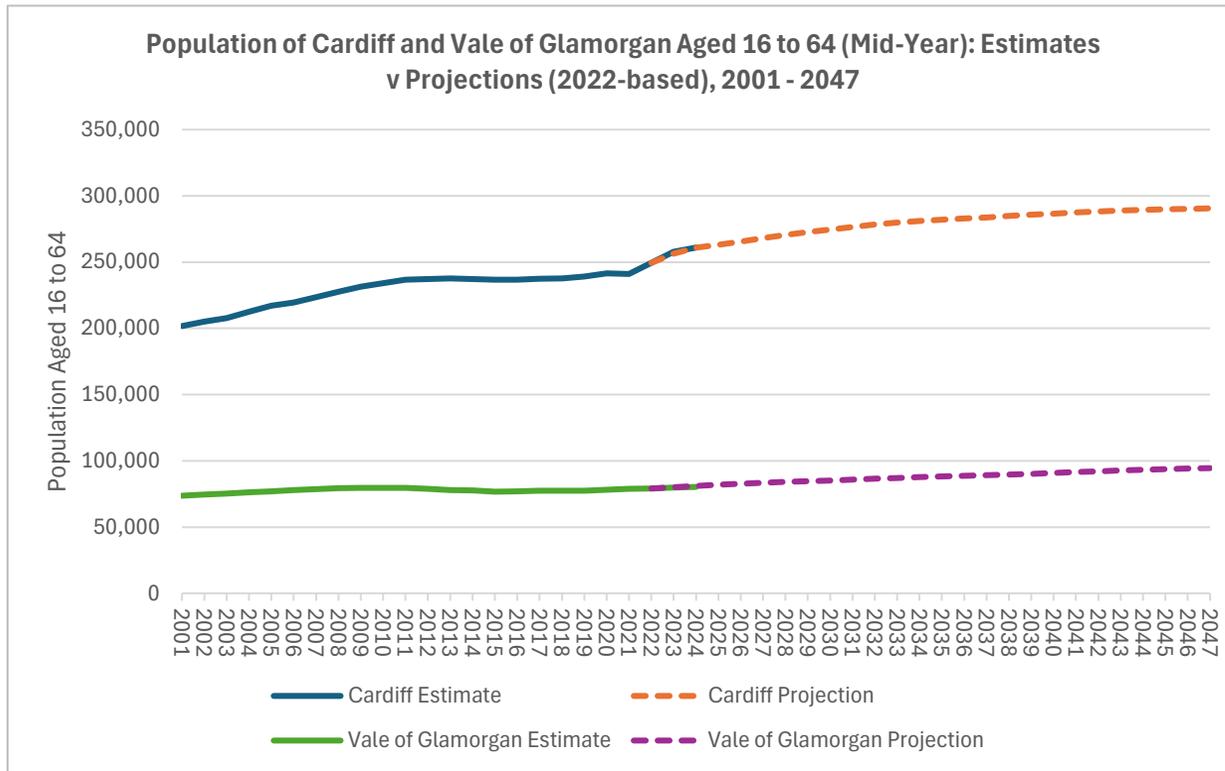
Population of Cardiff and Vale of Glamorgan Aged 5 to 15 (Mid-Year): Estimates v Projections (2022-based), 2001 - 2047



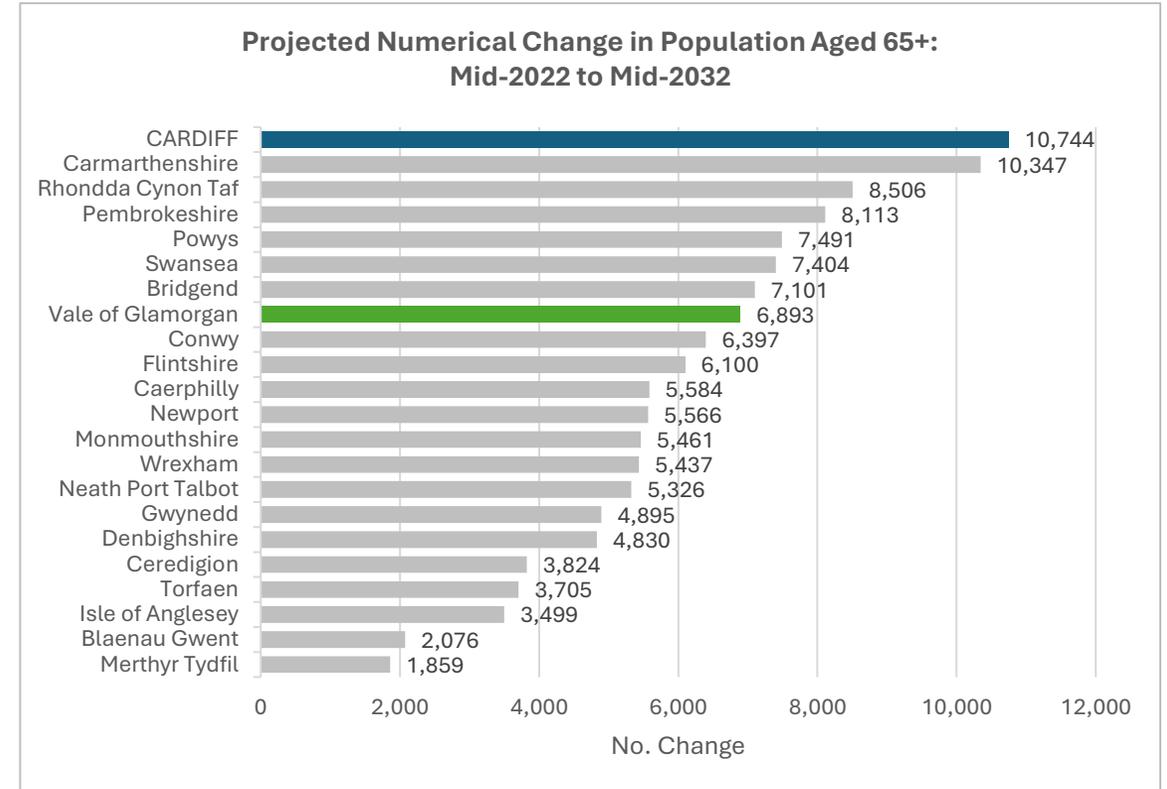
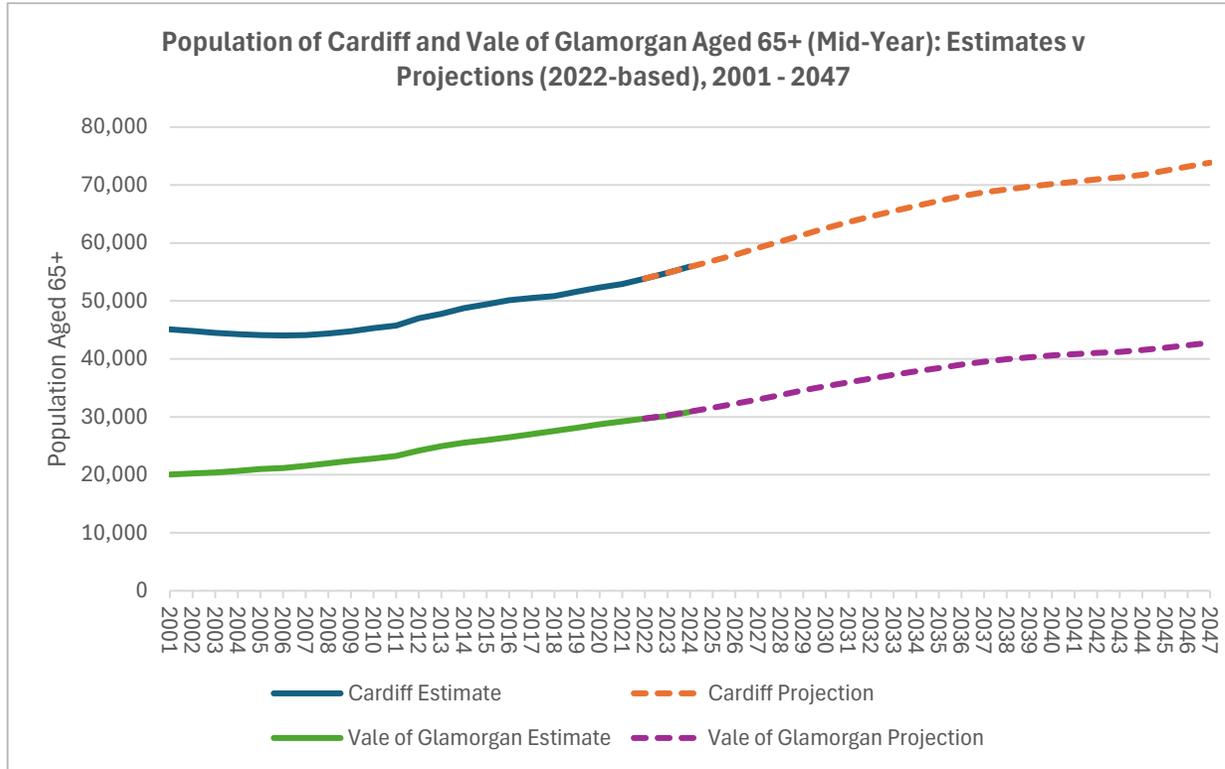
Projected Numerical Change in Population Aged 5 to 15: Mid-2022 to Mid-2032



Estimated & Projected Cardiff and Vale of Glamorgan Population: Aged 16 to 64

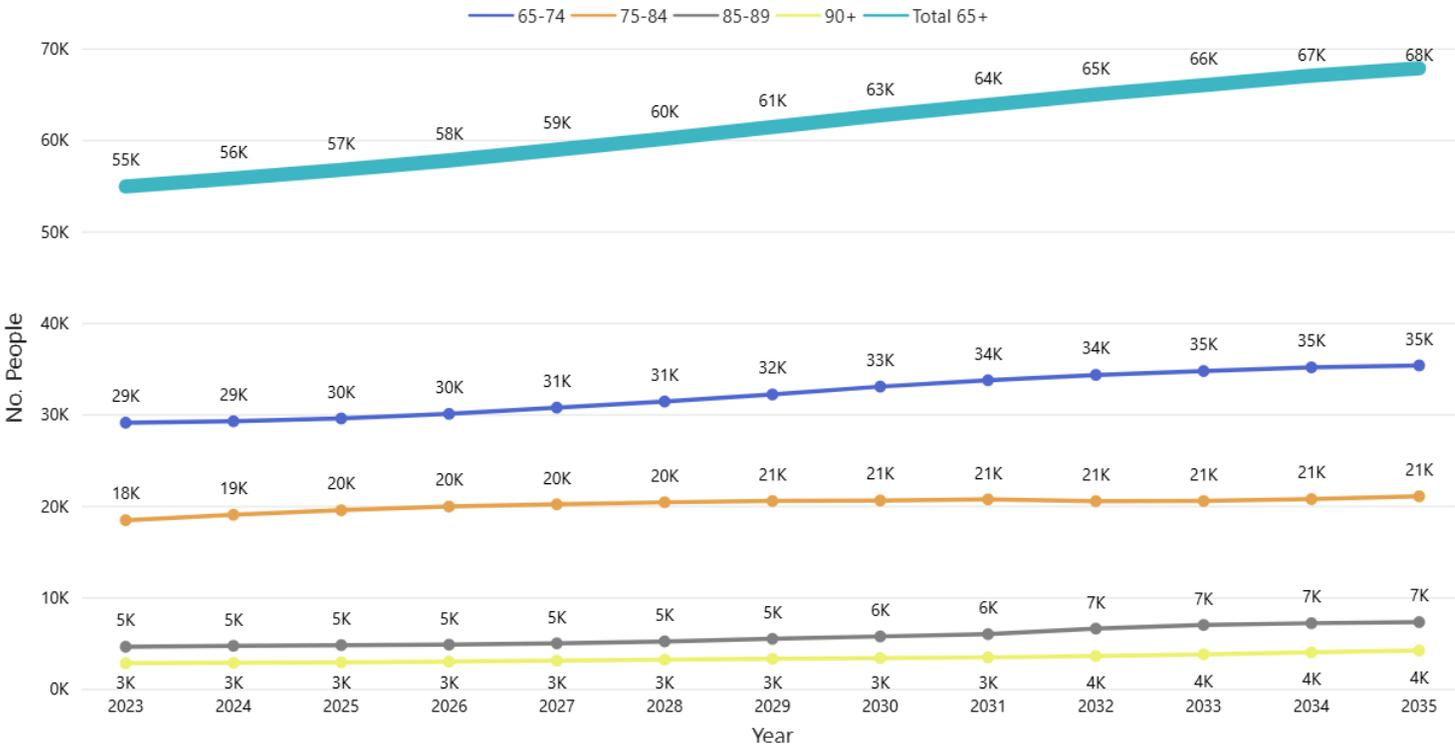


Estimated & Projected Cardiff and Vale of Glamorgan Population: Aged 65+





Proportional Adjustment Model: Forecast Growth of Population Age Groups



Age Range	Number	Percentage
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65 - 74	6256	21.51%
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75 - 84	2603	14.12%
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85 - 89	2690	58.58%
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90+	1383	49.46%
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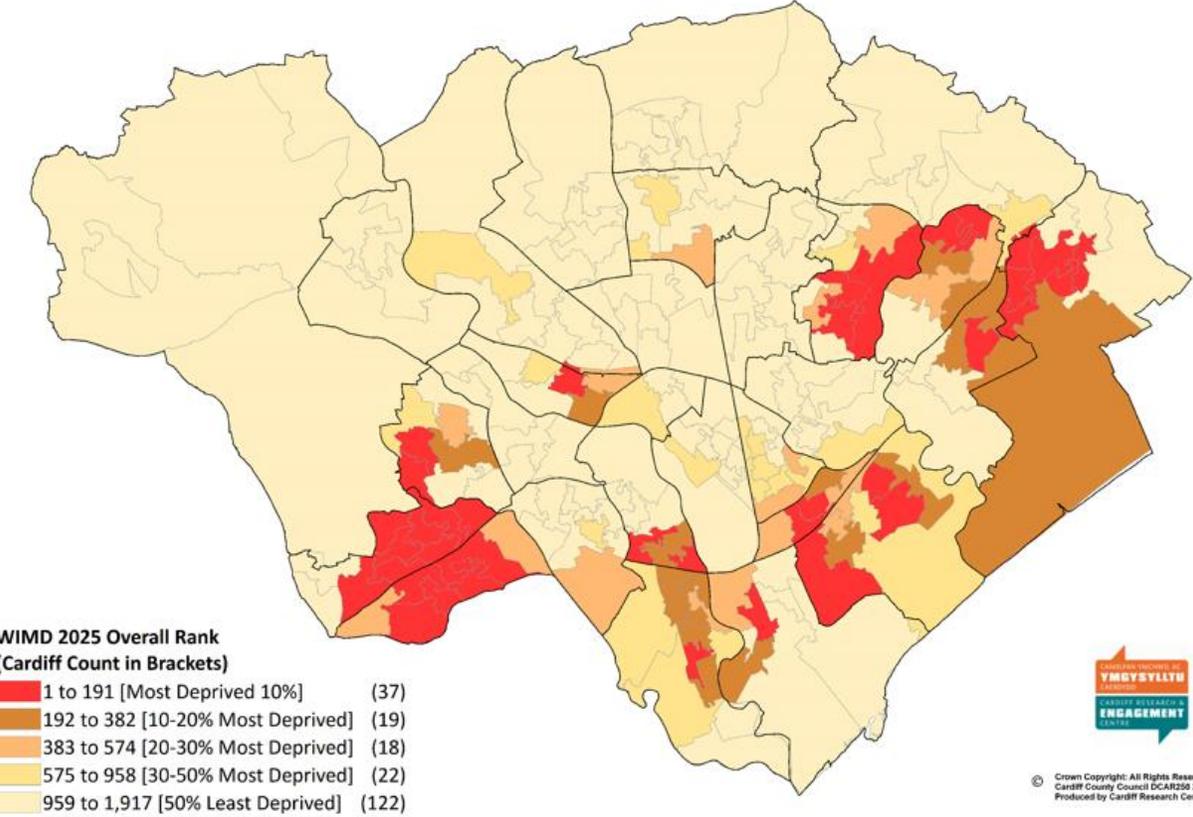
Over 65	12932	23.56%
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Over 85	4073	55.13%
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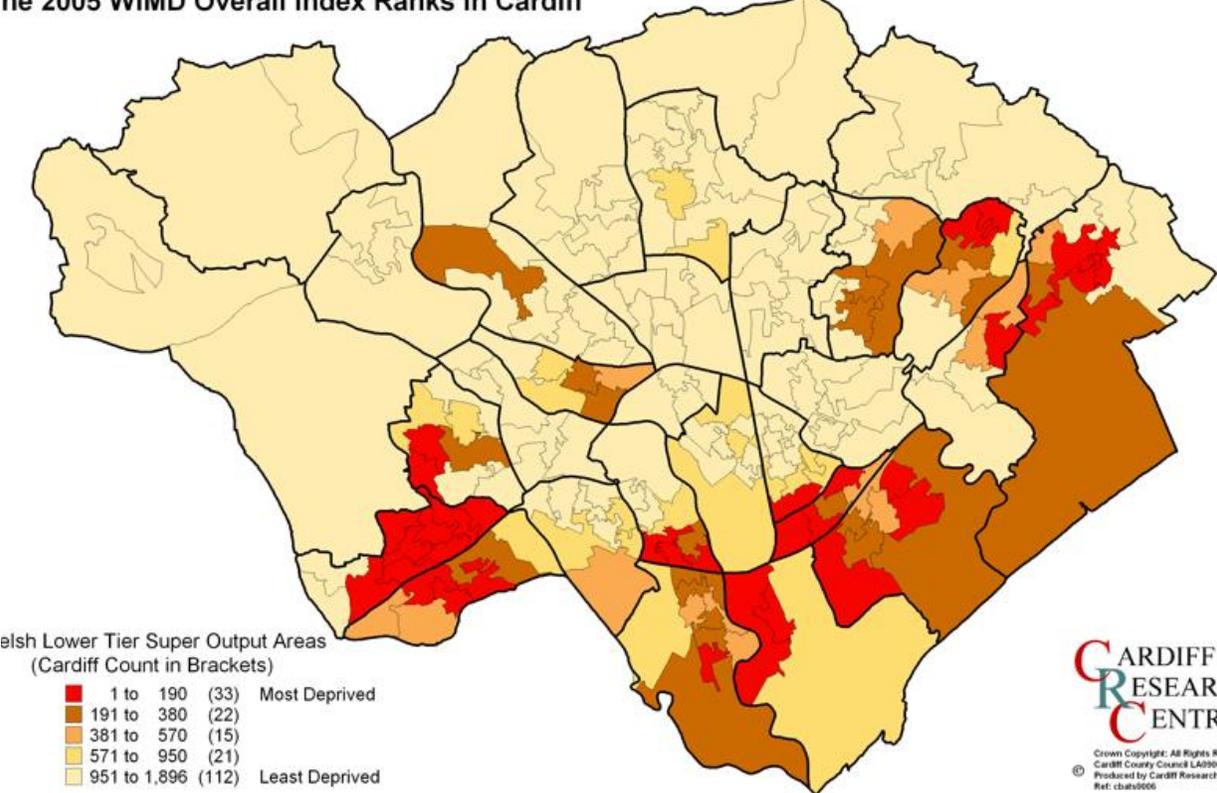


Deprivation in Cardiff: 2005 & 2025

2025 Welsh Index of Multiple Deprivation: Cardiff Overall Ranks

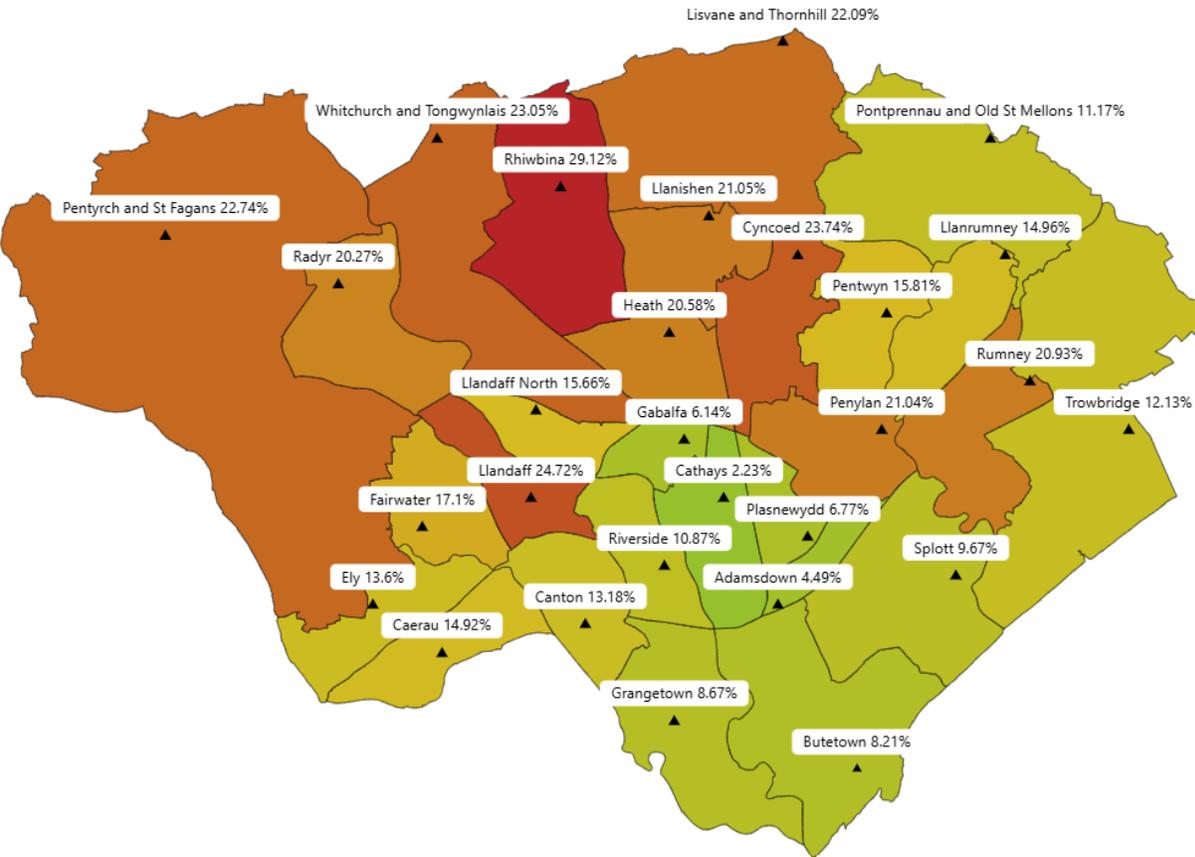


The 2005 WIMD Overall Index Ranks in Cardiff

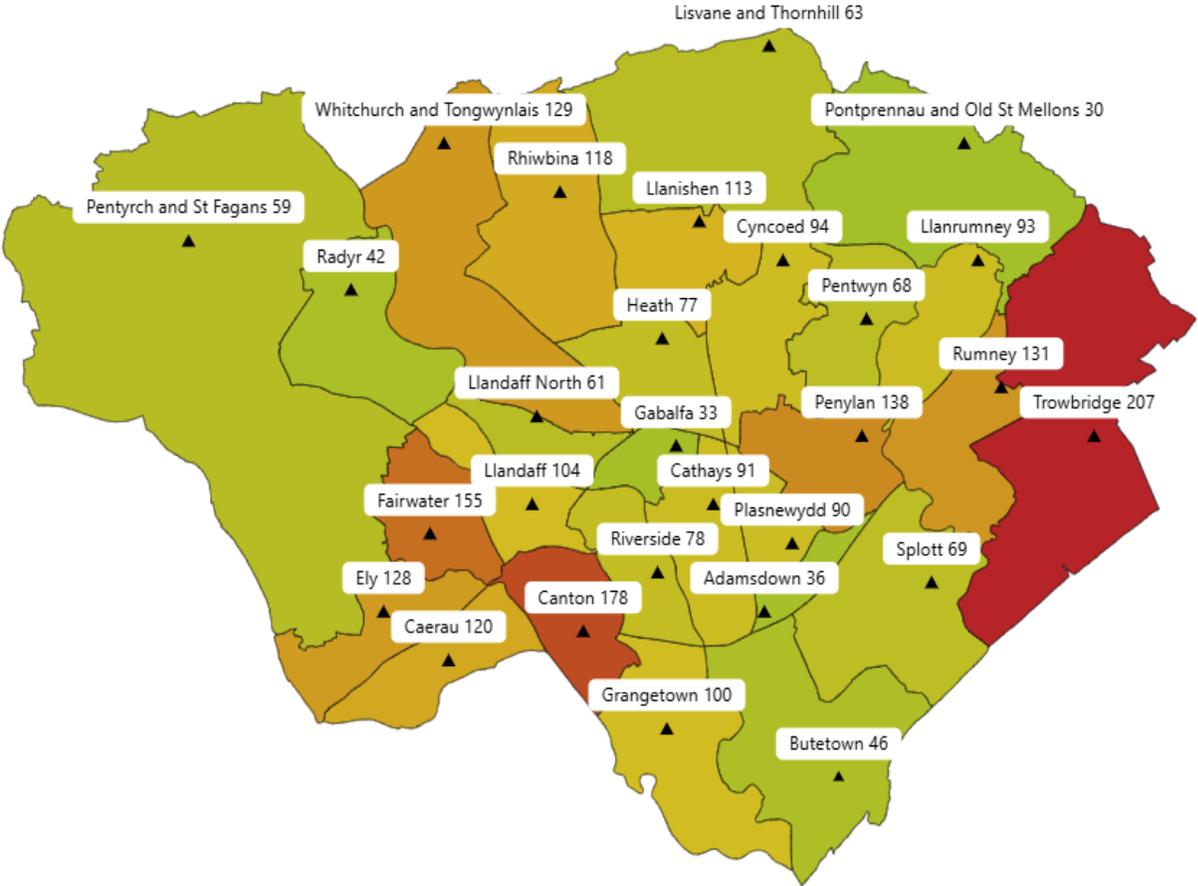


Cardiff: Deprivation and demand

Ward map showing the % of Population aged 65+



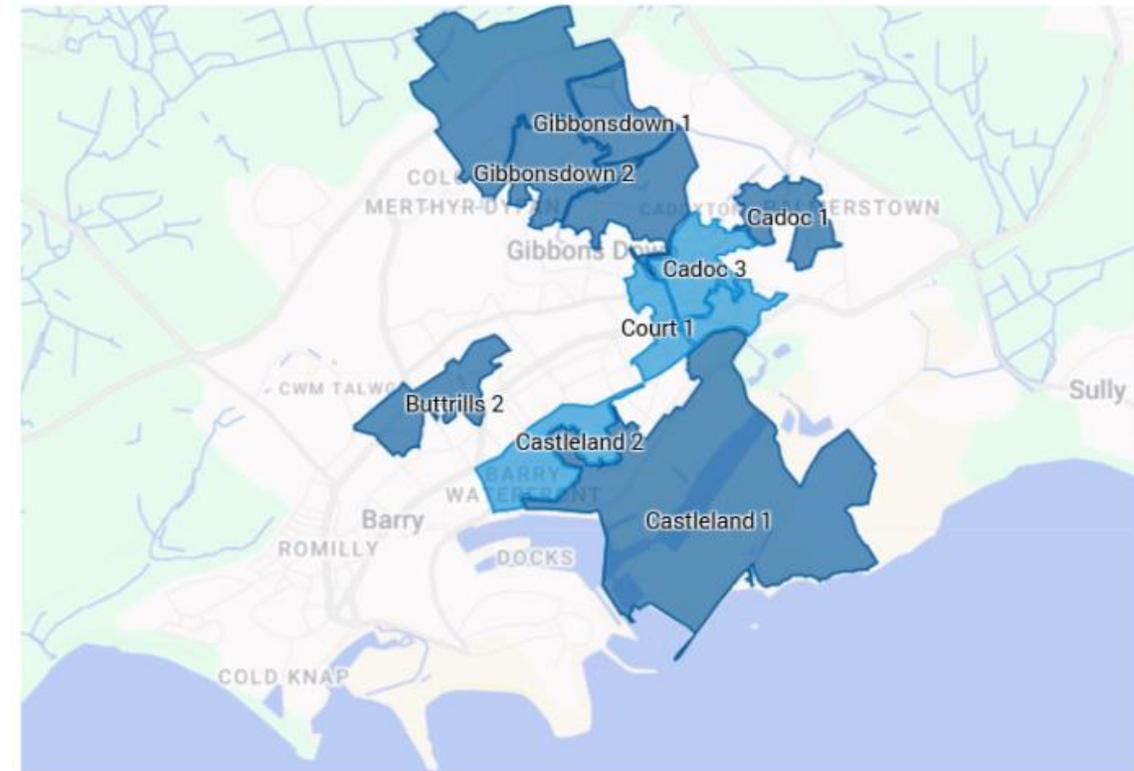
Ward map showing No. People 65+ receiving Adult Social Care (charged and uncharged) in 23/24. Red shading indicates a higher number.



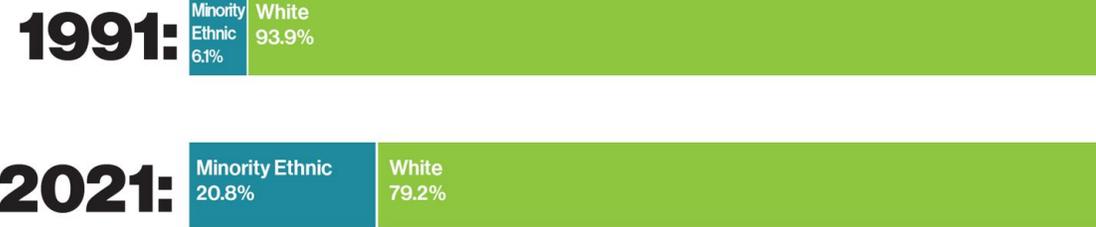
Source: ONS ward-level population estimates mid 2022 ward 2022

Deprivation in the Vale of Glamorgan

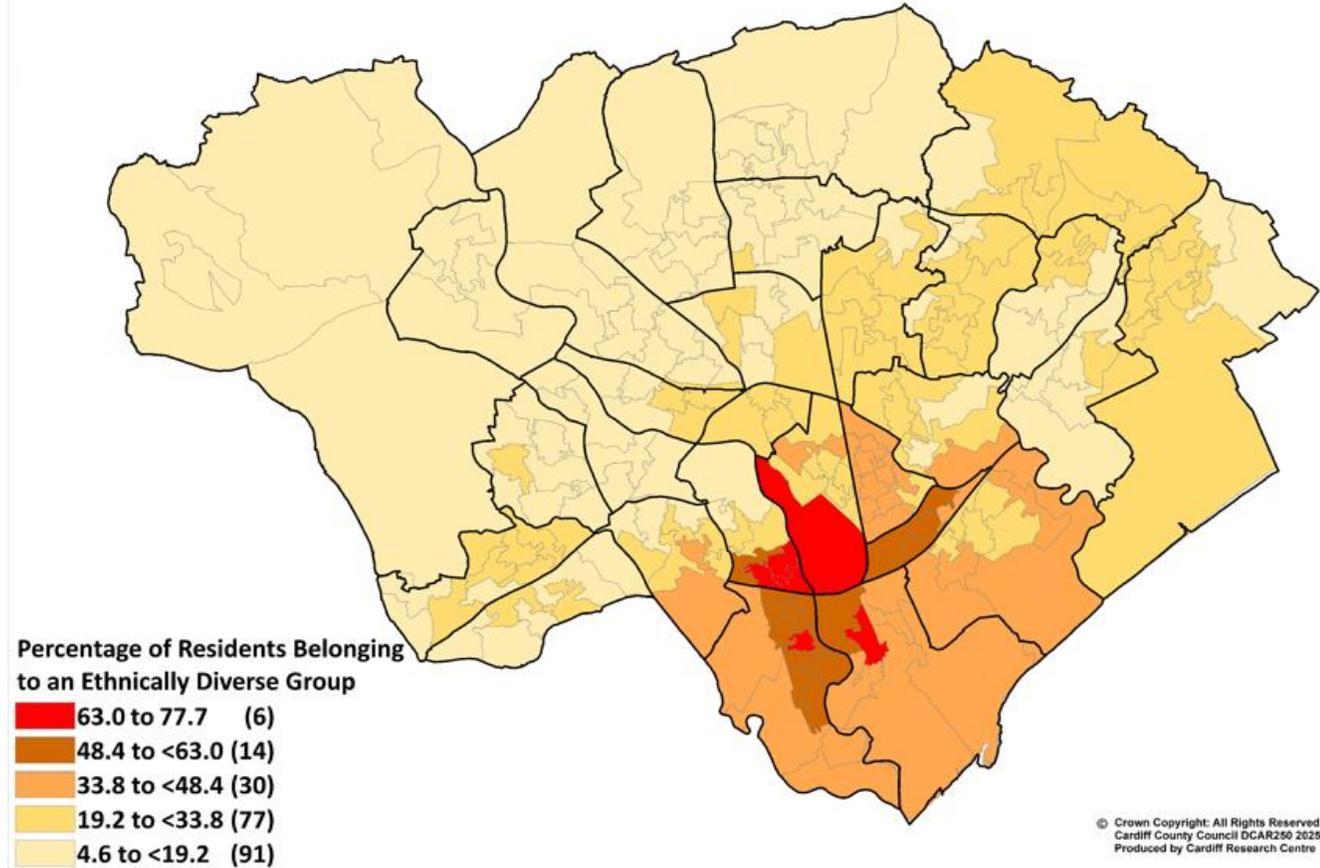
- In WIMD 2025, 7 LSOAs areas in Barry were included in the top-10% most deprived areas in Wales, a further 4 areas in Barry are included in the 10-20% most deprived areas in Wales.
- These eleven areas represent 13% (17,267) of the Vale's total population.
- **30%** (8,243) of all people in income deprivation in the Vale live in these areas.
- **30%** (3,489) of all people in employment deprivation in the Vale live in these areas.
- Of the total Social Services caseload, **16%** (620) are from these areas - 15% (427) Adults, 21% (193) Children and Young People.



Diversity



Percentage of Residents Belonging to an Ethnically Diverse Group by LSOA, 2021 Census



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 Cardiff County Council DCAR250 2025
 Produced by Cardiff Research Centre

Source: 1991 & 2021 Census



Demand

- Cardiff has the lowest use of care homes in Wales but there **has been a 20% increase in higher end care home placements** (Dementia Residential / Dementia Nursing care) since Jan 2021.
- **Demand for domiciliary care is very high and there is no sign of this reducing** – some packages of care are very costly and not sustainable.
- **We are not ageing well** – more people are living with life limiting illnesses
 - Bariatric individuals (extreme obesity) are an increasing trend.
 - 27% of Occupational Therapy referrals are now from working-age people.
- **Over the next ten years** the number of people aged 65+:
 - that will struggle with activities of daily living is projected to **increase by 17%**
 - with dementia projected to **increase by 31%** (from 4156 to 5435)
 - with severe dementia to **increase by 37%** (from 2598 to 3567)



Summary

- Cardiff and the Vale are among the fastest growing parts of Wales.
- Cardiff has experienced rapid growth over recent years, driven mainly by international migration for work and study – this is now returning to historic levels, with implications for future growth and the labour market.
- Despite being relatively ‘young,’ growth in the absolute number of older people is higher than elsewhere in Wales.
- And we’re not aging in a healthy way.
- Cardiff is becoming ever more diverse, and patterns of deprivation are (broadly) consistent over the last 20 years – with implications for health outcomes and services.
- These trends are leading to increasing demand pressure and costs, much of this at the crisis end – with preventative services squeezed.





Population changes - Impact on health

Public Health Projections:

- Increase in people with LTCs, 46-80% rise by 2038 e.g. diabetes
- More people living with multi-morbidity
- Increase in age-related conditions including dementia
- The emergence of a new pandemic infection, or significant morbidity or mortality due to antimicrobial resistance, remains a significant threat
- Increased periods of extreme weather in the coming decade due to climate change, worsening inequalities

PHW highlights that inequalities will widen without systemic intervention, not narrow naturally





Population changes - Impact on health

Estimates of burden of disease in 2040, Wales

Proportion of the adult population living with a major illness estimated to increase from almost 1 in 6 in 2019 to nearly 1 in 5 by 2040 meaning:

- Number of people living with major illness is estimated to increase to 556,000 by 2040; an increase of 137,000. More than a third from 2024.
- Much of the projected growth relates to; anxiety, depression, chronic pain, diabetes, which are predominantly managed in primary care and the community.
- Multi-morbidity, frailty and falls, dementia and cognitive impairment, Mental health need, particularly linked to deprivation and cost-of-living pressures
- Reinforces the need for investment in prevention and early intervention to reduce the impact of illness and improve the quality of people's lives.

[Estimated burden of disease in 2040 - gov.wales](https://gov.wales)





Population changes - Impact on health

Health Foundation Modelling (England), based on population size, population ageing, mortality rates, changes in morbidity.

Assumptions:

- projected growth in admissions is higher than historic trends due to population ageing and rising complexity (owing to higher morbidity and an increase in the number of deaths).
- slower fall in the time patients spend in hospital, due to diminishing returns from efforts to reduce this.
- bed occupancy held at 87%.

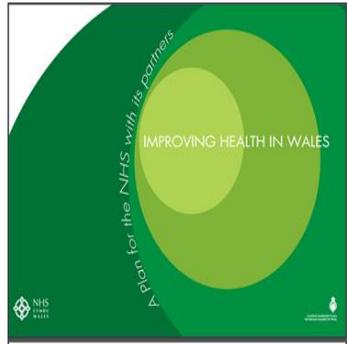
Applying to Wales:

- Need 15%-26% increase in hospital beds, equivalent to 2.5-4.5 new 600-bed hospitals, costing £1bn-£2bn

Applying to CAVUHB:

- Need 260-460 hospital beds, costing £200-£350m





NHS Expenditure as % of Welsh Government Budget

35%.....50%.....60%+

Expenditure on primary care as % of NHS Expenditure

25%.....19%.....15%

Percentage of population with illness that limits daily activities

28%.....33%.....35%.....40%

Percentage of population aged 85 and over

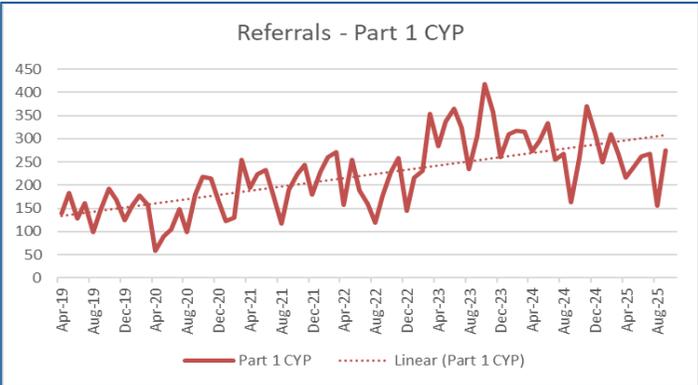
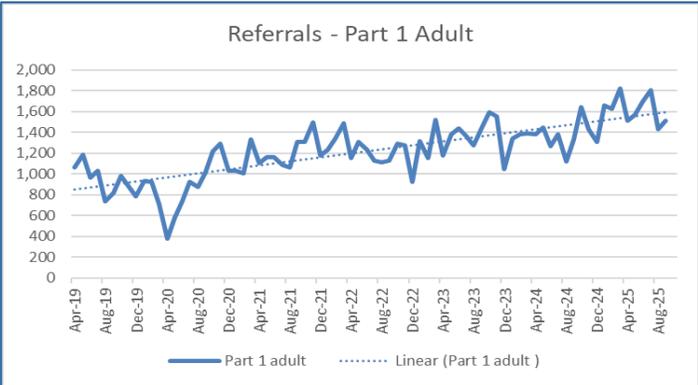
1.78%.....2.16%.....2.2%

(Life expectancy stalling)

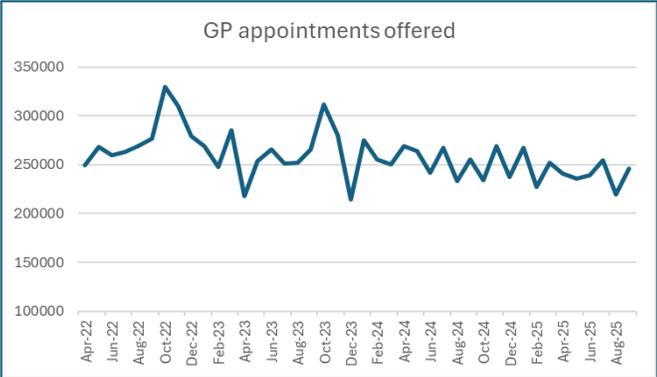


Impact on services

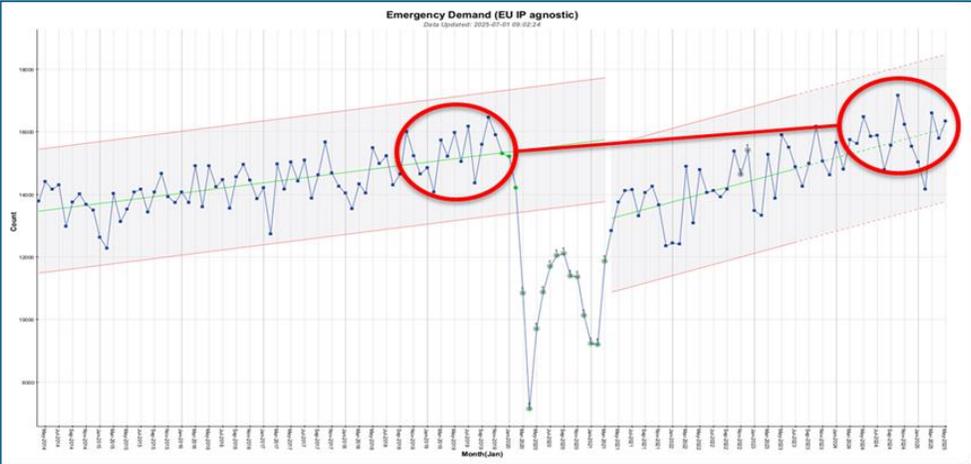
Mental Health



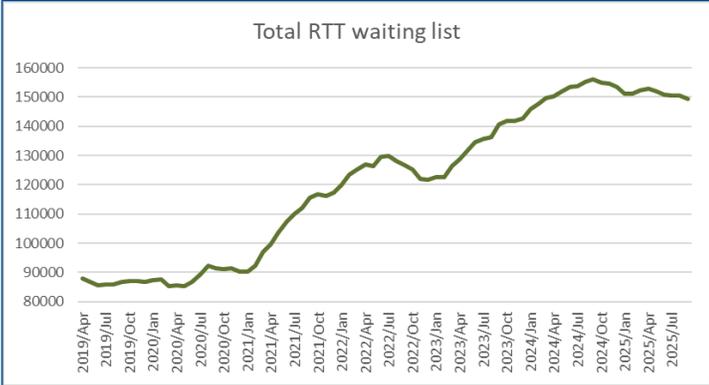
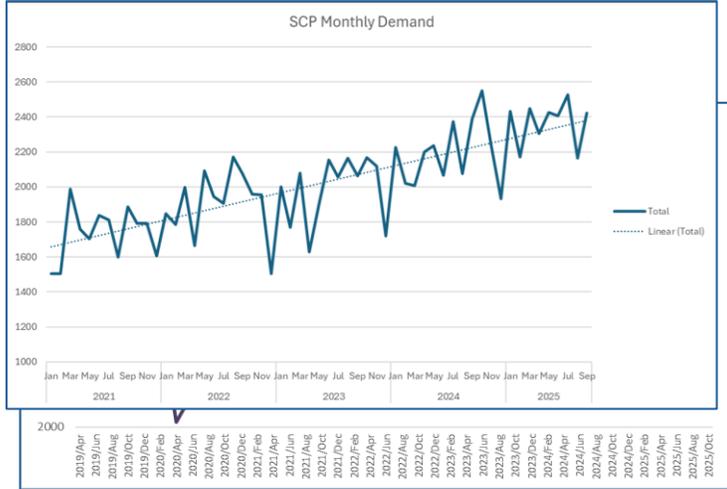
Primary Care



Urgent and Emergency care



Cancer





Clinical and service model trends

1. Earlier diagnosis & stratification

- Genomics, screening expansion, AI-supported diagnostics become routine
- Earlier identification means longer management horizons

2. Precision and personalised medicine

- Advanced biologics and personalised medicines
- Cell and gene therapies
- Medicines that shift demand across pathways (e.g. obesity, cancer, rare disease)
- Higher unit costs but more selective cohorts

3. Digital as enabler

- Remote monitoring and virtual care
- AI-supported diagnostics and triage
- Data-driven population health management.

4. Care moves out of hospitals

- Virtual wards
- Hospital-at-home
- Community diagnostics and treatment hubs

