



LLECHEN LÂN

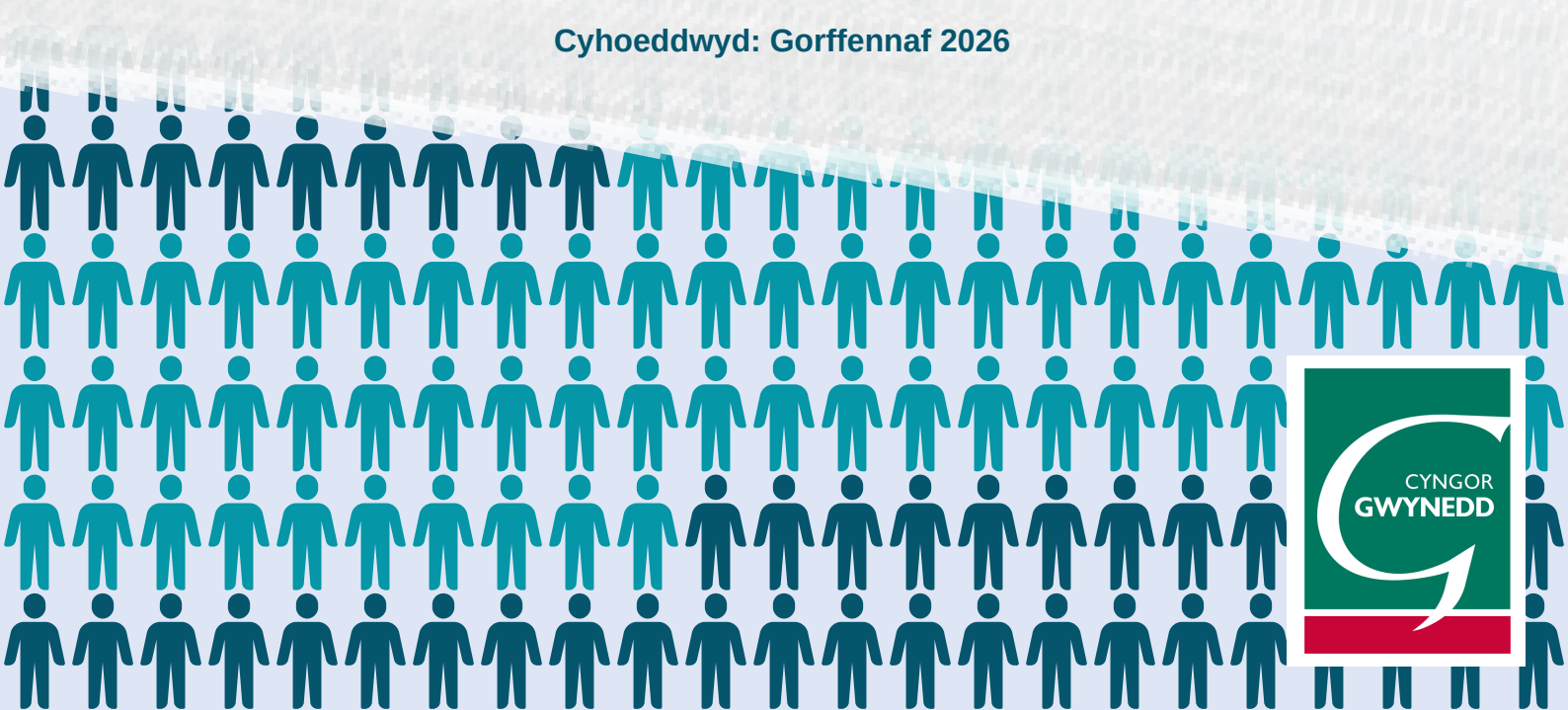
(A CLEAN SLATE)

SOCIAL SERVICES FOR OLDER PEOPLE FOR THE FUTURE

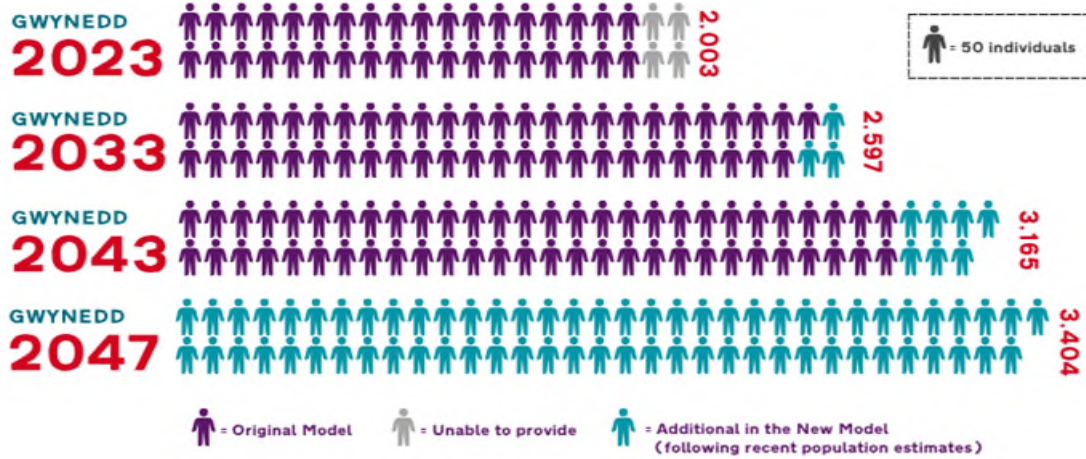
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2026 DATA UPDATE

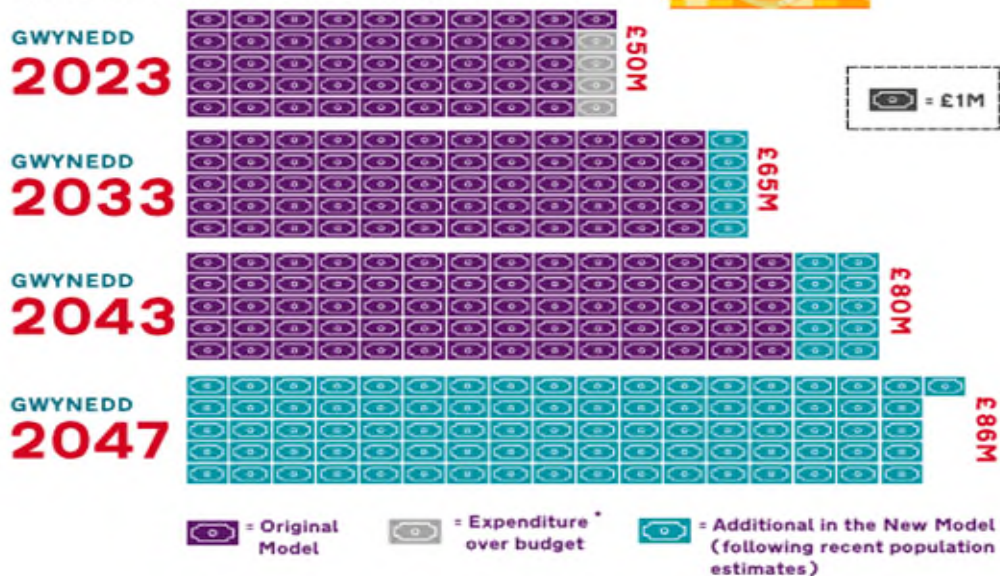
Cyhoeddwyd: Gorffennaf 2026



THE WORKFORCE NEEDED TO PROVIDE CARE



THE FUNDING NEEDED TO PROVIDE HOME, RESIDENTIAL AND NURSING CARE



*These figures do not include inflation

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Background

Gwynedd Council published the [Llechen Lân report](#) in September 2024. The report highlighted the pressures predicted to be faced by Cyngor Gwynedd over the next 20 years. The report referred mainly to challenges facing Cyngor Gwynedd's social services (elderly), but also more broadly the increasing pressures on all departments (e.g. Housing, Finance, Education, Economy) and residents of Gwynedd.

At the time of publication of the first report, the latest population projections were not available due to delays by the Welsh Government in publishing them. The report's data was based on 2018 population projections, slightly adjusted to reflect the decrease in the population of Gwynedd in the 2021 Census.

The Government has now published their latest population projections, so the first aim of this short report is to update the original model with the new population projections. Details of this update will be shown in full in part 1 of the report. In short, the new data confirms the overall direction of the previous projections but predicts a larger increase in the elderly population in Gwynedd. If care needs remain consistent, it is projected that more care will be needed than outlined in the original model.

The second aim is to provide an update on the recommendations highlighted at the end of the original Llechen Lân report. Almost 2 years have passed since the original report was published so it is a good time to reflect on the work that has been done and the work that needs to be done. Section 3 will update the programme.

Part 1: Data Update

Method and Assumptions:

The approach and assumptions are on the same basis as the original report (Page 16 of the [report](#) and Appendix 1). The only update to the data is the population projections. There is no change to the baseline basis used for the original model (Hours of care data based on total weekly hours of care in the week commencing Sunday 7/5/2023; workforce information and costs retained on the same basis as the original model).

The Welsh Government publishes population projections for local authority areas every few years. The latest population projections were published in November 2025, which are based on 2022 population data and therefore take into account the differences that emerged in the 2021 Census as well as any other demographic changes since the publication of the previous projections which were based on 2018. The Office for National Statistics publishes national population projections for Wales more frequently than this (with the last update being April 2026) but these are only further exercised every few years by the Welsh Government to break them down by local authority area.

As with the original Llechen Lân report, it is important to remember that this is a model, which uses the best available information in order to produce high-level estimates of future demand for older people's care services. The results should be treated as a projection of what might happen rather than a precise calculation; The future outlook may need to be updated in the light of experience, or further research may need to be carried out to confirm some aspects.

At the end of April 2026, the Office for National Statistics (ONS) released the 2024 base population projections for the whole of Wales. No corresponding data has been released for Gwynedd. While there are significant changes between the 2022 and 2024 base projections for the Welsh population as a whole, the percentage change is similar for the oldest age group (aged 80 and over) with the highest care needs. On this basis, it makes sense to continue with the update of the Gwynedd data based on the 2022 base population projections.

Age 65+ Population Projections:

The latest projections show more progress than the original projections, in the oldest ages (80+) in Gwynedd over the next ten and twenty years.

Note to remember – due to the nature of population projections, they are more reliable in the first 10 years and more uncertain in the longer term.

The original Llechen Lân report showed that the need for care increases with age, and therefore it is useful to separate this population into two age groups, 65 to 79 years old and 80 years and over. And this larger increase in population is projected for the 65 to 79 age group, and 80 and older.

In addition, the latest projections extend to the year 2047 and show that – in relation to the older age group (80+) in particular, further increases within this age group are predicted beyond the time period of the original Llechen Lân model.

The Office for National Statistics (ONS) explains some of the reasons behind these trends:

1. By 2032, the larger group of people born after the second world war will be around 85 years old, and the larger group born in the 1960s will be around 67 years old.
2. By 2047, with the larger group of people born in the 1960s now in their 80s, more people will be expected to be in the older age groups; It is also estimated that there will be an increase in life expectancy.

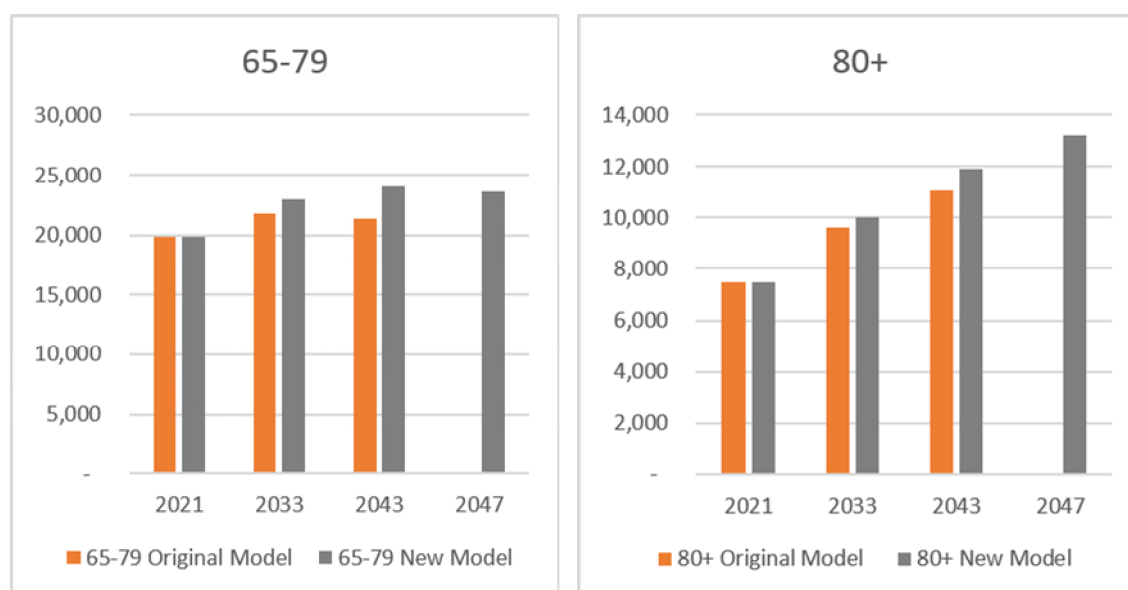
The tables and graphs below illustrate this in more detail.

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1. Population comparison (Amount):

Table 1 – Gwynedd Population Projections base 2018 (Original Model) and base 2022 (New Model) for the population aged 65-79 and aged 80+ ([Source: Welsh Government](#))

	65-79		80+	
	Original Model	New Model	Original Model	New Model
2021	19,823	19,823	7,451	7,451
2033	21,768	23,006	9,601	10,000
2043	21,315	24,029	11,042	11,930
2047		23,604		13,192



Graph 1 and 2 – Gwynedd population projections base 2018 (Original Model) and base 2022 (New Model) for the population aged 65-79 and aged 80+ ([Source: Welsh Government](#))

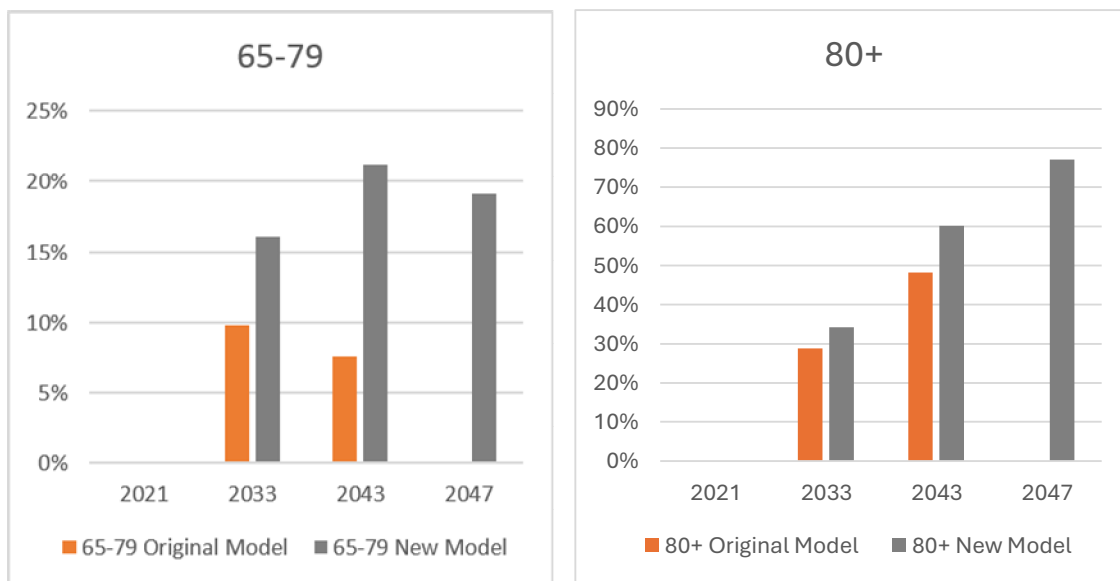
It's also useful to look at this change as a percentage, where a 77% increase is projected for the population aged 80 and over by 2047 compared to 2021.

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1. Population comparison (Percentage)

Table 2 – Percentage change in Gwynedd population projections base 2018 (Original Model) and base 2022 basis (New Model) for the population aged 65-79 and aged 80+ ([Source: Welsh Government](#))

	65-79		80+	
	Original Model	New Model	Original Model	New Model
2021	0%	0%	0%	0%
2033	10%	16%	29%	34%
2043	8%	21%	48%	60%
2047		19%		77%



Graph 3 and 4 – Percentage change in Gwynedd's population projections base 2018 (Original Model) and base 2022 (New Model) for the population aged 65-79 and aged 80+ ([Source: Welsh Government](#))

Projections update without intervention:

The increase in population projections will clearly have a direct impact on the original model of care.

The original report shows the age analysis in detail, for the three main 'traditional' care streams (Residential/ Nursing (Non-Dementia), Residential/ Nursing (Dementia), Domiciliary Care). Broadly speaking, it shows that the need for all three streams of care increases with age. It is therefore useful to look at the data in two age groups, namely 65-79 years old where there is lower need for care provision, and 80+ years old where there is higher care need. This means that the further increase in the population projections for the oldest age groups will have a major impact on these care streams.

It is important to note that, like the original model, these projections are based on the changes in the population e.g. an ageing society, and not any lifestyle, health or technological changes that may occur. These projections are also based on Gwynedd's social services operating in the same way as they currently are.

It is also important to highlight that new statistics from the ONS (2026) suggest that healthy life expectancy (average time living in good health based on current mortality rates and how individuals view their health) has fallen significantly in recent years. If this continues to worsen there is a possibility that more individuals in the 65-79 age group will need care, and more individuals under 65 will need care and support (ONS, 2026).

In Gwynedd, as in the whole of Wales, healthy life expectancy at birth has decreased over the last ten years. For women in Gwynedd, life expectancy at birth was 66.6 years in 2012-2014 but by 2022-2024 it had decreased to 62.5 years – a reduction of around 4 years. For males life expectancy at birth was 65.4 years in 2012-2014 but by 2022-2024 it had decreased to 62.3 years – a decrease of about 2 years (ONS, 2026). This data shows that the health of the population of Gwynedd, as well as the whole of Wales and Britain, is deteriorating. People are therefore expected to spend less of their lives in 'good' overall health, and this will have an impact on the population's need for care.

Here are the details of the projected number of hours of care needed for the three streams of care, comparing between the original model and the new model.

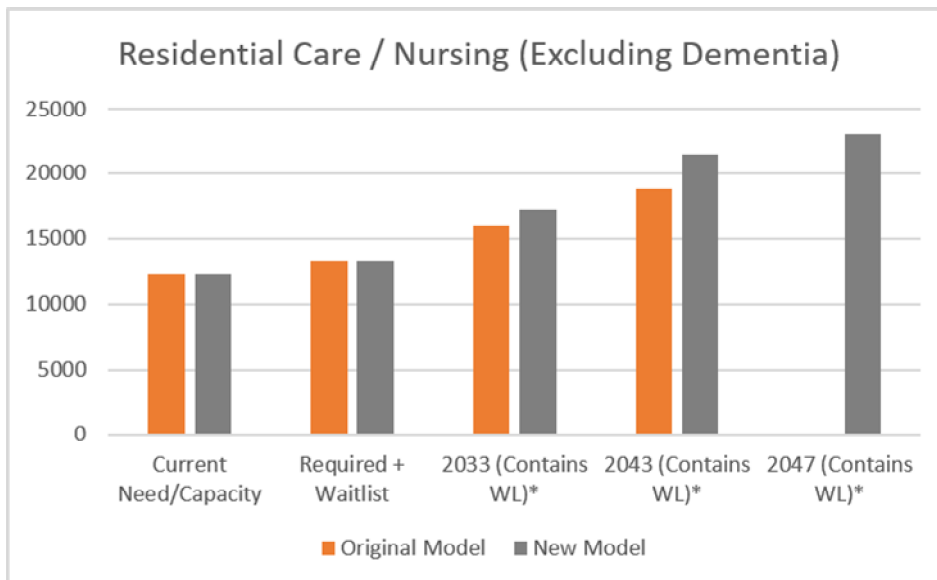
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Residential Care / Nursing (Excluding Dementia)

Table 3 – Projected need for residential / nursing care (excluding dementia) based on the 2018 (Original Model) and 2022 (New Model) Gwynedd population projections for the population aged 65-79 and 80+

	Number of hours of care		Percentage Change from Current Need	
	Original Model	New Model	Original Model	New Model
Current Need/Capacity	12,326	12,326	0%	0%
Required + Waitlist	13,275	13,275	8%	8%
2033 (Contains WL)*	16,013	17,228	30%	40%
2043 (Contains WL)*	18,835	21,441	53%	74%
2047 (Contains WL)*		23,057		87%

*Future figures include waiting list (WL), percentages showing change against existing baseline without waiting list.



Graph 5 – Projected need for residential / nursing care (Excluding dementia) based on the 2018 (Original Model) and 2022 (New Model) base Gwynedd population projections for the population aged 65-79 and 80+ years

Include WL = Future figures include waiting list, percentages showing change against baseline of existing need without waiting list.

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Behind the data:

The table and graphs above show that the further increase in the older age groups has had a significant impact on the need for residential/nursing care (Excluding dementia). The data shows that if there is no change; in the way care is delivered or on the health of the population as we age, the need for care could increase by up to 87% by 2047 compared to the provision during 2023. The original model projected a 53% increase by 2043.

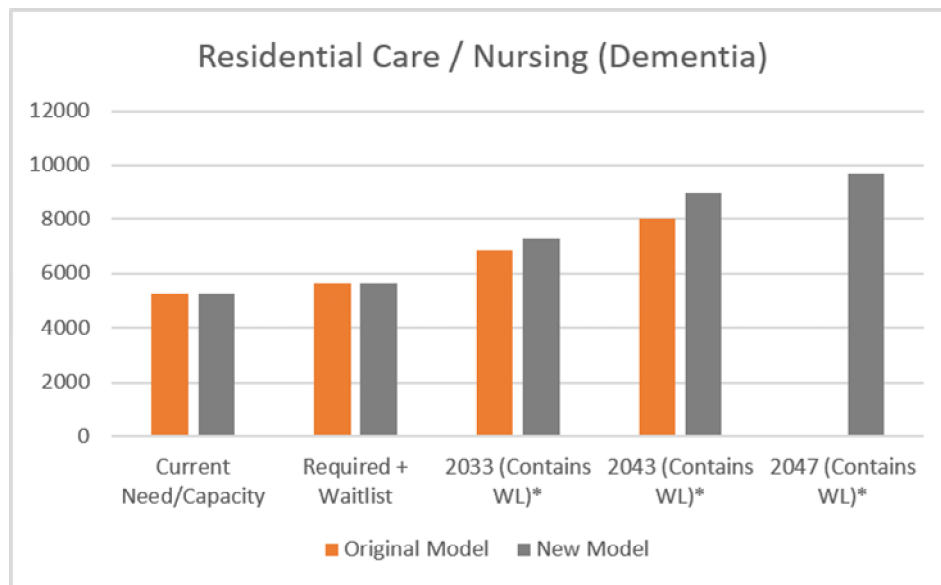
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Residential Care / Nursing (Dementia)

Table 4 – Projected need for residential / nursing care (Dementia) based on the Gwynedd population projections 2018 (Original Model) and 2022 (New Model) for the population aged 65-79 and 80+ years

	Number of hours of care		Percentage Change from Current Need	
	Original Model	New Model	Original Model	New Model
Current Need/Capacity	5,220	5,220	0%	0%
Required + Waitlist	5,597	5,597	7%	7%
2033 (Contains WL)*	6,831	7,267	31%	39%
2043 (Contains WL)*	8,004	8,978	53%	72%
2047 (Contains WL)*		9,673		85%

**Future figures include waiting list (WL), percentages showing change against the baseline without the waiting list.*



Graph 6 – Projected need for residential / nursing care (dementia) based on the 2018 (Original Model) and 2022 (New Model) population projections for the 65-79 and 80+ year old population

Contains WL = Future figures include waiting list, percentages showing change against existing baseline without waiting list.

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Behind the data:

The table and graph above show that the further increase in the older age group is having a significant impact on the need for residential/nursing care (dementia). The data shows that if there is no change in the way care is delivered or the prevalence of dementia, the need for care could increase by up to 85% by 2047 compared to the provision in 2023. The original model showed an increase of 53% by 2043.

It is important to note that we have used population projections, but we have not used projections on how Dementia numbers are growing. Research shows that the rate of dementia is increasing, not just because of age, but as a result of a number of different reasons e.g. lifestyle, air pollution (Alzheimer's Society, 2021). This report focuses solely on the change in demographics.

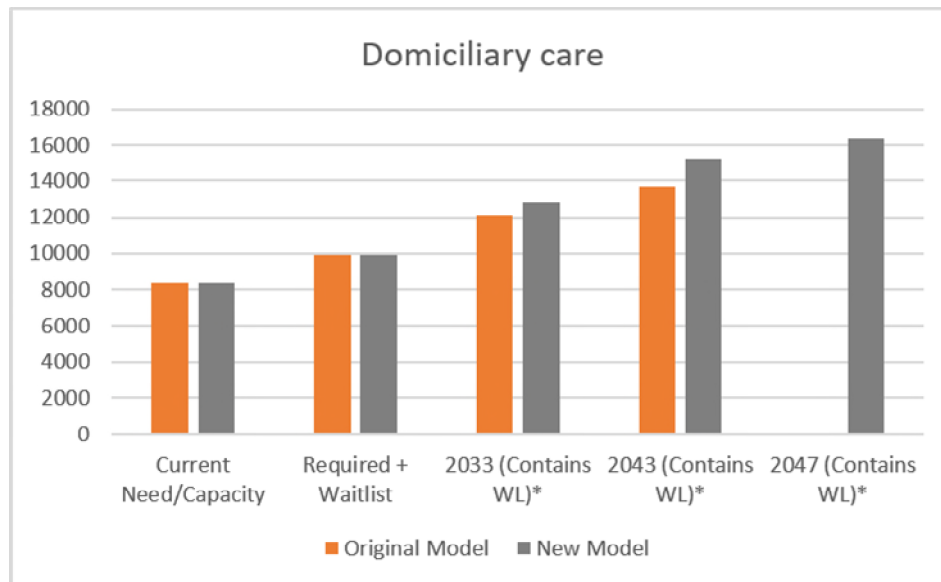
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Domiciliary Care

Table 5 – Projected domiciliary care needs based on the 2018 (Original Model) and 2022 (New Model) Gwynedd population projections for the population aged 65-79 and 80+

	Number of hours of care		Percentage Change from Current Need	
	Original Model	New Model	Original Model	New Model
Current Need/Capacity	8,393	8,393	0%	0%
Required + Waitinglist	9,893	9,893	18%	18%
2033 (Contains WL)*	12,130	12,836	45%	53%
2043 (Contains WL)*	13,664	15,214	63%	81%
2047 (Contains WL)*		16,366		95%

**Future figures include waiting list, percentages showing change against existing baseline without waiting list.*



Graph 7 – Projected domiciliary care needs based on the 2018 (Original Model) and 2022 (New Model) Gwynedd population projections for the 65-79 and 80+ year old population

Include WL = Future figures include waiting list, percentages showing change against existing baseline without waiting list.

Behind the data:

The table and graph above show that the further increase in the older age groups is having a significant impact on the need for domiciliary care. The data shows that if there is no change in the way care is delivered or on the health of the population as we age, the need for care could increase by up to 95% by 2047 compared to the provision in 2023. The original model projected a 63% increase by 2043.

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Details of the projections of the original model and the new model in terms of the number of care staff that would be required to meet the anticipated need for care (including the Council's internal workforce and external providers operating in Gwynedd) are as follows:

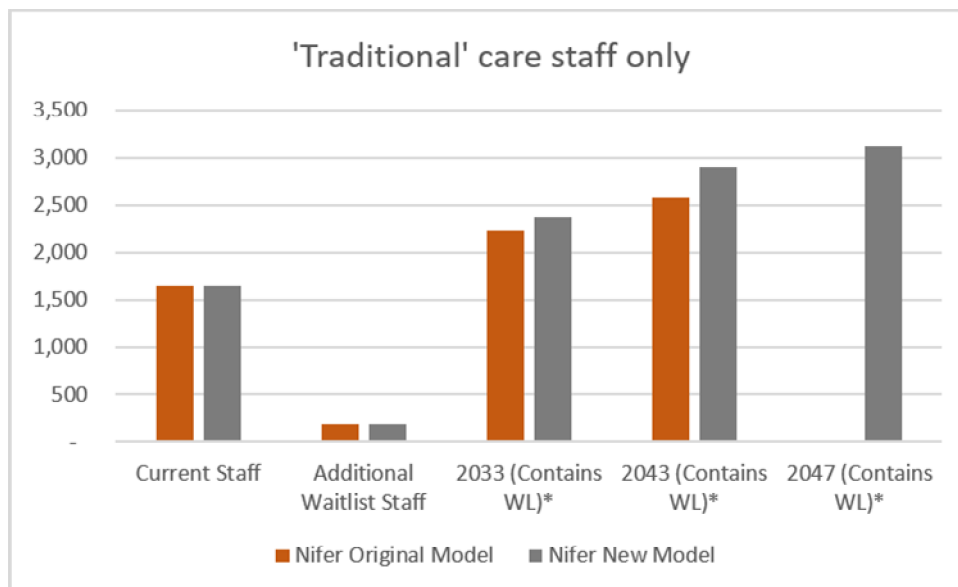
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Staffing:

Table 6 – Projected need for 'traditional' care staffing only based on the 2018 (Original Model) and 2022 (New Model) Gwynedd population projections for the population aged 65-79 and 80+

	Number of Staff		Percentage Change from Current Need	
	Original Model	New Model	Original Model	New Model
Current Staff	1,647	1,647		
Additional Staff needed for Waiting List	185	185		
2033 (Contains WL)*	2,228	2,378	35%	44%
2043 (Contains WL)*	2,578	2,902	57%	76%
2047 (Contains WL)*		3,122		90%

*Future figures include waiting list, percentages showing change against existing staff baseline without waiting list.



Graph 8 – Projected need for 'traditional' care staffing only based on the 2018 (Original Model) and 2022 (New Model) Gwynedd population projections for the population aged 65-79 and 80+ years

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Behind the data:

The original Llechen Lân report discussed the number of a wider workforce, including social workers/therapists, and staff for innovative areas e.g. direct payments. The infographic on page 2 shows the data updates for the full workforce, to maintain consistency with the infographic in the original report. To maintain consistency with the rest of this report, the table above and the discussion below focus solely on workforce needs in the more 'traditional' areas of care (domiciliary care, residential and nursing care).

When the original Llechen Lân paper was written there were 1,647 staff working in the 'traditional' areas of care. From the data it was estimated that an additional 185 members of staff would be needed to meet the needs of the waiting list as it was at the time.

The table above shows that the further increase in the older age groups has significant impact on staffing needs. The data shows that if there is no change in the way care is delivered or change in the health of the population as we age, the need for staff could increase by up to 90% by 2047 compared to the original staffing level. The original model projected a 57% increase by 2043.

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Funding:

This section highlights the impact that the changes in the population projections would have on the funding projections. This table highlights the financial cost of the three traditional streams of care; domiciliary care, residential/ nursing care (without dementia) and residential care/ nursing (dementia).

Domiciliary care makes up about 26% of the total costs involved; residential/nursing care (without dementia) makes up around 53%; and residential / nursing (dementia) care at around 21% (based on the 2023 budget baseline). A detailed analysis of the three separate streams can be found in appendix 1.

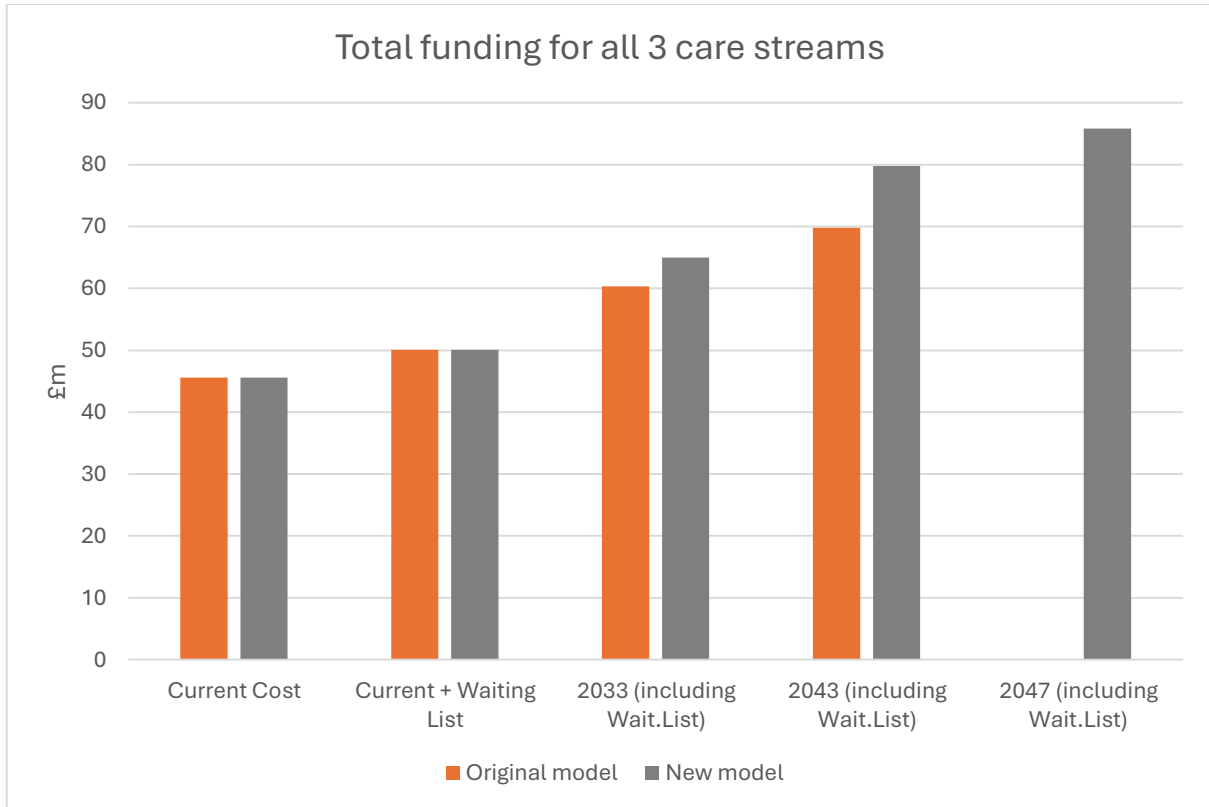
It is important to remember that costs have been calculated on the basis of 2023-24 prices. The impact of inflation between now and 2033/2043/2047 has not been included so that we are comparing similar by like.

Table 7 – Total funding projections based on the Gwynedd population projections 2018 (Original Model) and 2022 (New Model) for the population aged 65-79 and 80+

	£M	
	Original Model	New Model
2023 Current Funding	45.6	45.6
2023 Waiting List	4.5	4.5
2033 (Contains WL)*	60.3	65.0
2043 (Contains WL)*	69.8	79.8
2047 (Contains WL) *		85.8

**Future figures include waiting list, percentages showing change against existing staff baseline without waiting list.*

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Graph 9 – Projected funding for the three 'traditional' care streams based on the 2018 (Original Model) and 2022 (New Model) Gwynedd population projections for the population aged 65-79 and 80+

Including Wait.List = Future figures include waiting list.

Behind the data:

The previous report showed that additional funding of £4.5m would be needed to meet the extra care that was needed but not being provided at the time, across the three streams of care. Furthermore, the demographic change projected in the original model would mean that an additional £10.2m would be needed by 2033, and an additional £19.7m by 2043.

The new model estimates higher amounts for the impact of demographic change; an **additional £14.9m will be needed by 2033** and **£29.7m by 2043**. In addition, the new projections enable an estimate of the additional figure that will be needed **by 2047** of **£35.7m**.

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Reflecting demographics in the budget:

In the past the Council has had a procedure for the inclusion of an annual demographic addition in the budget of the Adults department to reflect unavoidable financial pressures arising from an increase in the older age population. This regime was 'frozen' from 2023/24 onwards following the slight decrease in population in 2021 Census and while awaiting the new population projections.

A similar arrangement could be reintroduced based on the new fiscal forecast model outlined above. That would mean adding annual amounts of over £1m on average over the next few years:

Table 10 – Annual demographic adjustment would be required to reflect the cost increase modelled above, 2027/28 to 2034/35 (excluding the impact of Waiting List)

Fiscal year	Possible demographic adjustment £'000 *
2027/28	850
2028/29	1,434
2029/30	1,420
2030/31	1,416
2031/32	1,071
2032/33	1,010
2033/34	1,523
2034/35	1,809

* the exact basis of the proposed fiscal model is being refined, so these amounts are subject to change

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Data Update Summary:

The above data update highlights the fact that the care crisis is increasing at a more alarming rate than previously thought. This suggests that the need to move away from traditional care methods and have Clean Slate in the way we work is more important than ever.

Section 2 moves to discuss what progress is being made in innovative approaches; And how direct payments and telecare have changed over the past three years. It also outlines work that has taken place in the area of extra care housing. Section 3 then goes on to discuss what has been achieved on the work programme and what work needs to continue and in some cases what work still needs to begin.

These figures outline the change in the next ten to twenty years but it is important to note that this increase is happening now and planning and change need to start now.

Part 2: Innovative Approaches

The 'Mitigations' / Innovative Approaches

The original report discussed some innovative approaches that can be used to reduce the demand for 'traditional' care, and offer options beyond these. These included community work, strength-based working, direct payments, Technology and Artificial Intelligence (AI) and extra care homes.

The data update here focuses on direct payments, telecare and extra care homes. This section provides an update on how the hours/numbers have changed in the last three years for direct payments and telecare. It then goes on to highlight new findings from the recently completed LIN Housing report (June 2026) on what recommendations they have made for additional extra care housing in the future.

Part three will update more on the work that has taken place in the last three years in all the workstreams outlined in the original report.

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Direct Payments

In the original report that included May 2023 data, there were 1,583.75 hours of care provided weekly through direct payments. By May 2026 2,656 hours of care were being provided by direct payments. This is an increase of about 1,072 hours, or 68%, in three years. In order to get a full picture of direct payments it is also important to look at the number of individuals receiving them, as it is possible that the hours data may be affected by an increase in individual's needs, rather than new individuals receiving direct payments.

Looking at this data per individual receiving direct payments, a similar trend can be seen. In May 2023 there were 57 individuals receiving direct payments, but by May 2026 there were 119 individuals. This is an increase of 62 individuals, which is 109%.

This shows a significant increase in the provision and the number of individuals receiving direct payments in three years. It should be taken into account that the initial numbers in 2023 are quite small which affects the size of the percentage change, therefore, it would be useful to continue to look at this data to see if similar increases continue to be seen. It's also worth noting that the upward trend is likely to level out over time. As direct payments are often not available to individuals with significant needs, it is harder over time to continue to increase numbers of direct payments.

Telecare/technology

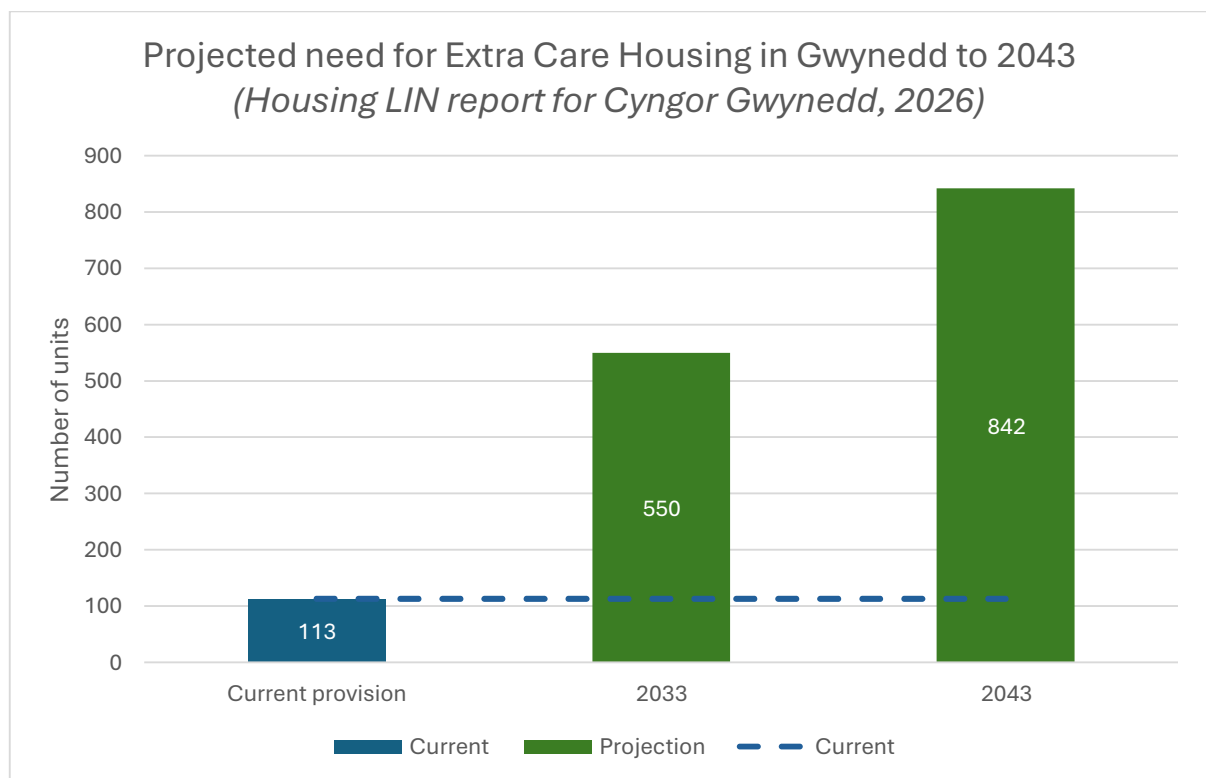
In the original report, which included data from May 2023, there were 1,396 individuals making use of telecare/technology. By May 2026 there were 1,485 individuals. This is an increase of 89 individuals, or 6%, in three years.

It should be known that the initial numbers in 2023 are quite small which affects the size of the percentage change, which would be useful to continue to look at this data to see if similar increases continue to be seen. Part three outlines what work has taken place in this area over the last 3 years.

Extra care housing

A consultancy company was commissioned to model the need for different types of care settings into the future in light of direction set by the original Llechen Lân report, the aspirations of service users and developments in the field in general. That report includes a projection of the need for a number of different types of provision for the future; This report focuses on the projection of the increase in the number of places in extra care homes as this is a key part of this reports picture.

In terms of the provision of extra care housing, the report (June 2026) projects that provision across Gwynedd will need to be increased over the next few years as follows:



Graph 10 – Projected needs for Extra Care Housing in Gwynedd up to 2043 (Housing LIN report)

It will be necessary to revisit the basis of this model and quantify the likely need in light of the impact of the revised population projections as outlined above.

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Working towards the rural mean update

During the original Llechen Lân project a model was created showing the potential impacts of reducing the need for domiciliary and residential care, so that Gwynedd's provision is more similar to that provided in other rural councils. This was described as a 'rural mean' and the aim was to reach a similar level to other rural counties in Wales by 2043. Although this was only a diagram to illustrate the potential impact of changing care provision, it is useful to look at Gwynedd's latest data to see how it compares to the original model. More work needs to continue in this area.

Residential Care:

The data shows growth in residential care need between 2023 and 2026 in line with the model's projections. Residential care has seen a growth of 10% between 2023 and 2026. The level of residential care provision continues to be higher than in the rest of the rural counties of Wales. It is suggested that this data should continue to be looked at regularly to see if this growth continues at the same scale, and more background work should be done to see what is driving the increase in residential placements.

Domiciliary Care:

The domiciliary care data shows a different picture, where the level of traditional home care provided appears to have declined since 2023. This is different from the model. It should be noted that data cleansing over the last two years means that this data is less reliable. This may also be an indication of the imminent impact of some of the innovative approaches discussed above (direct payments and telecare etc), but we know that waiting lists for domiciliary care continue, and on the ground the demand for domiciliary care seems to be higher than ever. It is too early to draw definitive conclusions from this data. It is suggested that the quality of this data should continue to be checked and trends kept an eye on, and then more concrete results can be drawn from the data over the next few years as the innovative approaches take root.

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Part 3: Work Programme Update

We have outlined the work that has been done in all workstreams in the attached Excel spreadsheet.

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Part 4: Next Steps

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Appendix 1: Background Finance data to part 2

1. Residential/ Nursing (Non-Dementia) care funding:

Table 10– Projected residential/nursing (non-dementia) funding based on the 2018 (Original Model) and 2022 (New Model) Gwynedd population projections for the population aged 65-79 and 80+

	£M	
	Original Model	New Model
2023 Current Funding	24.4	24.4
2023 Waiting List	1.2	1.2
2033 *	30.9	33.3
2043 *	36.4	41.4
2047 *		44.6

**Future figures including waiting list*

1. Residential/ Nursing (Dementia) care funding:

Table 11 – Projected residential/nursing care (dementia) funding based on the 2018 (Original Model) and 2022 (New Model) Gwynedd population projections for the population aged 65-79 and 80+

	£M	
	Original Model	New Model
2023 Current Funding	9.4	9.4
2023 Waiting List	1.1	1.1
2033 *	12.9	13.7
2043 *	15.1	17.0
2047 *		18.3

**Future figures including waiting list*

1. Domiciliary Care Funding:

Table 12 – Domiciliary care funding projections based on the 2018 (Original Model) and 2022 (New Model) Gwynedd population projections for the population aged 65-79 and 80+

	£M	
	Original Model	New Model
2023 Current Funding	11.8	11.8
2023 Waiting List	2.1	2.1
2033 *	16.5	18.0
2043 *	18.4	21.4
2047 *		23.0

**Future figures including waiting list*