This briefing provides background to the Finance Committee inquiry into demographic change and population ageing.
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EXECUTIVE SUMMARY

Demographic Change

Ross Burnside

Background

Scotland’s population is at record levels, but within it there have been changes to the age structure, with increasing numbers in the over 65 category. Like much of the developed world, the trend towards population ageing is projected to continue in Scotland in the coming years and decades, with implications for public policy and the distribution of public money.

This presents politicians with challenges, particularly in the area of health, social care and housing, but it also presents opportunities to tap into the potential of an older, more experienced workforce as well as economic opportunities in areas like the care sector.

This briefing provides background for the upcoming Finance Committee inquiry into demographic change and population ageing. It charts the demographic position of Scotland before looking at the implications of population projections for health and social care, housing, pensions and the labour market.
FINANCE COMMITTEE INQUIRY: DEMOGRAPHIC CHANGE AND POPULATION AGEING

On 23 May 2012, the Finance Committee agreed to undertake an inquiry into demographic change and population ageing with the following remit:

‘To identify the impacts which demographic change and an ageing population will have primarily on the public finances in respect of the provision of health and social care, housing, and pensions and the labour force, and the planning being undertaken by the Scottish Government and key public bodies to mitigate such impacts.’

This briefing provides members with background information in this area.

WHAT DRIVES DEMOGRAPHIC CHANGE?

Population size is driven by a combination of four factors: the number of births, death, immigrants and emigrants. There are two ways a population can change. The first is through a change in births and deaths, otherwise known as “natural change”, the second is via a change in “net migration”, which is the difference between the number of immigrants and emigrants. An ageing population is ultimately driven by the interaction of these four factors: “lower fertility combined with gradually decreasing mortality and no significant gains or losses from migration results in the redistribution of the population away from the younger to the older age groups” (Jeannet 2010).

SCOTLAND’S POPULATION

The estimated population of Scotland on 30 June 2011 (latest available) was 5,254,800, the highest ever. This represents an increase of 32,700 on the previous year and is 200,000 higher than the estimate for mid-2002, when the population dropped to its lowest level in recent times. In the twelve months to mid-2011, there was a net migration gain of 27,000 people, consisting of a net gain of 2,900 people from the rest of the UK, a net gain of 25,400 from overseas (including asylum seekers) and a net loss of 1,400 due to movements between the armed forces and the civilian population. There were 58,766 births in 2010-11 (slightly fewer than the previous year) and 53,957 deaths (slightly more than the previous year). The number of births in the twelve months up to mid-2011 exceeded the number of deaths by 4,809.

Scotland’s population has increased for nine years in a row, largely due to more people migrating into Scotland than leaving Scotland (as is shown in Figure 1 below).
Scotland’s population has been increasing in recent years, and it has also been ageing. The changing age structure of the population since 2001 is illustrated in Figure 2 below. The ageing of the population is evident in the rises in the older age groups (+13 per cent in the 45-59 age group, and +15 per cent in the 60-74 age group and 75 and over age group) and the falls in some of the younger age groups (-6 per cent in the under 16 age group and -12 per cent in the 30-44 age group). Population ageing is a phenomenon occurring throughout much of the developed world, and has obvious policy and budgetary implications, with a likely increasing demand placed on social services and healthcare.

Figure 2: The changing age structure of Scotland’s populations, 2001-2011.
POPULATION PROJECTIONS

A WORD OF CAUTION

Population projections are rightly used by policy makers as an indication of the likely future demands on public services, but it is important to attach a degree of caution to any population projection. Projections are just that, they are not a precise science. Projections are calculations that show what happens if a particular set of assumptions are made. They use past trends to deduce future trends and do not include behavioural or policy changes, nor do they include potential for unanticipated external shocks. The accuracy of the projections depends on two important drivers: the extent to which the past trends have been accurately measured and the extent to which the future reveals itself to be consistent with the past.

The reliability of the projections is entirely dependent on the quality of underlying data and the extent to which they represent current trend. Migration, in particular, is difficult to project because it is largely determined by evolving economic and political forces, rather than past trends. Fertility and mortality projection rates tend be closer to the realised rates. However, the unanticipated fertility increase in some recent years shows the limitations of these projections. Mortality trends are also subject to a certain degree of variability, pending certain medical breakthroughs that currently remain unforeseen. Many social and economic factors influence population change including policies adopted by both central and local government. The relationships between the various factors are complex and largely unknown (GROS, 2011).

Population projections may also be an impetus for behavioural and policy change, making them less likely to be realised. Population projections may indicate that existing trends and policies are likely to lead to outcomes which may not be deemed desirable. If policies are introduced that counter these trends, either directly or indirectly, the original projections will not be realised (GROS, 2011). An example of this was the Fresh Talent Initiative, which was introduced in 2004 as a response to the projection that the Scottish population might fall below the "symbolic 5 million" mark. Since 2004, however, the Scottish population has increased year-on-year, driven by higher than expected fertility rates and higher than expected immigration levels from the rest of the UK and in particular, from EU accession states.

SCOTTISH POPULATION PROJECTIONS

The latest projections of Scotland’s future population are based on existing trends and make no allowance for the future impact of government policies and other factors. They show that the total population of Scotland is projected to rise to 5.76m in 2035 (see figure 3 below). Longer term projections show the population continuing to rise, reaching approximately 6.2m by 2085.
Between now and 2035, the Scottish population is projected to age significantly. Figure 4 shows that the number of children aged under 16 is projected to rise by 3% (from 0.91m to 0.94m), while the number of people over 65 is projected to rise by 63% (from 0.88m to 1.43m).

The trends towards an ageing population are not uniform across the country, something the Committee may wish to consider in this inquiry. There is an urban-rural dimension to population ageing. People of working age tend to leave rural Scotland, whereas older people (65+) tend to migrate into the more rural parts of Scotland. This is reflected in the fact that local authority...
areas with greater degrees of rurality tend to have older populations. This has obvious implications for the provision of public services (most notably health, social care, housing and transport).

Figure 5: Age structure of council areas in 2010: children, working age and pensionable age (ranked by percentage of pensionable age)

![Figure 5](image1)

Figure 6: Projected age structure of Council areas in 2035 (2010-based): children, working age, and pensionable age (%), (ranked by percentage of pensionable age)

![Figure 6](image2)

Source: National Records of Scotland 2012

FISCAL SUSTAINABILITY IMPLICATIONS OF DEMOGRAPHIC CHANGE AND POPULATION AGEING

As mentioned above, population ageing is an issue that much of the developed world is currently facing. However, it is wrong to conclude that all aspects of population ageing are negative. It is worth celebrating the fact that life expectancy is increasing throughout the world. Scotland’s life expectancy, although lower than the rest of the UK and much of Europe, has
greatly improved in the last 25 years – it is currently 76.1 years for men and 80.6 years for women. Increasing life expectancy points to the improvements in wealth and living standards that have been achieved in many parts of the world since 1945. It also signifies the improvements in medical science that have been achieved as well as the improved access to medical technology enjoyed by many more people.

There are many age-related aspects of government spending where there will be implications for the public purse arising from the shift of population composition to people over 65. For instance, with fewer young people as a share of the total population, will there be scope to save resources in primary and secondary education, or would such a course be counter-productive given the preventative spending agenda all political parties are signed up to? As the Finance Committee has discovered in its work on preventative spending, government can create huge costs by cutting the wrong spending. Care must be taken to ensure unintended consequences from policy choices are kept at a minimum. If we are to face the future with sustainable policies and budgets, tough choices about the role of the state and the structure of the Scottish budget will be necessary. Paul Johnson, Director of the Institute for Fiscal Studies argues that there must be a focus on spending targeted at the over 65s, who traditionally, because of their increased propensity to vote have been relatively well protected.

Some of the most difficult choices are likely to be about how to manage the scale of health and pension costs associated with ageing. The over-65s have been the one group relatively protected during this period of spending cuts. But in future politicians will need to decide whether and how to raise more money from this group, which is vocal and votes actively, at a time when its numbers are growing. That is the political challenge of a generation (Johnson, 2012).

The remainder of this paper considers the implications of demographic change on the areas of spend being considered in the Finance Committee inquiry: health and social care, housing, pensions and the labour force. As the number of people aged over 65 increases, demand for health and social care will grow, there will be impacts for the provision of pensions and housing. Simultaneously, the base expected to pay for increasing demands on services provided by the state, people of working age who are employed, is becoming progressively smaller in both absolute and relative terms. This will have implications for labour market dynamics, with people likely having to work longer.

HEALTH AND SOCIAL CARE

Unlike certain state-services like social care and social security, almost everyone is a consumer of healthcare at some point in their life. The most recent Fiscal Sustainability report by the Office for Budget Responsibility (OBR) forecast that health spending across the UK would rise from 6.8% of GDP in 2016-17 to 9.1% of GDP in 2061-62 as a result of population ageing (OBR 2012). The 2010 Reshaping care for older people report (Scottish Government 2010c) found that “around £4.5bn was spent in total on health and social care for people aged over 65 in 2006-07” and considered that if we continue to provide services in the same way “this figure will increase by £1.1bn by 2016, and by £3.5bn or 74 per cent by 2031.”

Incidence of long-term conditions increase with age for both men and women. Musculoskeletal, circulatory, and respiratory disorders, along with sensory impairments, account for a large proportion of the illness and disability seen in the older population. Dementia and stroke are also particularly common causes of disability among older people living in long term care (Wood and Bain, 2001). Figures included in Scotland’s National Dementia Strategy (Scottish Government, 2010b) indicate that while 1.5% of the 65-69 age group are affected by dementia,
this increases to around one in 3 for those over 90, and the number of people with dementia in Scotland is expected to double over the next 25 years.

Given these kind of statistics, healthcare costs are generally thought to rise with age although the evidence for this is not entirely clear. There is a significant body of literature which suggests that, while age is important, “proximity to death” rather than age per se is also an important determinant of individuals’ health expenditures, with health care costs increasing significantly in the final year prior to death (Gray 2005). Taking this into account will tend to moderate the projected increase in health care expenditure due to the ageing of the population. Achieving improvements in Healthy Life Expectancy (HLE) (ie, reducing the numbers of years spent in poor health), however, will be an important factor in age related health expenditure in the future if the point at which people start making increased demands on health services is delayed. Improving HLE, like so many areas of public policy, takes us back to the importance of the preventative agenda.

There is also a geographic question to health and social care expenditure, although again the answer is not necessarily straightforward. The greater proportion of older people in rural areas (touched on above, also see annex 1) suggests higher demand for age-related health and social care services. However, this may be off-set to some extent by more favourable HLE in rural areas. Borders, Orkney, Grampian, Shetland and Highland Health Board areas all score particularly well in relation to HLE (Scottish Government 2010a). Differential health and social care requirements may be worthy of further exploration.

In Scotland, like many developed countries, there has been increased policy discussion on the integration of health and social care services since the 1970s. However, in recent years these discussions have developed greater momentum for a number of reasons. The current economic situation in Scotland (and the rest of the UK) and the resulting fiscal pressures have raised concerns as to the affordability of health and social care services. In addition, the trends towards ageing in much of the developed world have made this of more pressing policy concern. A study by Jeannet (2010) found that in Scotland, on existing trends, spending on primary care for people aged over 65 could increase by 23 per cent by 2018 and 70 per cent by 2033 in real terms. Integrating health and social care systems is seen as a way to make more effective and efficient use of limited resources (Suter, et al 2009) and is believed to be central to the challenge of improving outcomes for patients and service users (Thustlethwait 2011). This seems to have influenced Scottish Government thinking, and in December 2011, the Cabinet Secretary for Health, Wellbeing and Cities announced the Scottish Government’s plan to integrate adult health and social care. In May 2012 the Scottish Government launched its consultation on the integration of adult health and social care, which is due to close on 11 September 2012 (Scottish Government 2012). Members may wish to consider how Scottish Government thinking is developing in this area in light of the consultation responses.

The evidence suggests that an ageing population will be a large cost driver across a wide range of health services particularly at proximity to death. The extent of this cost is still widely debated and may be something the Committee wish to explore during this inquiry. Past trends show that older people rely more heavily on health services than younger people. It is difficult to anticipate if future generations of older Scots will age with similar health patterns as today. For instance, the long term behavioural impacts arising from public policy like the smoking ban, minimum pricing for alcohol and healthy eating campaigns have yet to be seen. These initiatives designed to improve “healthy” life expectancy, combined with medical advancements and continuing technological advances in health care delivery may offset some of the projected increases in health and care costs resulting from ageing.

Turning again to the implications of ageing for particular parts of Scotland, it is likely the population ageing will impact on costs in all health board areas but some areas could face more exaggerated challenges than others. Understanding the extent of the increase is difficult since it is not merely
considering the volume increase of services and products but also additional costs, such as building more facilities and hiring more staff. The extent of these costs is likely to vary based on each NHS board’s demographic make-up as well as their current ability to accommodate an ageing population. Given the projections for the number of people of pensionable age in rural Scotland, there may be a need for more intensive policy interventions in those areas. It is also important to consider the possibility that some board areas may be able to capitalise on economies of scale due to the increase usage of health services and their health provision may not suffer from efficiency deficiencies.

HOUSING

At the Finance Committee round table discussion on fiscal sustainability on 11 January 2012, Dr James McCormack said:

“In addition to the ageing issue, our society is becoming more marked by solo living – that is, people living in single-person households. That reflects relationship breakdown and all sorts of social trends, and it means that more of us than ever will, in all likelihood, arrive into older age living alone. That has implications for the supply of housing stock and the need to get our act together on housing adaptations” (Scottish Parliament Finance Committee 2012).

This analysis is borne out by the recent Registrar General’s review of demographic trends which found that in mid-2011, there were 2.37 million households in Scotland, around 173,000 more than in 2001. The GROS report projects that by 2035, the number of households in Scotland is projected to increase to 2.89 million, which is an average of 21,230 additional households per year. Obviously, this is a projection, but it does raise the need to think about the issue of housing stocks overall, and how existing stocks might be adjusted to accommodate an older citizenry.

The GROS report puts the projected increases in households down to an ageing population and more people living alone or in smaller households, rather than an increase in the size of the population overall. The projected increase in the numbers in older age groups (65+) and the small fall in the number of younger people (16-64) (see figure 4 above) will have an impact on household structures, as elderly people are more likely to live alone or with just one other person.

Increases in the number of households are projected across most of Scotland. In some council areas, the number of households are projected to sizably increase by at least 20%. The largest increases are projected in the City of Edinburgh (+43%) and Perth and Kinross (+43%). Aberdeen City, Aberdeenshire and East Lothian also have projected increases of over 30%. Inverclyde is projected to see a 6% fall in the number of households over the same period (2010-2035).

Figure 7 below shows the number of households by type in 1981, 2010 and projected to 2035. It shows in the years between 2010-2035, a substantial projected increase in households containing just one adult (+49% between 2010 and 2035); increases in households with two adults (projected to increase by 23%) and households with one adult with children (a projected increase of 51%).
The Scottish Government is aware of the housing challenge that arises from population ageing. In its Draft Budget 2012-13 the Scottish Government (2011a) committed to publishing a national strategy on housing for older people, which was duly published in December 2011 (Scottish Government 2011b). This Strategy sets out a national framework for delivering housing stock suitable to the needs of older people. Yet, it also states that “decisions on local policy and service delivery….are best taken by local authorities.” Housing, like a range of public policy, requires close collaboration between central government (who have a funding and leadership role) and local delivery agents. During the inquiry, the Committee may want to probe the efficacy of that central-local relationship in terms of the actual delivery of housing needs. Where are the examples of good practice, and can that good practice be shared? What are the urban and rural dynamics in housing policy? Age Scotland’s (2012) submission to the Committee’s call for evidence raised the following concerns regarding local authority delivery of housing for older people:

“To date, there is little in the way of progress from any local authority about how they will build the supply of this new stock suitable to the needs of older people. Indeed, given the lack of any specific and measurable targets within the document [SG’s Housing for older people strategy], and no additional money being allocated to delivering on the outcome, it seems unlikely that the vision detailed in the document of a national supply of adaptable housing that meets the needs of an ageing population will become a reality. Ultimately, with no compulsion or incentive to act, local housing provision for older people will continue to develop in ad hoc manner which threatens to undermine the entire Strategy.”

The issue of funding is obviously crucial to the delivery of suitable housing, and becomes more challenging at a time of public spending restraint. The Housing and Regeneration budget has been falling in recent years from a peak of £693.3m in 2009-10 to £300.8m in the current financial year, and £272.7m in the final year of the spending review (2014-15). This explains recent Scottish Government attempts to leverage in private sector investment into the housing sector through the National Housing Trust (NHT) initiative which uses private sector finance and council borrowing to support affordable housing. Members may wish to probe witnesses on the adequacy of funding available for housing.
PENSIONS

The UK Government is primarily responsible for setting policy for occupational public sector pensions. However, the Scottish Government has responsibility for some policy aspects of five of the six schemes (all but the civil service scheme), including aspects of scheme design. The sixth scheme is the Principal Civil Service Pension Scheme (PCSPS), which is wholly controlled at UK level, as are the terms and conditions of civil servants (Audit Scotland, 2010).

There are six main public sector pension schemes in Scotland, with which around one million people have a direct interest either as members or as pensioners and dependents. The six schemes are as follows: local government, NHS, teachers, police, firefighters and civil servants.

**Figure 8: Members of public sector pension schemes by status (2010)**

![Diagram showing membership of the six main public sector pension schemes in Scotland 2010](image)

**Source:** Audit Scotland 2010

Contribution rates

Employers’ contribution rates for the various pension schemes currently vary from 11.5% to 24.7%. In 2009-10, the total employer contribution to the various schemes with memberships in Scotland was £2.174bn. HM Treasury covers the contributions to the UK-wide civil service pension scheme (for those working in Scotland in reserved areas, eg, Defence), the teachers and NHS pension payments came out of the Scottish Annually Managed Expenditure (AME) budget, with the remaining pension schemes being paid out of the Scottish Departmental Expenditure Limit (DEL) budget. Local Government pension contributions come from the operating budgets of each council. Figure 9 provides information on the contribution rates of the various schemes as well as membership numbers.
Five of the six schemes in Scotland are so-called “unfunded” or “pay-as-you-go” schemes, which means that pension liabilities are paid from the current employees’ and employers’ contributions, or from Government funding, with no money being put aside in a pension fund. However, the current UK Government is concerned that with increasing life expectancy, the costs of these schemes in the future will require that employee contributions will need to increase. As such, the UK government has introduced a tiered system of increased contributions based on salary. The increased contributions are across the various unfunded public sector pensions schemes, and on average equate to a 3.2% increased employee contribution by April 2014. Increased employee contributions came in to force in April 2012, but unions are opposed and have undertaken industrial action as a result, and may undertake further industrial action in the autumn.

Unions point to the recent interim review into pensions by Lord Hutton which showed that the cost of the main pension schemes is falling from 1.9% of national income this year to 1.4% in 2060 due to reforms agreed to public sector pensions in the past decade:

Source: Audit Scotland 2010
There have been significant reforms to the main public service pension schemes over the last decade, including increased pension ages for new members and a change in the indexation of pensions from RPI to CPI indexation. Some of these changes have reduced projected benefit payments in the coming decades. For the interim report the Commission asked the Government Actuary’s Department (GAD) to project future public service pensions expenditure. It projected benefit payments to fall gradually to around 1.4 per cent of GDP in 2059-60, after peaking at 1.9 per cent of gross domestic product (GDP) in 2010-11” (Source: Independent Public Service Pension Commission, 2011).

The Local Government Pension scheme is a “funded scheme” which means that the money the employees and employers contribute is set aside in a fund and invested to provide a return to help meet future pension liabilities. According to the Audit Scotland Report into “the costs of public sector pensions in Scotland” the Local Government pension scheme “currently achieves a surplus each year” and that “local audits indicate that the 11 funds that make up the LGPS in Scotland are generally well administered, with the larger funds being examples of good governance.”

Audit Scotland made a number of recommendations in its report on the Cost of Public Sector Pensions in Scotland, which the Finance Committee may wish to follow-up during the course of the inquiry. It recommended that the Scottish Government should:

- provide a clear statement of the aims and objectives of the public sector pension schemes in Scotland
- ensure that it is meeting these aims and objectives by putting in place arrangements to scrutinise pension provision across the public sector in Scotland, within the context of other aspects of public sector pay and conditions;
- consider increasing the role of experts to strengthen scrutiny and decision-making
- consider whether differences among schemes in areas such as contribution rates and level of benefits are necessary to realise the objectives of each scheme
- within the legal and financial constraints which apply, decide how best to incorporate changes made at a UK level into the equivalent Scottish schemes to meet its objectives for public sector pension schemes in Scotland

LABOUR MARKET DYNAMICS

Changes to the age structure of the Scottish population will have implications for the labour market. Already we have seen planned changes to the state pension age announced by the UK Government, which will see the state pension age rise to 66 by 2020, 67 by 2036 and 68 by 2046. The mandatory retirement age of 65 is no more, which means that an individual can continue working beyond the age of 65. This means, and particularly in the current difficult economic retirement, that many over what has traditionally been defined as “working age” of 16-64, will opt to stay in the labour market. In evidence to the Finance Committee on 11 January 2012, Charlie Jeffrey of Edinburgh University said there was an opportunity to “release the talents and energies of the over 65s”:

“Given changes in retirement legislation, we do not stop at 65. We can go on and on, and many people have the abilities and the will to do so. A question is whether our employers are yet fully willing to recognise that and to adjust patterns of employment to get the best economic benefit – for their firms and for the Scottish economy more generally – from older people” (Scottish Parliament Finance Committee 2012).

People working longer is something that employers and the economy are going to have to adapt to. This has economic benefits in terms of retaining the experience, expertise and tax
contributions of employees in the workforce for longer. However, there may be knock-on consequences for younger members of society who are starting out in the labour market, particularly at the moment when we have relatively high unemployment. Given the evidence Committee has received around the lifetime effects and “scarring” of young people who remain outside the labour market for long periods, and the consequent costs for the state in the form of social security payments (Bell and Blanchflower 2009), this is an issue that was raised in evidence to the Finance Committee during the January round-table. The implications of an elongation of working life for younger members of society will need to be monitored in the coming years.

There is already evidence in the latest Labour Force Survey figures that in recent years as we have faced recession and flat growth, there has been an increase in employment for those above retirement age in both Scotland the rest of the UK. If and when we get back to growth rates closer to trend, it will be interesting to see whether this trend in people working beyond the retirement age continues.

Another potential impact of people working longer is in the potential interaction between labour market participation and the demands of caring for relatives and friends and children. The need (or wish) to take on a caring role or provide childcare for younger relatives may impact on the potential for increased labour market participation among older groups. Alternatively, an increasing number of older people opting to stay within the labour market may impact on the availability of carers or child-carers within this group (Scottish Government 2010a). The Growing up in Scotland (GUS) survey found grandparents to be the main providers of childcare for almost half of children aged 0 to 3 (Scottish Government 2010a). Any reduction in the availability of grandparents as carers for children may impact on the labour market participation of younger women with children, or, alternatively, fertility rates of women (given that availability of childcare may play a part in family planning decisions). The other, more positive possibility, however, is that demand for formal paid care will rise as a result of people staying in employment beyond 65, which creates economic and employment opportunities within the care sector.

Other economic dynamics arising from population ageing relate to demand for other goods and services linked to an ageing population. For instance, these might include increased demand for relevant medical and healthcare professionals, and manufacturers and suppliers of equipment and adaptation supporting independent living (Scottish Government 2010a). Older workers who remain in the workforce for longer and the affluent retired will pay taxes and continue to be important consumers of goods and services across the economy. Therefore, there will be economic and employment opportunities arising from population ageing.
ANNEX 1

Proportion of population over-64 in 2035 by local authority area
(GROS population projections)

Percentage of total population over 64 (2035)
- Between 17 and 19.9%
- Between 20 and 24.9%
- Between 25 and 29.9%
- Between 30 and 38%

Based on Ordnance Survey material with the permission of Ordnance Survey. Scottish Parliamentary Corporate Body 10039291.
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