



UKHCA Summary

An Overview of the Domiciliary Care Market in the United Kingdom

May 2016

Version 35

Prepared for UKHCA member organisations by:

Jonathon Holmes, Policy Officer, UKHCA

United Kingdom Homecare Association Ltd
Sutton Business Centre
Restmor Way
Wallington
SM6 7AH

Telephone: 020 8661 8188
E-mail: policy@ukhca.co.uk
Website: www.ukhca.co.uk
Twitter: @ukhca

Registered in England. No 3083104

Disclaimer

This document is provided as a free service and does attempt to be an exhaustive resource. We have endeavoured to provide information that was correct at the time of publication and to reduce errors and omissions.

United Kingdom Homecare Association Ltd accepts no liability for organisations acting or refraining from acting solely on the information contained within this document.

Table of Contents

Introduction	6
Domiciliary care at a glance	7
Key market trends	8
1. United Kingdom	9
1.1 Market Instability	9
1.2 Expenditure	10
1.3 Hours of domiciliary care	11
1.4 People who use services	13
1.4.1 Self-funders	14
1.5 Demographic profile.....	15
1.6 Self-funders	18
1.7 Number of providers	19
2. England	20
2.1 Key figures	20
2.1.1 Regulation	21
2.1.2 Inspection	22
2.3 Providers	23
2.4 People who use services	25
2.5 Hours of domiciliary care	27
2.6 Eligibility	29
2.7 Expenditure	30
2.8 Intensity of domiciliary care visits.....	32
2.8.1 Length of domiciliary care visits.....	33

2.9	Direct payments	34
2.10	Workforce	36
3.	Scotland	40
3.1	Key figures	40
3.2	Regulation	41
3.3	Providers	43
3.4	People who use services	45
3.5	Hours of domiciliary care	47
3.6	Eligibility	49
3.7	Expenditure	50
3.8	Intensity of domiciliary care visits	52
3.9	Direct payments	53
3.10	Workforce	55
4.	Wales	59
4.1	Key figures	59
4.2	Regulation	60
4.3	Providers	61
4.4	People who use services	63
4.5	Hours of domiciliary care	65
4.6	Eligibility	67
4.7	Expenditure	68
4.8	Intensity of domiciliary care visits	70
4.9	Direct payments	71
4.10	Workforce	73

5.	Northern Ireland	74
5.1	Key figures	74
5.2	Regulation	75
5.3	Providers	76
5.4	People who use services	77
5.5	Hours of domiciliary care	79
5.6	Eligibility	81
5.7	Expenditure	82
5.8	Intensity of domiciliary care visits.....	84
5.7.1	Length of domiciliary care visits.....	84
5.9	Direct payments	86
5.10	Workforce	88

Introduction

UKHCA is the professional association for providers of domiciliary care from the independent, voluntary, not-for-profit and statutory sectors across the United Kingdom.

The data contained within this report is aimed at researchers, journalists, management consultants and organisations considering entry into the domiciliary care sector. These figures are a summary and analysis of the most recent data; they will be revised as new data becomes available. More information can be found at www.ukhca.co.uk.

The domiciliary care sector suffers from a lack of routine or consistent data collection in all four administrations.

Despite this the figures below give a summary of recent market trends, including how many people benefit from domiciliary care, who provides the care and how it is funded.

In some instances the author has made reasonable estimates where data is missing or no longer available. In these instances the methodology and calculation used is clearly explained in footnotes.

Domiciliary care at a glance

*All figures relate to the financial year 2014/15

	England	Scotland	Wales	Northern Ireland	UK total
Total people using domiciliary care in 2014/15	673,000	112,000	47,300	41,200	873,500
Hours of domiciliary care delivered in 2014/15	249 million	39.6 million	15.4 million	14 million	318 million
Total expenditure on domiciliary care	£3.3 billion	£0.796 billion	£0.309 billion	£0.215 billion	£4.62 billion
- Expenditure by local authorities/HSCTs	£2.6 billion	£0.732 billion	£0.293 billion	£0.204 billion	£3.83 billion
- Expenditure by self-funders	£623 million	£63.7 million	£15.4 million	£10.7 million	£713 million
People receiving a direct payment	144,000	6,453	4,463	3,026	157,942
Expenditure on direct payments	£1.36 billion	£0.086 billion	£0.050 billion	£0.019 billion	£1.52 billion
People employed (headcount)	527,000	64,300	26,100	12,000	629,400
Registered locations	8,458	943	468	307	10,176

Table 1 The domiciliary care sector in the UK at a glance

Key market trends

In this overview we look back at previous domiciliary care market data to establish key trends and understand the direction of the market. The trends we have observed include:

- Growing concerns about the instability of the domiciliary care market. There is evidence that more providers are considering handing back substantial packages of care to commissioning local authorities, and many have concerns about the viability of their business;¹
- Between 2009 and 2015 the number of people receiving local authority funded domiciliary care in the UK decreased by **20%**. Over the same period the hours delivered decreased by **6.8%**. Evidently fewer people are receiving more hours of care and support at home. This suggests that that access to domiciliary care is being restricted to those with the greatest levels of care and support needs;
- The number of providers is increasing, in March 2016 there were **10,176** regulated providers of domiciliary care operating in the UK. This is a **3.6%** increase compared to March 2015;
- Gross expenditure by local authorities on domiciliary care continues to decrease. In 2014/15 gross expenditure on domiciliary care by local authorities was **£3.9 billion**. Gross total local authority expenditure in 2013/14 was **£4.05 billion**. This is a **3.7%** decrease.
- The uptake of direct payments continues to grow across the UK with the exception of England where the number of people to receive a direct payment decreased by **6%** to **144,065**. Across the rest of the UK uptake of direct payments increased by **7.6%** to **14,000**.
- The workforce increased in size (headcount) by **8.2%** in 2014/15 to **631,000** people.

¹ For more information please see: UKHCA, *Market Stability Survey 2015*, September 2015. Available at: <http://www.ukhca.co.uk/downloads.aspx?ID=486>

1. United Kingdom

Social care responsibilities are devolved to each nation within the UK. As such the market conditions, statutory requirements and regulations vary between each administration.

However there are UK wide issues, including national market instability, rising operating costs for homecare providers, a downward pressure on the price paid for domiciliary care by the state, an ageing population and challenges with the recruitment and retention of the workforce to name a few.

1.1 Market Instability

Over the last year there has been growing concern about the stability of the domiciliary care market in the UK. UKHCA has conducted survey research on this subject to gauge the scale of the issue.

In September 2015 providers trading with local authorities in Great Britain or Health and Social Care Trusts (HSCTs) in Northern Ireland reported that:

- **93%** of providers trading with councils had faced a real-terms decrease in the price paid for their service over the last 12 months, **20%** reported a decrease in the actual fees paid;
- **50%** of providers who were aware of tender opportunities from their local authority had declined to bid on the basis of price;
- There was also evidence of pending market stability over the next year, **74%** of providers responding to the survey said they would reduce the amount of publically funded care they delivered, estimated to affect **50%** of all people they provide care and support to; and
- **11%** of providers though they would have 'definitely' or 'probably' ceased trading within the next 12 months, while **38%** of providers were completely confident that they would still be trading at the same time next year.²

² UKHCA, *Market Stability Survey 2015*, September 2015. Available at: <http://www.ukhca.co.uk/downloads.aspx?ID=486>

1.2 Expenditure

Data covering detailed expenditure has not previously been collected in the devolved administrations and the methodology used to record expenditure varies between them. For this reason we cannot give a detailed, retrospective overview of state expenditure on domiciliary care. For detailed examination of expenditure in each of the devolved nations in subsequent chapters; see sections 2.7, 3.7, 4.7 and 5.7.

UKHCA estimate that total local authority expenditure on domiciliary care services in the UK in 2014/15 was **£3.9 billion**.³

As personalisation or self-directed support policy progresses nationally, the uptake of direct payments has increased. UKHCA estimate that total local authority expenditure on direct payments in the UK in 2014/15 was **£1.5 billion**.⁴

There has been a trend in England over recent years for NHS Clinical Commissioning Groups (CCG) to purchase social care and health services from the independent and voluntary sector. In 2014/15 total CCG expenditure on non-NHS care services was **£2.3 billion**.⁵ At this time we do not have more detailed expenditure analysis available or domiciliary care specific expenditure data.

Data on expenditure by people who self-fund their care is sparse. UKHCA estimate that expenditure on domiciliary care by self-funders in 2014/15 was **£713 million**.⁶

³ This is a composite figure, derived from local authority and Health and Social Care Trust statistical returns.

⁴ This is a composite figure, derived from local authority and Health and Social Care Trust statistical returns.

⁵ NHS England *Commissioning Board Report 2014/15*. Available at: <https://www.england.nhs.uk/wp-content/uploads/2015/07/nhse-annual-report-2014-15.pdf>

⁶ The figure for England is taken from the Dilnot Commission which reported in 2011. The figures for the devolved nations are derived from reasonable estimations about the size of the self-funding market.

1.3 Hours of domiciliary care

Nationally the hours of domiciliary delivered, funded by local authorities or HSCTs has decreased at a relatively slow pace. Between a sample week in 2009 and 2015 the hours of domiciliary care delivered decreased by **6.8%**. This is illustrated in Figure 1 and Table 1 below.

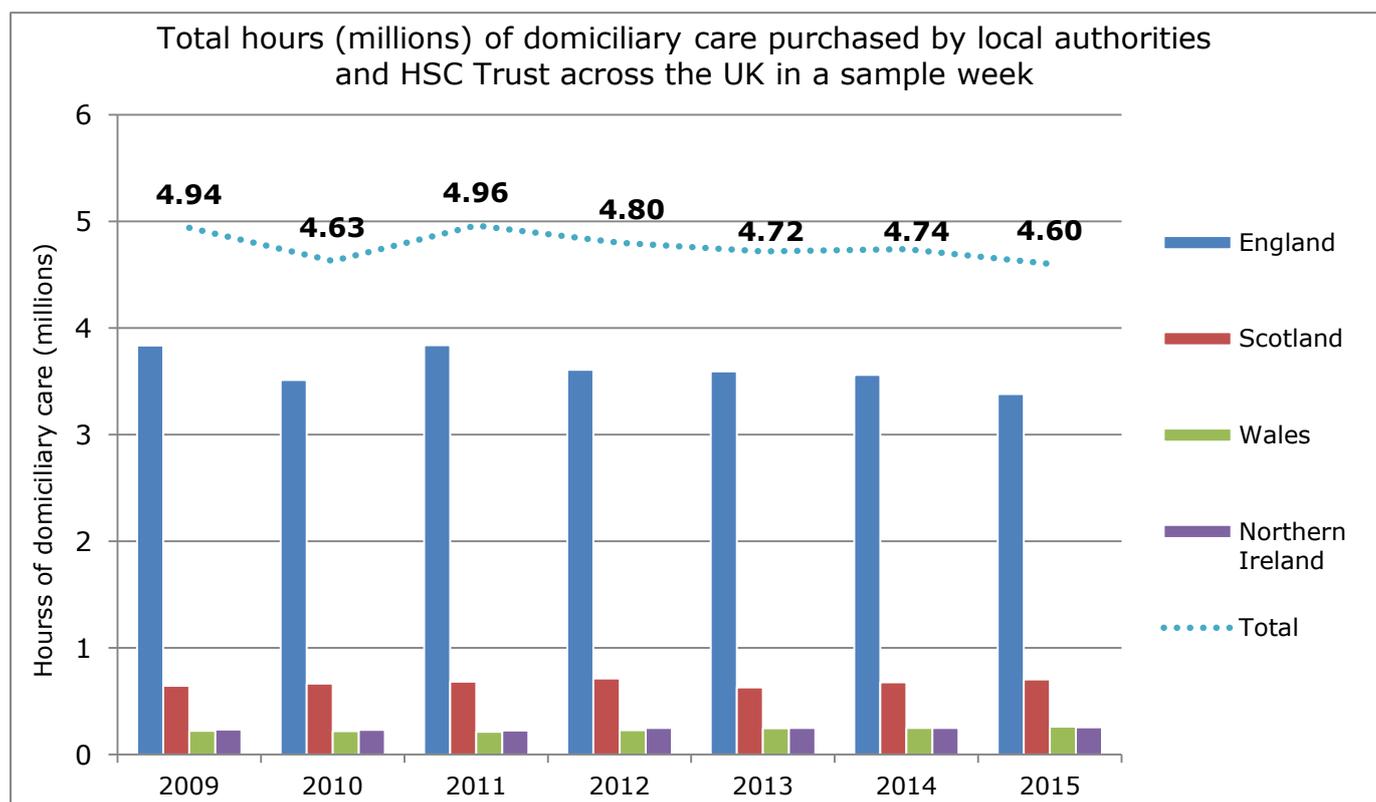


Figure 1 Total hours of domiciliary care purchased by local authorities and HSCTs in a sample week, 2009 - 2015

	England	Scotland	Wales	N. Ireland	Total
2009	3,835,876	645,700	224,224	235,559	4,941,359
2010	3,511,695	666,400	218,475	233,273	4,629,843
2011	3,837,819	683,900	214,642	224,473	4,960,834
2012	3,606,861	712,900	228,057	250,512	4,798,330
2013	3,592,240	631,100	245,305	249,381	4,718,026
2014	3,558,995	678,900	251,054	250,798	4,739,747
2015	3,379,860	706,000	262,242	255,209	4,603,311

Table 2 Total hours of domiciliary care purchased by local authorities and HSCTs in a sample week, 2009 – 2015

Section 1.4 details the decrease in the number of people receiving local authority or HSCT funded domiciliary care. The number of hours delivered has decreased at a lesser rate.

This suggests that fewer people are receiving more domiciliary care. This would suggest a greater level of care and support need in people receiving local authority or HSCT funded domiciliary care. This trend is illustrated in Figure 2 below.⁷

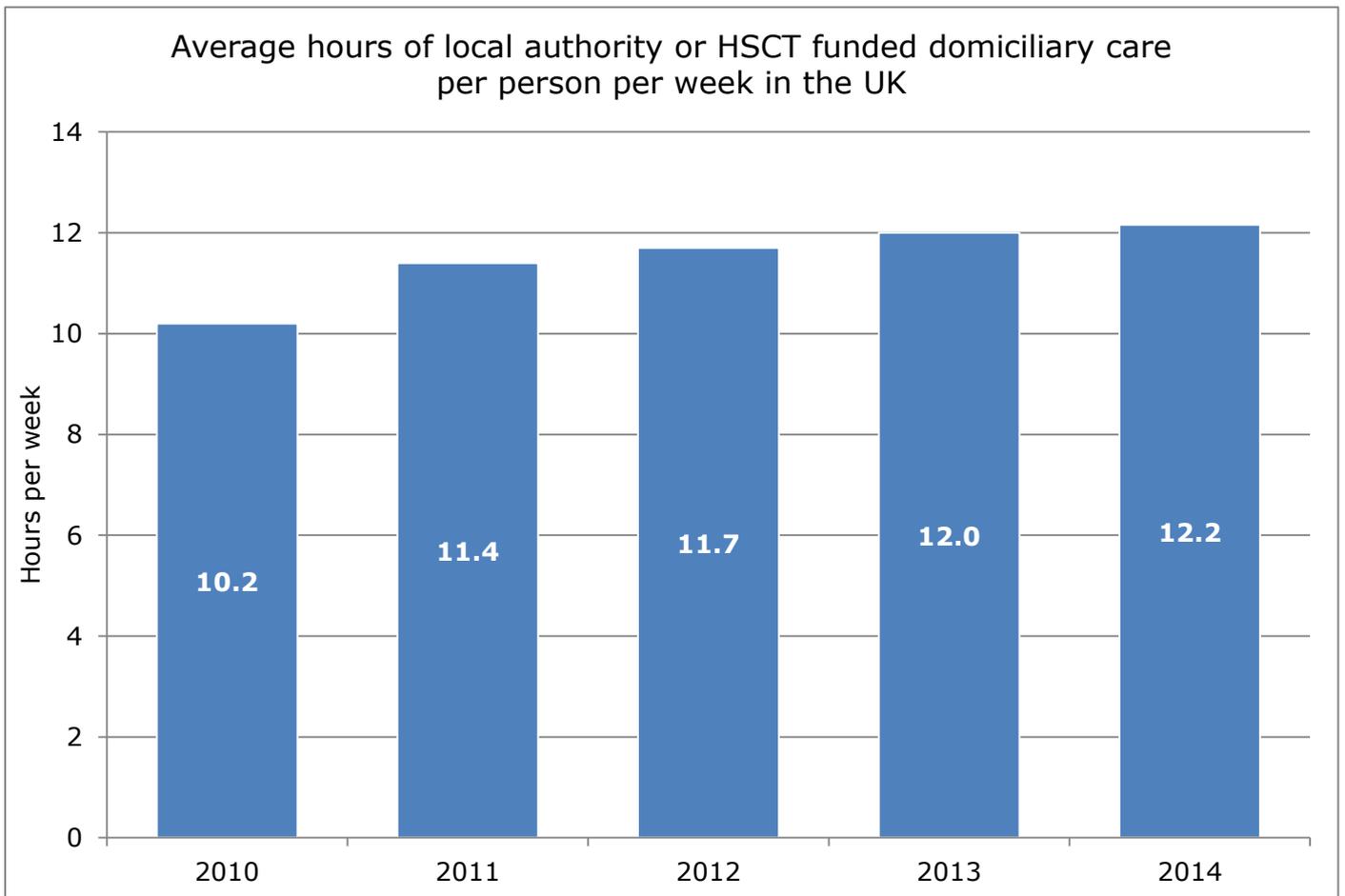


Figure 2 Average hours of local authority funded/HSCT commissioned domiciliary care per person per week in the UK, 2010 - 2014

⁷ Please note that the 2015 figure has been excluded due to a change in methodology in how people who use services is recorded in England, this would skew the data. The 2015 figure is not directly comparable to the 2010 – 2014 figures.

1.4 People who use services

There has been a steady decline in people receiving domiciliary care funded by local authorities or HSCTs; this is illustrated in Figure 3 and Table 2 below.

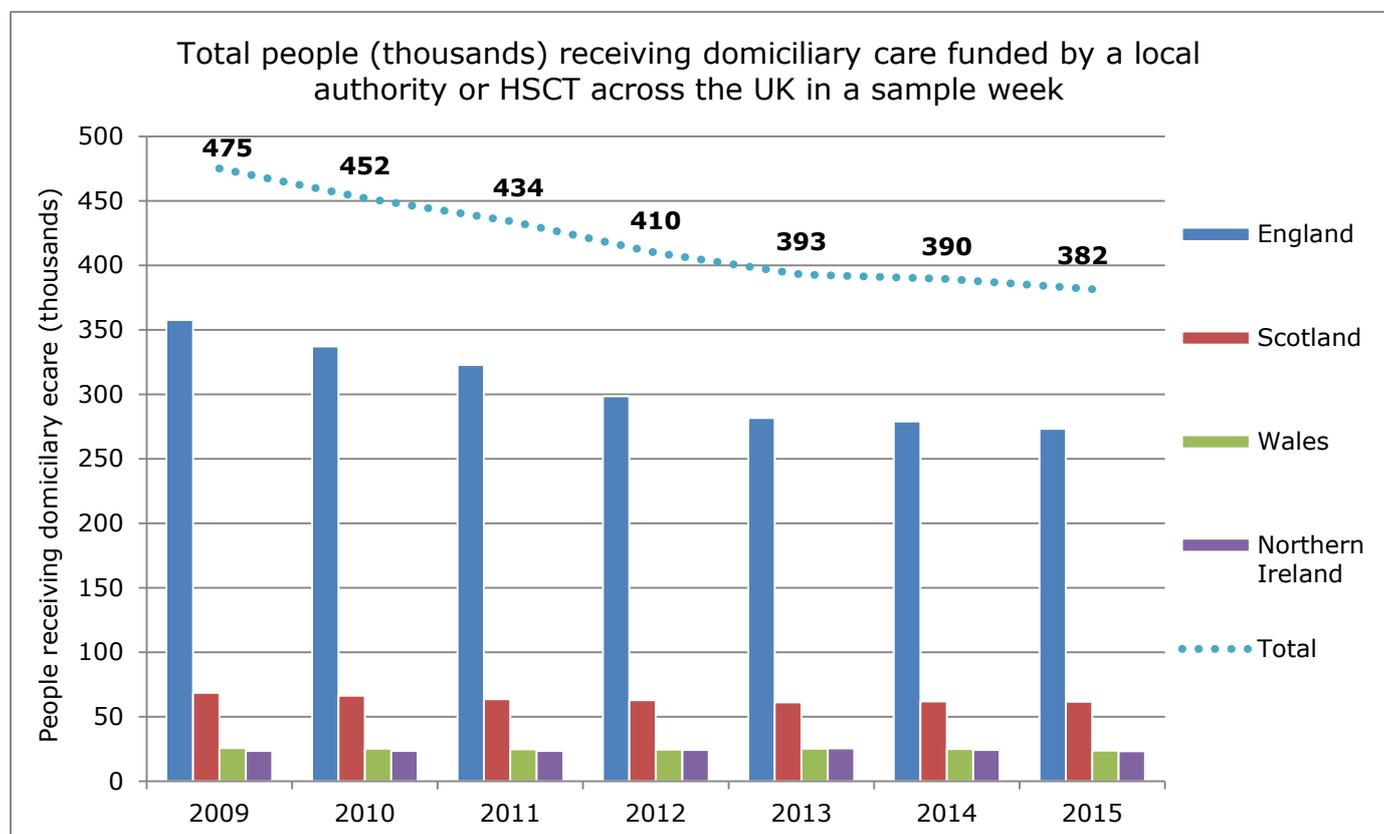


Figure 3 Total people receiving domiciliary care funded by a local authority or HSCT across the UK in sample week, 2009 - 2015

	England	Scotland	Wales	N. Ireland	Total
2009	357,545	68,579	25,685	23,377	475,186
2010	337,125	66,224	25,253	23,389	451,991
2011	322,660	63,460	24,638	23,522	434,280
2012	298,390	62,832	24,505	24,134	409,861
2013	281,550	60,950	25,205	25,330	393,035
2014	278,815	61,740	24,794	24,189	389,538
2015	273,124 ⁸	61,500	23,744	23,260	381,628

Table 3 Total people receiving domiciliary care funded by a local authority or HSC Trust across the UK in sample week, 2009 - 2015

⁸ This is an estimate. This figure is no longer recorded by in England.

Figure 3 shows a **20%** decrease in the number of people receiving domiciliary care funded by a local authority or HSCT over the six years between 2009 – 2015.

The causes of this decrease are many and varied. The principal causes may well be rising eligibility criteria and decreasing market/workforce capacity. As commissioning authorities have faced greater budgetary constraints over recent years, many have chosen to raise eligibility criteria, only funding care for those with the most acute needs.⁹

It is also the case that the market has diversified. Fewer people are receiving a traditional domiciliary care service purchased via a block contract and more people are micro-commissioning services via direct payments, Individual Service Funds, private insurance or from their own resources. Unfortunately there is very little market data in this area.

None of the nations within the UK accurately record how many people receive domiciliary care services over the course of the year. We estimate that in 2014/15 the number of people to receive local authority or HSCT funded domiciliary care was:

- England – **465,050**
- Scotland – **102,500**
- Wales – **39,500**
- Northern Ireland – **38,800**
- Total – **646,000**¹⁰

1.4.1 Self-funders

UKHCA estimate that **228,000** people received privately funded domiciliary care in the UK in 2014/15.¹¹

Including local authority, HSCT and privately funded individuals, **874,000** people received domiciliary care in the UK in 2014/15.

⁹ Legislative changes in England and Wales have introduced national eligibility criteria, meaning local authorities can no longer set eligibility thresholds.

¹⁰ We assume that the ratio of annual:weekly is 3:2 as in previous returns.

¹¹ This is a composite figure, based on available data/survey evidence, eligibility criteria and relative deprivation where no data is available.

1.5 Demographic profile

The majority of adults who use domiciliary care services are 65 years of age or over. In 2015, **76%** of all adults to receive domiciliary care funded by a local authority or HSCT were 65 years of age or over.¹²

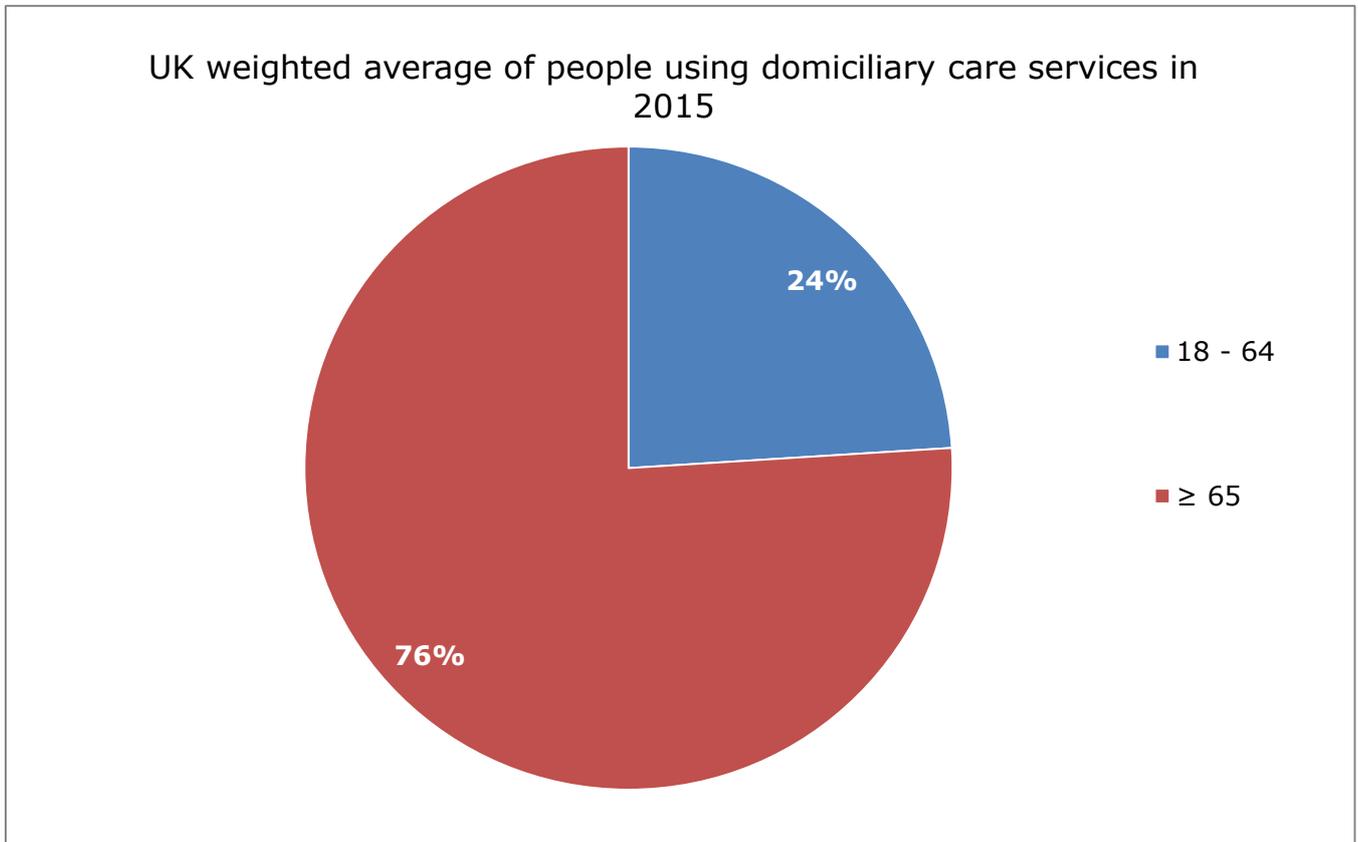


Figure 4 UK weighted average of people using homecare services in 2015

The Office for National Statistics (ONS) has projected that the population aged 65 years or more will grow over the coming years, both in real terms and as a percentage of the total population.

Figure 5 and Table 3 below illustrate the rate at which the population aged 65 years or more will grow between 2015 and 2035.¹³

¹² This is a weighted average derived from figures published by all UK Government administrations

¹³ Projections taken from the Office for National Statistics, 2012 based population projections. Available at:

<http://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationprojections/bulletins/nationalpopulationprojections/2013-11-06>

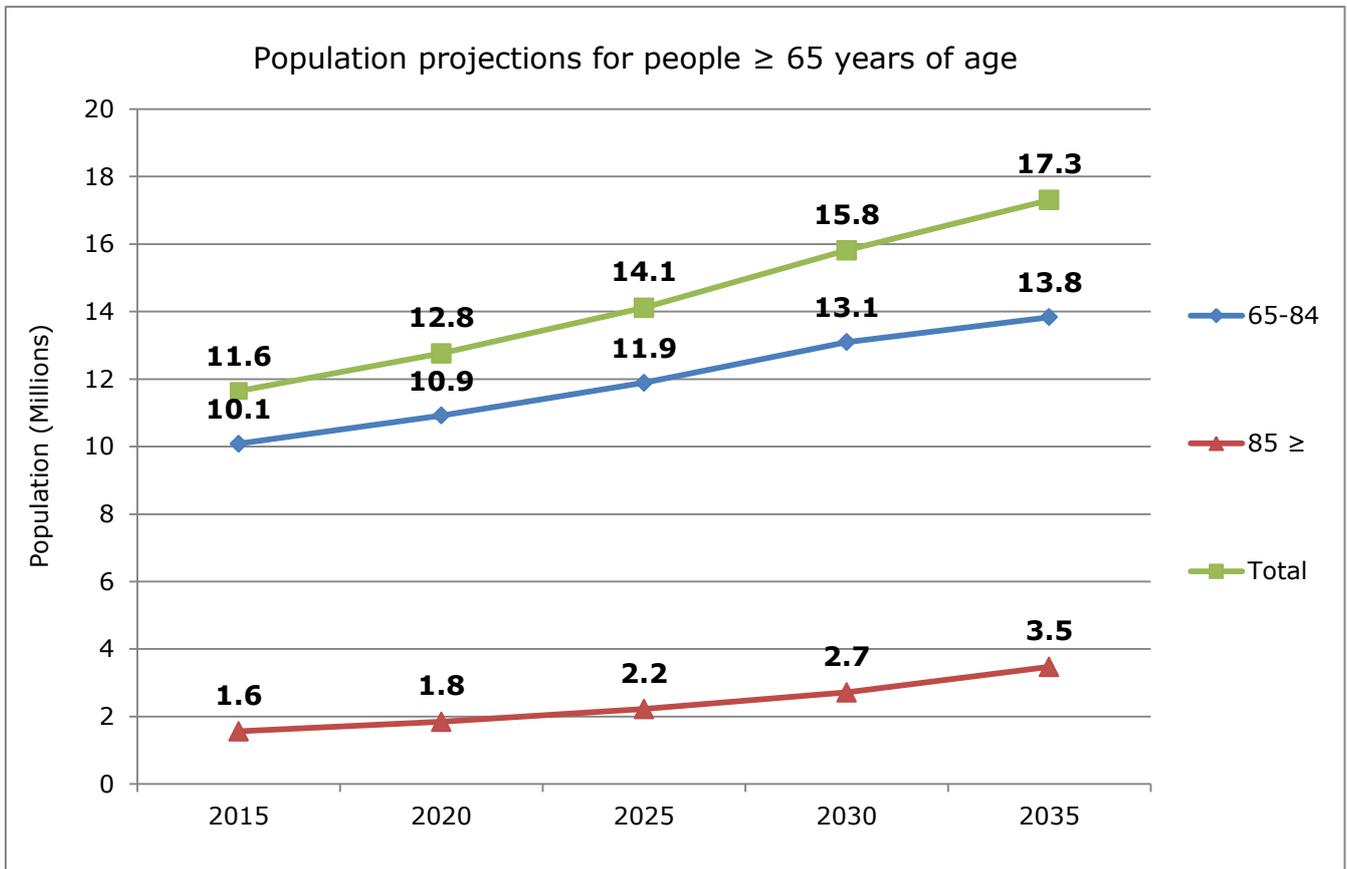


Figure 5 Population projections for people ≥ 65 years of age, 2015 - 2035

	65-84 years	≥ 85 years	Total
2015	10,084,561	1,561,201	11,645,762
2020	10,918,442	1,843,224	12,761,666
2025	11,890,193	2,224,413	14,114,606
2030	13,097,556	2,716,785	15,814,341
2035	13,833,905	3,471,915	17,305,820

Table 4 Population projections for people aged ≥ 65 years of age, 2015 - 2035

These projections show that the population aged 65 years and over will increase by **48%** between 2015 and 2035. During the same timeframe the population of less than 65 years of age will increase by **3.9%**.

In relative terms, the proportion of the population aged 65 years and over will grow, in 2015 the proportion of the population aged 65 years and over was **18%**. This figure is projected to grow to **24%** of the total population by 2035.¹⁴

¹⁴ Office for National Statistics, 2012 based population projections

The relative increases are illustrated in Figure 6 and Table 4 below.

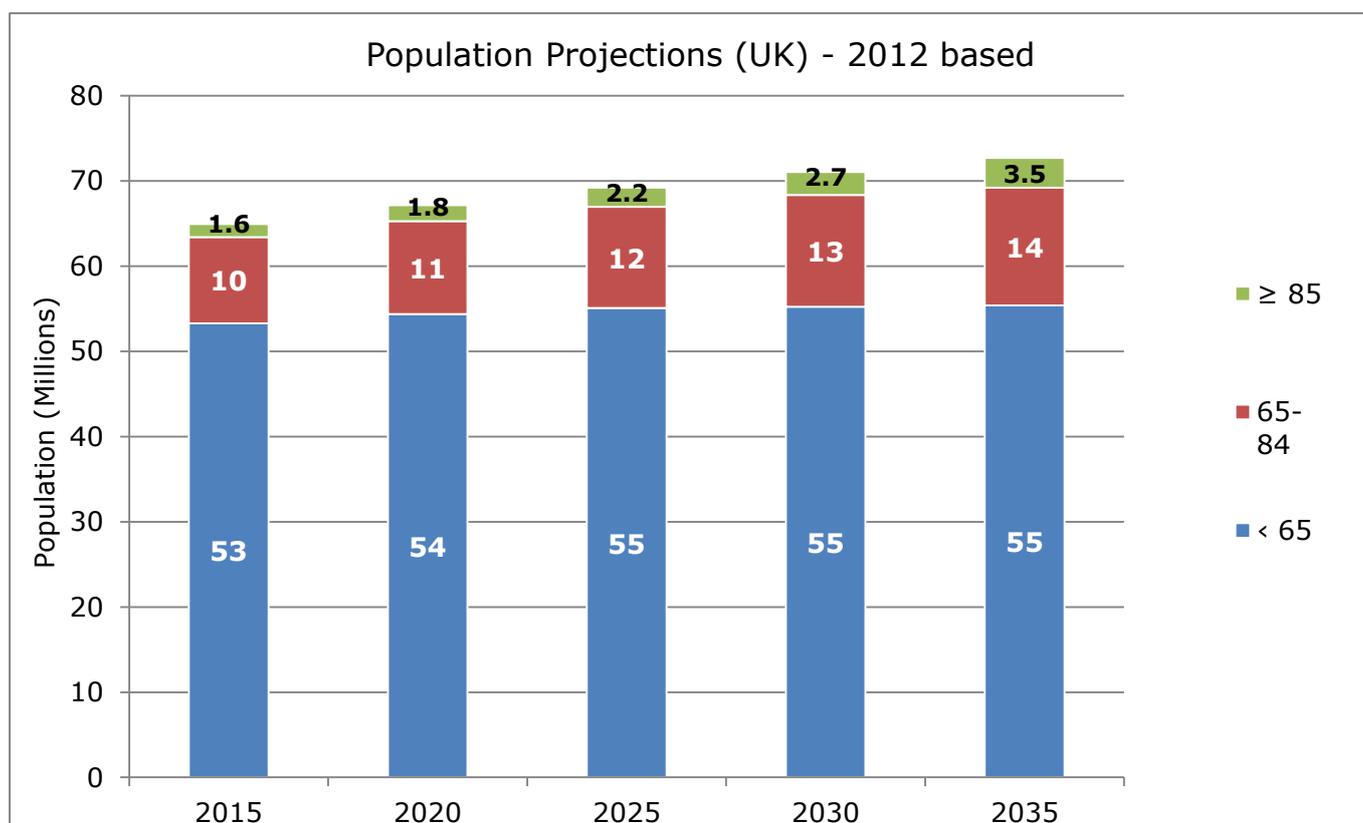


Figure 6 Population projections for the UK, whole population, 2015 – 2035

	< 65 years	65-84 years	≥ 85 years	Whole Population
2015	53,291,813	10,084,561	1,561,201	64,937,575
2020	54,364,141	10,918,442	1,843,224	67,125,807
2025	55,070,904	11,890,193	2,224,413	69,185,510
2030	55,223,119	13,097,556	2,716,785	71,037,460
2035	55,359,834	13,833,905	3,471,915	72,665,654

Table 5 Population projections for the UK, whole population, 2015 – 2035

1.6 Self-funders

There is a sizeable, privately funded domiciliary care market in the UK. However there is no routine data collection, any assessment of the market is based on reasonable estimation derived from previous surveys and comparative socio-economic structure of the nation where there is no direct information.

Please note that private purchase will vary considerably between localities depending upon the relative affluence/deprivation of an area.

Table 5 below gives an overview of the size of the self-funding market in the UK. Readers are advised to use these figures with extreme caution given that they are estimates.

	Hours of Care Purchased (Annual)	Expenditure (£) (Annual)	People Using Services (Annual)
England	73,052,000	652,000,000	207,509
Scotland	2,788,618	63,652,174	9,311
Wales	2,227,593	15,435,895	7,731
N. Ireland	700,885	10,745,192	2,448
Total	78,769,096	741,833,261	226,999

Table 6 Overview of domiciliary care purchased by self-funders in the UK

1.7 Number of providers

In March 2016 the respective regulators for each of the four UK Government regions recorded the following number of registered locations providing domiciliary care and the percentage change compared to March 2015:

- England – **8,458** (3.3% increase) registered locations providing personal care to people in their own home;¹⁵
- Scotland – **943** (6.3% increase) registered locations providing care and support services at home;¹⁶
- Wales – **468** (4.2% increase) registered locations providing domiciliary care;¹⁷
- Northern Ireland – **307** (0.01% increase) registered locations under the heading of a Domiciliary Care Agency;¹⁸ and
- Total – **10,176** (3.6% increase) registered locations providing domiciliary care.

In subsequent sections we go into greater detail in this area, see *sections 2.3, 3.3, 4.3 and 5.3*.

¹⁵ Care Quality Commission, all services registered as 'Service type domiciliary care'. Available at: <http://www.cqc.org.uk/content/how-get-and-re-use-cqc-information-and-data#directory>

¹⁶ The Care Inspectorate, Find a care agency – service type: Support Service, Care at Home. Available at: <http://www.careinspectorate.com/index.php/care-services>

¹⁷ The Care and Social Services Inspectorate Wales, Care Services Directory, all services registered as a domiciliary care agency. Available at: <http://cssiw.org.uk/find-a-care-service/?lang=en>

¹⁸ The Regulation and Quality Improvement Authority, Services Registered with RQIA, All Domiciliary Care Agencies. Available at: http://www.rqia.org.uk/what_we_do/registration__inspection_and_reviews/service_provider_directory.cfm

2. England

2.1 Key figures

The headline figures for England in the financial year 2014/15 are:

- Total people using domiciliary care: **673,000**
- Total hours of domiciliary care delivered: **249 million**
- Total direct expenditure on domiciliary care: **£3.3 billion**
 - Local authority: **£2.6 billion**
 - Expenditure by self-funders: **£623 million**
- Total people receiving a direct payment: **144,000**
- Total expenditure on direct payments: **£1.4 billion**
- Total people employed in the domiciliary care sector: **527,000**
- Total number of registered locations providing domiciliary care: **8,458** (3.3% increase compared to previous year)

2.2 Regulation and Inspection

2.1.1 Regulation

Providers in England are regulated under the Health and Social Care Act 2008 by the **Care Quality Commission** (CQC) which took over from the Commission for Social Care Inspection on 1st April 2009.

CQC regulate through direct inspection, data analysis and other checks. The CQC has various powers of enforcement (laid out in detail in the Health and Social Care Act 2008), ranging from suspension or cancellation of registration, through to criminal prosecutions.

The Health and Social Care Act 2008 received numerous amendments via new regulations in November 2014, in response to the Francis Enquiry. The regulations were entitled the **Fundamental Standards of Quality and Safety**, the new standards cover the conduct and level of training of care providers, the protection of service users and the character and candour of directors.¹⁹

Additionally Government has introduced the **Care Certificate**, which will be administered jointly by Skills for Care and Health Education England, and replaced the existing **National Minimum Training Standards** and the **Common Induction Standards** in England.

Both the Care Certificate and the changes to the Health and Social Care Act came into force in April 2015.²⁰

¹⁹ For more information on the Fundamental Standards please see: <http://www.cqc.org.uk/content/fundamental-standards>

²⁰ Please see UKHCA's guidance for providers on meeting the Care Certificate standards: <http://www.skillsforcare.org.uk/Document-library/Standards/Care-Certificate/Care-Certificate-assessment-guidance-for-homecare-providers--02-03-15.pdf>

2.1.2 Inspection

CQC previously inspected providers of regulated activities against a judgement framework of **Compliant or Non-Compliant**. A new system was introduced in October 2014, with new classifications: **Outstanding, Good, Requires Improvement** or **Inadequate**.

At 1st April 2016 CQC had inspected **2,640** registered locations providing domiciliary care under the Fundamental Standards. This represents **31%** of all registered locations providing domiciliary care.

Table 6 below gives an overview of inspection outcomes and ratings awarded to all providers of domiciliary care inspected by CQC between 1st October 2014 and 1st April 2016.

	Registered locations	%
Good	1,931	73.1%
Outstanding	22	0.8%
Requires Improvement	633	24.0%
Inadequate	54	2.1%
Total	2,640	31% of all registered locations

Table 7 Inspection outcomes for registered providers of domiciliary care in England, 1st October 2014 – 1st April 2016

2.3 Providers

In March 2016 CQC had **8,458** registered locations providing domiciliary care, from all sectors, providing personal care, to people in their own homes.²¹

In March 2015 there were **8,186** registered locations providing domiciliary care. This represents a **3.3%** increase in the number of registered locations providing domiciliary care over the course 2015/16.

Domiciliary care funded by local authorities in England is delivered either by independent/voluntary sector providers which the local authority have commissioned to meet the needs of eligible individuals, or it will be delivered by the local authorities in house community care team. A growing proportion is funded by the NHS.

In 2013/14, **92.1%** of all domiciliary care funded by local authorities in England was delivered by the independent and voluntary sector. The remaining **7.9%** was delivered by the statutory sector.²²

HSCIC no longer record data on sector by hours. UKHCA estimate that in 2014/15 **96%** of all domiciliary care funded by local authorities in England was delivered by the independent and voluntary sector. The remaining **4%** was delivered by the statutory sector.²³

This follows a long term trend, where the independent and voluntary sector is responsible for an increasing proportion of the hours of domiciliary care delivered. This is illustrated in Figure 7 below.

²¹ Care Quality Commission, all services registered as 'Service type domiciliary care'. Available at: <http://www.cqc.org.uk/content/how-get-and-re-use-cqc-information-and-data#directory>

²² HSCIC, *Community Care Statistics: Social Services Activity. England, 2013/14, Final Release*, Annex E. Available at: <http://www.hscic.gov.uk/searchcatalogue?productid=16628&topics=1%2fSocial+care%2fSocial+care+activity&sort=Relevance&size=10&page=1#top>

²³ UKHCA estimate. Assume that workforce ratio of independent:statutory 24:1 is equivalent to quantity of care delivered (measured in hours).

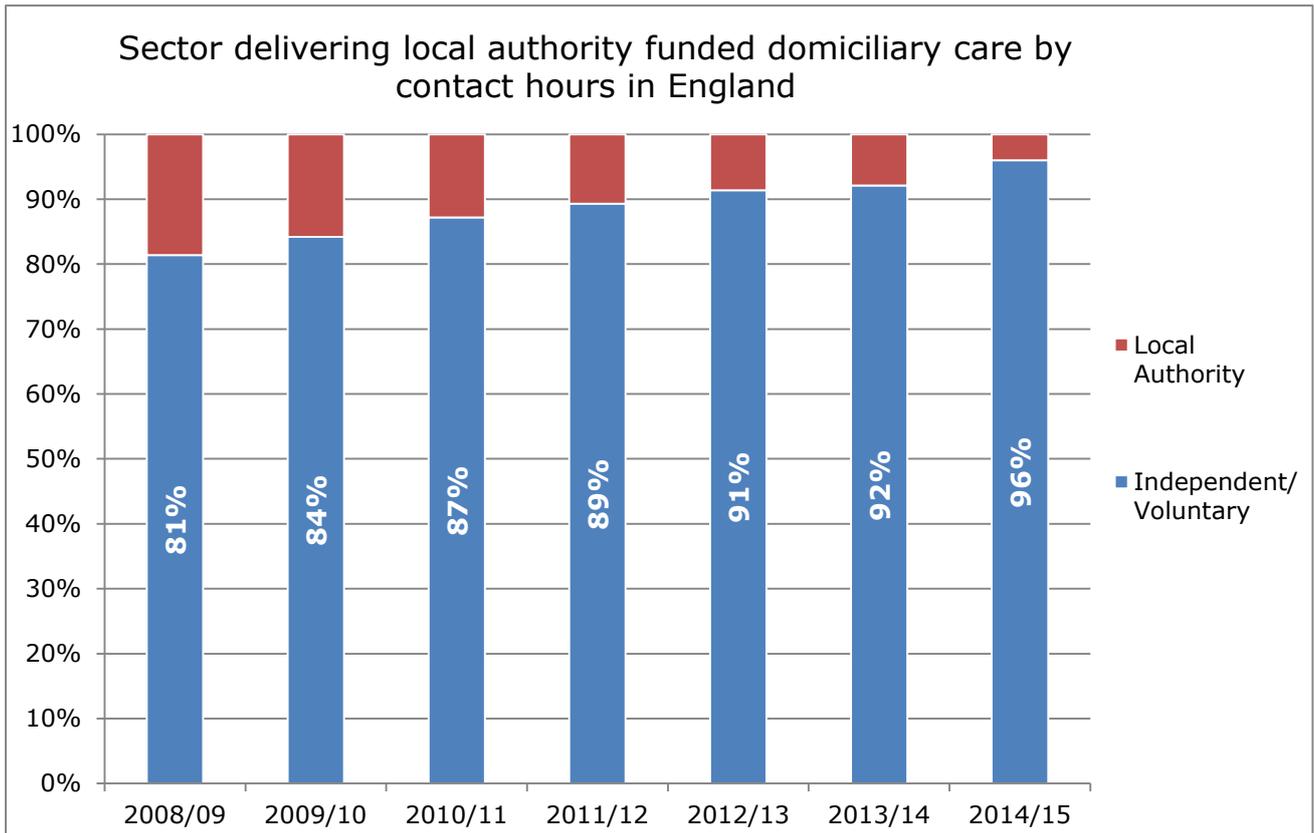


Figure 7 Sector delivering domiciliary care funded by the state in England, 2008/09 – 2014/15

No data is collected as to which sector provides domiciliary care purchased by individuals, it would be reasonable to assume that **100%** of privately funded domiciliary care is delivered by the independent/voluntary sector.

2.4 People who use services

The Health and Social Care Information Centre (HSCIC) did not record data on how many adults receive domiciliary care services in 2015.

UKHCA estimate that in 2014/15 *at least* **465,000** adults in England received a domiciliary care service.²⁴ Given this figure UKHCA estimate that at any given time *at least* **273,000** adults in England were receiving a domiciliary care service funded by a local authority in England in 2015.²⁵

This represents a **2.2%** decrease on the equivalent figure for 2015 and a **24%** decrease compared to the equivalent figure for 2009.

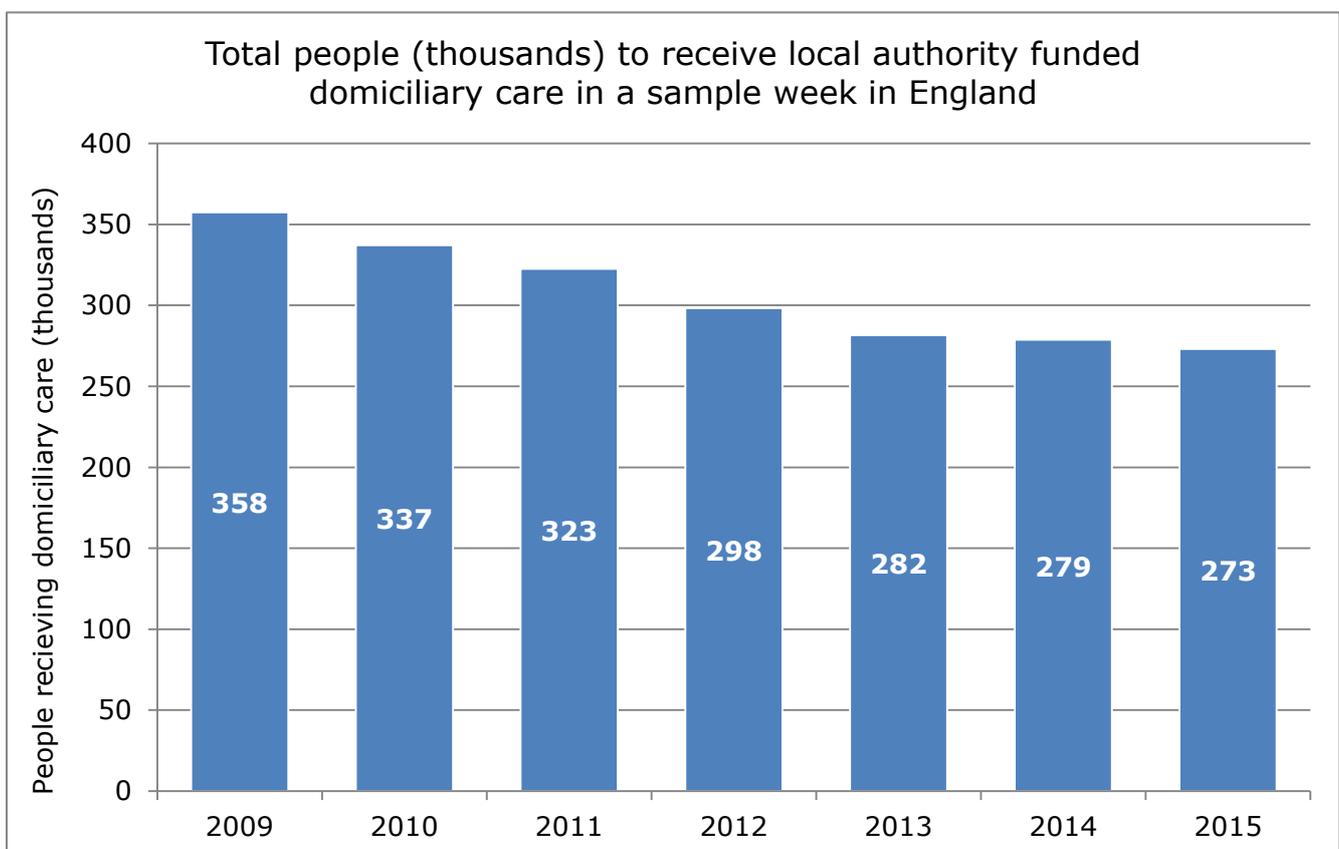


Figure 8 Adults to receive domiciliary care services funded by a local authority in England 2009 - 2015

²⁴ HSCIC only record adults who receive 'Community Support' by support service/delivery mechanism. Assumes all adults who receive CASSR commissioned community care receive some form of homecare (either long or short term) over the financial year. Use figure with caution.

²⁵ Assume ratio annual:weekly is 3:2 as in previous years.

The persistent decrease in the number of people to receive a domiciliary care service is at odds with demographic data.

The causes for this decrease are many and varied. Local authority budgetary constraints saw many authorities tighten eligibility criteria. In 2014 the Care Act introduced the National Eligibility Criteria, which removed all local authorities in England’s ability to set their own social care eligibility criteria, according to the Fair Access to Care (FAC) criteria. See section 2.6 for further information on eligibility criteria in England.

Other policy initiatives have seen the proportion of care purchased by local authorities decrease in relative terms. There is a greater tendency for local authorities to facilitate micro-commissioning of services via direct payments or individual service funds, the NHS are also responsible for commissioning more social from the independent and voluntary sector.

Table 7 below illustrates the increasing level of need for care and support amongst adults aged 65 years or more in England between 2015 and 2030.²⁶

	2015	2020	2025	2030	% Change 2015 - 2030
People aged ≥ 65 years of age unable to manage ≥ 1 domestic task on their own	3,939,081	4,415,453	5,003,644	5,680,777	44%
People aged ≥ 65 years of age unable to manage ≥ 1 self-care activity on their own	3,235,206	3,614,408	4,091,671	4,654,956	44%

Table 8 People aged 65 years of age unable to manage ≥ 1 domestic task or self-care activity on their own, 2015 - 2030

²⁶ All figures taken from *Projecting Older People Population Information System (POPPI)*. Available at: <http://www.poppi.org.uk/>

2.5 Hours of domiciliary care

Since 2014, HSCIC do not record how many hours of domiciliary care are purchased by local authorities from independent and voluntary sector providers in England.

UKHCA estimate that during a sample week in September 2014 local authorities in England purchased *at least 3.4 million* hours of domiciliary care from independent and voluntary sector providers.²⁷

Over the course of 2014/15 UKHCA estimate that local authorities in England commissioned **141 million** hours of homecare from the independent and voluntary sector.

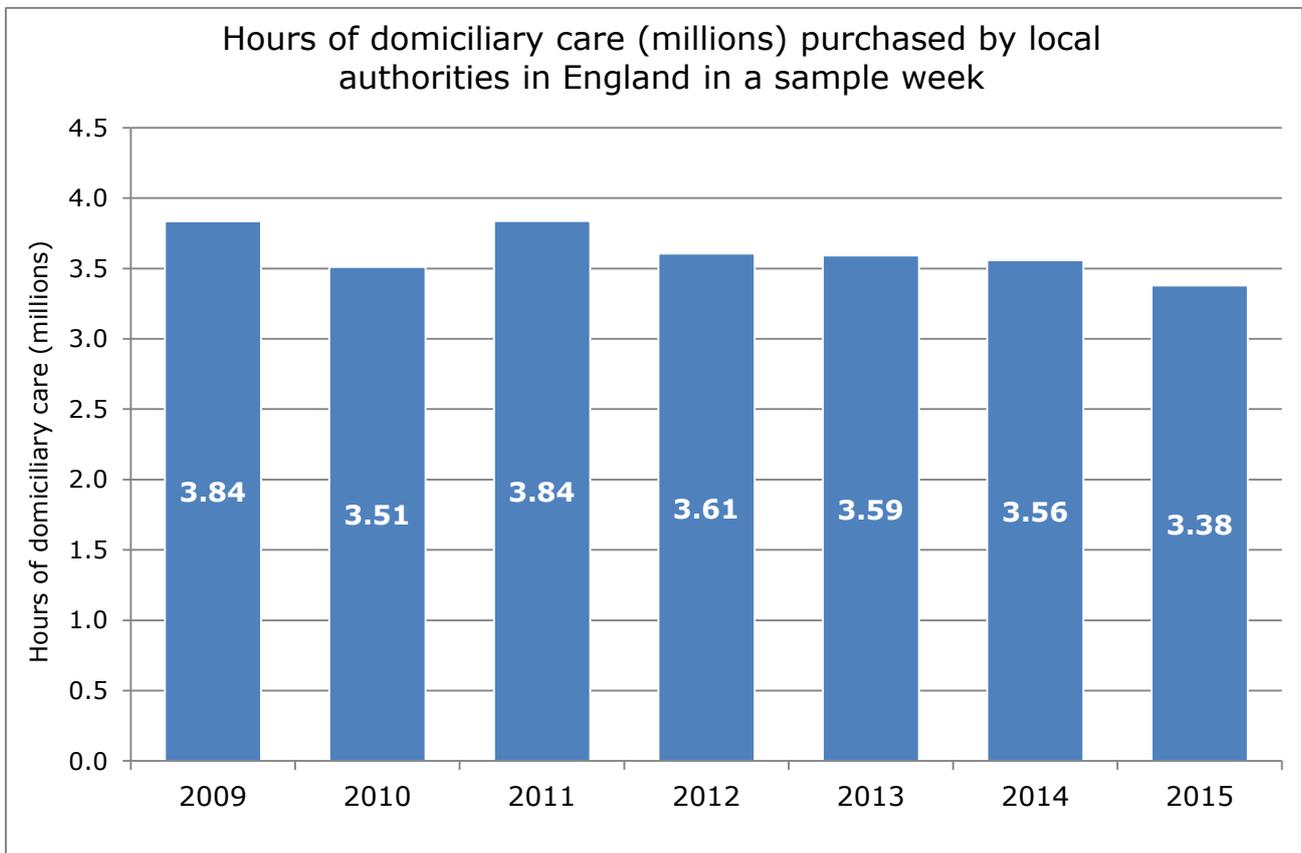


Figure 9 Hours of domiciliary care commissioned by local authorities in England in a sample week, 2009 - 2015

²⁷ UKHCA, *The Homecare Deficit* records that 2.7 million hours of domiciliary care were purchased for adults aged ≥ 65 years. Assume equivalent ratio of service user group to hours = 3:1

Figure 9 illustrates a slight reduction in the number of hours of domiciliary care commissioned by local authorities in England. Between 2009 and 2015 the number of hours commissioned fell by **12%**.

The fact that the number of hours delivered has fallen at a considerably slower rate than the number of people to receive domiciliary care services funded by local authorities over the same timeframe (**24%**) suggests an increasing level of dependence. Meaning that fewer people with a greater level of care and support need are receiving domiciliary care services in England.

There is no reliable information collected on the number of hours of care purchased by people who self-fund domiciliary care. In 2009 Laing Buisson recorded that in a sample week in 2009 a total of **1.4 million** hours of domiciliary care were purchased by people privately funding their care.²⁸

²⁸ Mickelborough, P. *Domiciliary Care Market Report, 2013*, p. 100 (Laing Buisson). Not available online.

2.6 Eligibility

The Care Act 2014 introduced the national eligibility criteria for adult social care services funded by a local authority in England. The Statutory Guidance to the Care Act gives an overview of how the national eligibility criteria should be applied.

A local authority must consider the following when considering an adult's eligibility for care and support:²⁹

- a) The adult's needs are due to a physical or mental impairment or illness;
- b) The inability to meet an outcome will have a significant impact on the adult's wellbeing; and
- c) The effect of the adult's needs is that the adult is unable to achieve two or more of the following outcomes (this list is not exhaustive):
 - Managing and maintaining nutrition;
 - Maintaining personal hygiene;
 - Managing toilet needs;
 - Being appropriately clothed;
 - Being able to make use of the home safely;
 - Maintaining a habitable home environment;
 - Developing and maintaining family/personal relationships;
 - Accessing and engaging in work, training, education or volunteering;
 - Making use of necessary facilities or services in the community; or
 - Carrying out any caring responsibilities for a child.

The Care Act also introduces a new framework for a means assessment. The upper capital limit is currently **£23,250** (this excludes the value of any tangible assets i.e. housing) anything below this, an eligible adult can seek means tested support from their local authority.

²⁹ The Department of Health, *Care and Support Statutory Guidance, Issued under the Care Act 2014*,

2.7 Expenditure

In the financial year 2014/15 the gross expenditure on domiciliary care provision by local authorities in England was **£2.6 billion**.³⁰ This represents an **8.2% decrease** compared to 2013/14.

Figure 10 below tracks local authority expenditure on domiciliary care in real terms (adjusted according to GDP deflator values where 2014/15 = 100) and in cash terms.

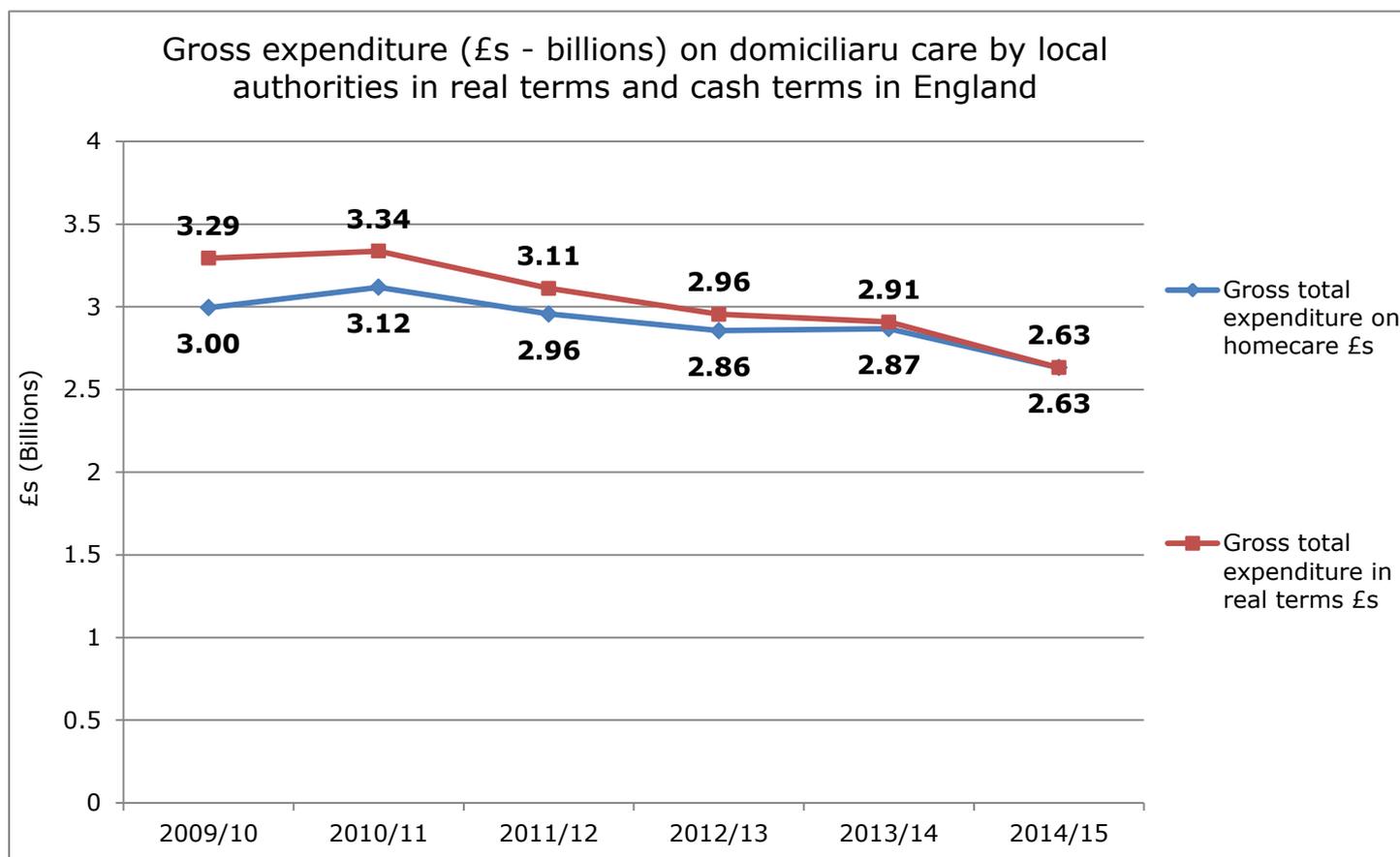


Figure 10 Gross total expenditure (£s) on homecare by local authorities in real terms and cash terms in England, 2009/10 – 2014/15

³⁰ Personal Social Services and Expenditure 2014-15, bridging year data.

Available at:

<http://www.hscic.gov.uk/searchcatalogue?productid=19459&q=community+care&topics=2%2fSocial+care%2fSocial+care+expenditure%2fPersonal+Social+Services+expenditure&sort=Most+recent&size=10&page=1#top>

Since 2014, HSCIC do not record detailed information on expenditure or unit cost for domiciliary care.

Figure 11 below shows detailed breakdown of local authority expenditure on domiciliary care by service user groups over previous years.

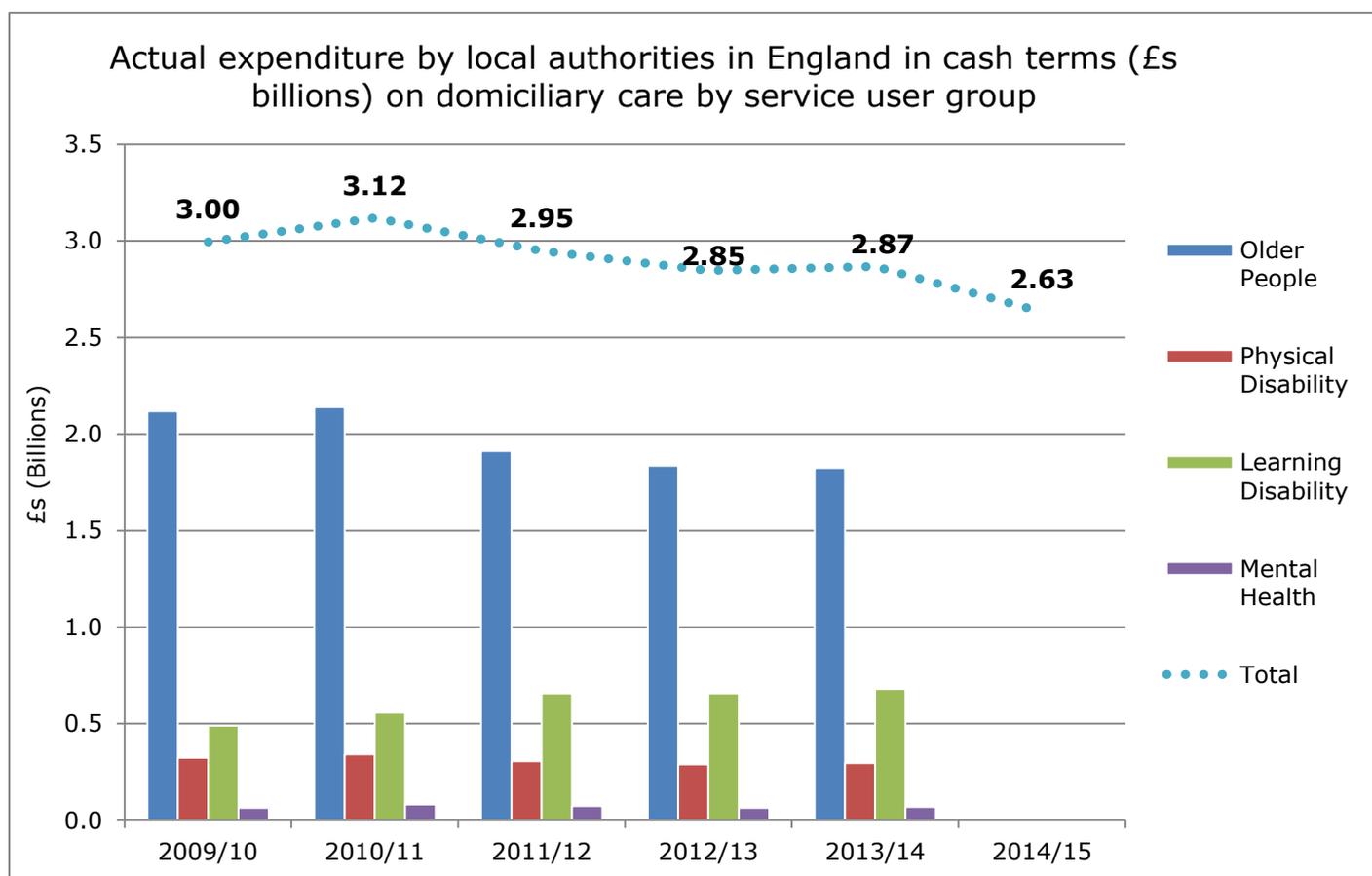


Figure 11 Actual expenditure by local authorities in England in cash terms (£s) on domiciliary care by service user group, 2009/10 – 2014/15

	Older People	Physical Disability	Learning Disability	Mental Health	Total
2009/10	£2,118,722,000	£323,181,000	£488,851,000	£64,409,000	£2,995,163,000
2010/11	£2,139,076,000	£340,440,000	£557,075,000	£81,946,000	£3,118,537,000
2011/12	£1,911,749,000	£305,494,000	£656,653,000	£73,795,000	£2,947,691,000
2012/13	£1,835,533,000	£290,149,000	£656,653,000	£64,409,000	£2,846,744,000
2013/14	£1,824,464,000	£295,808,000	£678,778,000	£69,449,000	£2,868,499,000
2014/15	£2,632,549,000

Table 9 Annual local authority expenditure on domiciliary care by service user group in England, 2009/10 – 2014/15

2.8 Intensity of domiciliary care visits

HSCIC no longer record data on the intensity of domiciliary care services funded by local authorities in England.

However, by looking at data on hours of domiciliary care delivered and people to receive services in a sample week from previous years we can establish a trend. This is illustrated in Figure 12 below.

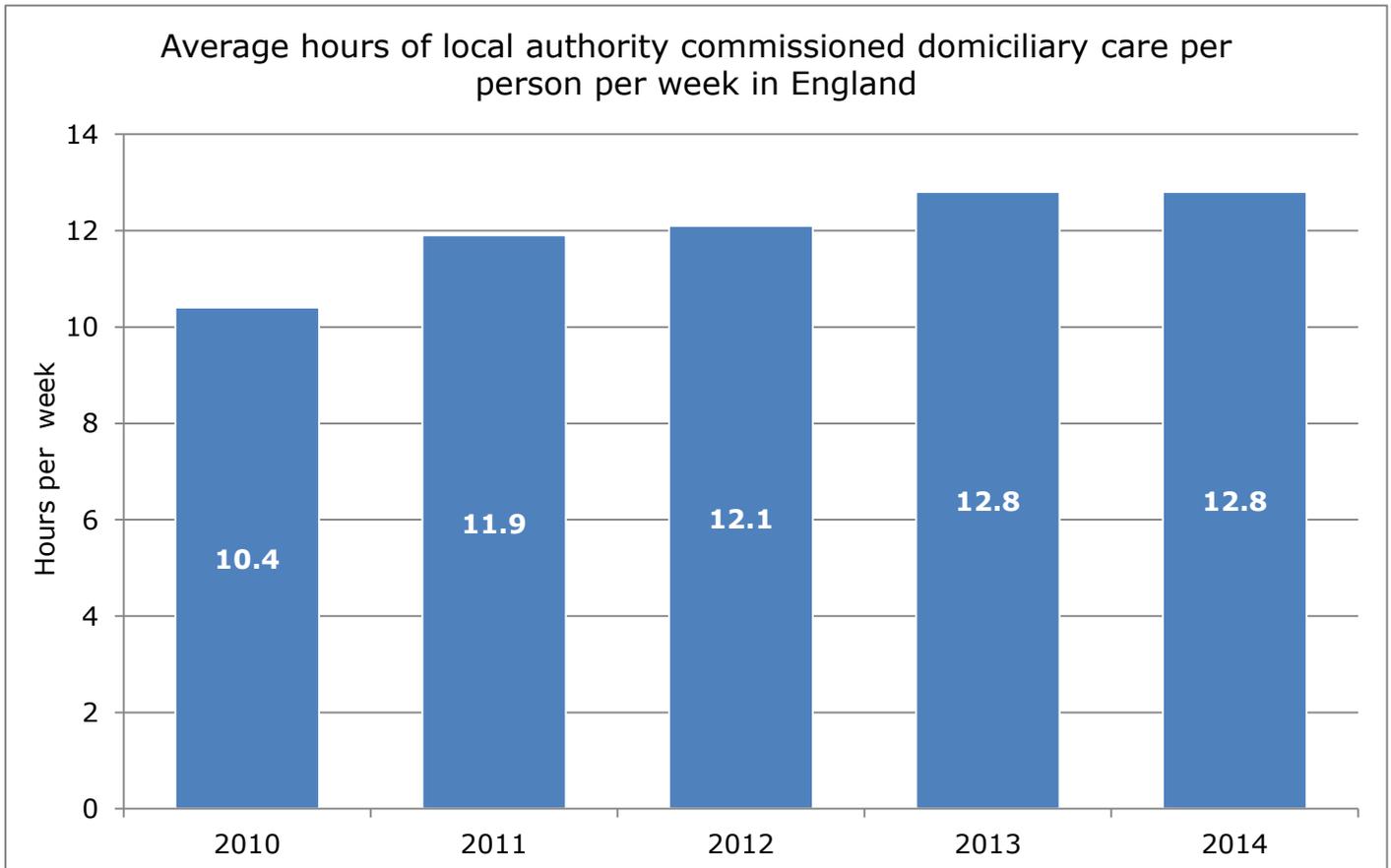


Figure 12 Average hours of local authority commissioned domiciliary care per person per week in England, 2010 - 2014

Sections 2.4 and 2.5 detail the decrease in the number of people to receive local authority funded domiciliary care and the hours of local authority delivered domiciliary care in England.

The decrease in the number of people receiving services has been greater than the decrease in hours. Suggesting fewer people receive greater amounts of local authority funded domiciliary care in England.

2.8.1 Length of domiciliary care visits

There has been significant research carried out by UKHCA and other organisations on the prevalence of very short homecare visits commissioned by local authorities.

In 2012 UKHCA reported that average domiciliary care visits commissioned by local authority in England were:

- ≤ 15 minutes – **10%**
- 16 – 30 minutes – **63%**
- 46 – 60 minutes – **10%**
- > 1 hour – **6%**³¹

In January 2016 UNISON reported that **74%** of councils in England commissioned domiciliary care visits that lasted 15 minutes or fewer.³²

³¹ UKHCA, *Care is not a Commodity*, 2012. Available at:
<http://www.ukhca.co.uk/downloads.aspx?ID=356>

³² UNISON, *Suffering alone at home: A UNISON report on the lack of time in our homecare system*, January 2016. Available at:
https://www.unison.org.uk/content/uploads/2016/01/23574_Save_care_now_homecare_report-5.pdf

2.9 Direct payments

A direct payment is a financial transaction, made by a local authority to an adult with eligible care and support needs, which the adult must use to meet their assessed needs.

In the financial year 2014/15 a total of **144,065** adults in England received a direct payment from their local authority.³³ This represents a **6% decrease** compared to the figure reported in 2013/14.

This decrease runs contrary to the trend observed over recent years where the uptake of direct payments has increased steadily. This trend is illustrated in Figure 13 below.

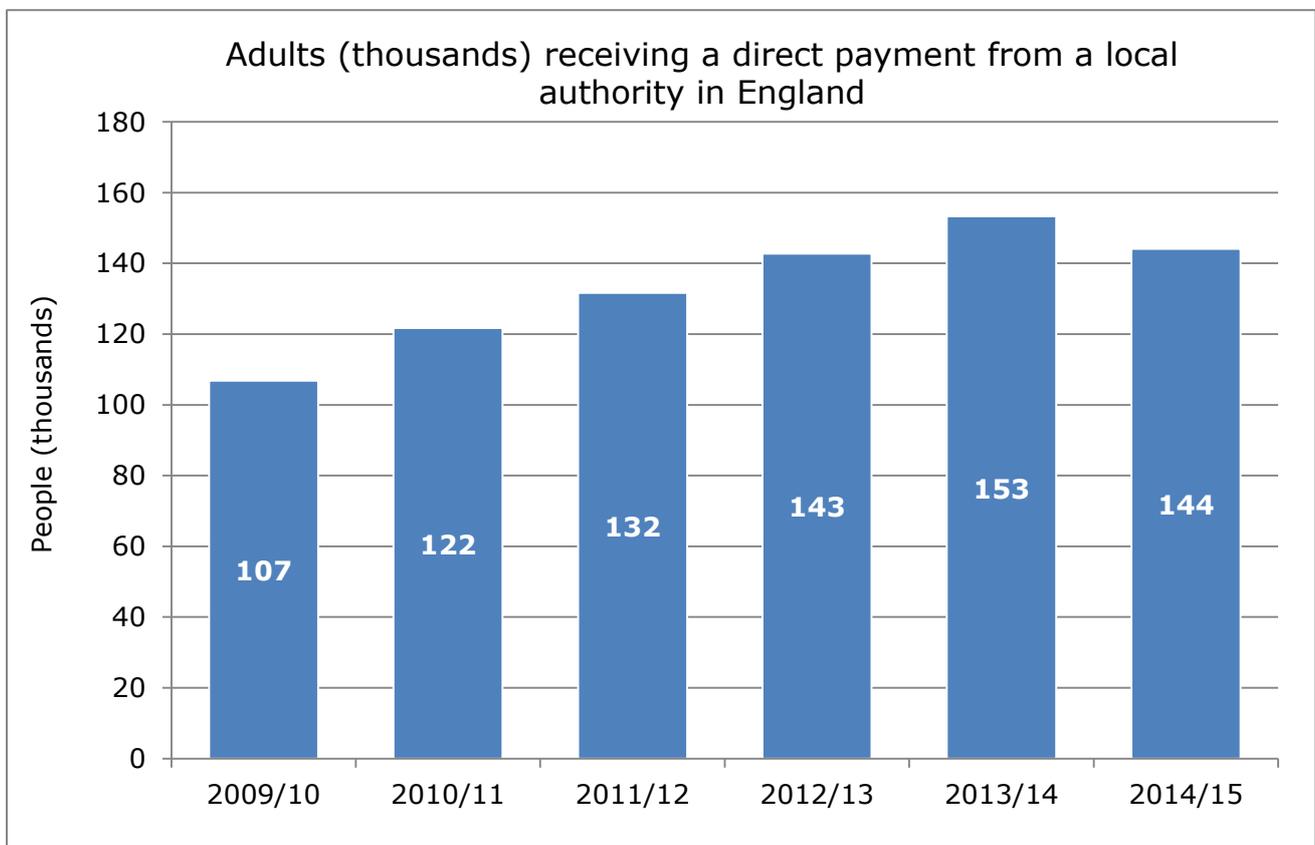


Figure 13 People receiving a direct payment from a local authority in England, 2009/10 – 2014/15

³³ HSCIC, *Community Care Statistics, Social Services Activity, England, 2014/15*, Annex E, October 2015. Available at: <http://www.hscic.gov.uk/searchcatalogue?productid=18981&topics=1%2fSocial+care%2fSocial+care+activity&sort=Relevance&size=10&page=1#top>

In 2014/15 gross expenditure on direct payments by local authorities in England was **£1.36 billion**.³⁴ This represents a **0.8%** decrease compared to the expenditure reported in 2013/14.

The trends in annual gross expenditure on direct payments is illustrated in Figure 14 below.

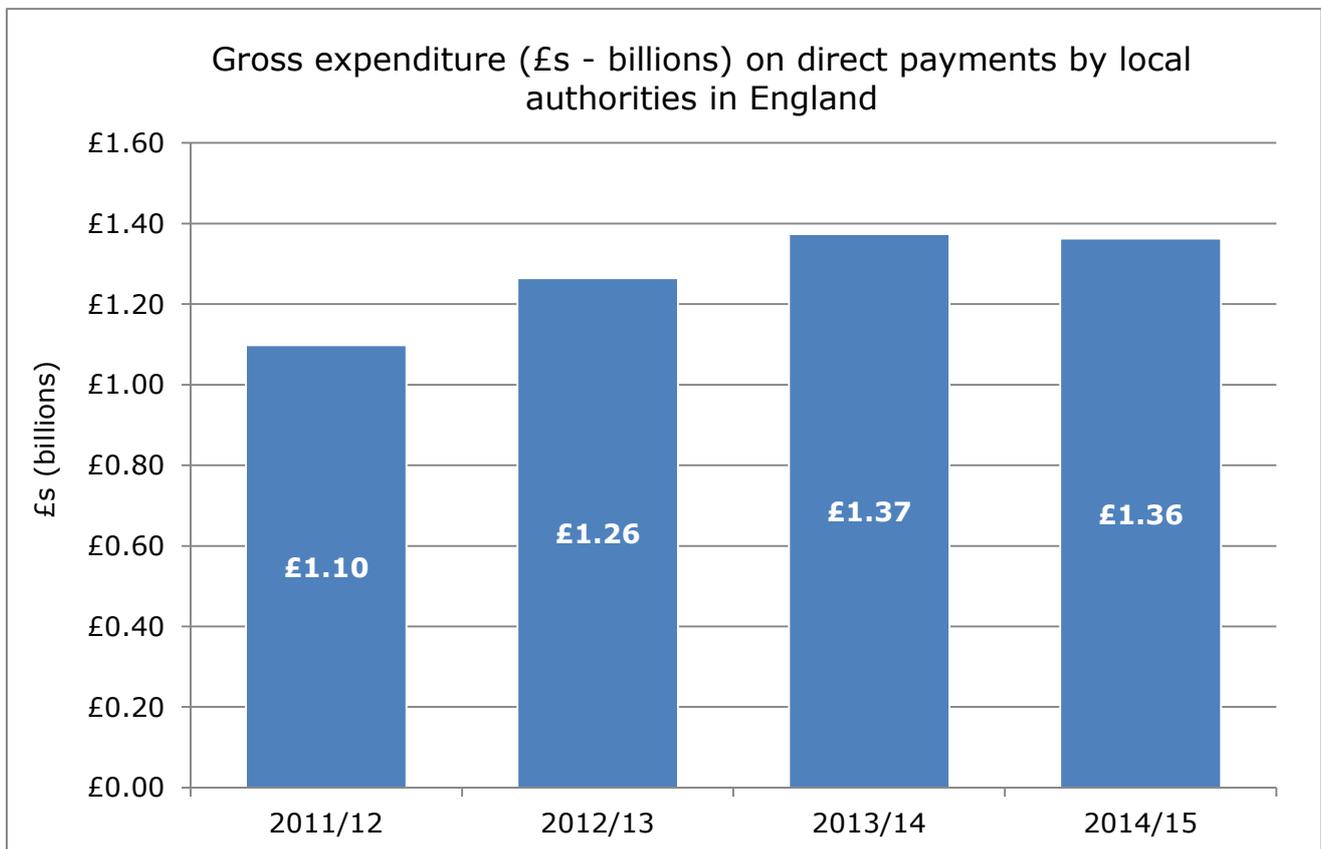


Figure 14 Gross total expenditure on direct payments by local authorities in England, 2011/12 – 2014/15

³⁴ Personal Social Services and Expenditure 2014-15, bridging year data.

Available at:

<http://www.hscic.gov.uk/searchcatalogue?productid=19459&q=community+care&topics=2%2fSocial+care%2fSocial+care+expenditure%2fPersonal+Social+Services+expenditure&sort=Most+recent&size=10&page=1#top>

2.10 Workforce

Skills for Care report, that there were **510,000** jobs in the CQC regulated independent and voluntary domiciliary care sector in England in 2015.³⁵ The full time equivalent ratio is **79%**.

The National Minimum Data Set – Social Care (NMDS – SC) also produced by Skills for Care, reports that there are **18,956** people employed in the statutory domiciliary care sector in England.³⁶

Turnover rate of careworkers remains one of the biggest issues in the domiciliary care sector. Figure 15 below illustrates variations in turnover rates between job roles reported in 2015 and 2016.

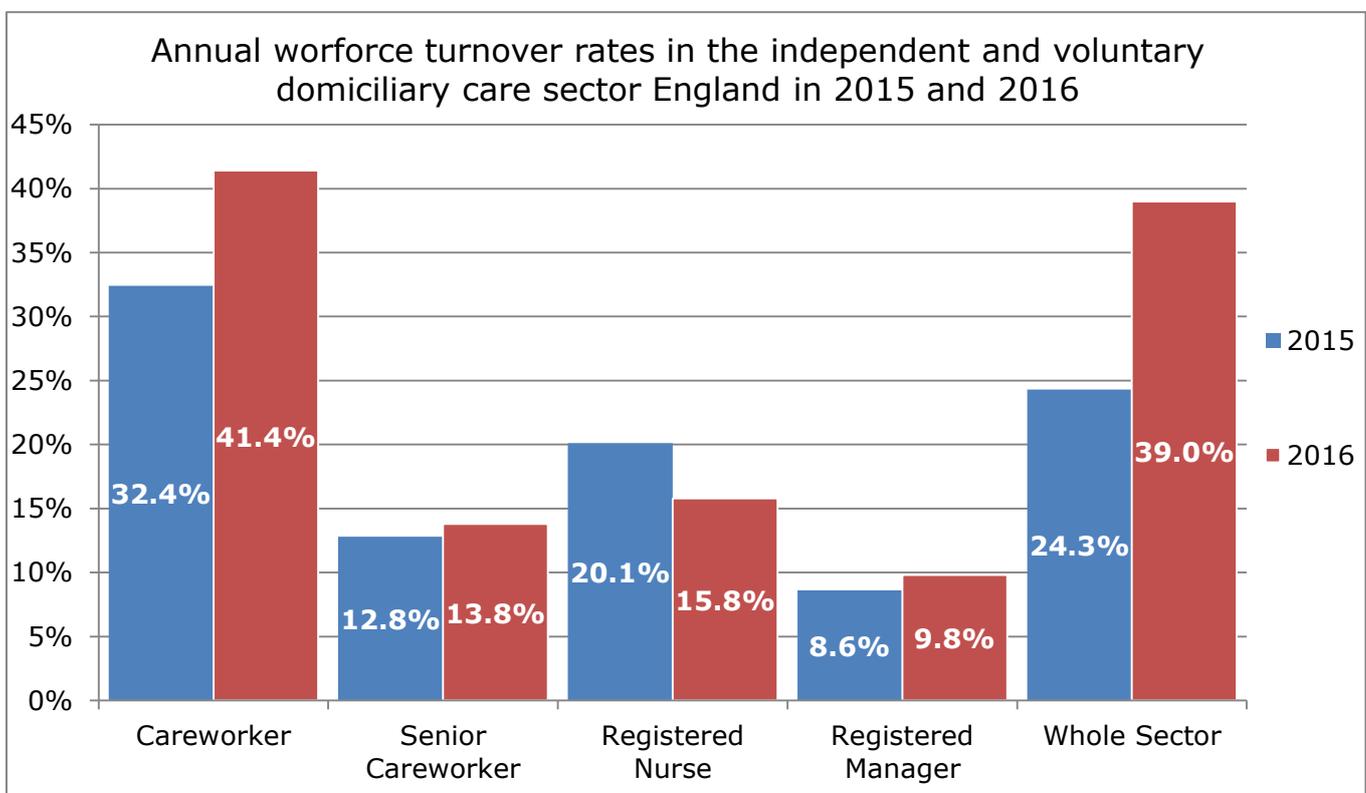


Figure 15 Annual workforce turnover rates in the independent and voluntary domiciliary care sector in England in 2015 and 2016

³⁵ Skills for Care, *The Size and Structure of the Adult Social Care Workforce in England, 2015*. Available at: <http://www.skillsforcare.org.uk/Documents/NMDS-SC-and-intelligence/NMDS-SC/Analysis-pages/The-size-and-structure-Report-2015.pdf>

³⁶ Skills for Care, *NMDS-SC Dashboards*. Available at: <https://www.nmds-sc-online.org.uk/reportengine/GuestDashboard.aspx?type=StaffProfile>

Annual pay rates in the sector vary according to job roles; this is illustrated in Figure 16 below.

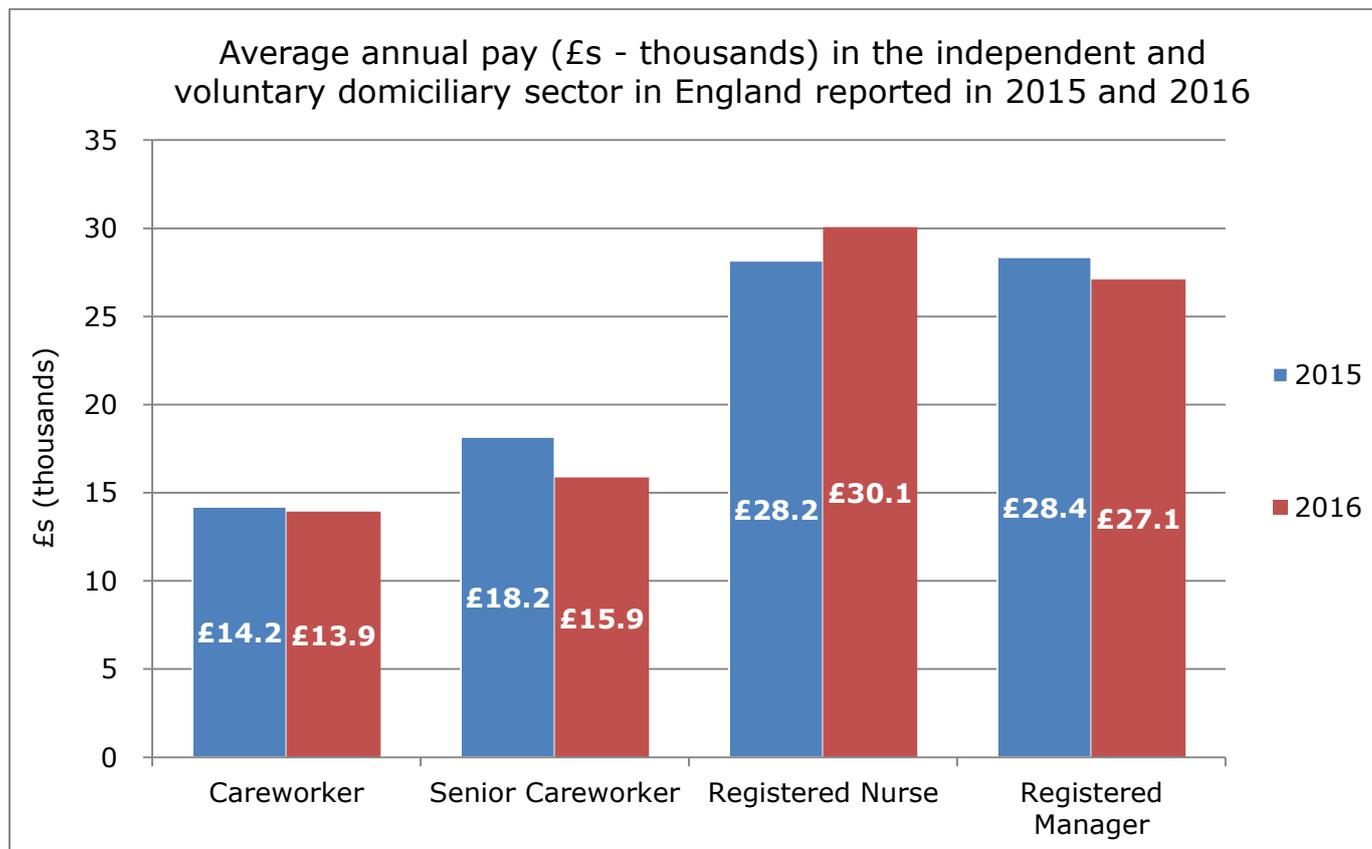


Figure 16 Average annual pay rates in the domiciliary care sector in England reported in 2015 and 2016.

Figure 15 below shows that the workforce is predominantly female. Of all careworkers in the domiciliary care sector recorded on the NMDS – SC **85.1%** identify as female.³⁷

³⁷ Skills for Care, *NMDS-SC Dashboards*. Available at: <https://www.nmds-sc-online.org.uk/reportengine/GuestDashboard.aspx?type=Gender>

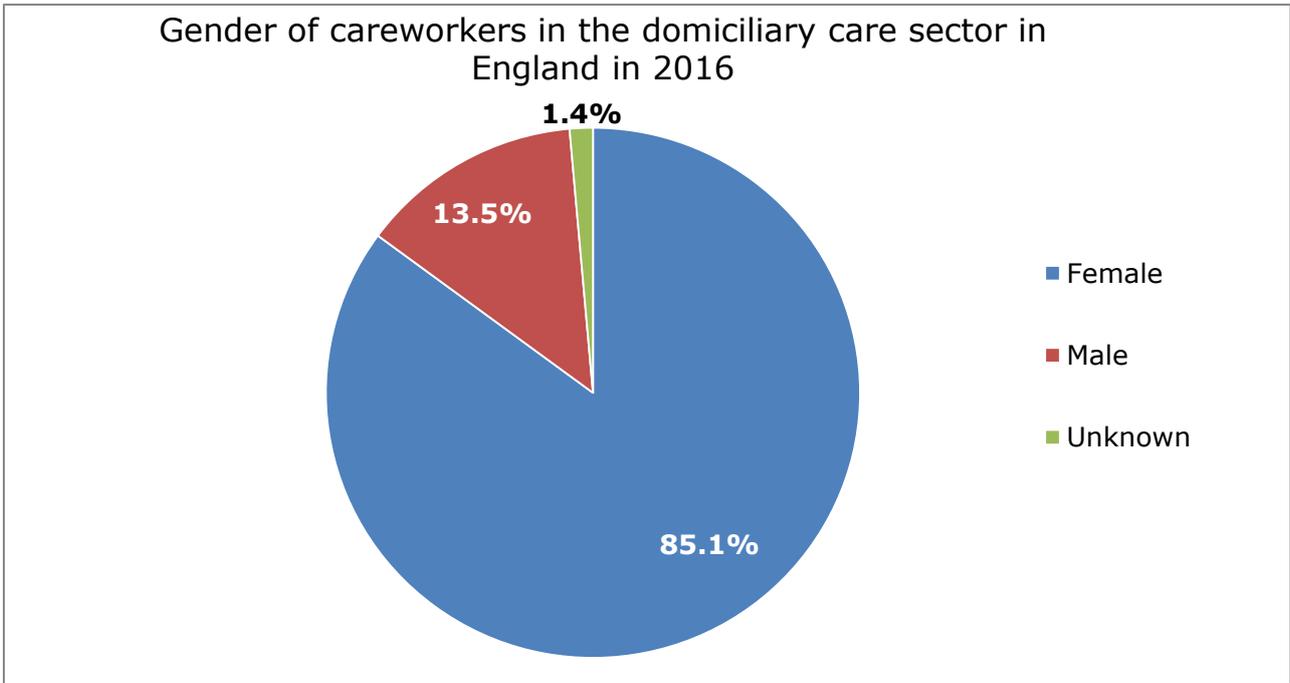


Figure 15 Gender of careworkers in the domiciliary care sector in England, 2016

The age demographic recorded in the NMDS – SC show a more even distribution, the largest group being the 45 – 54 age range who constitute **24.9%** of the total workforce.

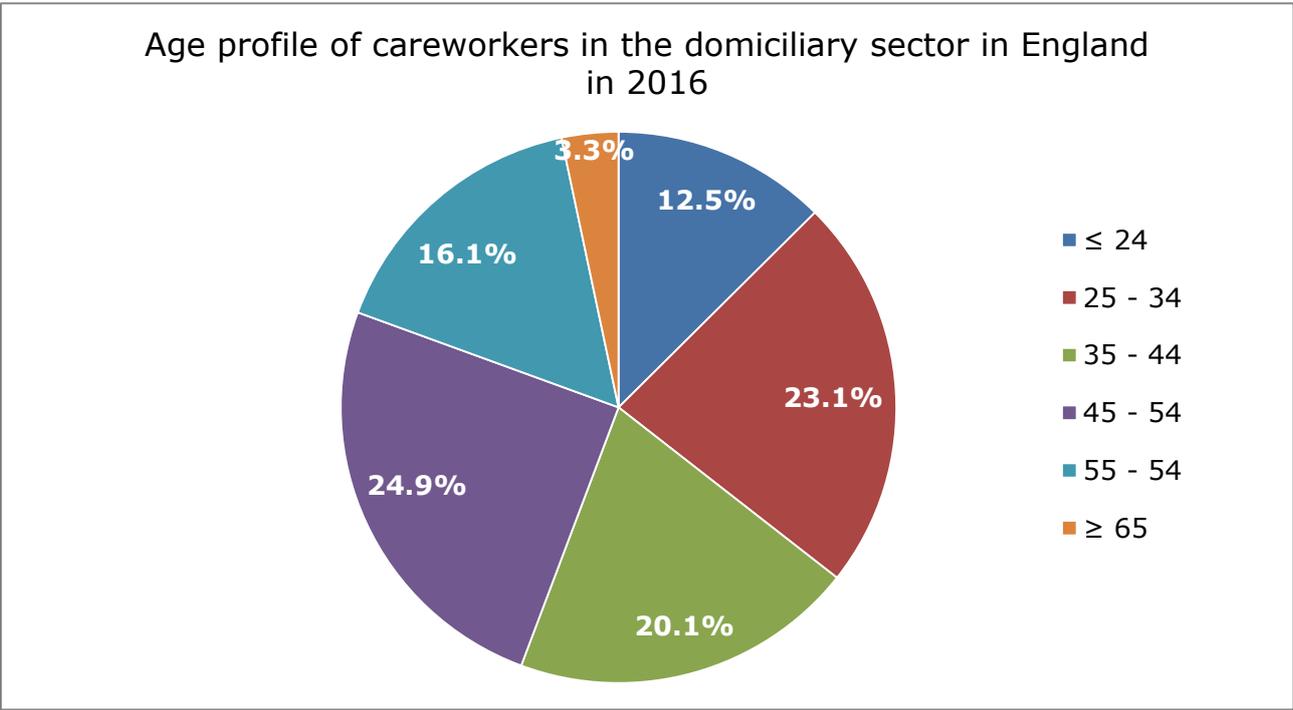


Figure 16 Age profile of careworkers in the domiciliary care sector in England, 2016

The NMDS – SC also records the nationality of careworkers, their records show that **65.4%** of all careworkers in the domiciliary care sector in England are British citizens.

The full breakdown of careworkers by nationality is illustrated in Figure 17 below.

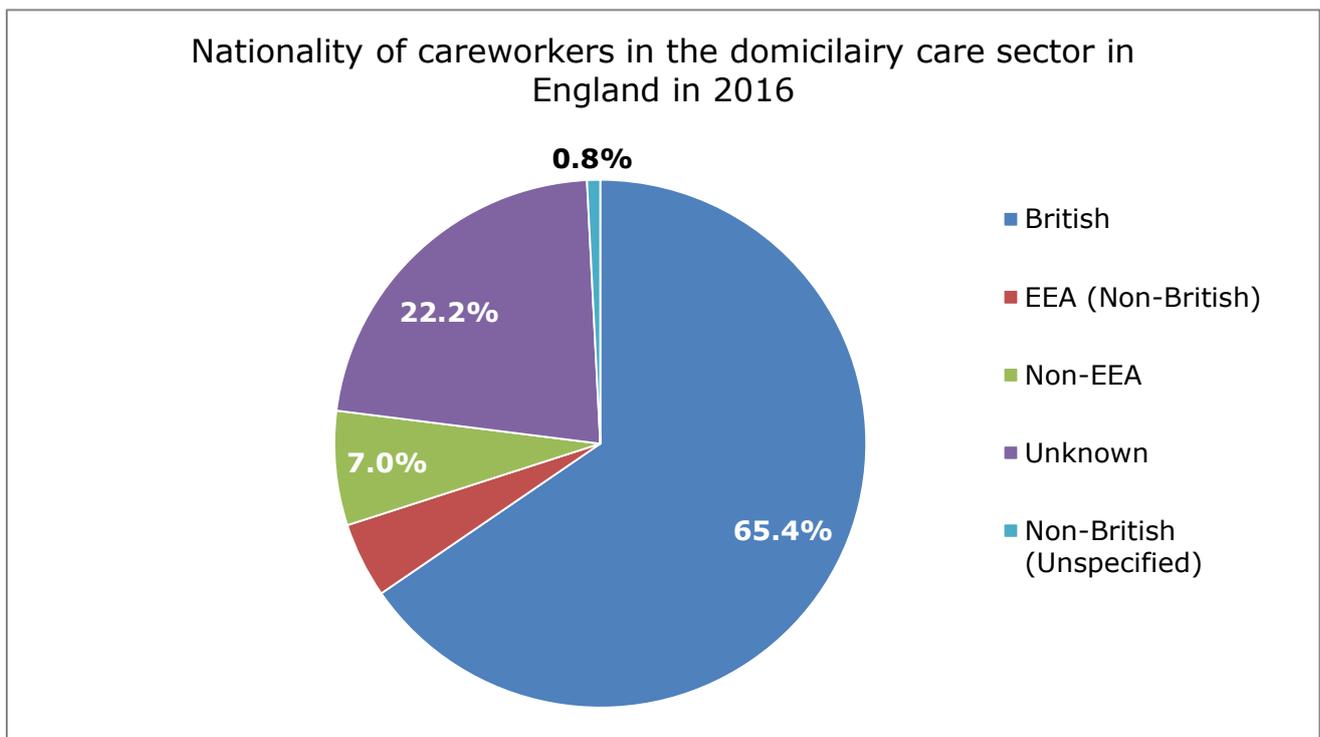


Figure 17 Nationality of careworkers in the domiciliary care sector in England, 2016

3. Scotland

3.1 Key figures

The headline figures for Scotland in the financial year 2014/15 are:

- Total people using domiciliary care: **112,000**
- Total hours of domiciliary care delivered: **39.6 million**
- Total direct expenditure on domiciliary care: **£796 million**
 - Local authority: **£732 million**
 - Expenditure by self-funders: **£63.7 million**
- Total people receiving a direct payment: **6,453**
- Total expenditure on direct payments: **£86.1 million**
- Total people employed in the domiciliary care sector: **64,300**
- Total number of registered locations providing domiciliary care: **943**
(6.3% increase compared to previous year)

3.2 Regulation

Domiciliary care in Scotland is regulated by the **Care Inspectorate**, an independent organisation who are funded by the continuation and registration fees paid by providers of social care, they are also publically funded by the Scottish Government.

The Care Inspectorate was formed under the Public Services Reform (Scotland) Act 2010 and is responsible for the mandatory registration, inspection and evaluation of care services in Scotland. When inspecting care services the Care Inspectorate refer to all of the **relevant legislation** and the **National Care Standards**.

The Regulation of Care (Scotland) Act 2001 made provisions for Ministers in the Scottish Government to draw up the **National Care Standards**.³⁸ The Care Standards themselves are extensive and are based on principles of dignity, privacy, choice, safety, realising potential as well as equality and diversity.

When evaluating care services the Care Inspectorate uses a system which awards grades to providers ranging from 1-6; (1 being unsatisfactory, 6 being excellent). The graded aspects of care are:

- Quality of Care and Support;
- Quality of Environment;
- Quality of Staffing; and
- Quality of Management and Leadership.

If the Care Inspectorate finds a provider falling short of the Care Standards or breaching regulation this is recorded in the inspection report and the service manager is required to address it. The Inspectorate can impose an additional condition on the service's registration if the provider persistently, substantially or seriously failed to meet the standards or breached a regulation.

³⁸ Please note; the National Care Standards are currently under review:
<http://www.gov.scot/Topics/Health/Support-Social-Care/Regulate/Standards/NCSreview>

An 'improvement notice' sets out the required improvements to be made and the timescale in which those improvements should be accomplished. An improvement notice would usually be issued upon the failure of the agency to improve conditions after the above action has taken place, however the Care Inspectorate can move straight to an improvement notice if it feels it is necessary.

If there is no improvement following the issuing of an improvement notice the Care Inspectorate can move to cancel the registration of the agency. In extreme cases (for example where there is risk to a person's life or well-being) the Inspectorate could take immediate measures to cancel the registration of any agency without issuing an improvement notice first.

3.3 Providers

In March 2016 the Care Inspectorate had **943** registered locations under the heading of *Support Services, Care at Home*.³⁹ This represents a **6.3% increase** compared to the March 2015 figure.

Domiciliary care funded by a local authority in Scotland is delivered either by the independent/voluntary sector, who the local authority have commissioned to meet the needs of eligible individuals, or it will be delivered by the local authorities in house community care team.

In 2015 the independent sector delivered **37%** of all local authority funded domiciliary care in Scotland.⁴⁰ Figure 18 below illustrates how volume of delivery has varied by sector over recent years.

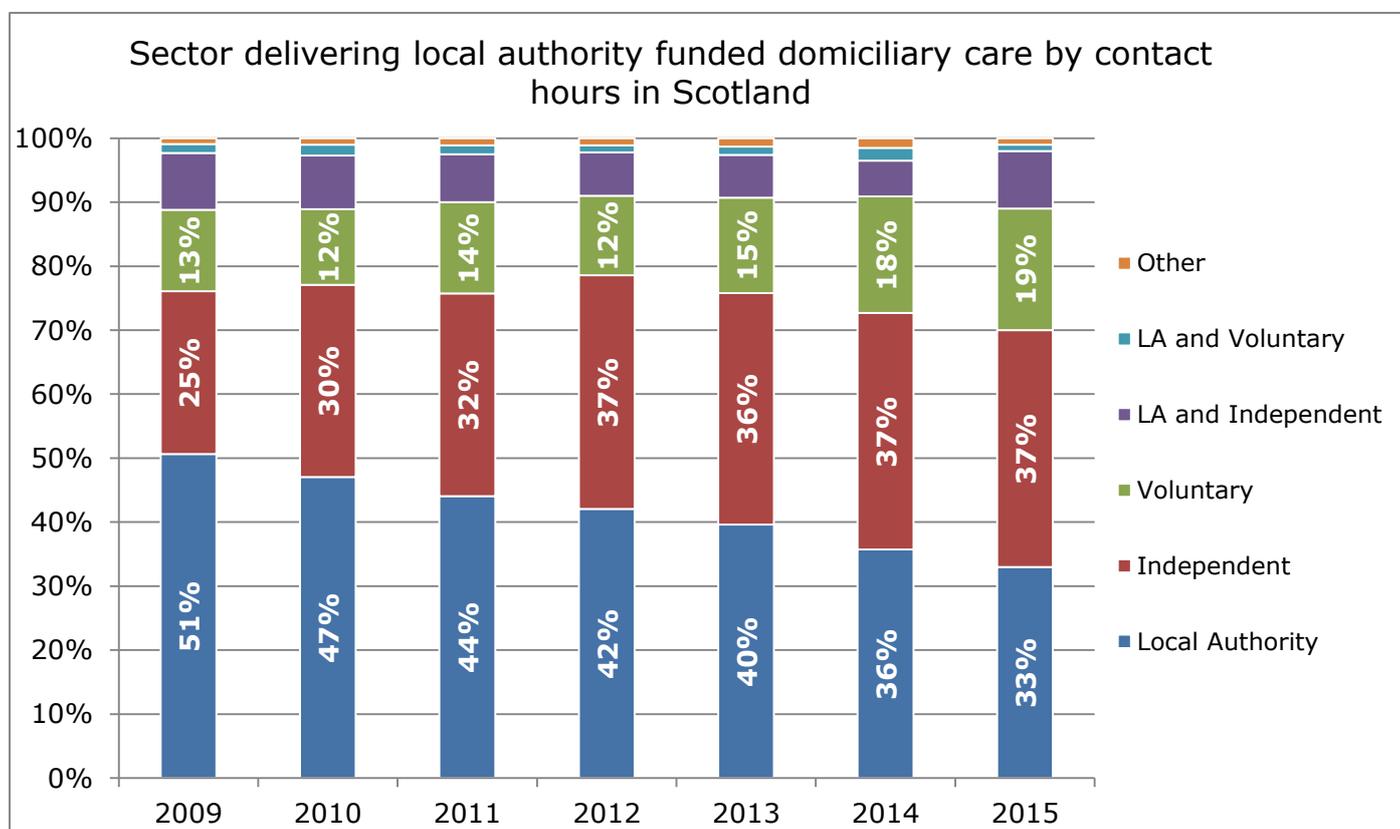


Figure 18 Sector delivering local authority funded domiciliary care by contact hours in Scotland, 2009 - 2015

³⁹ The Care Inspectorate, *Find a care agency*. Available at: <http://www.careinspectorate.com/index.php/care-services>

⁴⁰ The Scottish Government, *Health and Social Care Data Sets, Social Care Survey 2015*. Available at: <http://www.gov.scot/Topics/Statistics/Browse/Health/Data/HomeCare>

Table 9 below gives a more detailed overview of recent trends in the quantity of local authority domiciliary care delivered by each sector in Scotland.

	Local Authority	Independent	Voluntary	LA and Independent	LA and Voluntary	Other
2009	51%	25%	13%	9%	1%	1%
2010	47%	30%	12%	8%	2%	1%
2011	44%	32%	14%	8%	1%	1%
2012	42%	37%	12%	7%	1%	1%
2013	40%	36%	15%	7%	1%	1%
2014	36%	37%	18%	6%	2%	2%
2015	33%	37%	19%	9%	1%	1%

Table 10 Sector delivering local authority funded domiciliary care by contact hours in Scotland, 2009 - 2015

No data is collected as to which sector provides domiciliary care purchased by individuals, it would be reasonable to assume that **100%** of privately funded care is delivered by the independent/voluntary sector in Scotland.

3.4 People who use services

During the census week in March 2015 **61,500** people received domiciliary care services funded by a local authority in Scotland.⁴¹

This represents an annual figure of **102,500** people to receive domiciliary care services funded by a local authority in Scotland.⁴²

The number of people receiving local authority funded domiciliary care in Scotland has declined over recent years. Between 2009 and 2015 the number of people to receive services decreased by **10.2%**. This is illustrated in Figure 19 below.

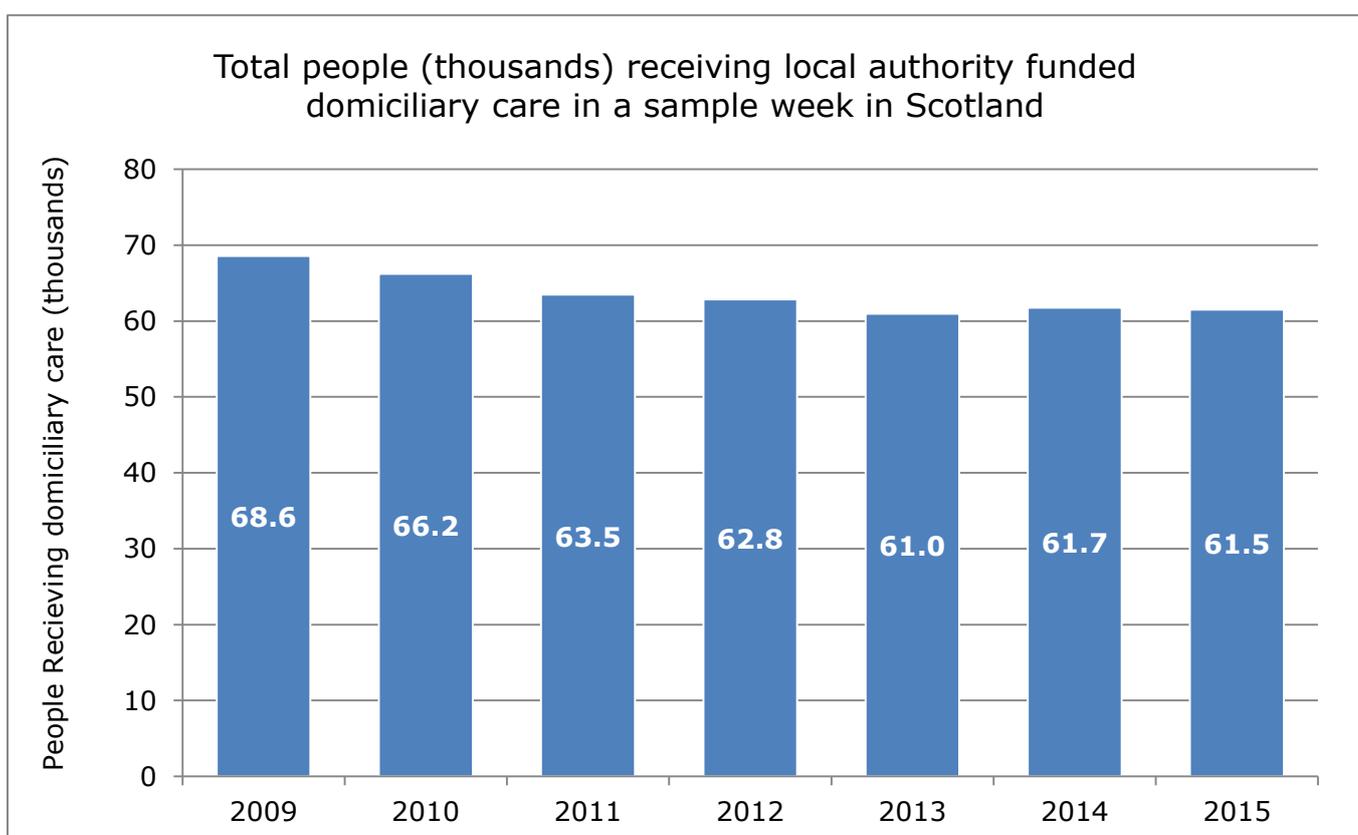


Figure 19 Total people receiving local authority funded domiciliary care in a sample week in Scotland, 2009 - 2015

⁴¹ The Scottish Government, *Health and Social Care Data Sets, Social Care Survey 2015*. Available at: <http://www.gov.scot/Topics/Statistics/Browse/Health/Data/HomeCare>

⁴² Assume ratio annual:weekly is 3:2 as in previous years.

Of all people to receive to services, **82%** were aged 65 years or over. A more detailed breakdown is shown in Figure 20 below.

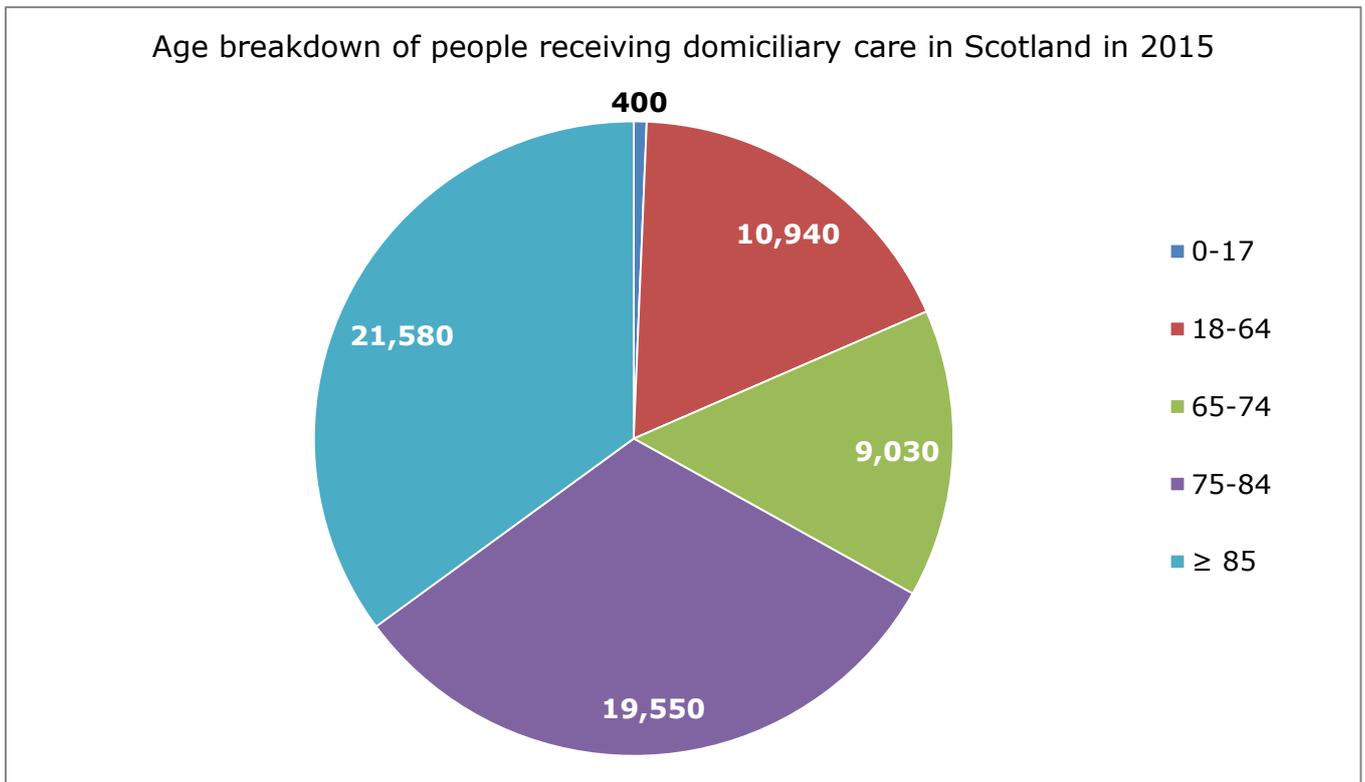


Figure 20 Age breakdown of people receiving domiciliary care in Scotland in 2015

No data is regularly recorded on how many people privately fund domiciliary care in Scotland. UKHCA estimate that in 2014/15 a total of **9,300** people self-funded domiciliary care in Scotland.

3.5 Hours of domiciliary care

During the financial year 2014/15 local authorities in Scotland funded **37 million** hours of domiciliary care.⁴³

In a sample week in March 2015 local authorities in Scotland funded **706,000** hours of domiciliary care.⁴⁴

Figure 21 below illustrates recent trends in the quantity of domiciliary care funded by local authorities in Scotland.

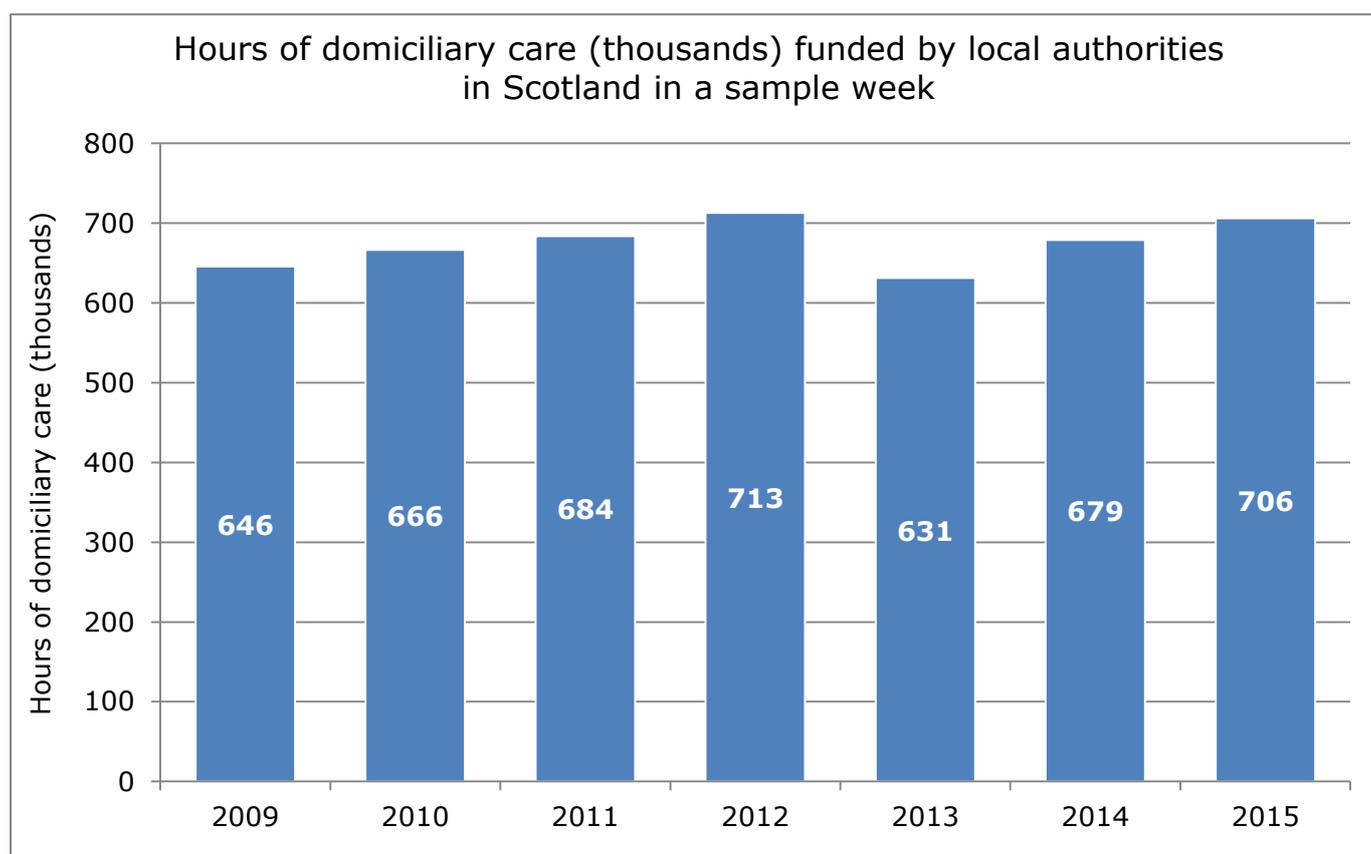


Figure 21 Hours of domiciliary care funded by local authorities in Scotland in a sample week, 2009 – 2015

⁴³ This figure is an estimate, taking the figure relating to a sample week published by the Scottish Government and multiplying it by 52.18.

⁴⁴ The Scottish Government, *Health and Social Care Data Sets, Social Care Survey 2015*. Available at: <http://www.gov.scot/Topics/Statistics/Browse/Health/Data/HomeCare>

Table 10 below gives a more detailed overview of recent trends in the quantity of domiciliary care funded by local authorities in Scotland.

	Hours of care (sample week)	Hours of care (annual)
2009	645,700	33,692,626
2010	666,400	34,772,752
2011	683,900	35,685,902
2012	712,900	37,199,122
2013	631,100	32,930,798
2014	678,900	35,425,002
2015	706,000	36,839,080

Table 11 Hours of domiciliary care funded by local authorities in Scotland in a sample week and annually, 2009 – 2015

No data is recorded on the amount of domiciliary care purchased by people privately funding their domiciliary care in Scotland. UKHCA estimate that in the financial year 2014/15 a total of **2.8 million** hours of domiciliary care were purchased by people who fund their own domiciliary care in Scotland.⁴⁵

⁴⁵ Use with extreme caution: Figures worked back from Southerland, S. *Independent Review of free personal and nursing care in Scotland*, p. 68. Published in 2008. Available at: <http://www.gov.scot/Publications/2008/04/25105036/0>

3.6 Eligibility

In Scotland, local authorities carry out an **Assessment of Your Care Needs** whereby an individual is assessed by healthcare professionals to determine what their care needs are and how they might be met. Following this a financial assessment may be undertaken to determine whether the individual is eligible for financial assistance in order to pay for the provision of their care and if so to what extent.

As part of the Community Care and Health (Scotland) Act 2002, local authorities in Scotland are required to provide, free of charge, those services defined as *personal care* to all persons aged over 65 and who have been assessed as requiring personal care.

Personal Care is defined in the Regulation of Care (Scotland) Act 2001 as:

*'Care which relates to the day to day physical tasks and needs of the person cared for (as for example, but without prejudice to that generality, to eating and washing) and to mental processes related to those tasks and needs (as for example, but without prejudice to that generality, to remembering to eat and wash); and "personal support" means counselling, or other help, provided as part of a planned programme of care.'*⁴⁶

The amount of free care an individual will receive is determined by their local authority following assessment. There is no set limit to the amount of free care they can provide.⁴⁷

Services other than personal care, such as assistance with shopping and housework are deemed chargeable. Persons with capital judged to be below **£16,250** (this excludes the value of any tangible assets i.e. housing) may receive assistance with fees for non-personal care. Those with capital judged to be above **£26,250** will not receive assistance.

⁴⁶ The Scottish Government, *Regulation of Care (Scotland) Act 2001, Part 1; The Commission and Care Services, Section 2, (28)*. At: <http://www.legislation.gov.uk/asp/2001/8/contents>.

3.7 Expenditure

In the financial year 2013/14 gross expenditure on domiciliary care provision by local authorities in Scotland was **£732 million**.⁴⁸ This represents a **3.1% increase** compared to the 2012/13 expenditure.

Figure 22 below tracks local authority expenditure in real terms (adjusted according to GDP deflator where 2013/14 =100) and in cash terms.

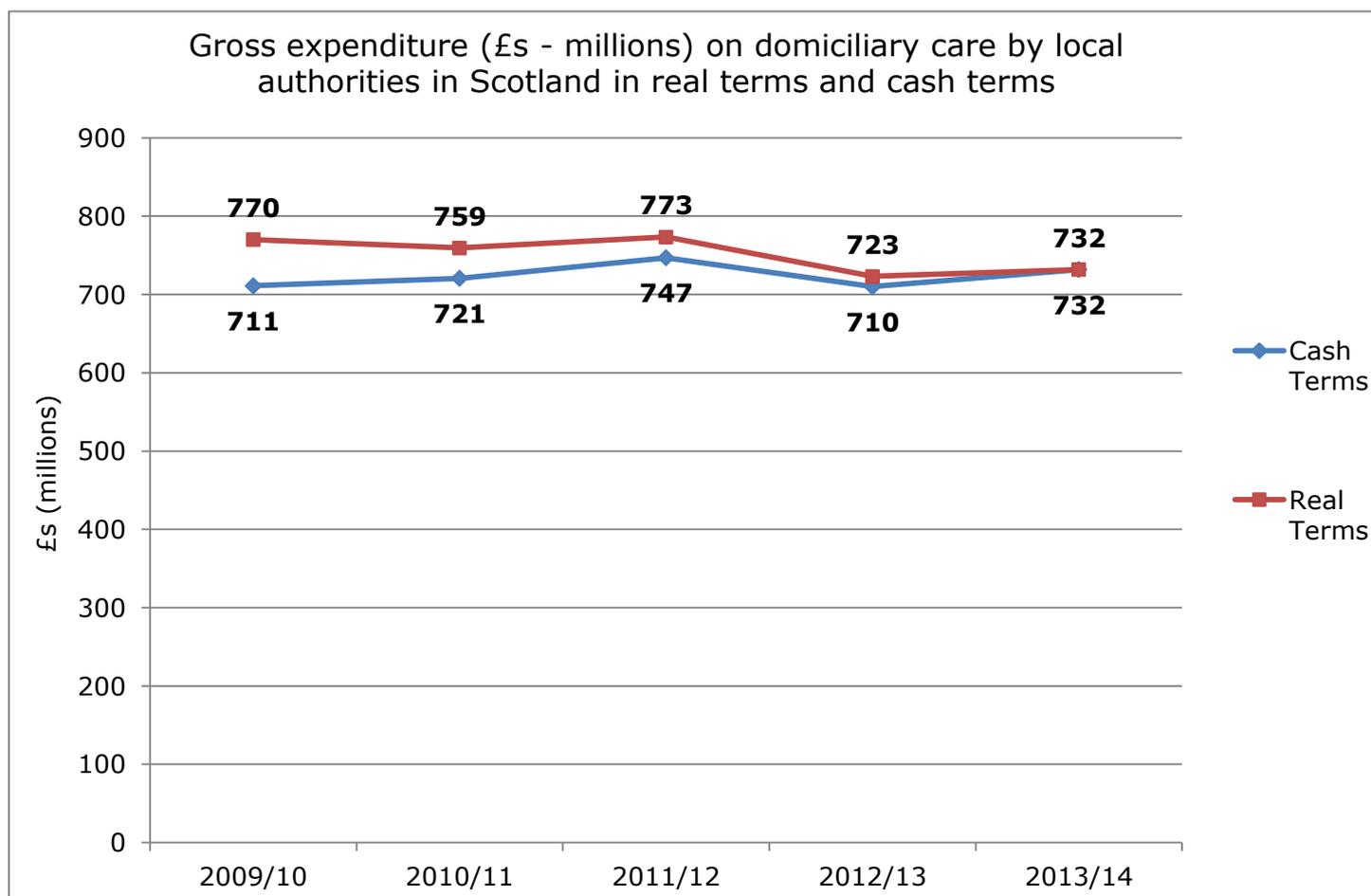


Figure 22 Gross expenditure (£s millions) on domiciliary care by local authorities in Scotland in real terms and cash terms, 2009/10 – 2013/14

⁴⁸ The Scottish Government, *Expenditure on Adult Social Care Service, 2003/4 – 2013/14*. Available at: <http://www.gov.scot/Publications/2015/03/5885/downloads>

Data on expenditure by self-funders in Scotland is sparse, UKHCA currently estimates that annual private expenditure on domiciliary care in Scotland is **£52 million**.⁴⁹

⁴⁹ Use with extreme caution, figured calculated by working out spend relative to size of the market in term of hours of care purchased, where local authority funding is 92% of the market.

3.8 Intensity of domiciliary care visits

Figure 23 below illustrates the intensity of local authority funded domiciliary care in Scotland in a sample week in March 2015.

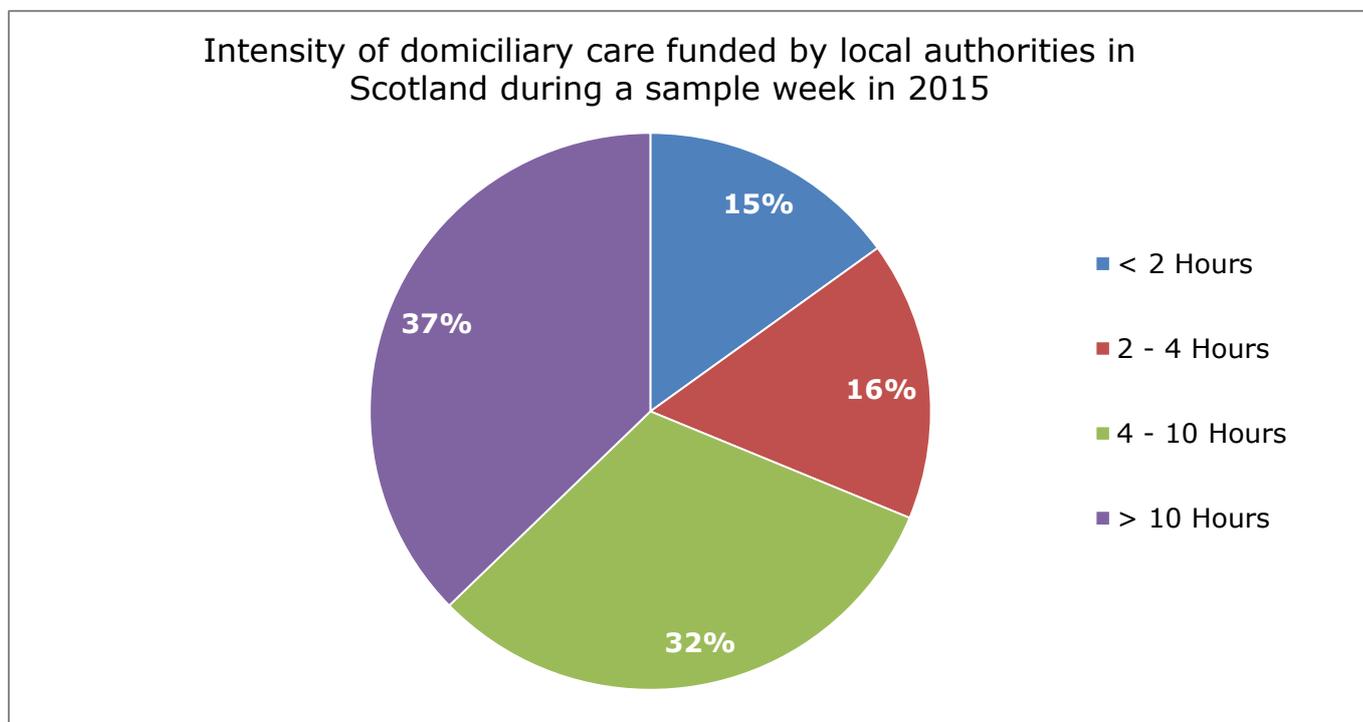


Figure 23 Intensity of domiciliary care commissioned by local authorities in Scotland in a sample week in March 2015

During the census week in March 2015, **22,930** people received at least one domiciliary care visit lasting ten hours or more, including overnight and live-in care. This represents **37%** of all people to receive domiciliary care in the sample week.

Hours per week	Service users in a sample week	%
< 2 Hours	9,240	15%
2 - 4 Hours	9,980	16%
4 - 10 Hours	19,360	31%
> 10 Hours	22,930	37%

Table 12 Intensity of domiciliary care commissioned by local authorities in Scotland in sample week in March 2015

3.9 Direct payments

A direct payment is a financial transaction made by a local authority to an eligible person; the person must use their direct payment to meet their assessed needs.

During the financial year 2014/15 a total of **6,453** people in Scotland received a direct payment from their local authority.⁵⁰ This is a **7.4% increase** compared to 2013/14. Despite the ongoing increase, the number of people receiving direct payments is **6%** of people receiving domiciliary care purchased directly by a local authority.

There has been an ongoing trend across the UK to promote the uptake of direct payments, this has been the case in Scotland as illustrated in Figure 24 below.

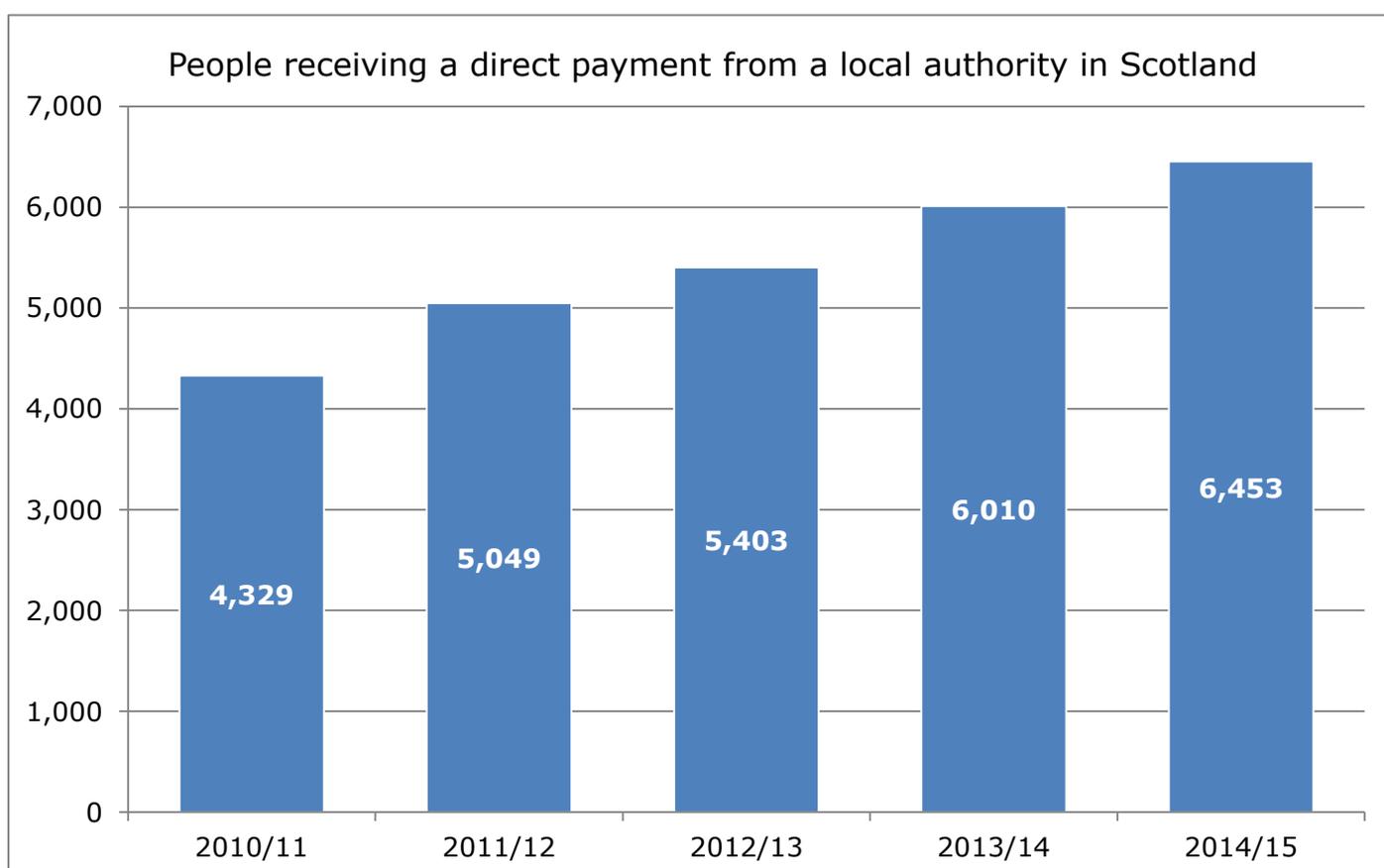


Figure 24 Total expenditure on direct payments by local authorities in Scotland, 2010/11 – 2014/15

⁵⁰ The Scottish Government, *Health and Social Care Data Sets, Social Care Survey 2015*. Available at: <http://www.gov.scot/Topics/Statistics/Browse/Health/Data/HomeCare>

Similarly expenditure on direct payments has increased. In 2014/15 total expenditure on direct payments was **£86 million**.⁵¹

Figure 25 below illustrates the rate of increase in expenditure on direct payments by local authorities in Scotland.

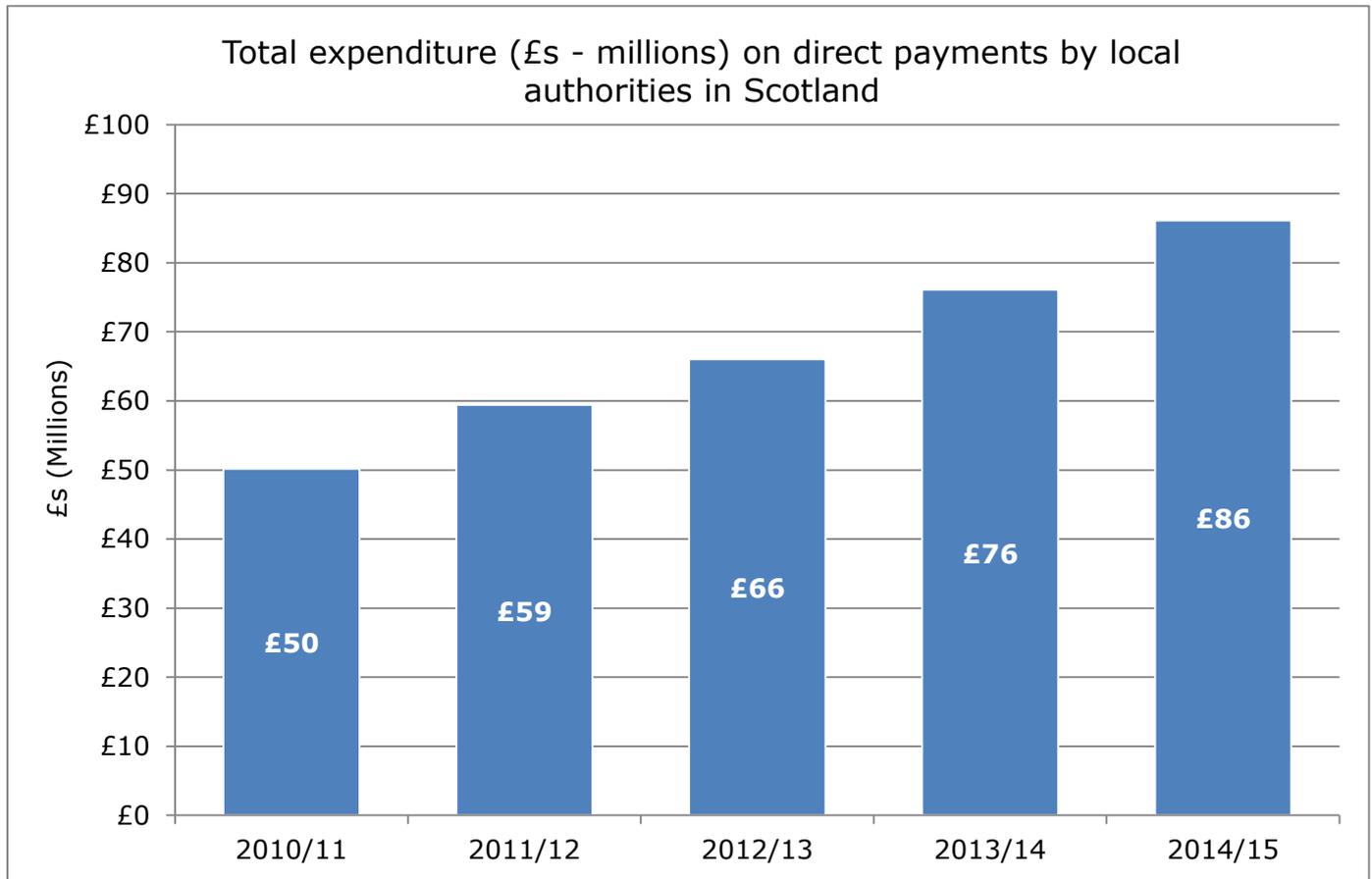


Figure 25 People receiving direct payments awarded by a local authority in Scotland, 2010/11 – 2014/15

⁵¹ The Scottish Government, *Health and Social Care Data Sets, Social Care Survey 2015*. Available at: <http://www.gov.scot/Topics/Statistics/Browse/Health/Data/HomeCare>

3.10 Workforce

The Scottish Social Services Council (SSSC) reported there were **64,290** people employed in the domiciliary care and housing support sector in 2014.⁵²

Of these recorded workers **89%** were employed as direct care givers, while **7%** were employed in support roles, such as office staff, co-ordinators, assessors and administrators. The remaining **4%** were employed in management positions.⁵³

Figure 26 illustrates this breakdown.

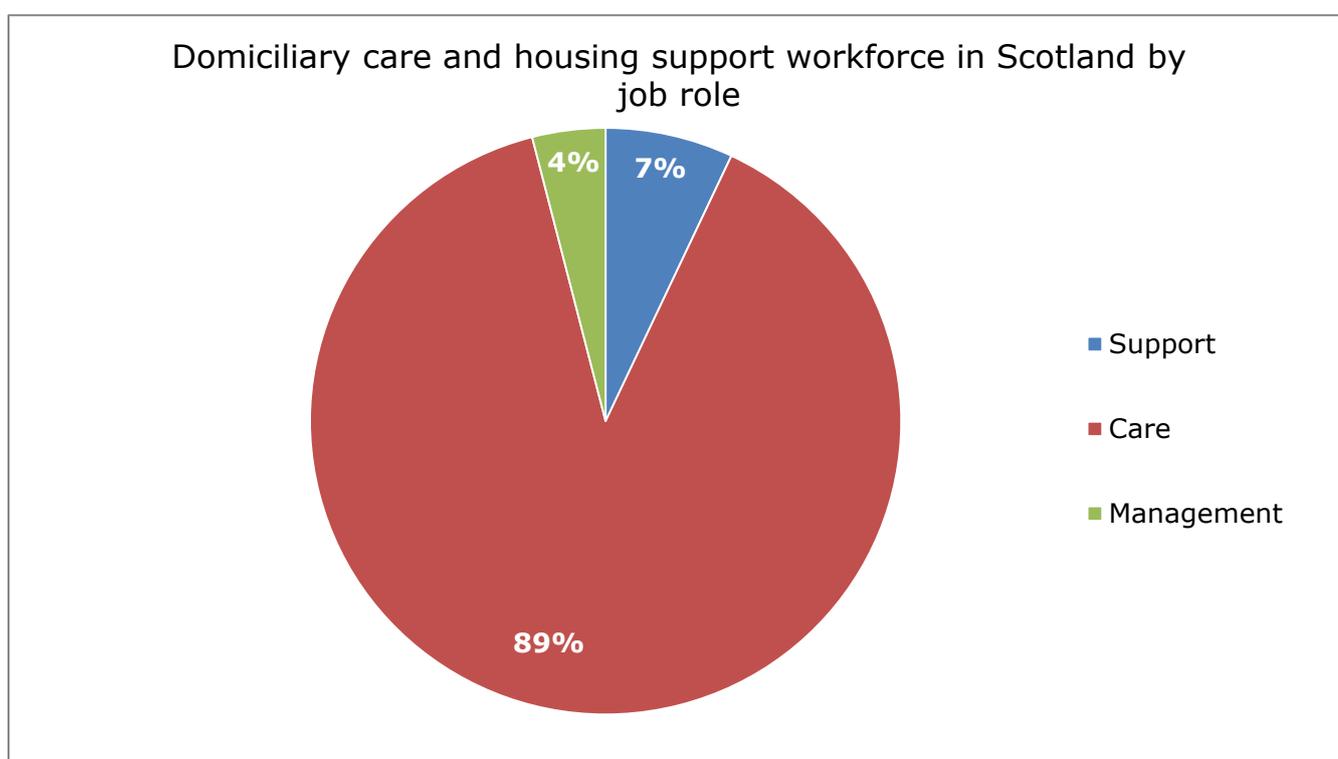


Figure 26 Domiciliary care and support workforce in Scotland by job role, 2014

⁵² SSSC, *Report on the 2014 Workforce Data*. Available at: <http://data.sssc.uk.com/data-publications/22-workforce-data-report/99-scottish-social-service-sector-report-on-2014-workforce-data>

⁵³ SSSC, *Report on the 2014 Workforce Data*. Available at: <http://data.sssc.uk.com/data-publications/22-workforce-data-report/99-scottish-social-service-sector-report-on-2014-workforce-data>

Figure 27 below illustrates the breakdown of employer type by sector.

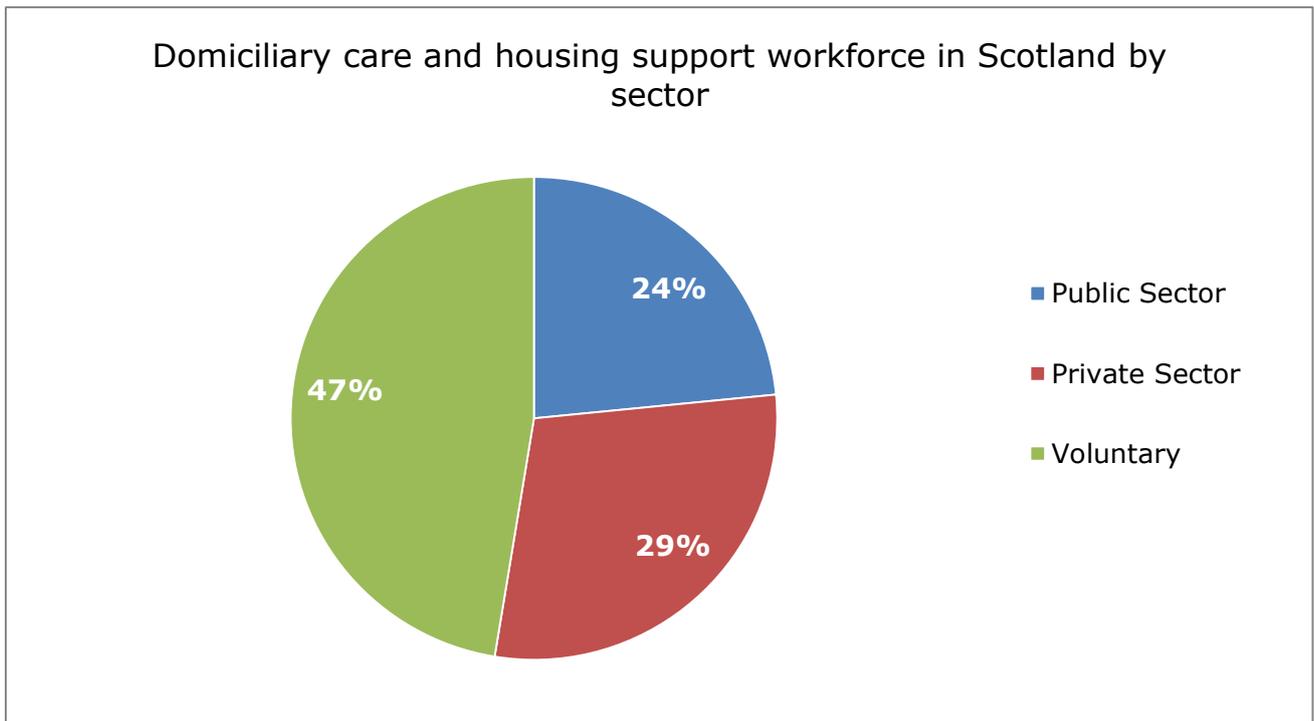


Figure 27 Domiciliary care and support workforce in Scotland by sector, 2014

As in other parts of the UK the care workforce in the domiciliary care and housing support sector in Scotland is predominantly female.

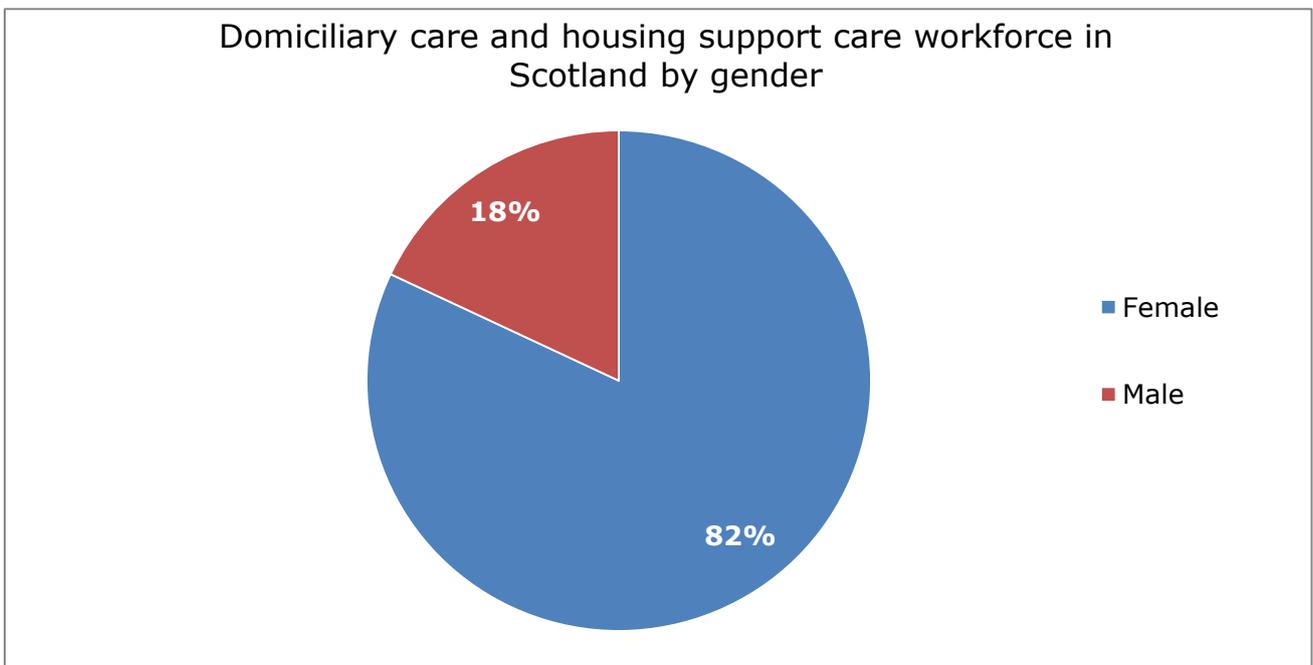


Figure 28 Domiciliary care and housing support care workforce in Scotland by gender, 2014

Figure 29 shows the median age of the workforce, in the domiciliary care and housing support sector by sub-sector.

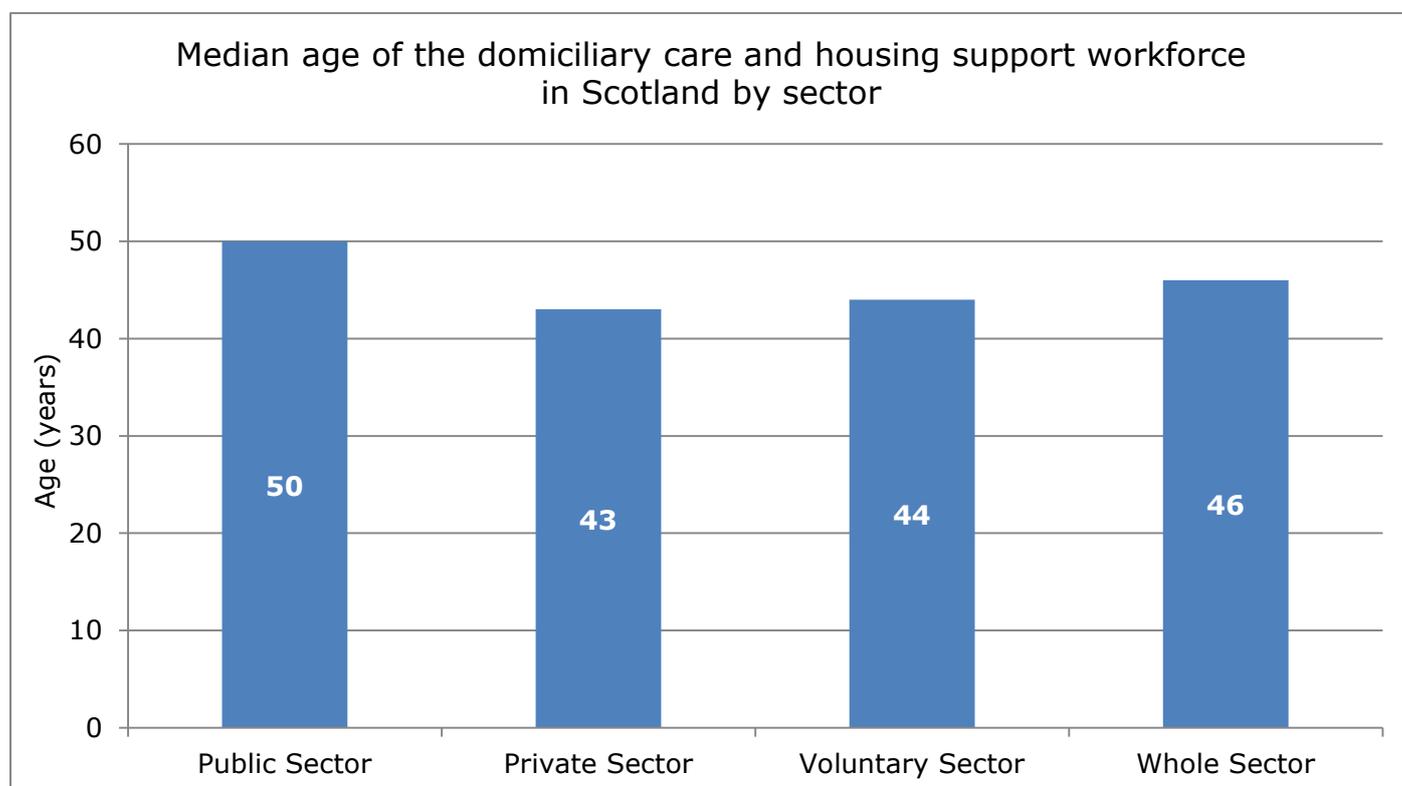


Figure 29 Median age of the domiciliary care and housing support workforce in Scotland by sector, 2014

SSSC also provides a breakdown of contract type for the domiciliary care and housing support sector in Scotland. This breakdown is shown in detail in Table 12 below.

	Contract Type
Permanent	81%
Temporary	2%
Agency	2%
Bank	2%
Full Time	1%
Sessional	4%
Casual	5%
Trainee	0%
Other	1%
No Guaranteed Hours	9%

Table 13 Overview of the domiciliary care and housing support sector by contract of employment type, 2014

The high recorded use of permanent contracts is reflected in the statistics on the median number of hours worked per week in the domiciliary care and housing support sector in Scotland. This is detailed in Figure 30 below.

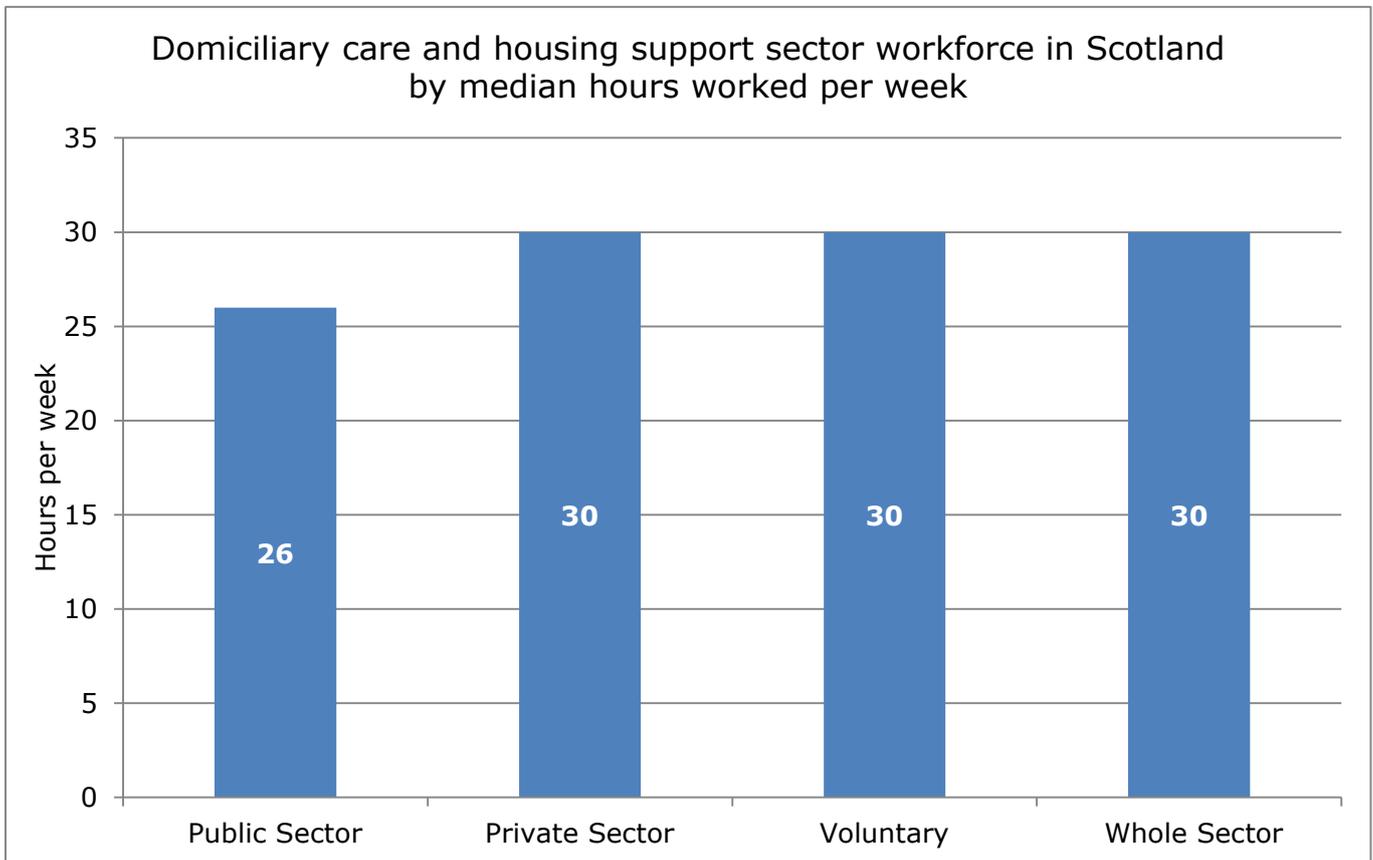


Figure 30 Domiciliary care and housing support sector workforce in Scotland by median hours worked per week by sector, 2014

4. Wales

4.1 Key figures

The headline figures for Wales in the financial year 2014/15 are:

- Total people using domiciliary care: **47,300**
- Total hours of domiciliary care delivered: **15.4 million**
- Total direct expenditure on domiciliary care: **£309 million**
 - Local authority: **£293 million**
 - Expenditure by self-funders: **£15.4 million**
- Total people to receiving a direct payment: **4,463**
- Total expenditure on direct payments: **£49.5 million**
- Total people employed in the domiciliary care sector: **26,100**
- Total number of registered locations providing domiciliary care: **468**
(4.2% increase compared to previous year)

4.2 Regulation

Domiciliary care agencies in Wales are regulated by the Care and Social Services Inspectorate Wales (CSSIW), under The Health and Social Care (Community Health and Standards) Act 2003 and The Care Standards Act 2000.

If a provider is found to be failing in its obligations in accordance with The Care Standards Act 2000, and people who use services are being put at risk, a non-compliance notice may be issued by the CSSIW, published in conjunction with the inspection report, in certain circumstances, where immediate action is required, a non-compliance report may be issued prior to the publishing of the inspection report.⁵⁴

The Regulation and Inspection of Social Care (Wales) Act 2016 received Royal Assent in January 2016. The Act will not be implemented until April 2018 and will be fully operational in April 2019.

The Act will:

- Reform the regulatory regime for care and support services;
- Establish requirements for local authorities and Welsh Ministers to undertake assessments of the sector's future stability;
- Reform the inspection regime for local authority social services functions;
- Reconstitute and rename the Care Council for Wales as Social Care Wales and broaden its remit; and
- Set out the regulation of the social care workforce.

The current National Minimum Standards remain in force until 1st April 2018.

⁵⁴ CSSIW, *Responding to Non Compliance*, 2014, p.p. 10-11. Available at: <http://cssiw.org.uk/docs/cssiw/general/141020noncompliancdeen.pdf>

4.3 Providers

In February 2016 the Care and Social Services Inspectorate Wales (CSSIW) recorded **468** registered locations under the heading of *Domiciliary Care Agency*.⁵⁵ This is a **4.2%** increase compared to February 2015.

Domiciliary care funded by a local authority in Wales is delivered either by the independent/voluntary sector, who the local authority have commissioned to meet the needs of eligible individuals, or it will be delivered by the local authorities in house community care team.

In 2015 the independent/voluntary sector delivered **81%** of all local authority funded domiciliary care in Wales. The remaining **19%** was delivered by local authority in-house teams.⁵⁶

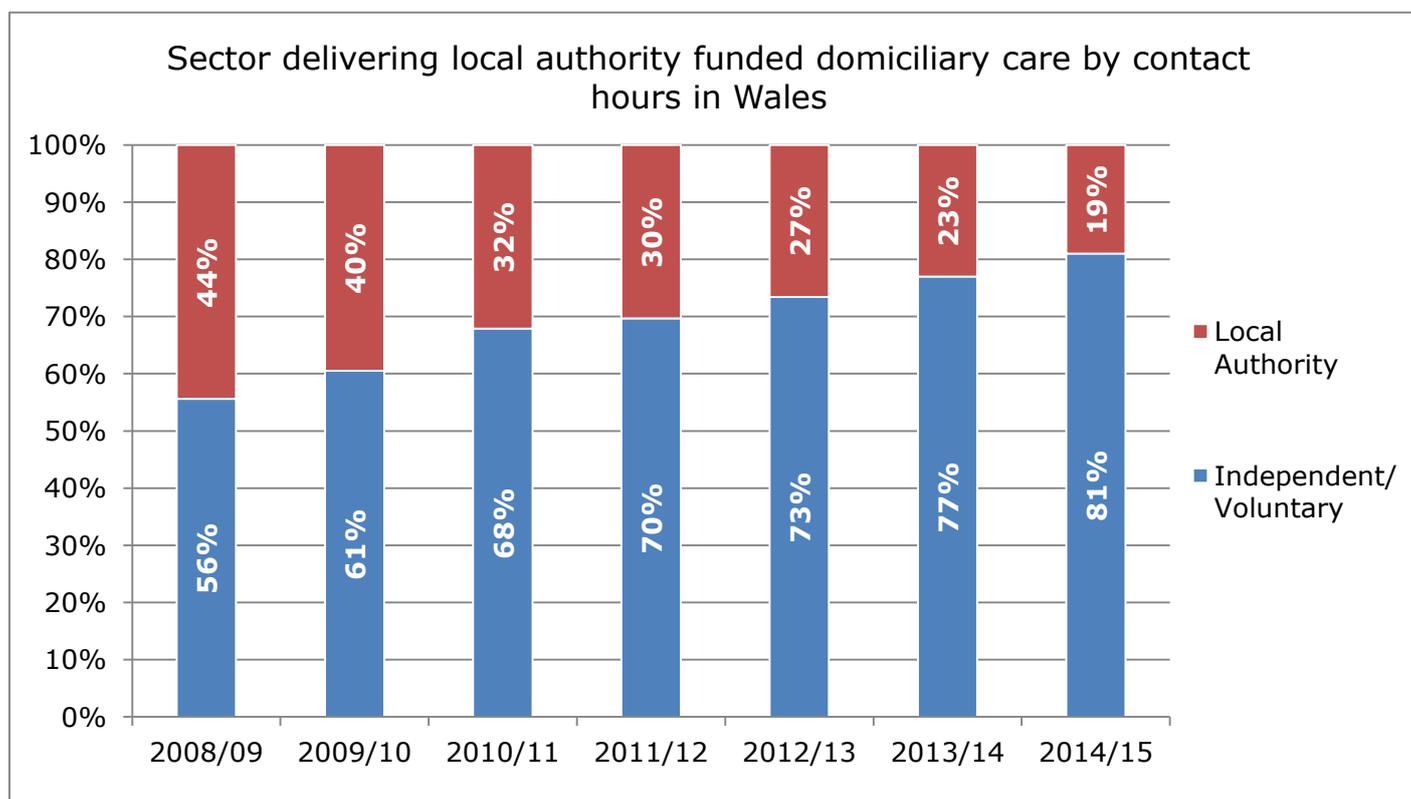


Figure 31 Sector delivering local authority funded domiciliary care by contact hours in Wales, 2008/9 – 2014/15

⁵⁵ CSSIW, *Care Services Directory, all services registered as a domiciliary care agency*. Available at: <http://www.careinspectorate.com/index.php/care-services>

⁵⁶ The Welsh Government, *Assessments and Social Services for adults 2014/15*. Available at: <http://gov.wales/statistics-and-research/assessments-social-services-adults/?lang=en>

No data is collected as to which sector provides domiciliary care purchased by individuals in Wales, it would be reasonable to assume that **100%** of privately funded care is delivered by the independent/voluntary sector.

4.4 People who use services

During the census week in September 2014 **23,744** adults received domiciliary care services funded by a local authority in Wales.⁵⁷

This represents an annual figure of **39,600** people receiving domiciliary care services funded by a local authority in Wales.⁵⁸

Figure 32 below illustrates the changes in number of people to receive domiciliary care in Wales over recent years.

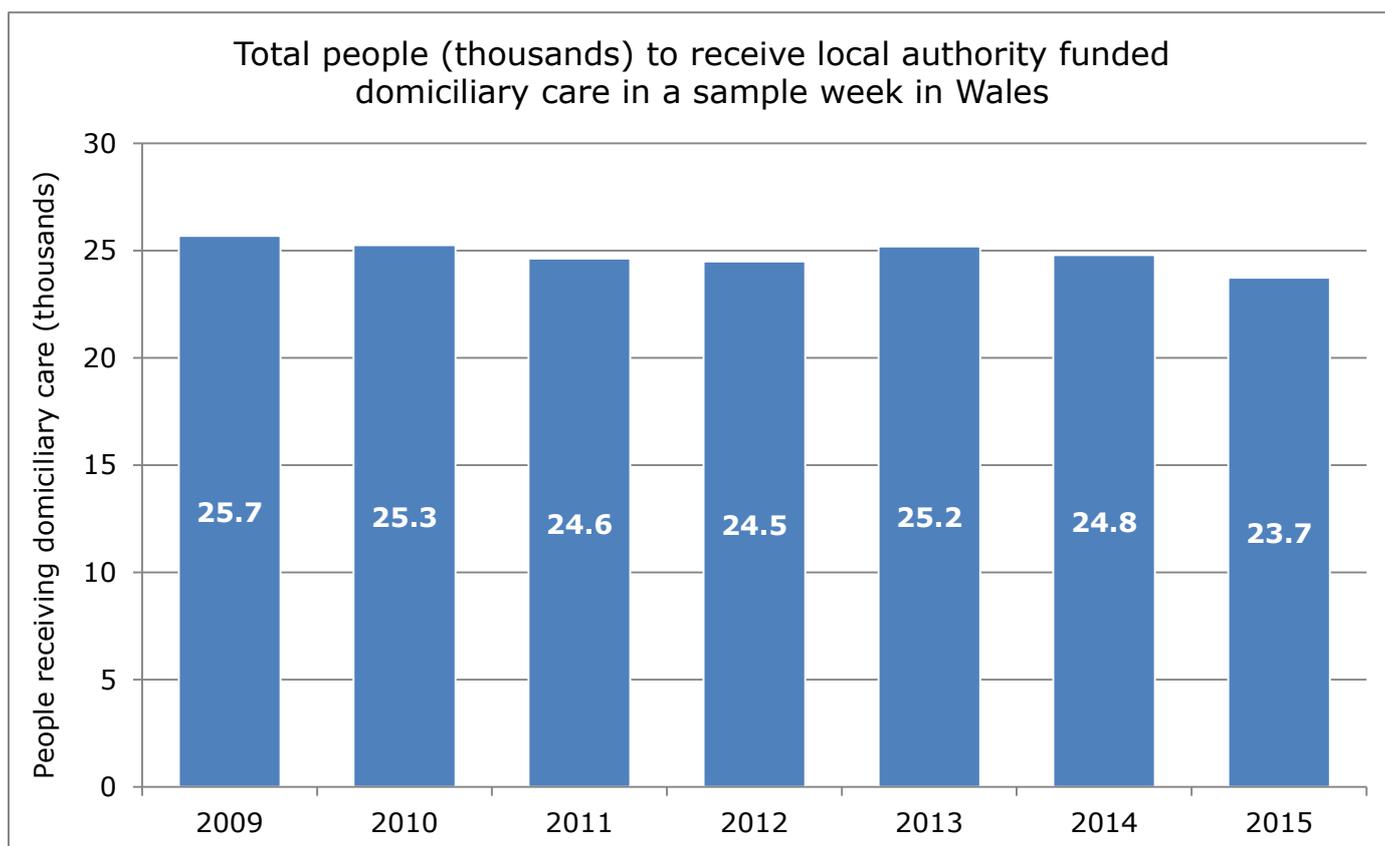


Figure 32 Total people to receive local authority funded domiciliary care in a sample week in Wales, 2009 - 2015

⁵⁷ The Welsh Government, *Assessments and Social Services for adults 2014/15*. Available at: <http://gov.wales/statistics-and-research/assessments-social-services-adults/?lang=en>

⁵⁸ Assume ratio annual:weekly is 3:2 as in previous years.

Of all people to receive community care services in Wales **67%** were aged 65 years or over. A more detailed breakdown is shown in Figure 33 below.

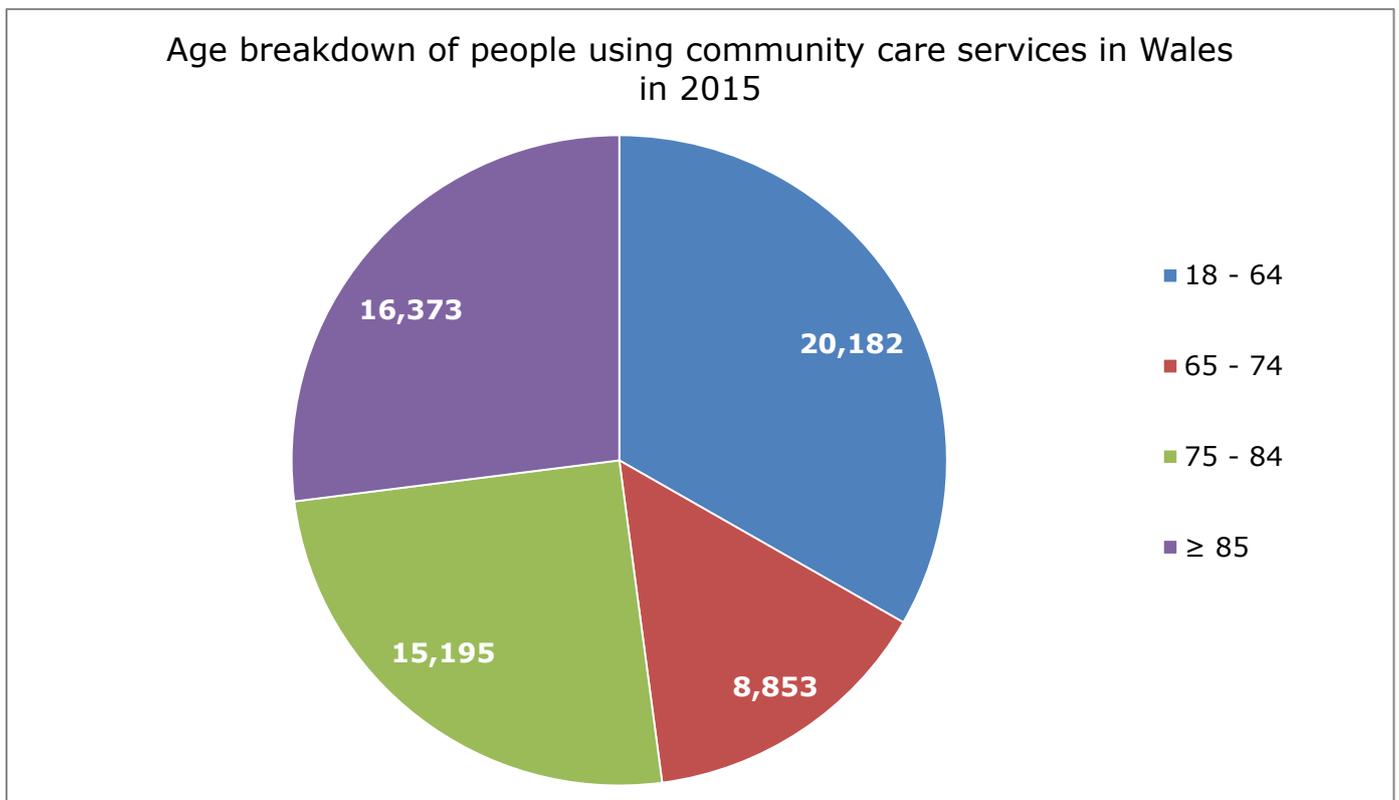


Figure 33 Age breakdown of people using community care services in Wales in 2015

No data is regularly recorded on how many people privately fund domiciliary care in Wales. UKHCA estimate that in 2014/15 a total of **7,700** people self-funded domiciliary care in Wales.⁵⁹

⁵⁹ Estimate made by working out average hours/user for state-funded care, and then dividing total hours of self-purchase by this figure

4.5 Hours of domiciliary care

During the financial year 2014/15 local authorities in Wales funded **13.7 million** hours of domiciliary care.⁶⁰

In a sample week in September 2014 local authorities in Wales funded **262,000** hours of domiciliary care.⁶¹

Figure 34 below illustrates recent trends in the quantity of domiciliary care funded by local authorities in Wales.

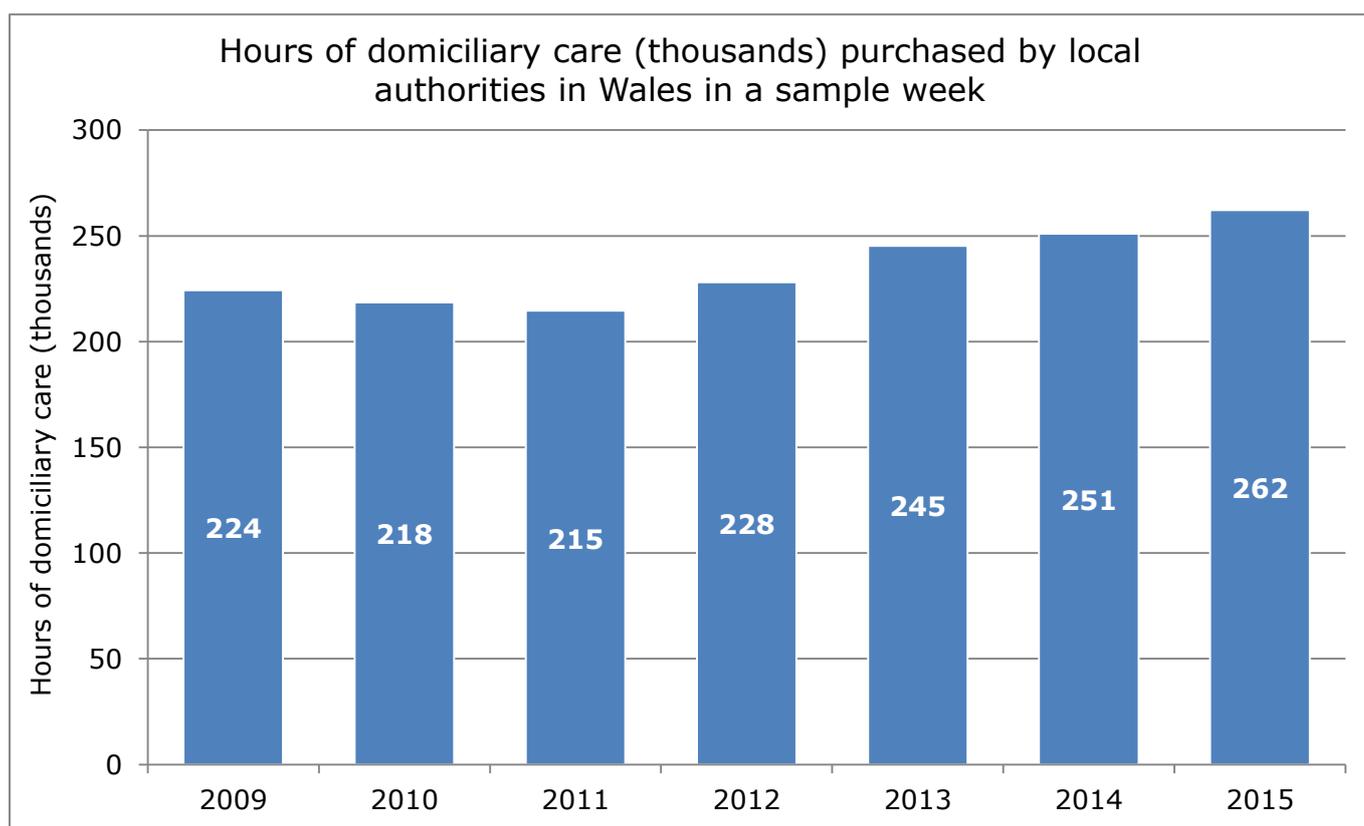


Figure 34 Hours of domiciliary care purchased by local authorities in Wales in a sample week, 2009 – 2015

⁶⁰ This figure is an estimate, taking the figure relating to a sample week published by the Welsh Government and multiplying in by 52.18.

⁶¹ The Welsh Government, *Assessments and Social Services for adults 2014/15*. Available at: <http://gov.wales/statistics-and-research/assessments-social-services-adults/?lang=en>

Table 13 below gives a more detailed overview of recent trends in the quantity of domiciliary care funded by local authorities in Wales.

	Hours of care (sample week)	Hours of care (annual)
2009	224,224	11,700,008
2010	218,475	11,400,026
2011	214,642	11,200,020
2012	228,057	11,900,014
2013	245,305	12,800,015
2014	251,054	13,099,998
2015	262,242	13,683,788

Table 14 Hours of domiciliary care funded by local authorities in Wales in a sample week and annually, 2009 - 2015

No data is recorded on the quantity of domiciliary care purchased by people privately funding domiciliary care in Wales. UKHCA estimate that in the financial year 2014/15 a total of **2.2 million** hours of domiciliary care were purchased by people who privately fund their own domiciliary care in Wales.⁶²

⁶² Estimate figure based on relative social deprivation in Wales compared to England, with self-funders likely to be consolidated in a few urban areas. Use 50% of the ratio of private to statutory purchase in England (i.e. 14%)

4.6 Eligibility

The Social Services and Wellbeing (Wales) Act 2014 brought a national eligibility framework for social care services into law in Wales for the first time.

The eligibility Regulations set out the eligibility criteria for adults, children and carers. In each case, there are four separate conditions which must all be met:⁶³

- i. The first condition relates to the person's circumstances and is met if the need arises from the kind of circumstances which are specified in the Regulations, for example physical or mental ill-health. The Regulations specify different kinds of circumstances for adults, children and carers.
- ii. The second condition is met if the need relates to one or more of the outcomes specified in the Regulations, for example the ability to carry out self-care or domestic routines. The Regulations specify different outcomes for adults, children and carers.
- iii. The third condition is met if the need is such that the person is not able to meet that need alone, with the care and support of others who are able or willing to provide that care and support. This condition is modified in the case of a child such that it is met if the need is one that neither the child, the child's parents or other persons in a parental role are able to meet either alone or together.
- iv. The fourth condition is met if the person is unlikely to achieve one or more of their personal outcomes unless the local authority provides or arranges care and support to meet the need in accordance with a care and support plan or it enables the need to be met by making direct payments.

⁶³ Code of Practice on the exercise of social services functions in relation to part 4 (Meeting needs) of the Social Services and Well-being (Wales) Act 2014. Available at: <http://gov.wales/topics/health/socialcare/act/code-of-practice/?lang=en>

4.7 Expenditure

In the financial year 2014/15, the gross expenditure by local authorities in Wales on domiciliary care was **£263 million**.⁶⁴ This represents a **2.6% decrease** compared to the 2013/14 figure.

Figure 35 below tracks local authority expenditure on domiciliary care in Wales in real terms (adjusted according to GDP deflator values where 2014/15 = 100) and in cash terms.

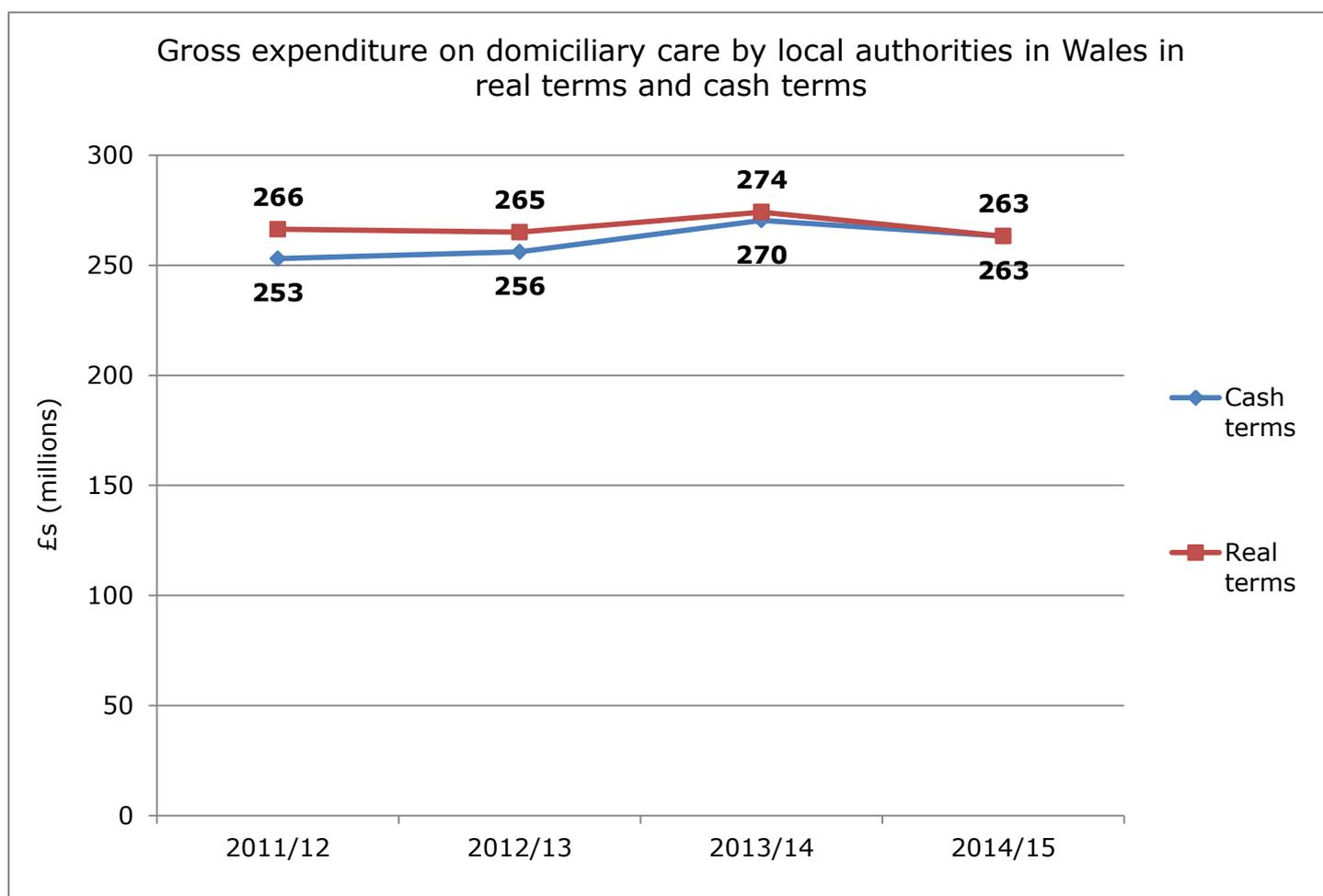


Figure 35 Gross expenditure (£s) on domiciliary care by local authorities in Wales in real terms and cash terms, 2011/12 – 2014/15

⁶⁴ The Welsh Government, *Social Services Revenue Expenditure Objective Analysis*. Available at: <https://statswales.wales.gov.uk/Catalogue/Local-Government/Finance/Revenue/Social-Services/socialservicesrevenueexpenditureobjectiveanalysis-by-authority>

Figure 36 and Table 14 below shows a detailed breakdown of local authority expenditure on domiciliary care by service user groups over previous years.

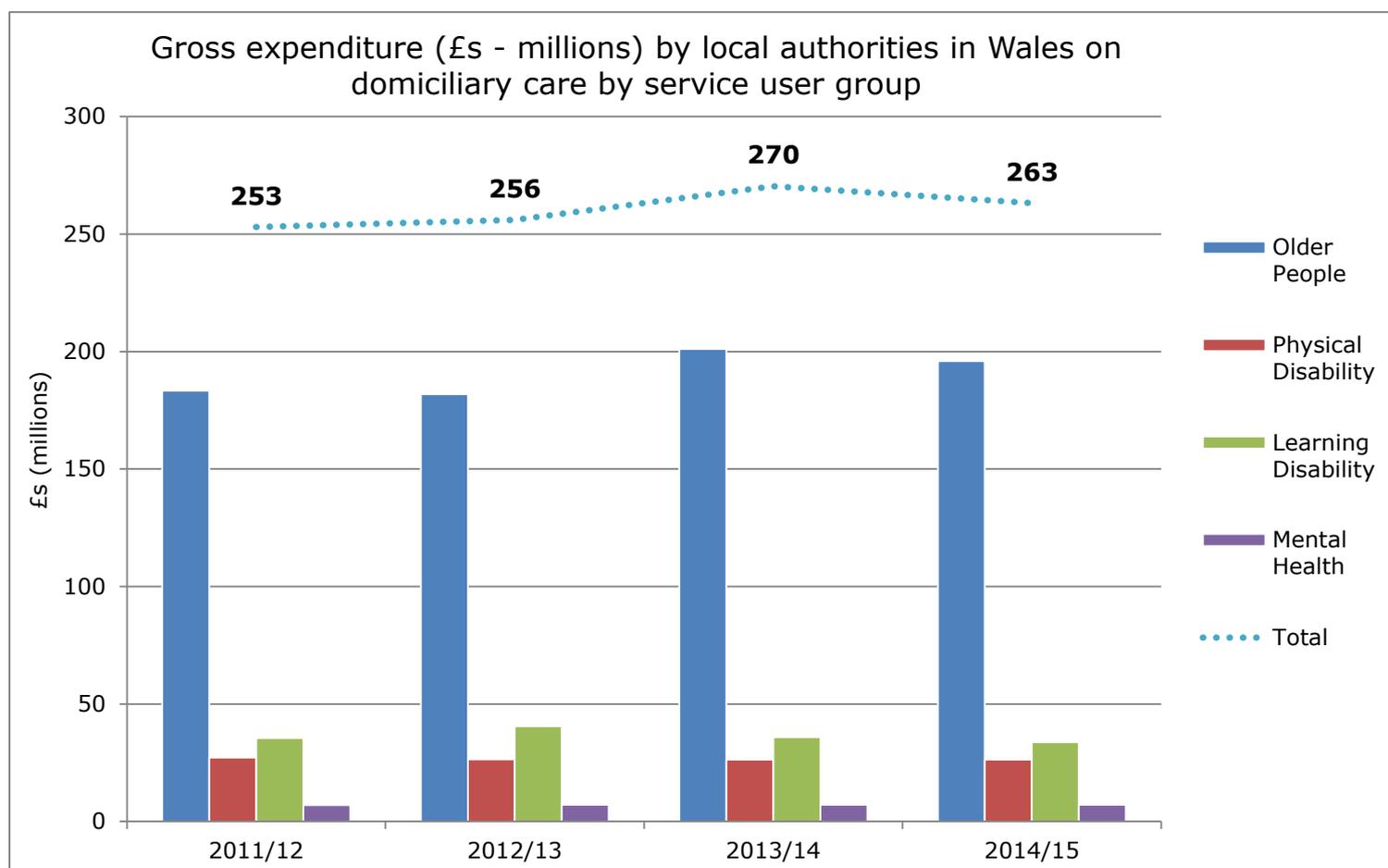


Figure 36 Gross expenditure in cash terms by local authorities in Wales on domiciliary care by service user group, 2011/12 – 2014/15

	Older People	Physical Disability	Learning Disability	Mental Health	Total
2011/12	£183,396,000	£27,158,000	£35,529,000	£6,941,000	£253,024,000
2012/13	£181,854,000	£26,494,000	£40,578,000	£7,135,000	£256,061,000
2013/14	£201,141,000	£26,281,000	£35,835,000	£7,135,000	£270,392,000
2014/15	£196,004,000	£26,384,000	£33,727,000	£7,118,000	£263,233,000

Table 15 Gross expenditure in cash terms by local authorities in Wales on domiciliary care by service user group, 2011/12 – 2014/15

4.8 Intensity of domiciliary care visits

Figure 37 below illustrates the intensity of local authority funded domiciliary care visits in Wales in a sample week in September 2014.

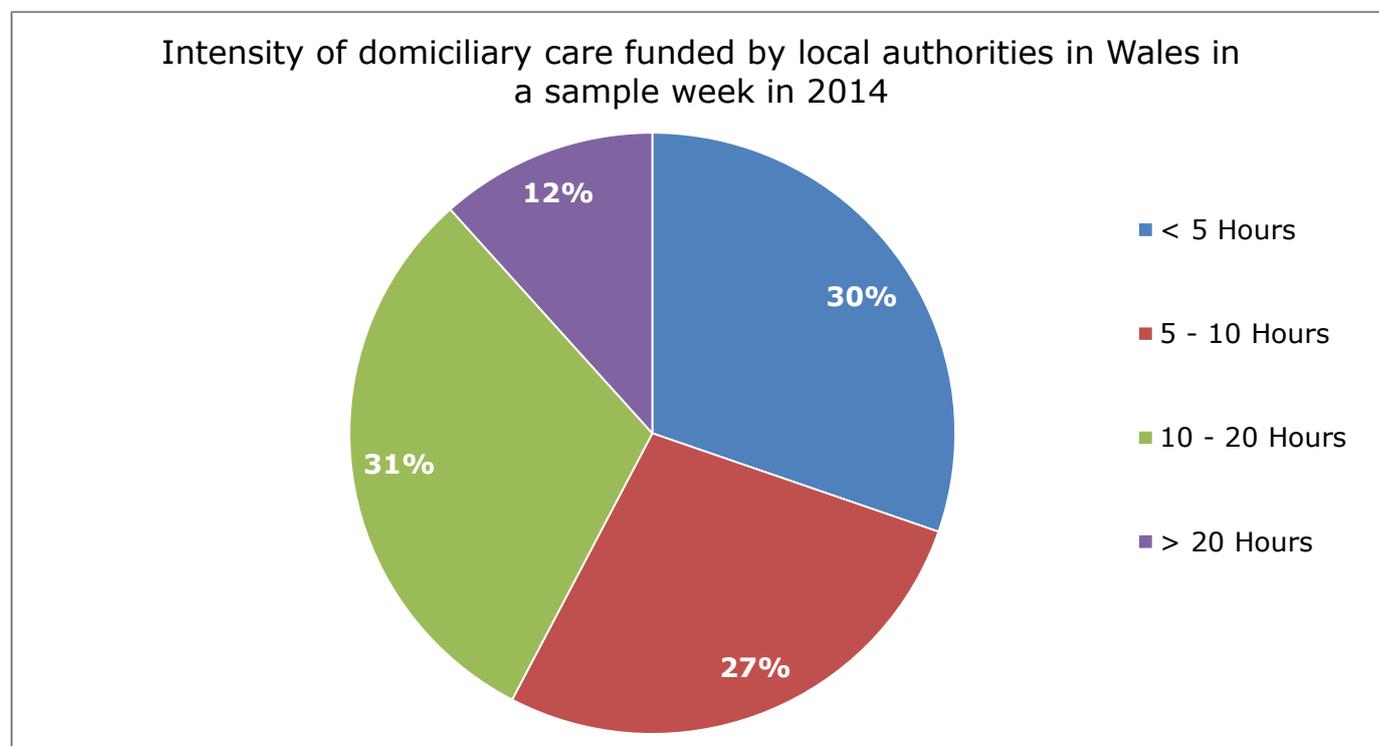


Figure 37 Intensity of domiciliary care funded by local authorities in Wales in a sample week in September 2014

During the census week in September 2014 **9,718** people received at least 10 hours of domiciliary care funded by a local authority. This represents **43%** of all adults to receive domiciliary care in a sample week.

Hours per week	Service users in sample week	%
< 5 Hours	6,957	30%
5 - 10 Hours	6,278	27%
10 - 20 Hours	7,050	31%
> 20 Hours	2,668	12%

Table 16 Intensity of domiciliary care commissioned by local authorities in Wales in a sample week in September 2014

4.9 Direct payments

A direct payment is a financial transaction, made by a local authority to an eligible person; the person must use their direct payment to meet their assessed need.

On the 1st March 2015, **4,463** adults in Wales were in receipt of a direct payment from their local authority.⁶⁵ This is a **7.6% increase** compared to March 2014.

This is an on-going trend in Wales, as illustrated by Figure 38 below.

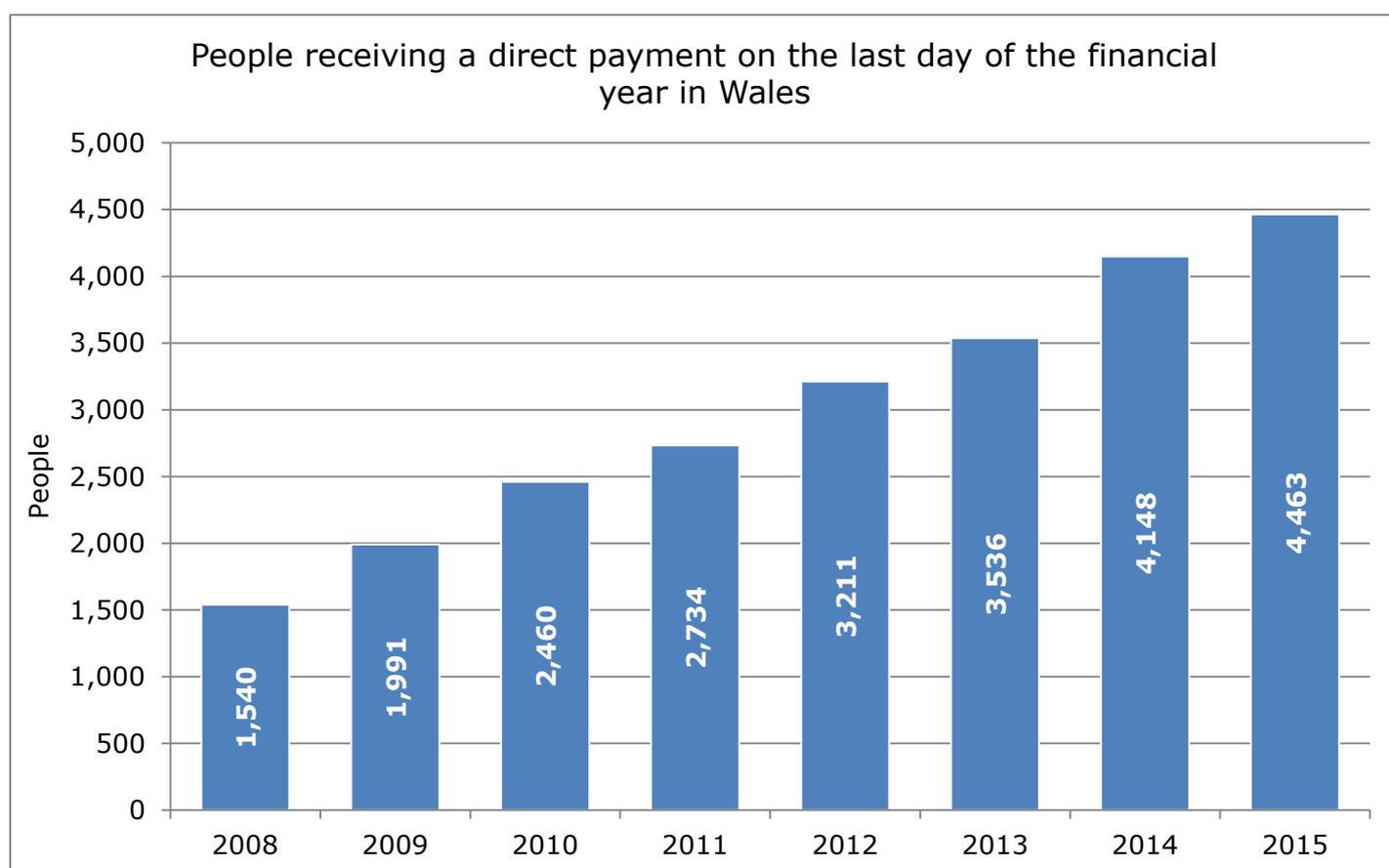


Figure 38 People receiving direct payments on the last day of the financial year in Wales, 2008 - 2015

⁶⁵ The Welsh Government, *Social Services Revenue Expenditure Objective Analysis*. Available at: <https://statswales.wales.gov.uk/Catalogue/Local-Government/Finance/Revenue/Social-Services/socialservicesrevenueexpenditureobjectiveanalysis-by-authority>

Similarly, expenditure on direct payments has increased. In 2014/15 gross expenditure on direct payments by local authorities in Wales was **£57 million**.⁶⁶

Figure 39 below illustrates the rate of increase in expenditure on direct payments by local authorities in Wales.

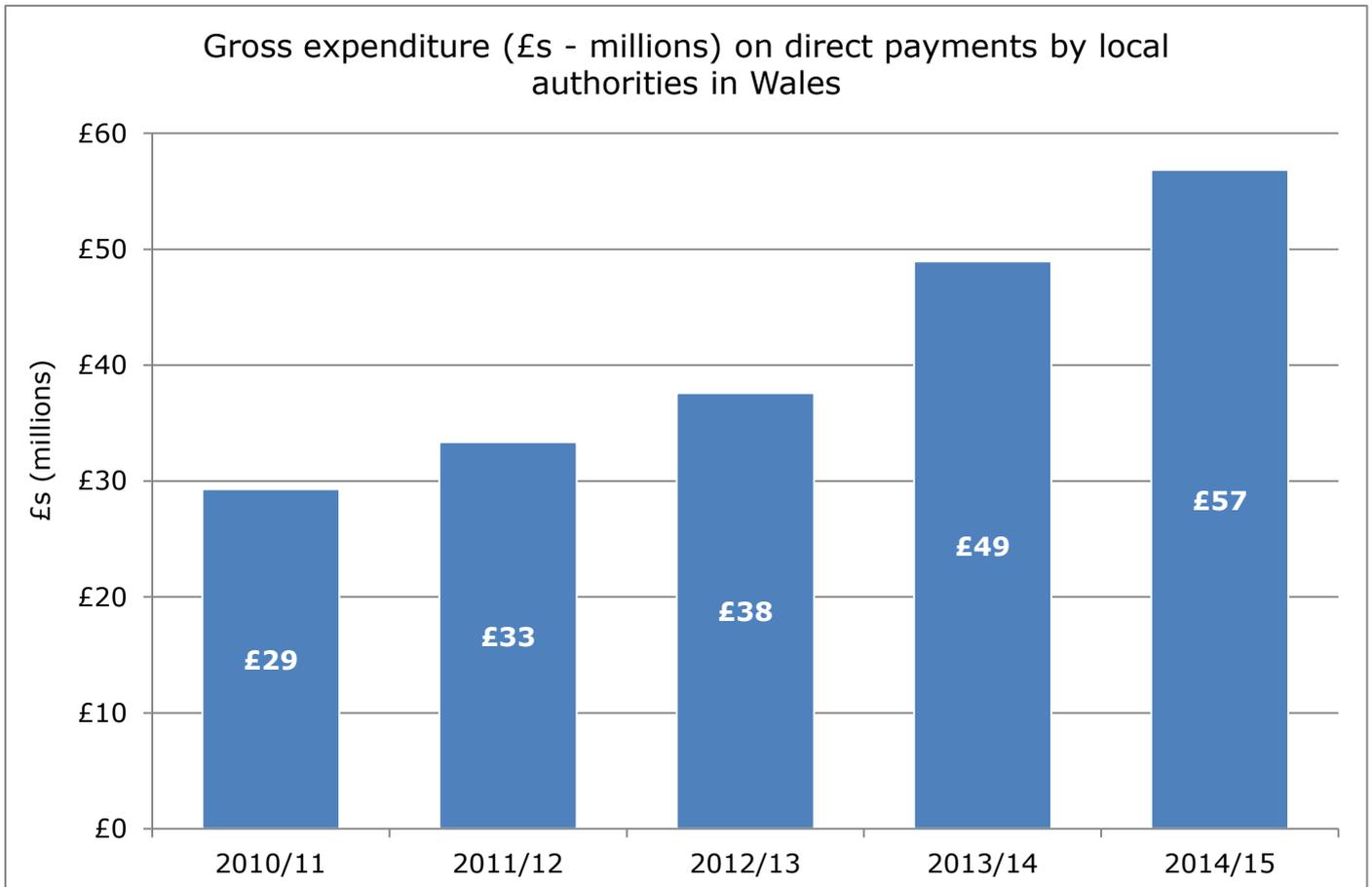


Figure 39 Gross expenditure on direct payments by local authorities in Wales, 2010/11 – 2014/15

⁶⁶ The Welsh Government, *Social Services Revenue Expenditure Objective Analysis*. Available at: <https://statswales.wales.gov.uk/Catalogue/Local-Government/Finance/Revenue/Social-Services/socialservicesrevenueexpenditureobjectiveanalysis-by-authority>

4.10 Workforce

No data is collected on how many people are employed in the independent/voluntary domiciliary care sector in Wales. UKHCA estimate that **21,100** people are employed in the independent/voluntary domiciliary care sector in Wales.⁶⁷

The Welsh Government record the number of people employed in the statutory domiciliary care sector. During the census week in March 2015 there were **4,948** people employed in the statutory domiciliary care sector in Wales.⁶⁸

UKHCA estimate that **26,100** people are employed in the domiciliary care sector in Wales.

⁶⁷ No data available, estimate arrived at by assuming ratio of service delivery repeated in workforce size, where statutory sector delivers 19% of hours.

⁶⁸ The Welsh Assembly, *Social Services Staff Numbers, March 2015*. Available at: <http://gov.wales/statistics-and-research/local-authority-social-services-staff-numbers/?lang=en>

5. Northern Ireland

5.1 Key figures

The headline figures for Northern Ireland in the financial year 2014/15 are:

- Total people to use domiciliary care: **41,200**
- Total hours of domiciliary care delivered: **14 million**
- Total direct expenditure on domiciliary care: **£215 million**
 - Health and Social Care Trusts: **£204 million**
 - Expenditure by self-funders: **£10.7 million**
- Total people receiving a direct payment: **3,026**
- Total expenditure on direct payments: **£18.5 million**
- Total people employed in the domiciliary care sector: **12,000**
- Total number of registered locations providing domiciliary care: **307**
(0.01% increase compared to previous year)

5.2 Regulation

Providers in Northern Ireland are regulated by the **Regulation and Quality Improvement Authority** (RQIA). RQIA was established under the Health and Personal Social Services Order (Northern Ireland) (2003). It is an independent body and is responsible for the registration, monitoring and inspection of health and social care services throughout Northern Ireland.

An RQIA inspection process begins with self-assessment on the part of the care provider, a pre-inspection analysis of the data produced by that self-assessment, before a visit is undertaken by the inspector which may include a discussion with the manager of the care agency, an examination of the agency's records, a consultation with stakeholders and a file audit. RQIA's minimal frequency of inspection of registered domiciliary care agencies is once per year.

RQIA has various powers through which it enforces standards and regulations, ranging from 'Improvement Notices' where changes a provider must make to their service are laid out, through to cancellation of registration – either as an urgent response to a serious issue of non-compliance (i.e. one which puts the health/well-being of service users at risk), or as a consequence of repeated non-compliance with improvement notices.

RQIA may issue 'A Failure to Comply Notice' when a provider has breached regulations (including conditions of registration), puts service users at risk or has repeatedly failed to adequately address identified breaches in regulation in previously issued Quality Improvement Plans.

5.3 Providers

In March 2016 the Regulation and Quality Improvement Authority (RQIA) had **307** registered locations under the heading of a Domiciliary Care Agency.⁶⁹ This represents a **0.01%** increase compared to March 2015.

Domiciliary care funded by a HSCT is delivered either by the independent sector or voluntary sector who the HSCT have commissioned to meet the needs of eligible individuals, or it will be delivered by the HSCT's in-house community care team.

In 2015 the independent and voluntary sectors delivered **68%** of all HSCT funded domiciliary care.⁷⁰ Figure 40 below illustrates how volume of delivery has varied by sector over recent years.

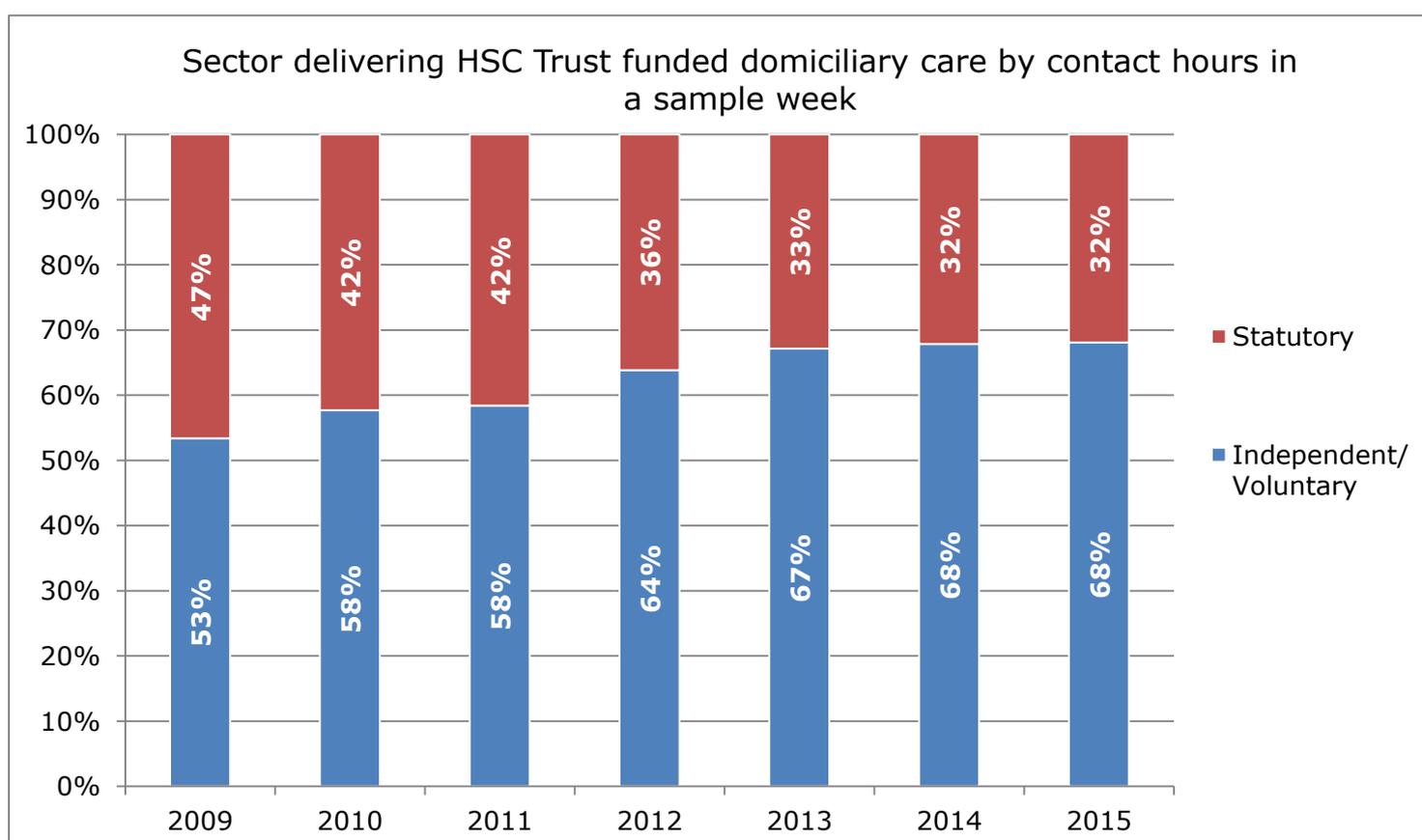


Figure 40 Sector delivering HSC Trust funded domiciliary care by contact hours in Northern Ireland, 2009 - 2015

⁶⁹ RQIA, Provider Directory. Available at: http://www.rqia.org.uk/what_we_do/

⁷⁰ Department of Health, *Domiciliary Care Services for Adults in Northern Ireland 2015*. Available at: <https://www.health-ni.gov.uk/publications/domiciliary-care-services-adults-northern-ireland-2015>

5.4 People who use services

During the survey week in September 2015 **23,260** people received domiciliary care services funded by a HSCT in Northern Ireland.⁷¹

This represents an annual figure of **38,800** people to receive a domiciliary care service funded a HSCT.⁷²

Figure 41 below illustrates recent trends in people to receive a domiciliary care services funded by a HSCT in a sample week.

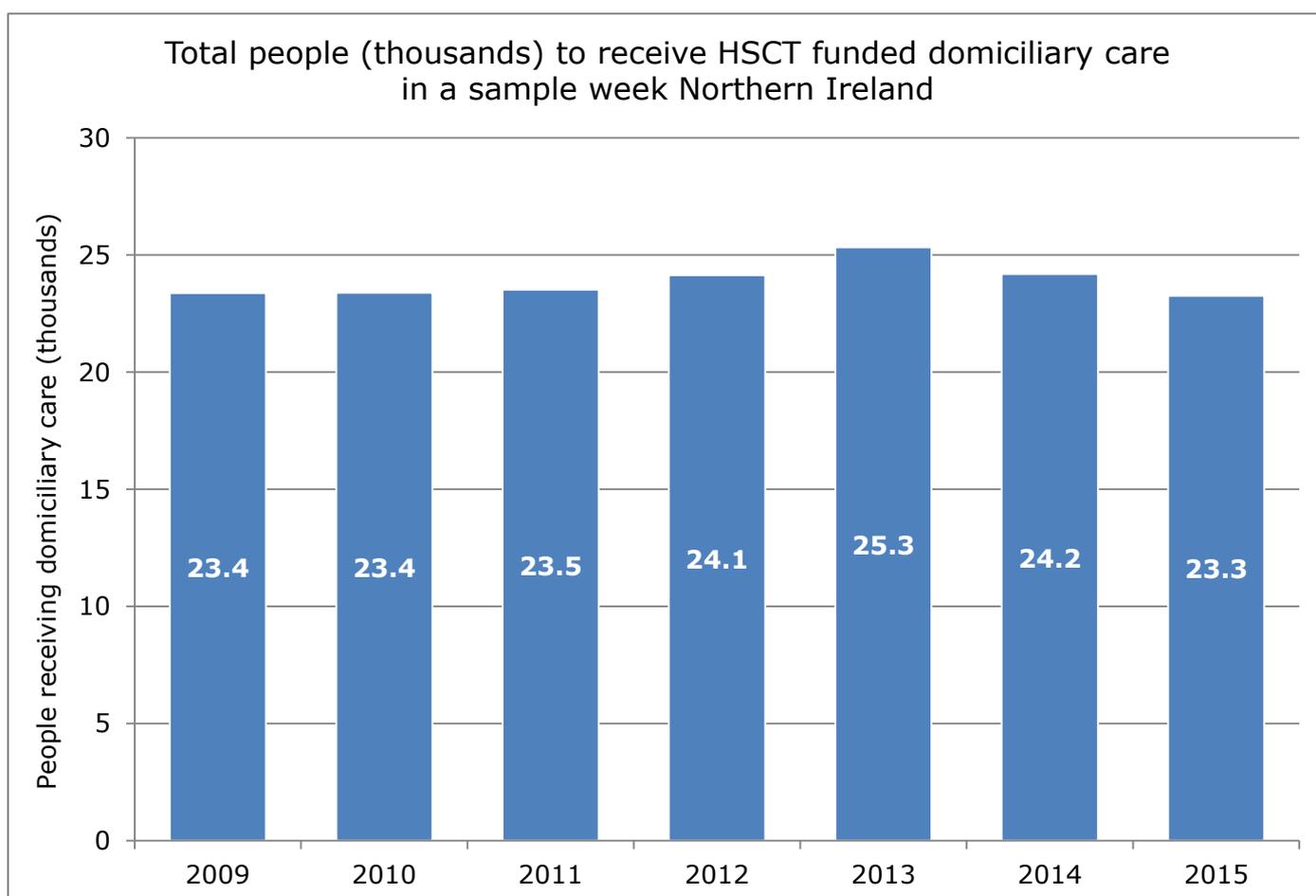


Figure 41 People to receive HSCT funded domiciliary care in a sample week in Northern Ireland, 2009 - 2015

⁷¹ Department of Health, *Domiciliary Care Services for Adults in Northern Ireland 2015*. Available at: <https://www.health-ni.gov.uk/publications/domiciliary-care-services-adults-northern-ireland-2015>

⁷² Assume ratio of annual:weekly is 3:2 as in previous years.

Of all people receiving a domiciliary care service in the survey week in September 2015, **83%** were aged 65 years or over. This is illustrated in Figure 42 below.

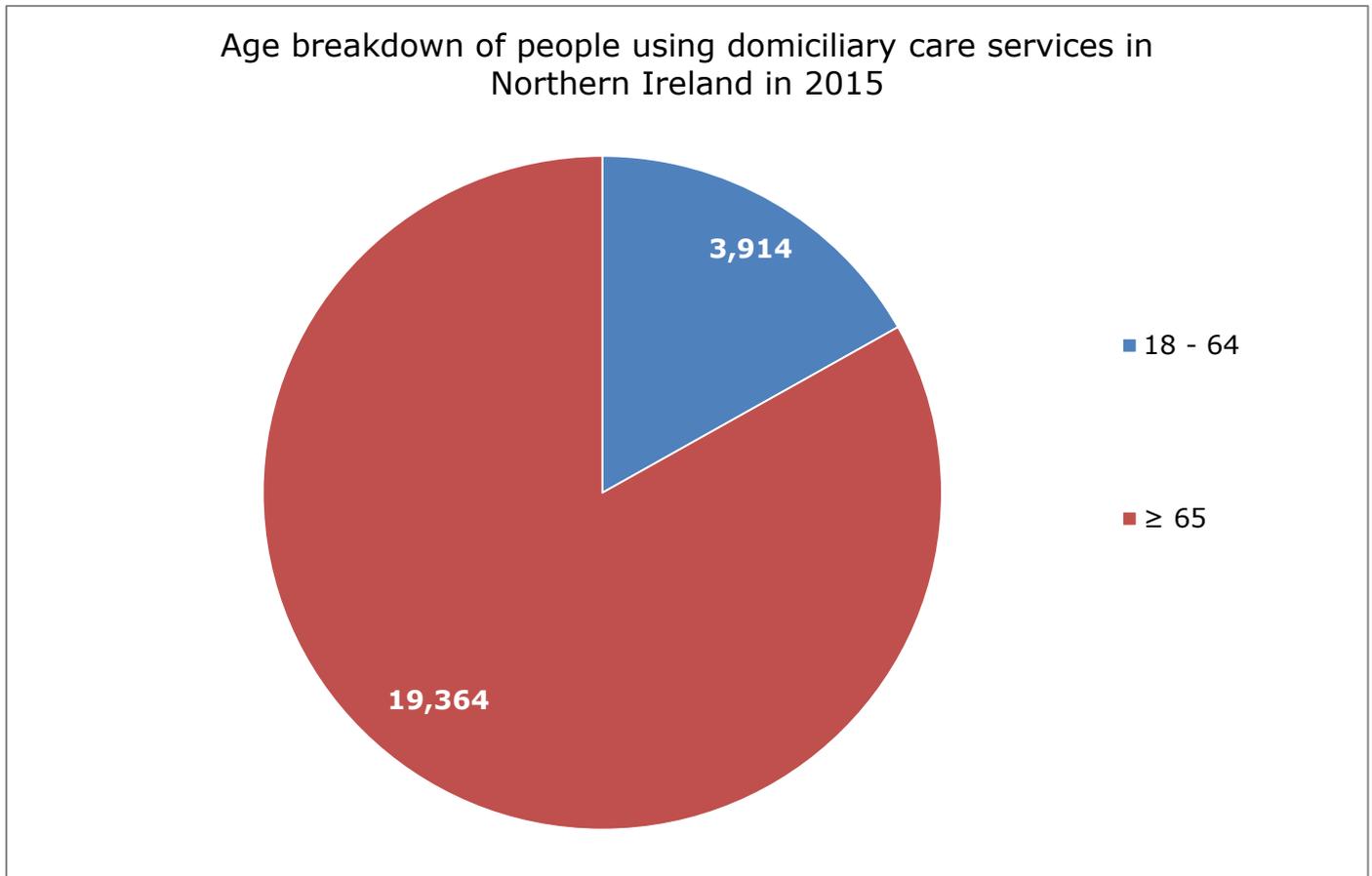


Figure 42 Age breakdown of people using domiciliary care services in Northern Ireland in 2015

No data is regularly recorded on how many people privately fund domiciliary care in Northern Ireland. UKHCA estimate that in 2014/15 a total of **2,400** people self-funded domiciliary care in Northern Ireland.⁷³

⁷³ Estimate made by working out average hours/user for state-funded care, and then dividing total hours of self-purchase by this figure

5.5 Hours of domiciliary care

During the financial year 2014/15 the HSCTs funded **13.3 million** hours of domiciliary care.⁷⁴

In a sample week in March 2015 the HSCTs funded **255,209** hours of domiciliary care.⁷⁵

Figure 43 below illustrates recent trends in the quantity of domiciliary care funded by HSCTs in Northern Ireland.

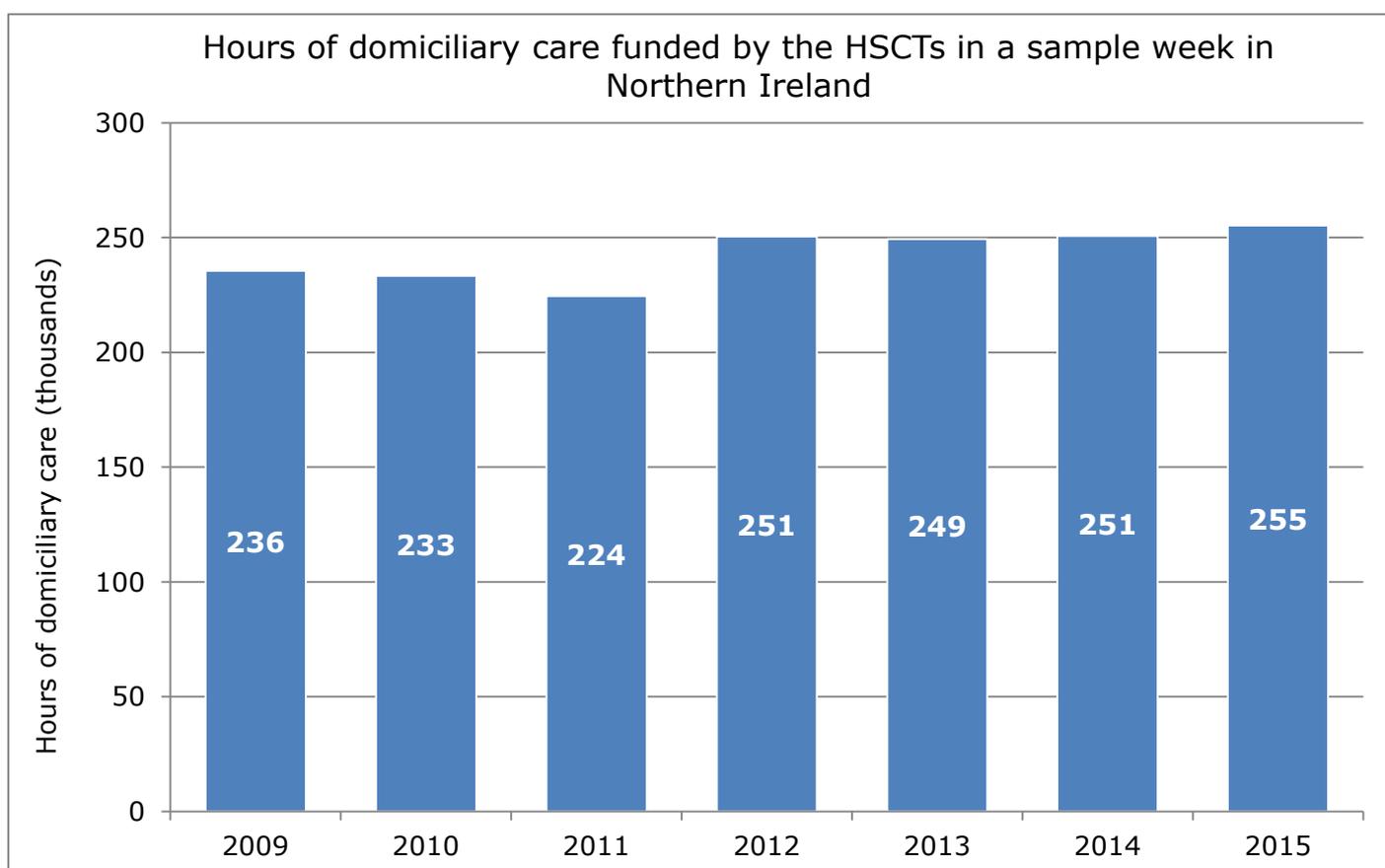


Figure 43 Hours of domiciliary care funded by the HSCTs in a sample week in Northern Ireland, 2009 - 2015

⁷⁴ This figure is an estimate, taking the figure relating to a sample week published by the Department of Health and multiplying it by 52.18

⁷⁵ Department of Health, *Domiciliary Care Services for Adults in Northern Ireland 2015*. Available at: <https://www.health-ni.gov.uk/publications/domiciliary-care-services-adults-northern-ireland-2015>

Table 16 below gives a more detailed overview of recent trends in the quantity of domiciliary care funded by the HSCTs in Northern Ireland

	Hours of care (sample week)	Hours of care (annual)
2009	235,559	12,291,469
2010	233,273	12,172,185
2011	224,473	11,713,001
2012	250,512	13,071,716
2013	249,381	13,012,701
2014	250,798	13,086,640
2015	255,209	13,316,806

Table 17 Hours of domiciliary care funded by HSCTs in Northern Ireland in a sample week and annually, 2009 – 2015

No data is recorded on the quantity of domiciliary care purchased by people privately funding their domiciliary care in Northern Ireland. UKHCA estimate that in the financial year 2014/15 a total of **701,000** hours of domiciliary care were purchased by people who fund their own domiciliary care in Northern Ireland.⁷⁶

⁷⁶ Assume 5% of all hours purchased are private, based on lower threshold for eligibility and greater access to state-funded care

5.6 Eligibility

In 2009, the Department of Health, Social Services and Public Safety of Northern Ireland (DHSSPSNI) introduced the **Northern Ireland Single Assessment Tool** (NISAT), with the aim of streamlining and consolidating the existing assessment procedures for social care, and to ensure universality of assessment through health and social care trusts across Northern Ireland.⁷⁷

A financial assessment follows an assessment of the individual's care needs.

The upper capital limit in Northern Ireland is currently set at **£23,250**; if the individual being assessed is judged to have capital under **£14,250** (excluding tangible assets i.e. housing – a person's home counts towards their capital 12 weeks after they have moved into a long term residential care setting) then their capital will be disregarded in determining how much they can contribute towards the costs of their care.⁷⁸

⁷⁷ For more information please see: <http://www.dhsspsni.gov.uk/ec-northern-ireland-single-assessment-tool>

⁷⁸ For more information please see: <http://www.nidirect.gov.uk/paying-your-residential-care-or-nursing-home-fees>

5.7 Expenditure

In the financial year 2014/15 the total expenditure on domiciliary care by HSCTs in Northern Ireland was **£204 million**.⁷⁹ This represents a **0.01% decrease** compared to the 2013/14 figure.

Figure 44 below illustrates the breakdown in expenditure between statutory services and services commissioned by HSCTs from independent and voluntary sector domiciliary care providers.

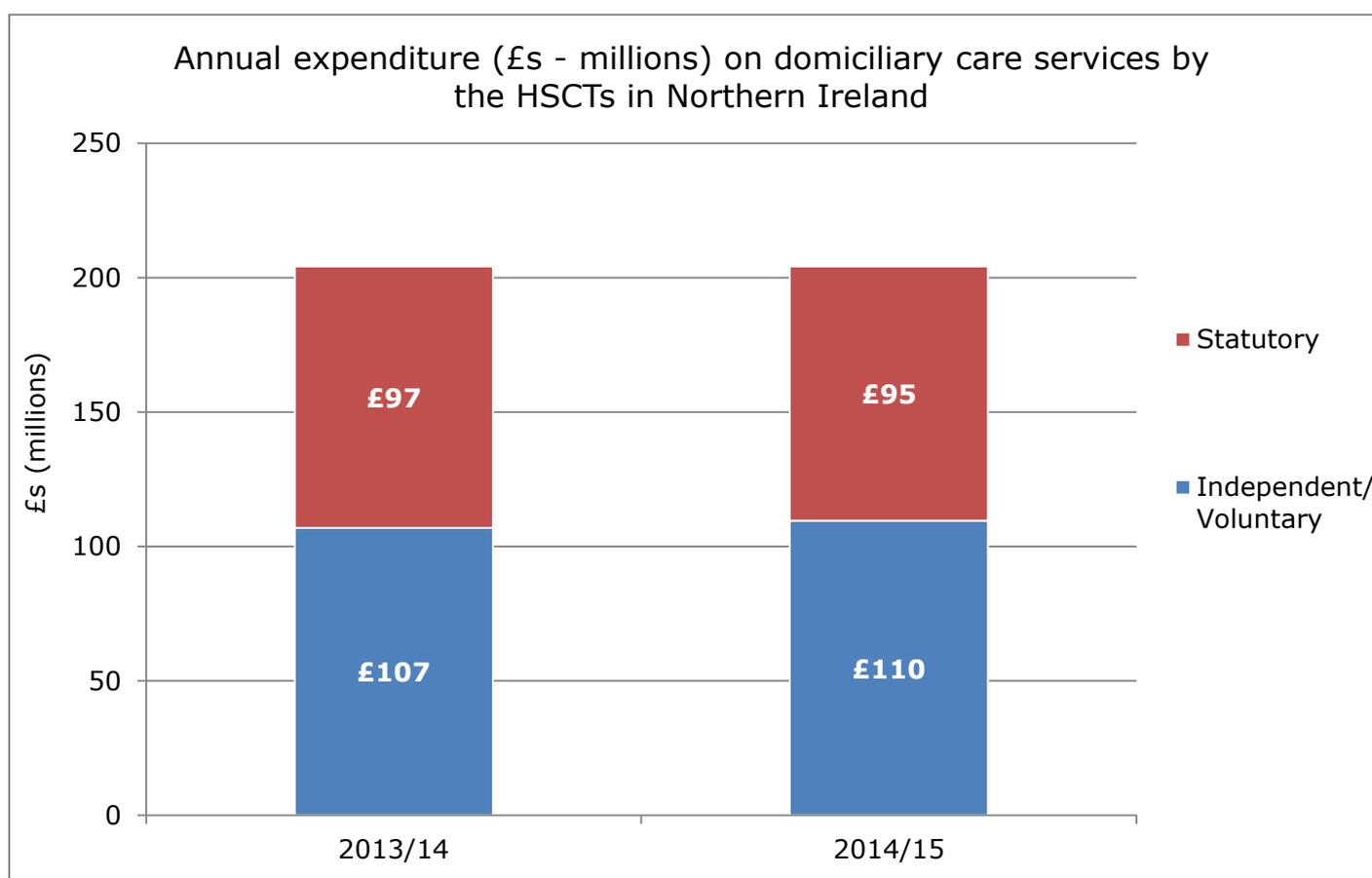


Figure 44 Annual expenditure on domiciliary care services by HSCTs in Northern Ireland by sector provider, 2013/14 – 2014/15

⁷⁹ Trust Financial Returns (TFR P) 2014/15. Not available online

Table 17 below gives a more detailed overview of expenditure by each HSCT in Northern Ireland by sector provider in 2014/15.

	Independent/Voluntary	Statutory	Total
Belfast HSCT	£19,611,167	£16,415,110	£36,026,277
Northern HSCT	£17,554,557	£29,680,072	£47,234,629
S Eastern HSCT	£35,805,304	£11,848,805	£47,654,109
Southern HSCT	£17,499,156	£24,264,902	£41,764,058
Western HSCT	£19,113,185	£12,366,395	£31,479,580
Total	£109,583,369	£94,575,284	£204,158,653

Table 18 Annual expenditure on domiciliary care services by HSCTs Northern Ireland by Trust and sector provider, 2014/15

5.8 Intensity of domiciliary care visits

Figure 45 below illustrates the intensity of HSCT commissioned domiciliary care services in Northern Ireland in a sample week in September 2015.

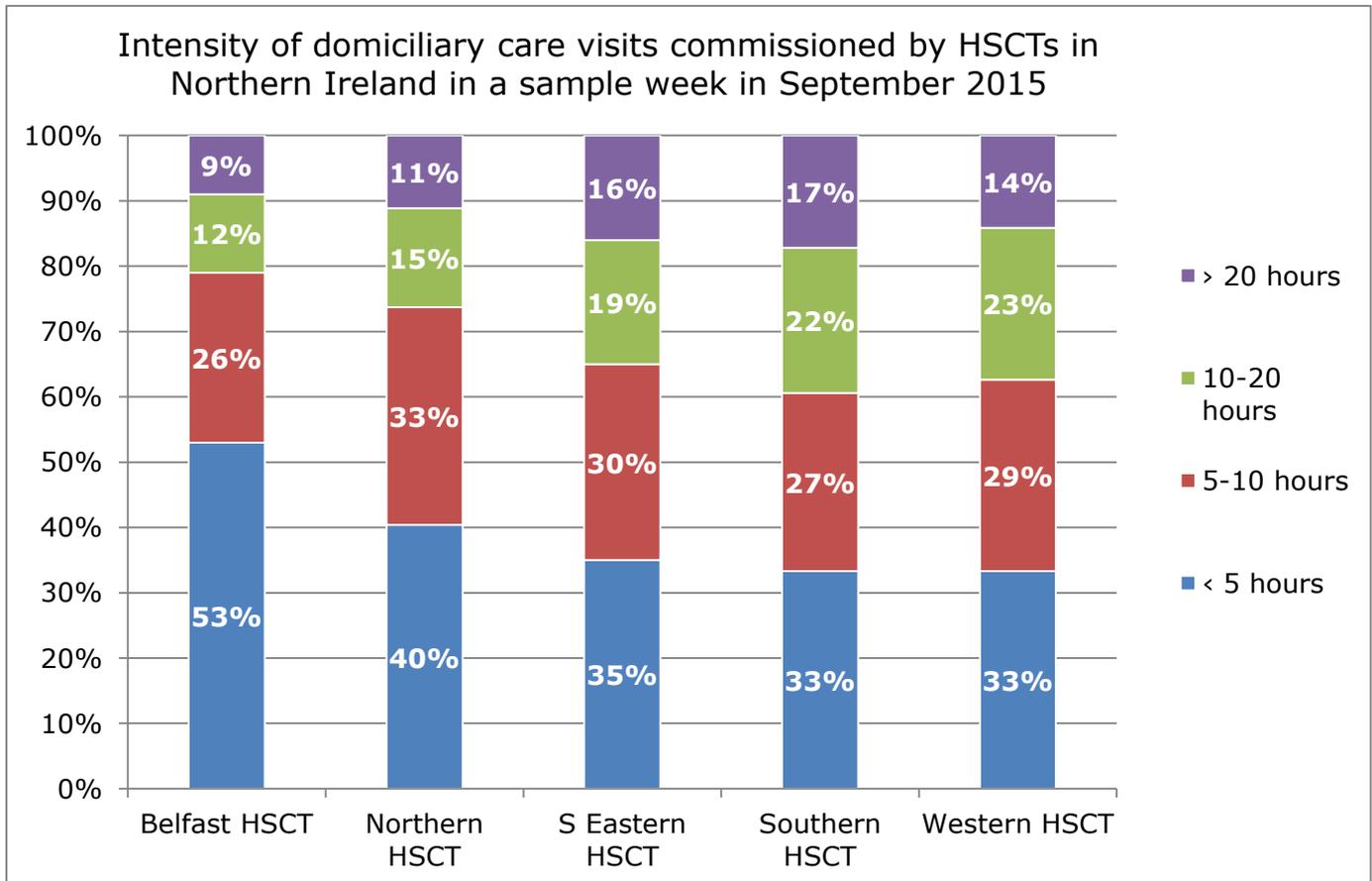


Figure 45 Intensity of domiciliary care visits commissioned by HSCTs in Northern Ireland in a sample week, September 2015

5.7.1 Length of domiciliary care visits

The Department of Health in Northern Ireland also publish data on the length of domiciliary care visits commissioned.

They report that **28%** of all domiciliary care visits commissioned lasted \leq 15 minutes.

Figure 45 below illustrates the quantity of domiciliary care visits funded by the HSCTs by length of visit.

Proportion of domiciliary care visits funded by the HSCTs in Northern Ireland by length of visit during a sample week in September 2015

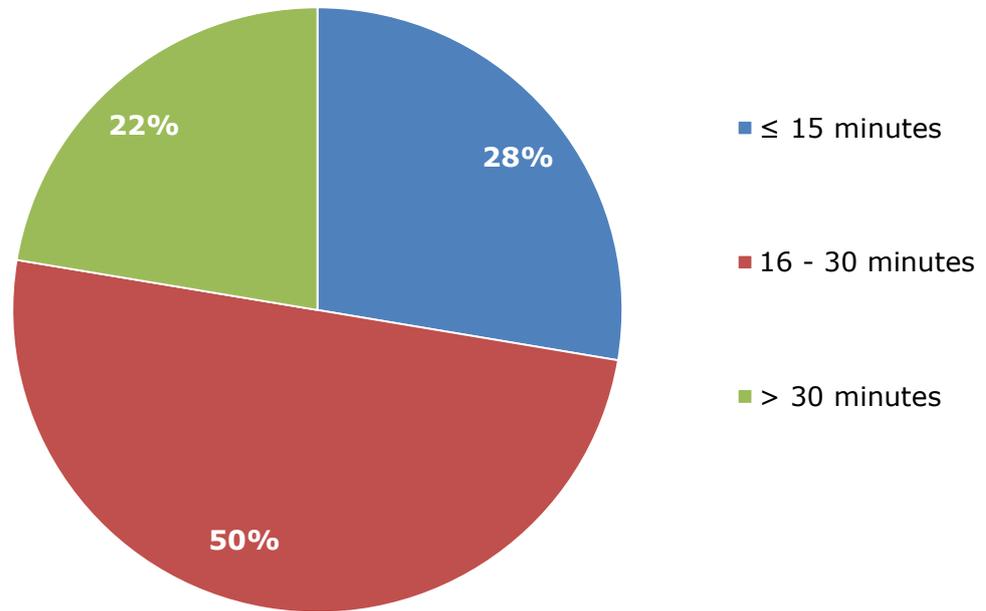


Figure 46 Proportion of domiciliary care visits funded by the HSCTs in Northern Ireland by length of visit during a sample week, September 2015

This is shown in greater detail in Table 18 below.

Length of visit	Number of visits	%
≤ 15 minutes	89,059	28%
16 - 30 minutes	160,954	50%
> 30 minutes	71,974	22%
Total	321,987	..

Table 19 Number of domiciliary care visits funded by HSCTs in Northern Ireland by length of visit, September 2015

5.9 Direct payments

A direct payment is a financial transaction, made by a HSCT to an eligible person, the person must use their direct payment to meet their assessed needs.

On the 31st December 2015 a total of **3,176** adults in Northern Ireland were receiving a direct payment from a HSCT. This represents a **5.8% increase** compared to the same day in 2014.⁸⁰

This has been an ongoing trend, Figure 47 below illustrates the rate of increase in the uptake of direct payments in Northern Ireland.

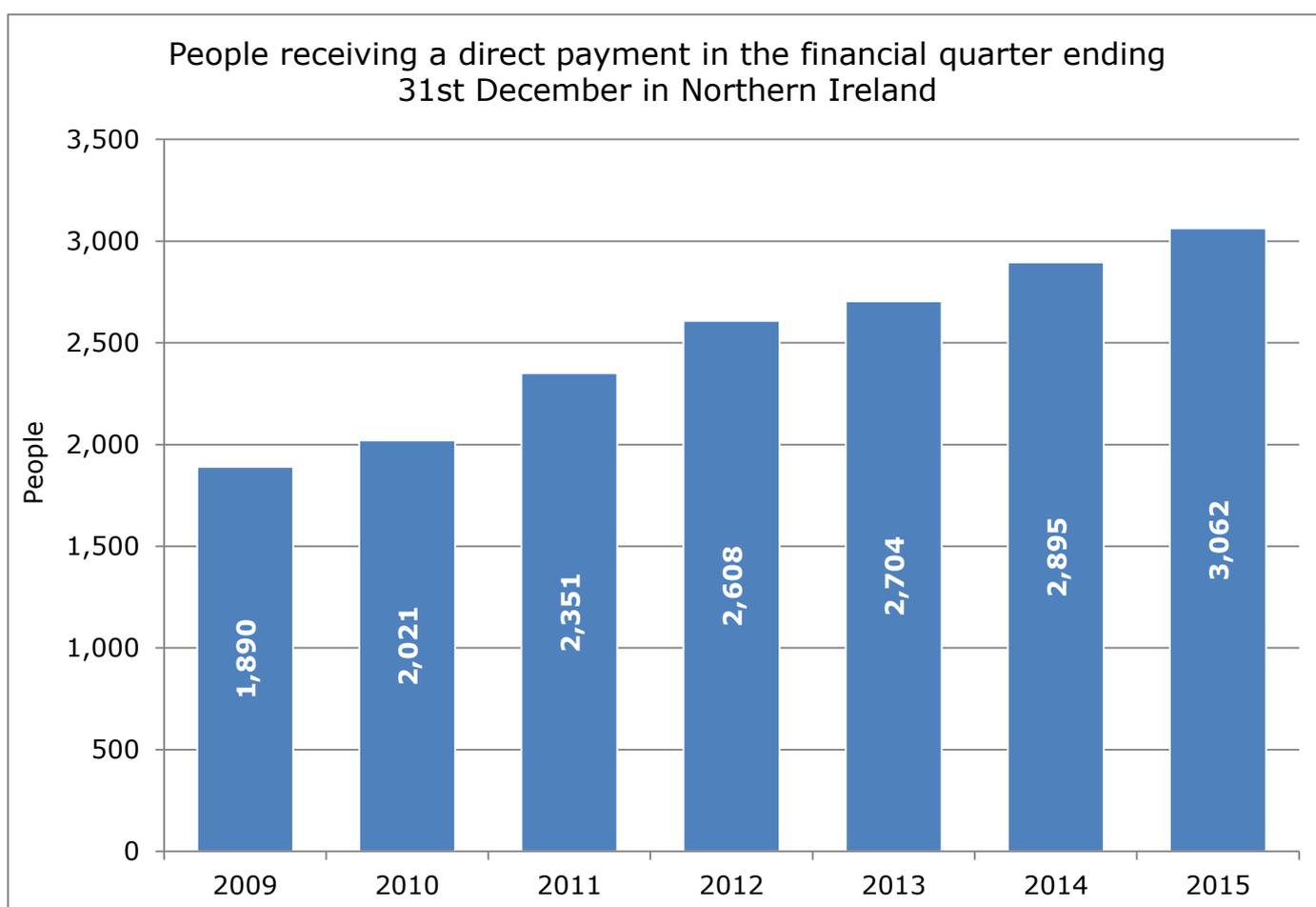


Figure 47 People receiving a direct payment in the financial quarter ending 31st December, 2009 - 2015

⁸⁰ Department of Health, *Quarterly direct payments statistics*. Available at: <https://www.health-ni.gov.uk/publications/quarterly-direct-payments-statistics>

Similarly expenditure on direct payments has increased. In 2014/15 total HSCT expenditure on direct payments was **£18.7 million**.⁸¹ This represents a **6.9% increase** compared to the 2013/14 expenditure.

Figure 48 below illustrates the rate of increase in expenditure on direct payments by HSCTs in Northern Ireland.

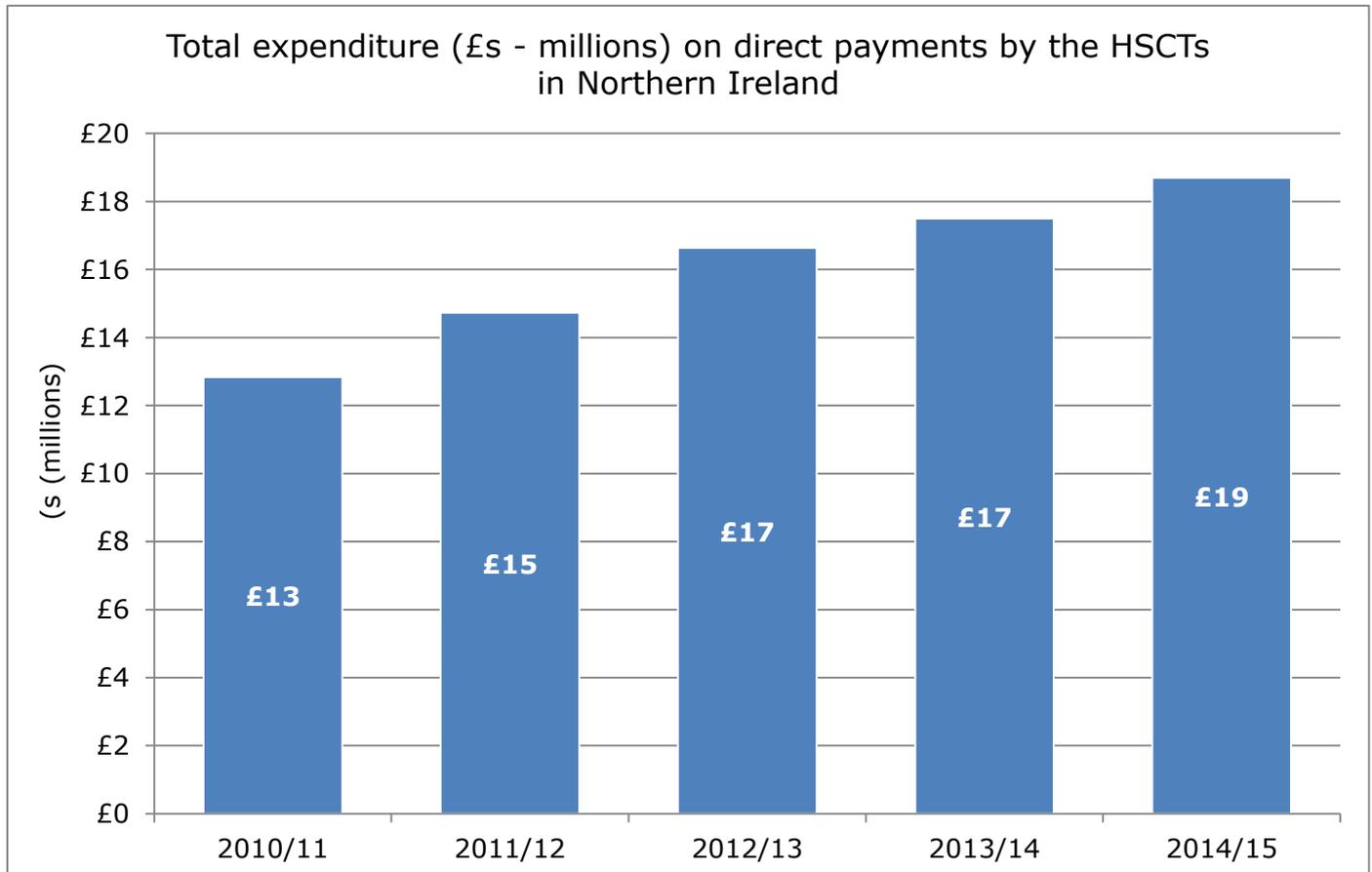


Figure 48 Total expenditure on direct payments by the HSCTs in Northern Ireland, 2010/11 – 2014/15

⁸¹ Department of Health, *Quarterly direct payments statistics*. Available at: <https://www.health-ni.gov.uk/publications/quarterly-direct-payments-statistics>

5.10 Workforce

There is no routine collection of data on the size or structure of the workforce in Northern Ireland.

UKHCA estimate that there are approximately **12,000** careworkers in the statutory, voluntary and independent domiciliary care sector in Northern Ireland.⁸²

UKHCA estimate that the breakdown between careworkers in the statutory and independent/voluntary sector is:

- Independent/voluntary – **8,160**⁸³
- Statutory – **3,840**⁸⁴

The Northern Ireland Social Care Council (NISCC) will complete the registration of careworkers in the domiciliary care sector in December 2016. At this time we hope to have more accurate data as regards the domiciliary care workforce in Northern Ireland.

⁸² The Northern Ireland Social Care Council (NISCC) are currently in the process of registering all careworkers in the domiciliary care sector and estimate that they will create 12,000 new records.

⁸³ Assume that ratio of independent/voluntary:statutory is 34:9 as in sector delivery by hours data.

⁸⁴ Assume that ratio of independent/voluntary:statutory is 34:9 as in sector delivery by hours data.

If you have particular needs which make it difficult for you to read this document, please contact 020 8661 8188 or accessibility@ukhca.co.uk and we will try to find a more suitable format for you.

 UKHCA, Sutton Business Centre, Restmor Way, Wallington, SM6 7AH
 020 8661 8188 |  enquiries@ukhca.co.uk |  www.ukhca.co.uk