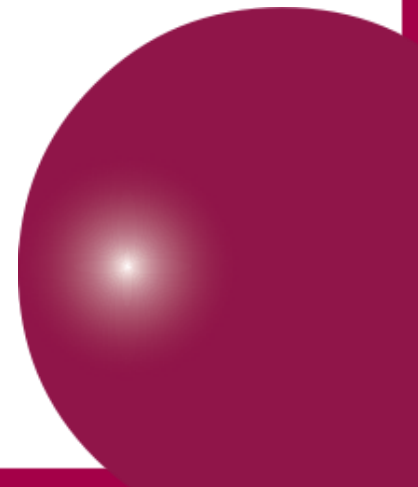


Trends and Foresight

Report 1 - Ageing
Prepared for Big Lottery Fund
January 2014

The logo for Trajectory, featuring a red curved line above the word "trajectory" in a lowercase sans-serif font. Below "trajectory" is the tagline "the futures partnership" in a smaller, lowercase sans-serif font, with "futures" in red and "partnership" in black.

trajectory
the futures partnership



AGEING

Introduction

- The ageing of the UK population is driven by two main factors – the very large baby boomer cohort (born after WW2) reaching retirement and increasing life expectancy.
- The impact of this ageing will create significant areas of need – including public service provision, wellbeing and digital isolation.
- Critically, the demographic trends that underpin the ageing society are not uniform (although they are present in each UK Nation). They vary sharply by local authority.

Ageing 2013-2018

Over the next 5 years, there will be at least a 10% rise in the number of over 65s in the UK, with even faster growth in the number of over 80s

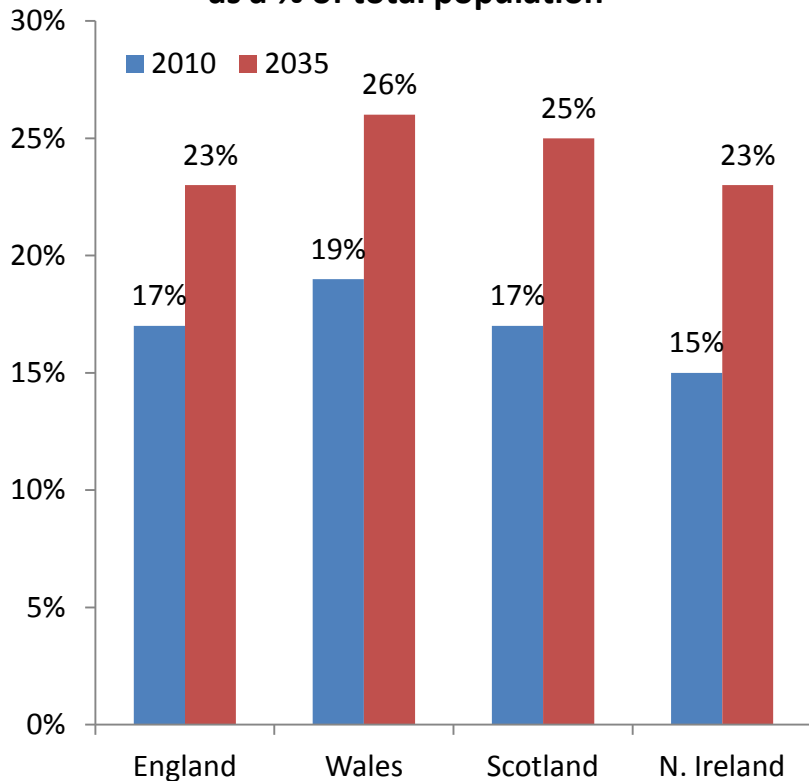
	Over 65 population, 2013	Over 65 population, 2018	% change	Over 80 population, 2013	Over 80 population, 2018	% change
England	9,303,221	10,297,475	11%	2,542,754	2,890,810	14%
Wales	600,325	659,882	10%	158,764	178,705	13%
Scotland	947,571	1,041,956	10%	241,789	277,720	15%
Northern Ireland	279,315	312,933	12%	71,526	83,310	16%

ONS population projections 2012 based

Ageing 2010-2035

The longer term picture is even more dramatic, with the proportion of over 65s rising to 25% or more by 2035 – such long term forecasts underline the need for early planning

persons aged 65 and over by UK country
as a % of total population



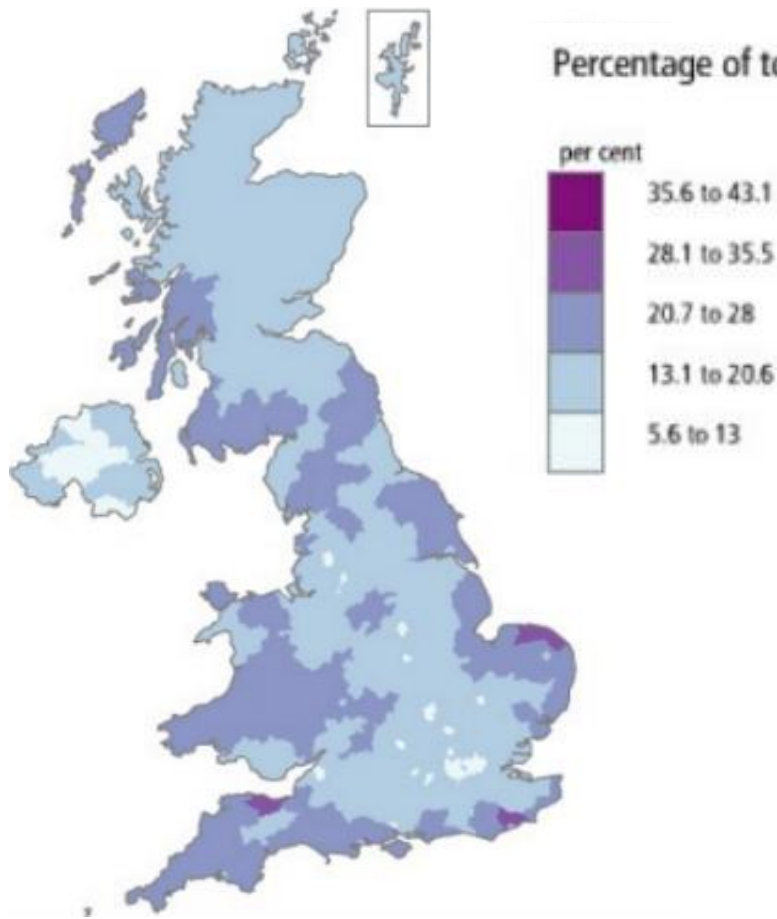
- Between 2010 and 2035 the numbers and percentages of older people in all four UK countries are projected to increase.
- Northern Ireland and Scotland projected to have the largest increases in the proportion of older people (+8%).
- By 2035, Wales is predicted to have the highest proportion of people aged 65 or older (26%), closely followed by Scotland (25%).

Ageing is not uniform across the UK

However, although each constituent UK Nation is ageing (at similar paces) there are sharp disparities at local and regional level. Some areas of the UK are ageing at a faster rate than other – typically those based in the South West of around the South East coast, which are popular retirement areas

Highest proportion of older people	% 65+	Lowest Proportion of older people	% 65+
Christchurch	29.7%	Tower Hamlets	6.1%
West Somerset	29.1%	Newham	6.7%
North Norfolk	28.8%	Hackney	7.1%
Rother	28.4%	Lambeth	7.7%
East Devon	28.2%	Southwark	7.7%
East Dorset	27.9%	Islington	8.8%
Tendring	27.0%	Wandsworth	8.8%
West Dorset	26.5%	Haringey	8.8%
Arun	26.3%	Hammersmith and Fulham	9.0%
East Lindsey	26.0%	Slough	9.1%

Regions with high concentration of older people



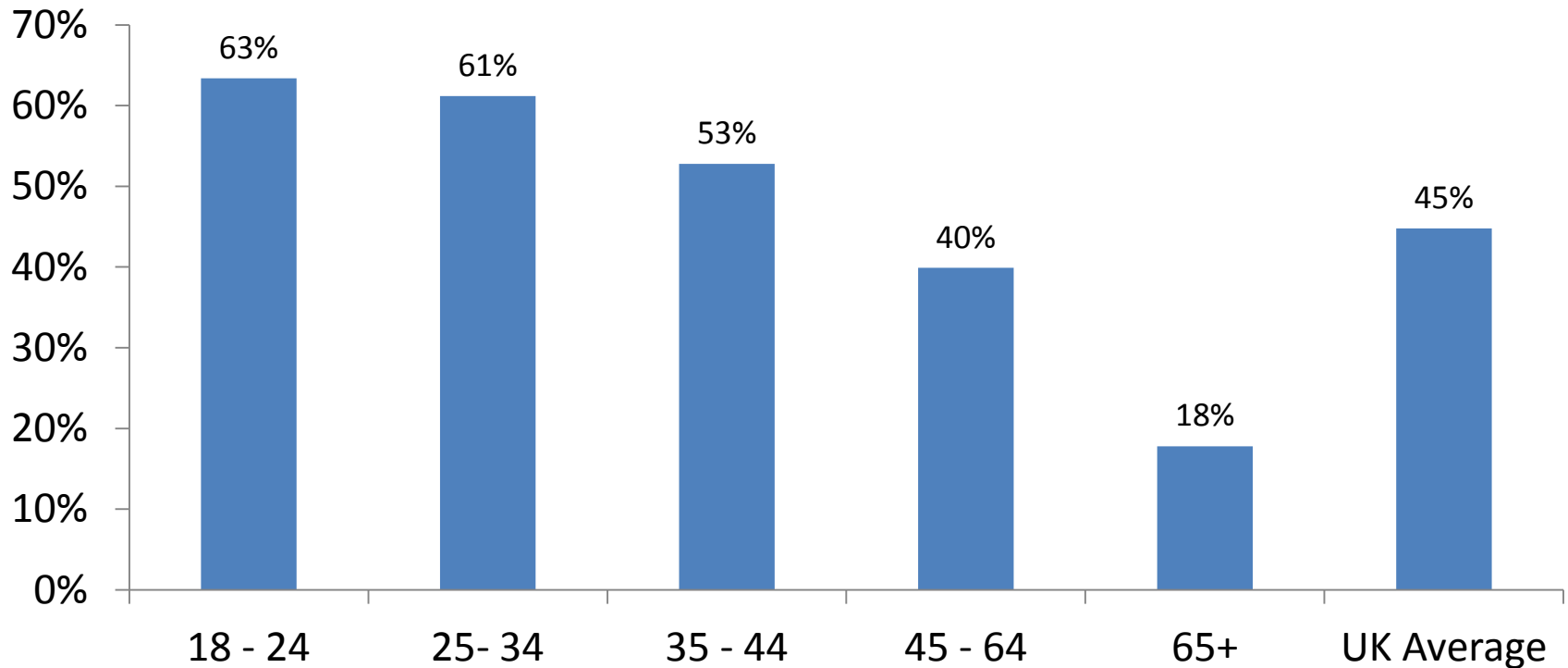
Legend: Percentage of total population aged 65+

- Oxford, Manchester, Cambridge and Nottingham had the lowest median ages in 2010 - higher education institutions in these areas increase the population of young adults, reducing the average age.
- Many of the areas with the highest percentages of people aged 65 and over were located on the east or south coast, reflecting a tendency for people to retire to these areas.
- Despite similar fertility and mortality patterns in Wales and England, Wales' population is ageing faster – this may be explained by both young people migrating out of Wales, and older people living and retiring in Wales due to its highly rural appeal.

Digital Divide

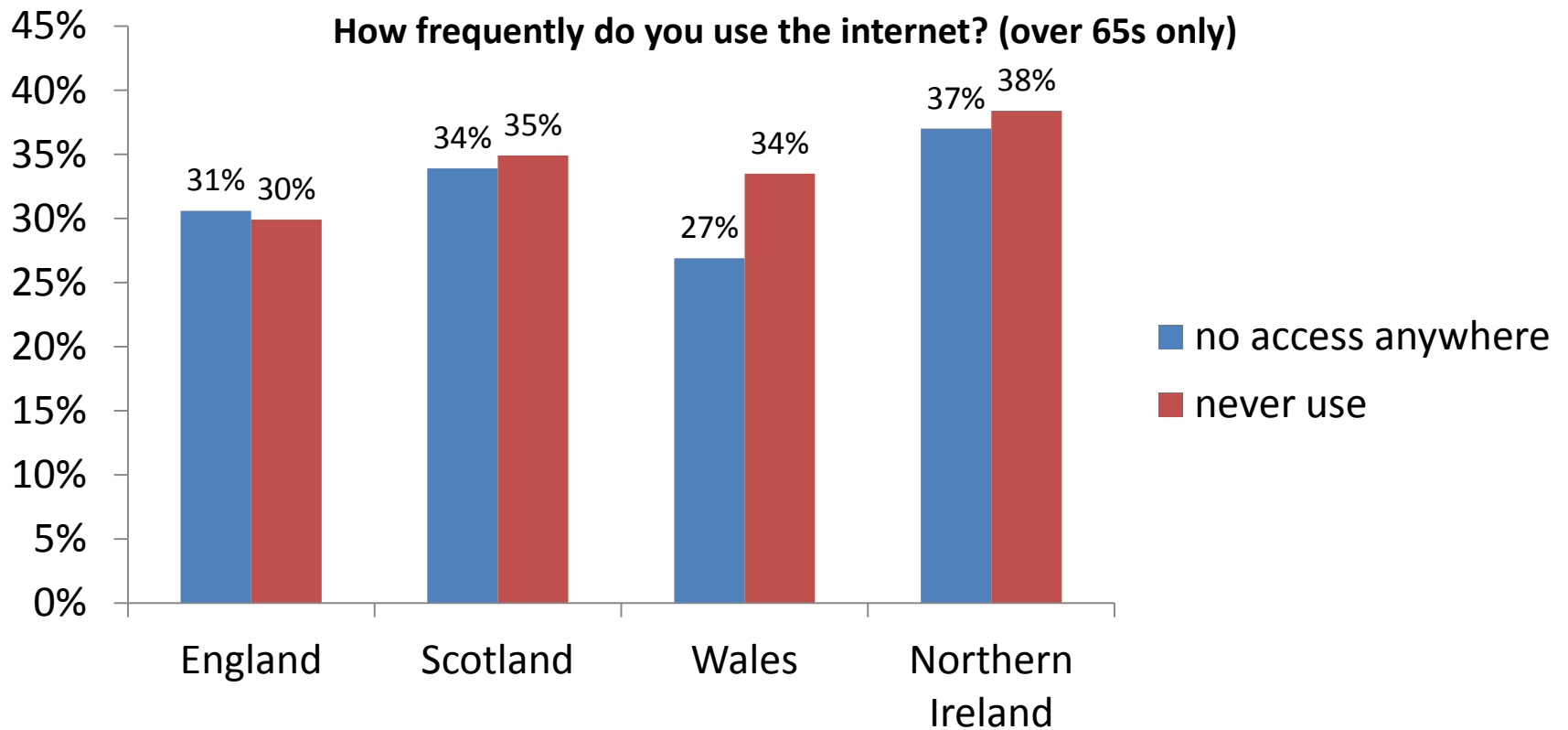
People over the age of 65 are significantly less likely to use the internet than younger groups – just 17% use the internet regularly

How frequently do you use the internet? (% responding every day)



Digital access lowest in Northern Ireland

Digital access is lowest in Northern Ireland, where 75% of the over 65 population either have no access or never use the internet

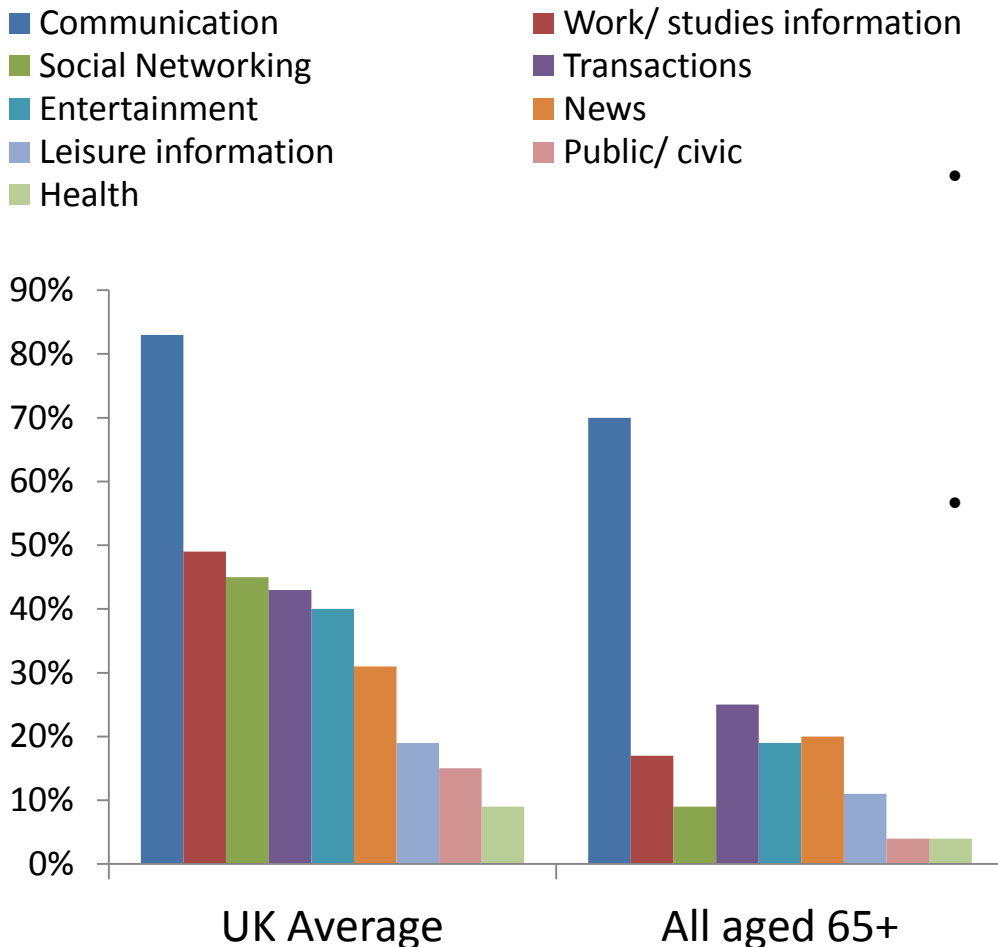


North-South Digital Divide

Within England, the Digital Divide is particularly evident in the gap between the local areas with the highest and lowest proportion of over 65s online

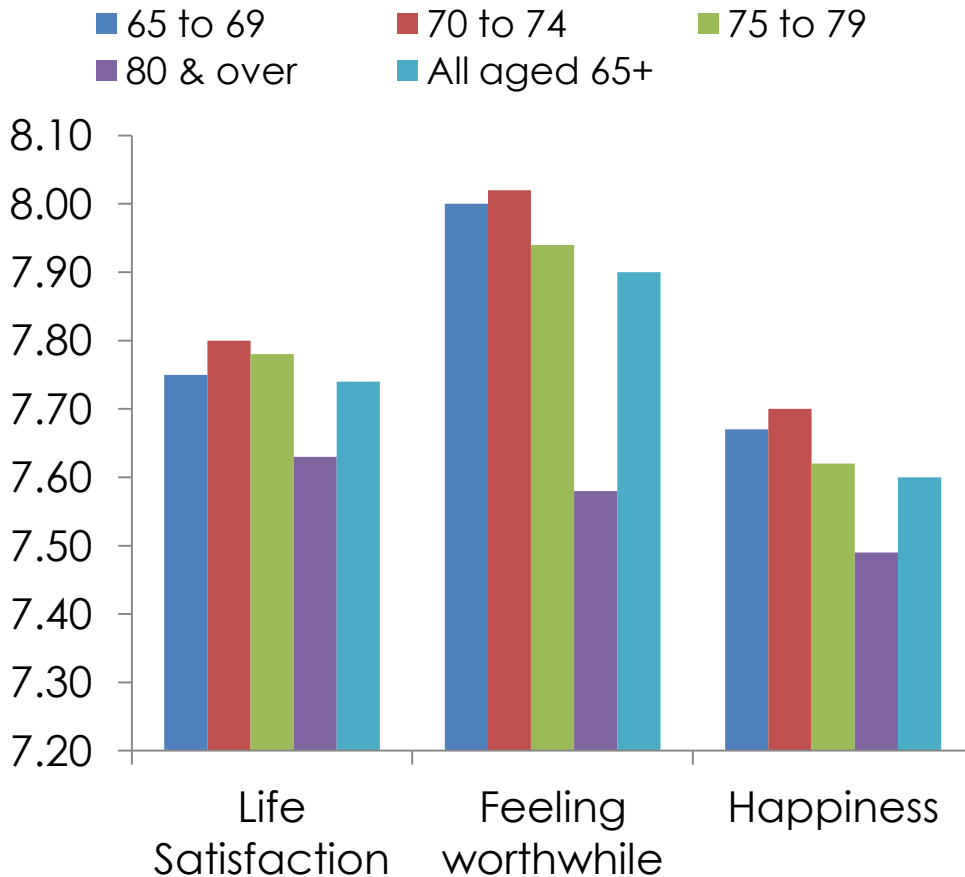
Bottom five areas for internet use amongst people aged 65	People 65+ offline (never using the internet)	People 65+ online (use the internet)	Top five areas for internet use amongst people aged 65+	People 65+ offline	People 65+ online
Tyne and Wear	72.3%	27.7%	Surrey	37%	63%
West Yorkshire	70.3%	29.7%	Bedfordshire	46.2%	53.8%
Cumbria	69.8%	30.2%	Bucks	46.6%	53.4%
South Yorkshire	68.7%	31.3%	Suffolk	47.1%	52.9%
Hull and East Riding	68.5%	31.5%	Oxfordshire	50%	50%

Communication critical for older people



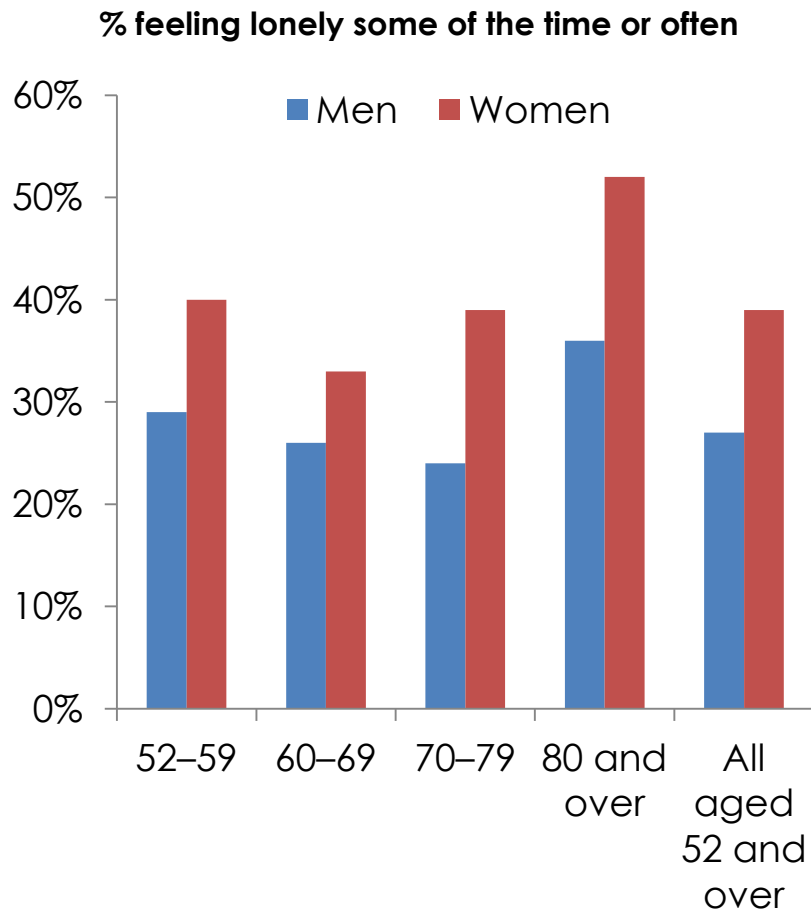
- Like the UK average, over 65s are most likely to use the internet as a means of communication – but are far less likely to use it for anything else.
- The practical benefits of the internet are the next most popular amongst the older demographic – transactions and viewing news.

Well-being in old age



- Life satisfaction increases post retirement, but then experiences a slight decrease at the age of 80 or over.
- 'Feeling worthwhile' is highest post retirement, but then experiences a slight decrease at the age of 80.
- Those aged between 65 and 79 are happiest, with a slight decrease in happiness beyond the age of 80.

Feeling lonely



- One impact of ageing and concern about well-being is elderly isolation.
- A higher percentage of women than men reported feeling lonely some of the time or often in each age group.
- In many cases, this is likely to be a result of the disparity in life expectancy between the sexes.
- This trend will increase as the population ages.

Source: English Longitudinal Study of Ageing, Wave 5, 2009-10

Emerging areas of need

- In the short and medium term, isolation is a key area of need for the increasing numbers of older people across the UK.
- This will take several forms, but includes geographical isolation (high proportion of older people in rural areas) as well as digital isolation.
- The impact of this will be seen in the wellbeing of older people – although people in the UK are happiest and most satisfied with their life immediately post-retirement, this wanes as they age. This is also true of those feeling that life is worthwhile, which experiences a sharp drop after the age of 80.
- Wellbeing and isolation are likely to be linked – making this a critical area of need for BIG to help address.
- It is crucial to recognise, however, that this is not uniform across either the UK or any of its constituent nations – but can vary dramatically within regions.
- This necessitates a local and carefully targeted approach in order to ensure that measures aimed at alleviating this need are relevant to the local area.

Thank You

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