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# Yorkshire and the Humber Joint Improvement Partnership

# The state of the adult social care market in the Yorkshire and the Humber region

## A report for commissioners

## November 2010

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Oxford Brookes University

# Yorkshire and the Humber Joint Improvement Partnership

# The state of the adult social care market in the Yorkshire and the Humber region

# A report for commissioners

## 1 Executive Summary

In 2010 the Joint Improvement Partnership in the Yorkshire and the Humber region requested a report that analyses the state of the adult social care market in the region. The brief was to use nationally available data to look in detail at the makeup of the adult social care market across all the fifteen authorities within the region. In summary, the following observations can be made of the social care market:

- Commissioning activities for adult social care services happen within individual local authority areas with locally based providers, rather than across region.
- No single provider organisation dominates in the region. There are some providers that operate in up to 7 local authority areas within the region.
- The private sector holds over 70% of the market share in care home, care home with nursing and the domiciliary care.
- Only one authority area has totally outsourced all adult social care provision. All other local authority areas have adult social care services that are provided by in house and outside the authority provider organisations.
- There is a lower than average budget for social care as a percentage of overall local authority council spending. Only three authorities areas were above the England average in 2008/09.
- Over 50% of all local authority adult social care budgets from across Yorkshire and the Humber were spent on the older people's population in 2008/09.

The report also highlights a number of issues that appear to exist within the adult social care market across Yorkshire and the Humber. The report suggests that further in-depth analysis is required to fully understand these perceived issues, to analyse the reasons behind the data and assess the impact that these issues may have on the region and its vulnerable adult and older people's population. Issues highlighted include:

- This is the third lowest performing region in England in relation to the number of older people aged over 65 years supported in residential and nursing care. If the region wishes to improve their performance there needs to be a continuation of the drive to help people remain at home.
- There appears to be significant variation in budgets across authorities and spend by client group in the region on adult social care per local authorities.

- There is a correlation between local authorities spend on residential care and domiciliary care in 2008/09, that is, those authorities that are able to reduce levels of residential care were able to increase spend on domiciliary care.
- Direct payments make up 6% of the adult social care budget in the region.

## 2 Introduction

This report has been prepared for the Joint Improvement Partnership of the Yorkshire and the Humber region by the Institute of Public Care. The data used for this analysis has been drawn from the following sources and covers the period of 1st April 2008 to 31st March 2009:

- NASCIS
- POPPI
- PSSEX
- Local Strategic Documents
- CQC data

The aim of this report is to use the best available data to establish a picture of the adult social care market within the Yorkshire and the Humber region. It is envisaged that this analysis will be used by commissioners in the region to aid them in the development of stronger strategies, facilitating the market and in making more informed commissioning decisions.

## 3 Market Makeup

### 3.1 What does the market look like?

The Yorkshire and Humber is a large northern region of England which encompasses both a number of large cities, and also areas which are both rural and have scattered populations. Within the locality it is home to some of the most thriving but also some of the most deprived communities in the country.

The local adult care market reflects this diversity both in the range of care services provided, and the range of provider organisations by whom they are provided. In December 2009[1] it was home to 2200 registered care providers. These registered services comprised of 55 percent care homes, 21 percent care homes with nursing and 20 domiciliary care services (the remaining amount belonging to nursing agencies 3 percent and adult placement schemes 1 percent). As well as these registered services, there are also hundreds of non regulated provider organisations who provide housing and support services to both vulnerable adults and older people from across the region.

Within Yorkshire and the Humber there are a number of provider organisations who have a significant presence both in the care home, care home with nursing and domiciliary care market. The majority of the market is however occupied by provider organisations that own just a single or a few care homes or domiciliary care services within individual authority areas across the region. Of the larger

[1] *CQC web site – Y & H list of registered adult social care providers 2009*

provider organisations, none have a footing within every region within Yorkshire and the Humber, and given the number of smaller providers in the market suggests that contracting practice for adult social care services happens at a locality basis rather than across authority areas or on a regional basis.

The current adult social care market across Yorkshire and the Humber is made up of five sectors:

- Private
- Local authority/NHS
- Voluntary[2]
- Charitable[3]
- Other (including social enterprises and individual employment)

**Diagram 1**

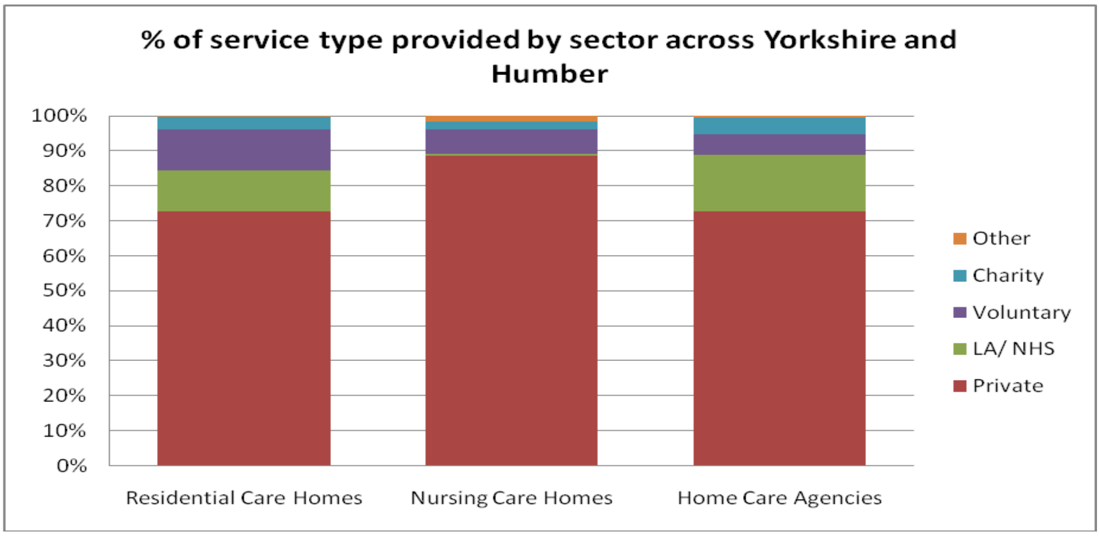



Diagram 1[4] illustrates the market share that each sector has within each of the three separate market service areas; Care homes, care homes with nursing care and domiciliary care agencies. It shows that:-

- The private sector has over 70 percentage share of the market in each service area.
- The voluntary/ charitable sector has its greatest presence in the care homes market with just over 20 percentage of the total market share.
- The private sector has the dominant within the care home with nursing market with just under 90 percentage of the market share.
- The Local authority/ PCT is least dominant in the care home with nursing market with 3 percentage of market share.

[2] A voluntary organisation is one whose main focus is to deliver social benefit in a variety of forms, rather than to generate profit for distribution to its members
[3] An organisation with exclusively charitable purposes and registered with the Charity Commission under the provisions of the Charities Act 1993, section 3
[4] NASCIS Data.

- The Local authority/NHS has its greatest presence within the domiciliary care market with just under 20 percentage of market share.

**Diagram 2**

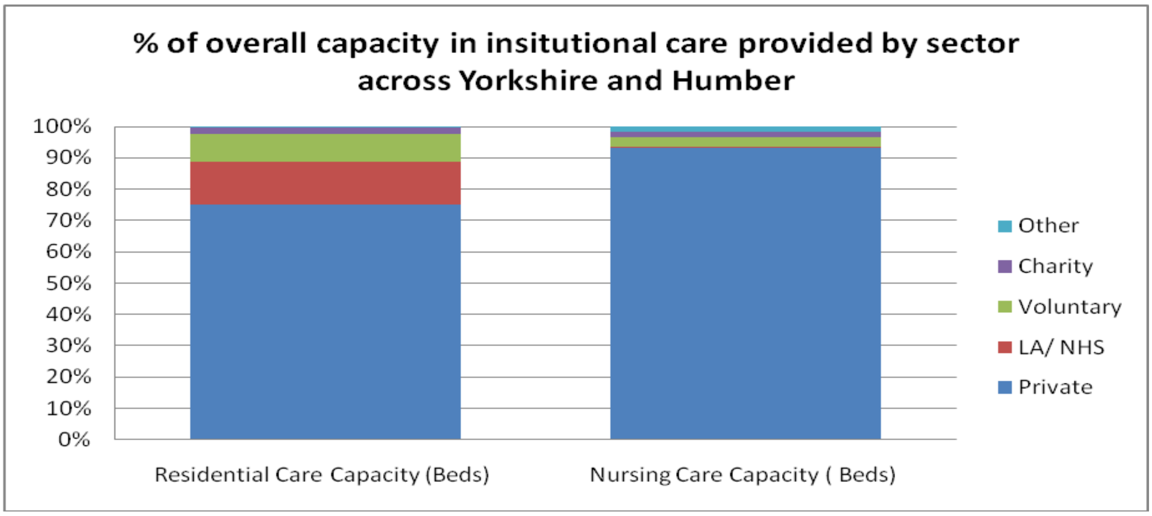
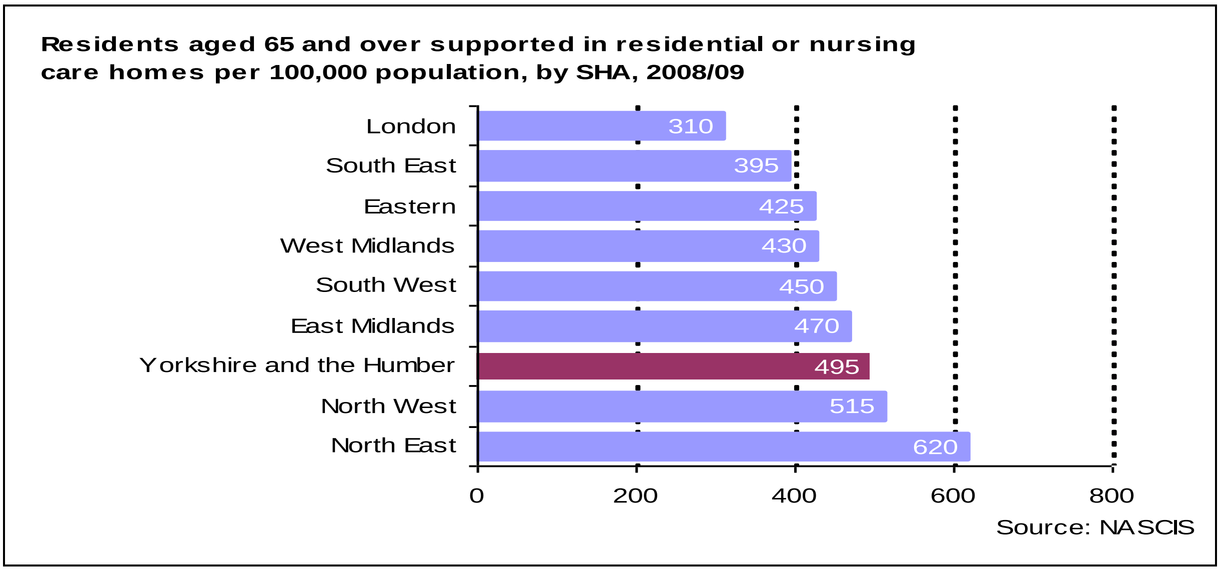



Diagram 2 looks at the capacity share held by each sector in the care home and care home with nursing markets. It shows that capacity share largely matches market share as outlined in diagram 1.

## 4 Market Performance within Yorkshire and the Humber

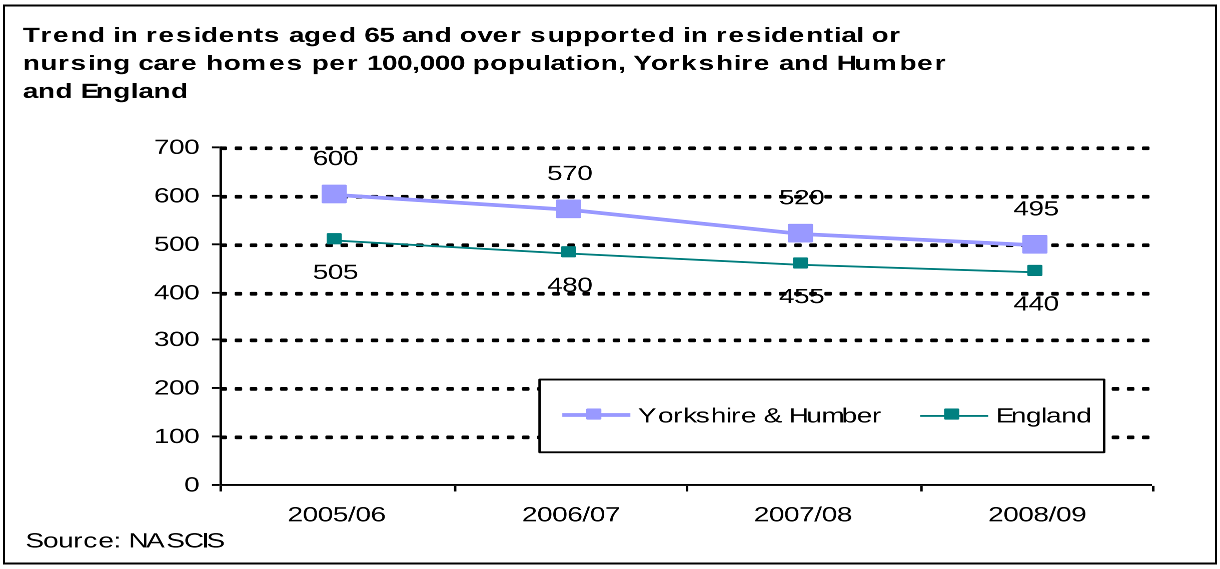
### 4.1 Residential and Nursing Care

**Diagram 3**



As diagram 3[5] illustrates Yorkshire and the Humber are the 3rd poorest performing region in relation to the number of over 65 population supported within residential and nursing care.

**Diagram 4**




Performance has improved in recent years but data within diagram 4 suggests that there is still significant progress to be made.

**Diagram 5**

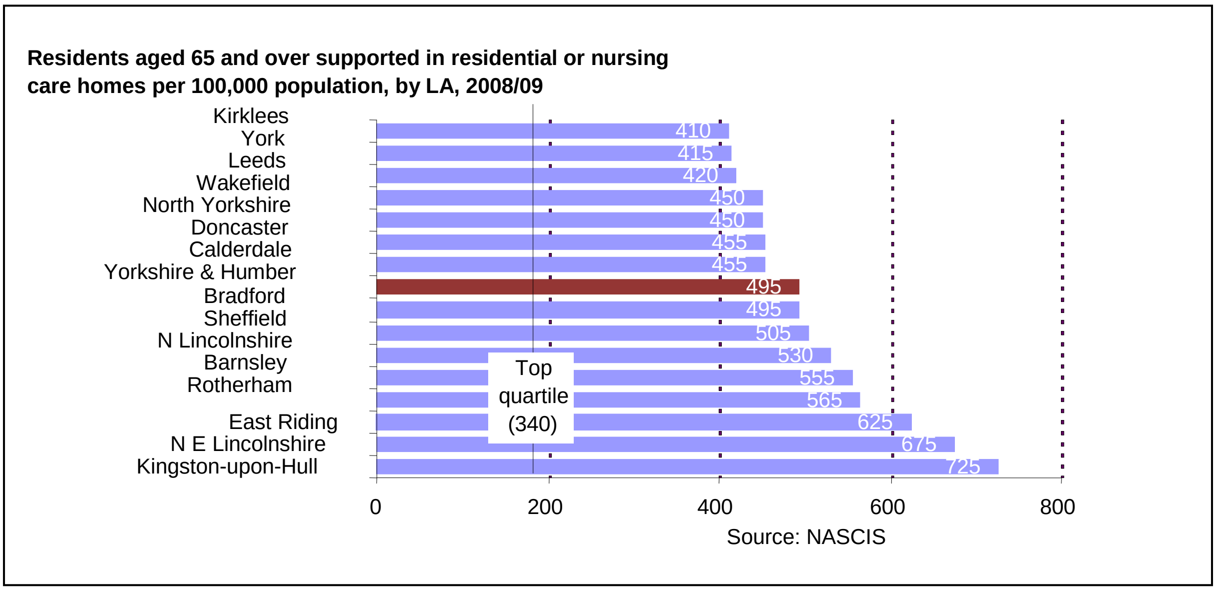



Diagram 5 demonstrates that across the region there is a huge variation in performance of authorities in regards to the number of people over the age of 65 years currently supported within residential and nursing care. In particular it appears that a small number of authorities appear to have significant impact on the regional performance within this area. This data suggests that across the region there could appear both to be different priorities within authority areas

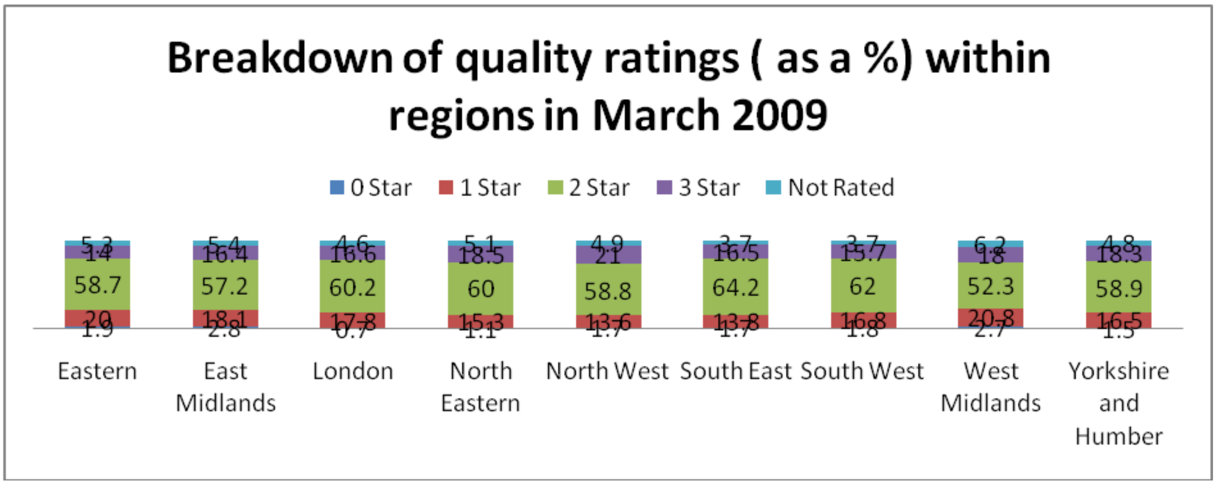
5 NASCIS

and different degrees of cost effectiveness across the public sectors within the region.

### 4.2 Domiciliary Care

**CQC Quality Ratings**

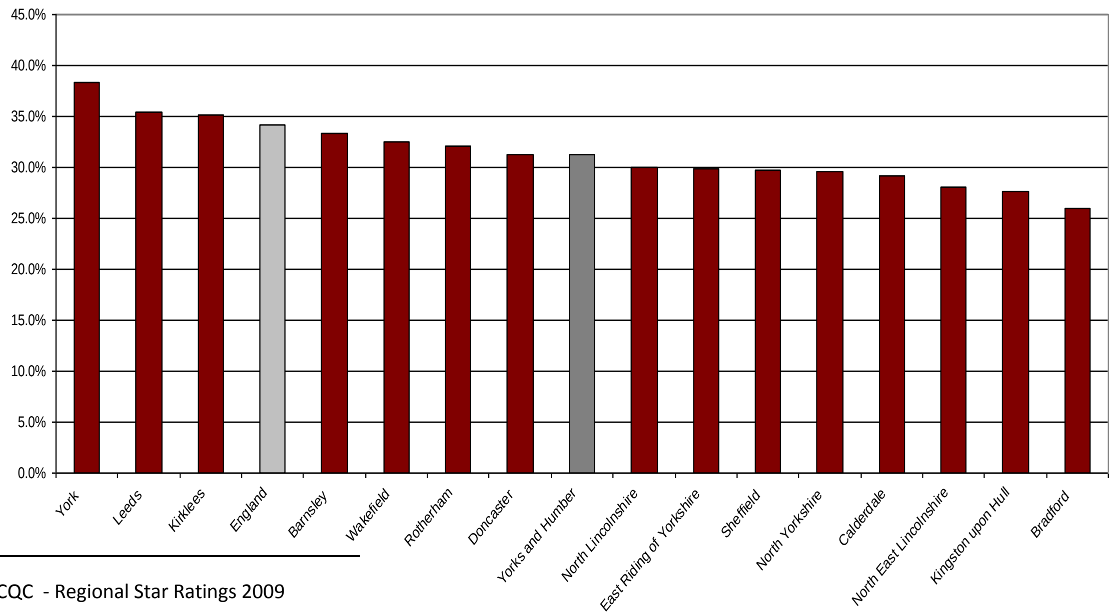
**Diagram 6**




In 2008/09, 70 percent of all registered services in Yorkshire and Humber were rated as being good or excellent. As diagram 22[6] illustrates, in regards to quality ratings, Yorkshire and the Humber were one of the best performing regions in the country. However what this diagram also demonstrates is that in March 2009, authority areas from across the region were contracting with ... services that no been assessed as having no stars.

## 5 Patterns of Social Care Spend in Adult Social Care

**Diagram 7: Social care expenditure as a percentage of LA expenditure, 2008-09**




6 CQC - Regional Star Ratings 2009

As a region Yorkshire and the Humber local authorities spent £1.5 billion on Adult Social Care in 2008/09. As Diagram 7[7] illustrates, spend on adult social care as a percentage of overall council expenditure appears to vary considerably across local authorities across the region. Proportions of local authority budgets allocated to adult social care vary from 38 percent in York to 26 percent in Bradford. Diagram 7 also demonstrates that proportion of expenditure on adult social care as a percent of local authority expenditure is below the English Average in 12 authority areas from across the region. Of course this may not mean that across the region that expenditure on social care is low but could suggest that spend on all over council services is high.

### 5.1 Who is the money spent on?

**Table 1:[8] Percentage of Local Authority budget spent on ASC by Yorkshire and the Humber Local Authorities broken down into client group**

| Authority | Adults 18-64 – PD | Adults 18-64 - LD | Adults 18-64 – MH | OP 65+ |
|---|---|---|---|---|
| **Barnsley** | 6.31 | 20.46 | 8.29 | 55.76 |
| **Bradford** | 10.34 | 18.94 | 7.93 | 55.24 |
| **Calderdale** | 12.88 | 23.58 | 7.04 | 54.13 |
| **Doncaster** | 6.95 | 25.59 | 5.68 | 59.01 |
| **East Riding** | 9.31 | 28.86 | 6.47 | 54.16 |
| **Hull** | 7.67 | 23.74 | 8.18 | 58.56 |
| **Kirklees** | 10.09 | 26.41 | 6.45 | 54.60 |
| **Leeds** | 10.26 | 22.32 | 8.56 | 56.88 |
| **N E Lincolnshire** | 9.72 | 15.59 | 8.46 | 63.53 |
| **N Lincolnshire** | 10.30 | 17.04 | 8.44 | 61.87 |
| **N Yorks** | 8.49 | 26.00 | 4.63 | 59.60 |
| **Rotherham** | 10.34 | 23.52 | 7.27 | 57.41 |
| **Sheffield** | 9.17 | 22.66 | 7.51 | 59.79 |
| **Wakefield** | 9.26 | 23.21 | 7.02 | 59.18 |
| **York** | 9.13 | 25.91 | 6.64 | 56.77 |
| **Average** | 9.35 | 22.92 | 7.24 | 57.77 |
| **Median** | 9.31 | 23.52 | 7.27 | 57.41 |

[7] NASCIS
[8] *PSSEX, Net Total Expenditure by client group*

**Diagram 8**[9]

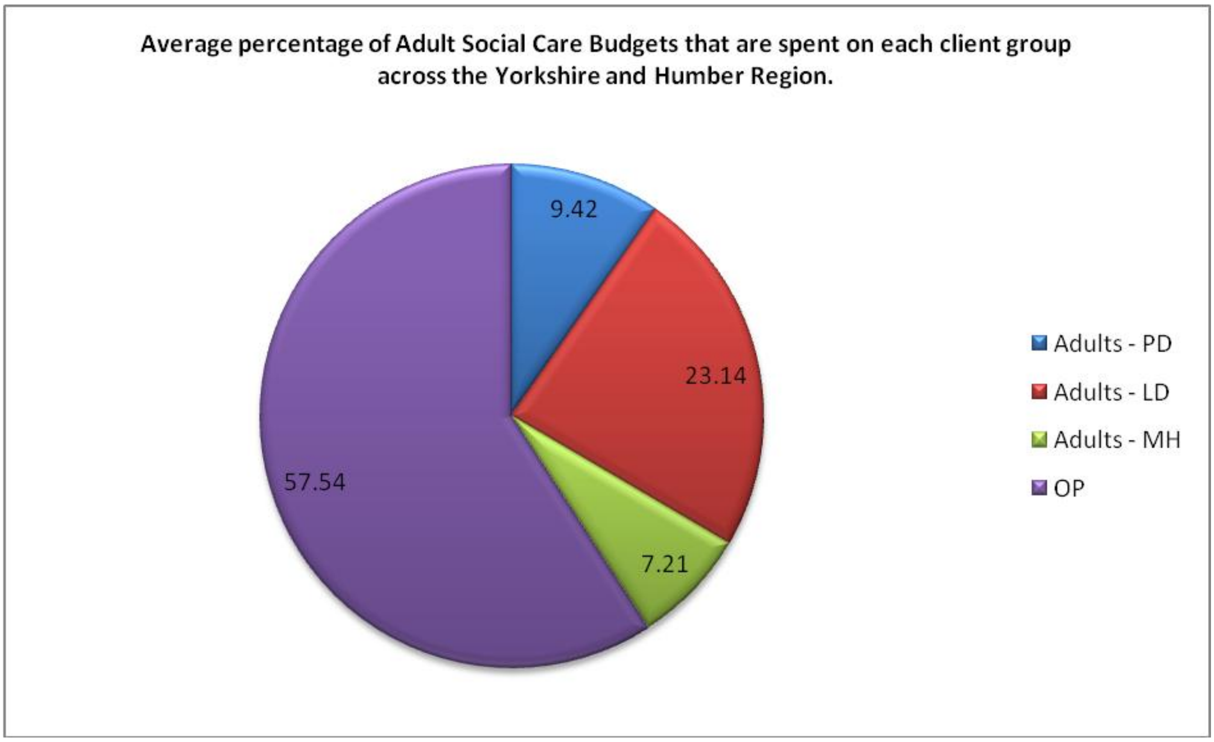



Table one provides a more detailed breakdown of spend. It outlines the percentage of the total of the adult social care budget that was spent by each authority within the region on particular client groups IN 2008/09. It highlights that:

- Over 50 percent of all authorities adult social care budgets from across the region were spent on the older people's population.
- The overall proportion of spend on older people, as a percentage of the total adult social care spend from across the authority areas was 57 percent. This figure varied however from 54 percent in Kirklees to 63 percent in North East Lincs.
- There was no significant variation in the percentage of the overall budget spent on adults with a physical disability or mental health across authorities in the region .The average spend as a percentage of the overall adult social care budget was 9 and 7 percent respectively.
- There was significant variation in the percentage of the overall budgets spent on adults with a learning difficulty, which ranged from 17 percent of the adults social care budget in North Lincolnshire to 28 percent in East Ridings.

Diagram 8 demonstrates pictorially the average percentages of the adult social care budget allocated to each client group across the Yorkshire and the Humber region as a whole.

[9] PSSEX, Net Total Expenditure by client group

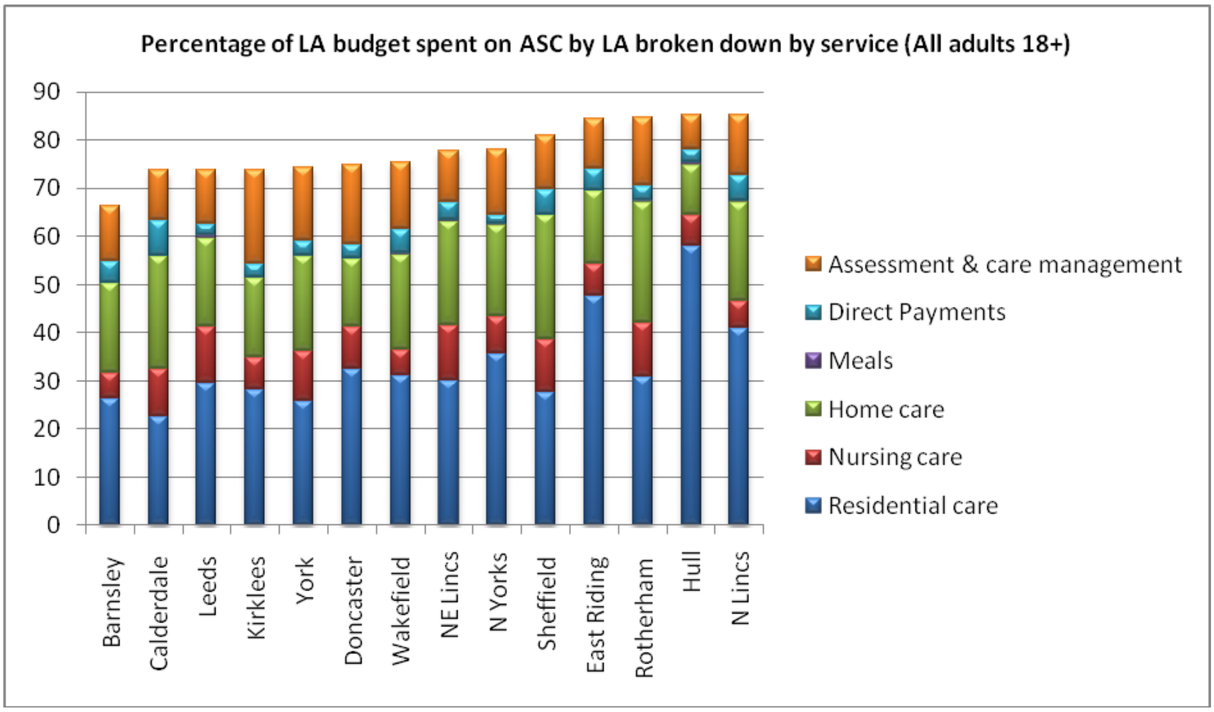
## 5.2 Where is the money spent?

**Table 2**

| | Residential Care | Nursing Care | Home Care | Meals | Direct Payments | Assessment and Care Management |
|---|---|---|---|---|---|---|
| **Average regional percentage spend on each service area** | 33 | 8.55 | 18.94 | 0.18 | 3.05 | 11.47 |
| **Approx overall budget - £millions** | 495 million | 128 million | 284 million | 2.7 million | 45 million | 172 million |

At the time of writing this report detailed cost breakdowns for total social care spend on each service area were not available. Approximate figures for total spend in £millions in each service area have however been calculated by equating what in £millions the percentage spent on each service area is of the overall regions social care budget of £1.5 billion.[10]

**Diagram 9**[11]



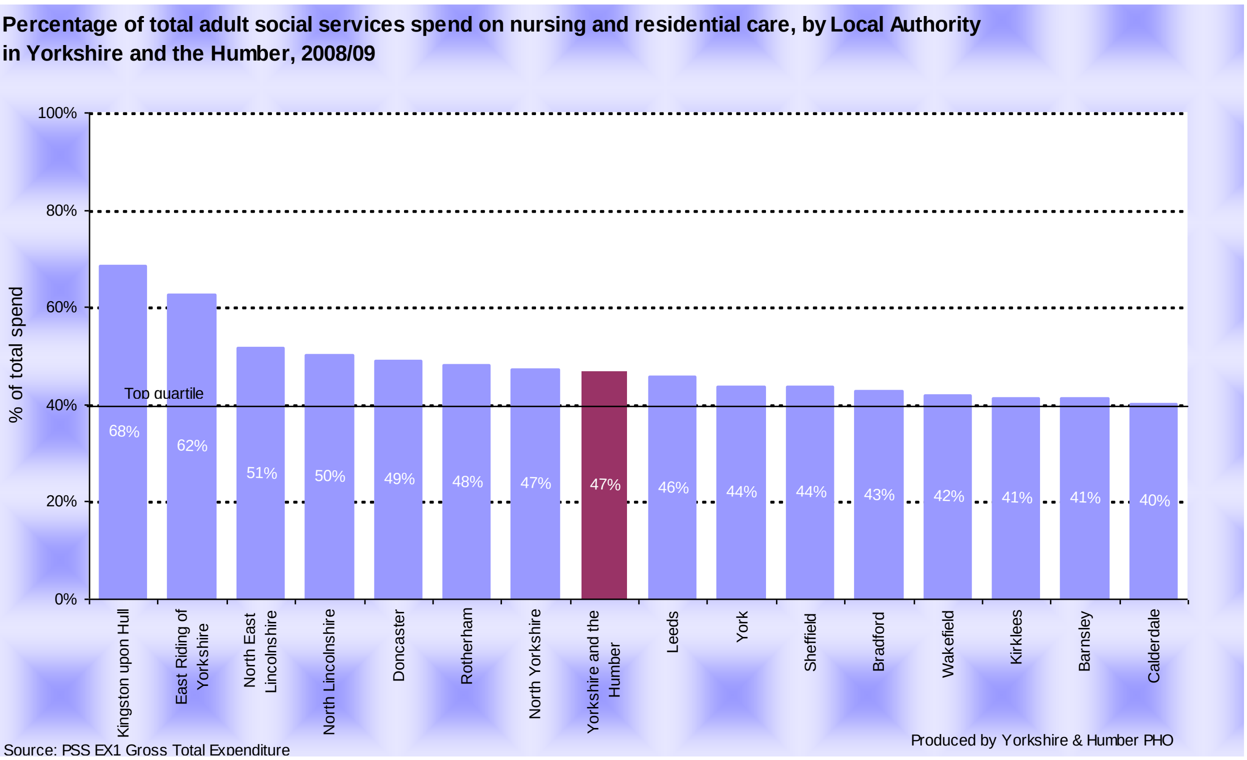

[10] Calculations are based on the figure of an overall spend of 1.5 billion on Adult Social Care in 2008/09

[11] *CIPFA - CIPFA - Finance & General Statistics 08/09 and PSSEX Net Total Expenditure, Total Adult Services*

Diagram 9 provides a little more detail on how budgets were spent and outlines the distribution of the overall adult social care budget by service type within each authority area across Yorkshire and the Humber. It shows that:

- There is a clear correlation between the percentage of the adult social care budget that is spent on care homes and that which is spent on domiciliary care within authority areas.
- Those authorities, for example Hull and East Ridings, which have a higher percentage spend on care homes have a significantly lower percentage spend on domiciliary care.
- Those authorities, for example Calderdale and Rotherham, which have a lower percentage spend of care homes have a comparably higher percentage spend on domiciliary care than other authority areas.
- Across all authority areas the overall budget spent on direct payments is still insignificant. In 2008/09 no local authority within Yorkshire and the Humber spent more than 5% of their adult social care budget on direct payments.
- The percentage of budgets spent on assessment and care management varies considerably across the region. There appears to be no correlation between higher percentage spend on assessment and allocation and those authority areas that still have a number of their service functions in house.

**Diagram 10[12]**




On average nearly half of all spend on adult social care across the authority areas in the region in 2008/09 was on care homes and care homes with nursing. Data extracted from a recent Yorkshire and Humber Public Health Observatory presentation, and set out in diagram 10 shows that the two local authorities with

[12] *PSSEX Gross Total Expenditure*

the highest proportions of spend on care homes and care homes with nursing were Kingston upon Hull (68 percent) and East Riding (62 percent). These two authorities are also two of the highest spending authorities in the country.

Due to the proportions of budgets being spend on residential and nursing care, as diagram 10 shows, none of the local authorities in the region are ranked within the top quartile performance band for the percentage of total adult social services spend on care homes and care homes with nursing. In order to be ranked in the top quartile performance band they would need to spend less than 40 percent of their social care budgets on residential care and nursing care. Most authorities however have shown a decrease in the percentage of adult social care spend on residential and nursing care from 2007/08 to 08/09 suggesting a reduction in the use of residential care across the region.

**Diagram 11: Percentage of older people spend in residential homes, 2008-09**

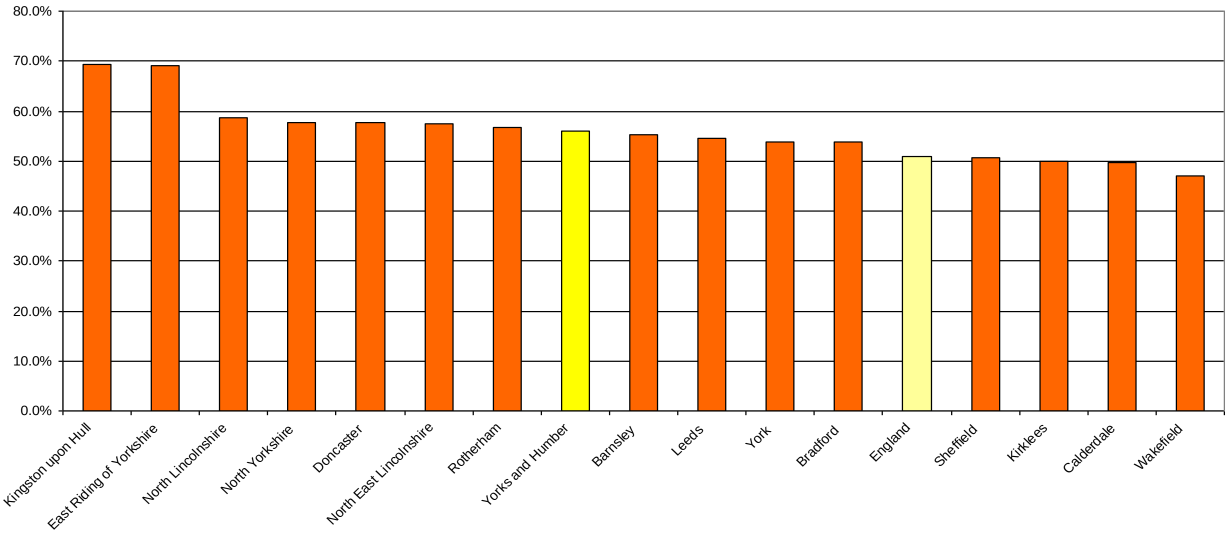



**Diagram 12: Percentage of spend on those with learning disabilities in residential homes, 2008-09**

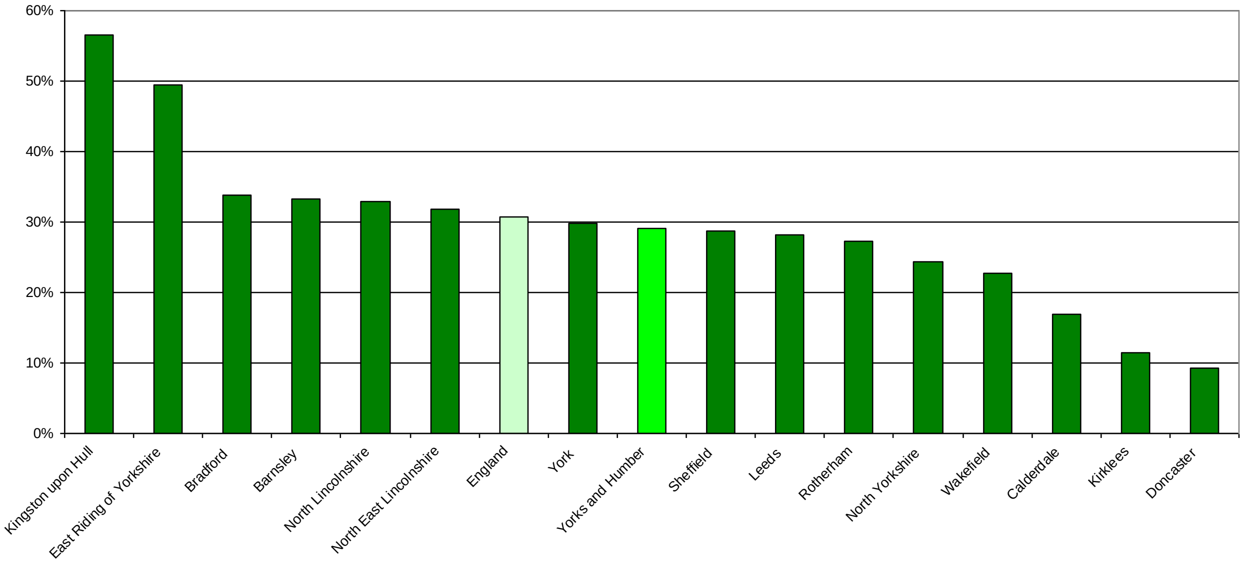


**Diagram 13: Percentage of spend on those with mental health problems in residential homes, 2008-09**

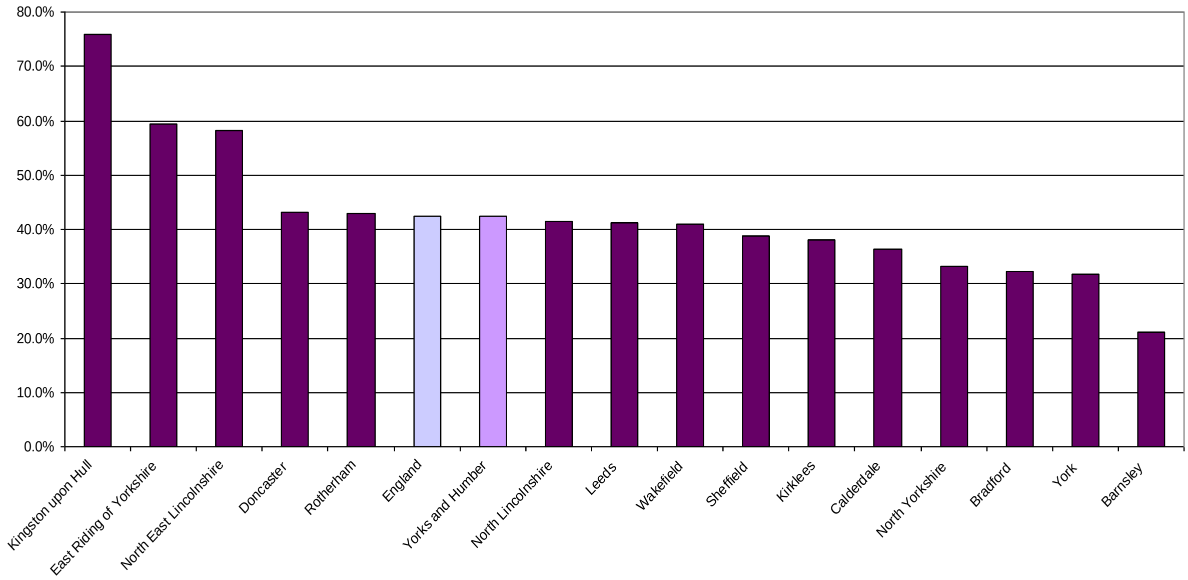
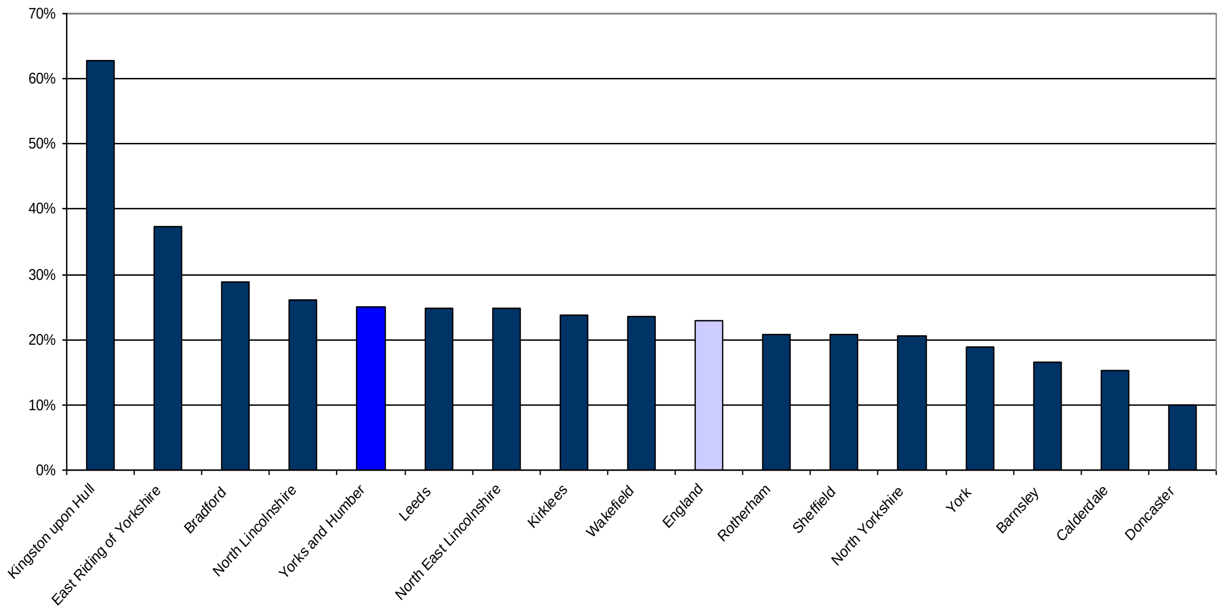



**Diagram 14: Percentage of spend on the physically disabled in residential homes, 2008-09**




The series of diagrams[13] (11-14) sets out a breakdown of how much (as a percentage) of local authority client group budgets is spent on care homes and care homes with nursing for service users. When analysed it is clear that:

- As a region does Yorkshire and Humber spend significantly more of its total adult social care budget on adults and older people in care homes and care homes with nursing than compared with the national average in nearly all of the four separate client groups. 57 percent of the adult social care budget is

[13] *PSSEX, Net Total Expenditure by service provision and client group*

spent on residential care for this client group in comparison to the England average of 51%.

- There is considerable variation in spend on vulnerable adults and older people in care homes and care homes with nursing amongst authorities social care departments across the region.
- As a region Yorkshire and the Humber have a worse than average spend in care homes and care homes with nursing on the physically disabled. 25 percent of the total adult social care budget is spent on residential care for this client group in comparison with the England average of 23 percent. There is also a wide variation across LA's ranging from Kingston upon Hull spending 60 percent of their relative budgets on residential care to under 10 percent in Hull.
- The proportion learning disabilities budget that is spent on people with learning disabilities in care homes and care homes with nursing across Yorkshire and the Humber is close to the England average. However there is a more than 3 fold difference in spend across the local authorities in the region on learning disabilities spend in institutions and a 6 fold variation in spend for those with mental health problems.
- There is a degree of consistency in the proportions of spend in care homes and care homes with nursing by authority area across each of the four client groups – with Kingston upon Hull and East Riding of Yorkshire being consistently higher than others in the region.

## 5.3 How much do services cost?

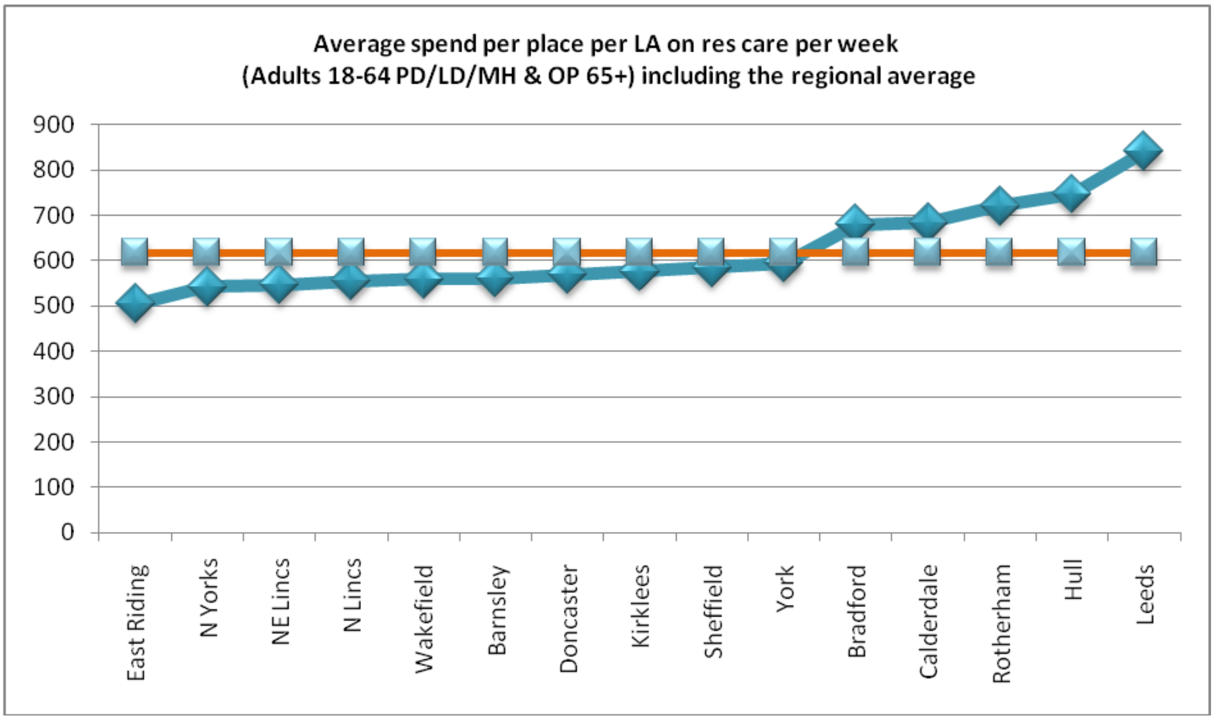
**Table 3[14]: Average spend per place per local authority on residential care and residential care with nursing**

| Average spend per place per LA on res care and res care with nursing per week (ADULTS 18-64 PD/LD/MH & OP 65+) | | |
|---|---|---|
| **Authority** | **Residential care** | **Residential care with nursing** |
| **Barnsley** | 561.00 | 559.25 |
| **Bradford** | 680.25 | 592.00 |
| **Calderdale** | 683.75 | 584.50 |
| **Doncaster** | 570.00 | 628.75 |
| **East Riding** | 504.50 | 779.50 |
| **Hull** | 745.50 | 1011.00 |
| **Kirklees** | 576.25 | 615.25 |
| **Leeds** | 840.50 | 811.25 |
| **N Lincs** | 556.00 | 722.25 |
| **N Yorks** | 542.50 | 727.75 |
| **NE Lincs** | 547.50 | 698.75 |

14 *PSSEX, Unit costs residential and nursing care – all client groups*

| **Average spend per place per LA on res care and res care with nursing per week (ADULTS 18-64 PD/LD/MH & OP 65+)** | | |
|---|---|---|
| **Authority** | **Residential care** | **Residential care with nursing** |
| **Rotherham** | 720.25 | 1041.25 |
| **Sheffield** | 585.00 | 662.00 |
| **Wakefield** | 559.25 | 334.50 |
| **York** | 595.25 | 591.25 |
| **Average** | 617.83 | 690.62 |
| **Median** | 576.25 | 662.00 |

**Diagram 15**[15]




Despite having two of the highest spending authorities in the country, and a number of authorities with higher than average spend on care homes, in 10 authority areas the average weekly spend per place on residential care per week is lower than the national average. Diagram 15 and Table 3 also show that:

- Fees vary considerably across the region: Ranging from £504 to £840 for residential care, and £334 and £1041 for nursing care.
- There appears to be a number of factors which account for the higher levels of spend per place in residential care in some authority areas. Leeds who has the highest spend per place also has one of the highest levels of in house provision across the region. Rotherham and Hull have a higher than average overall budget spend on residential care and support a higher than average number of older people within residential care institutions.

15 *PSSEX, Unit costs residential and nursing care – all client groups*

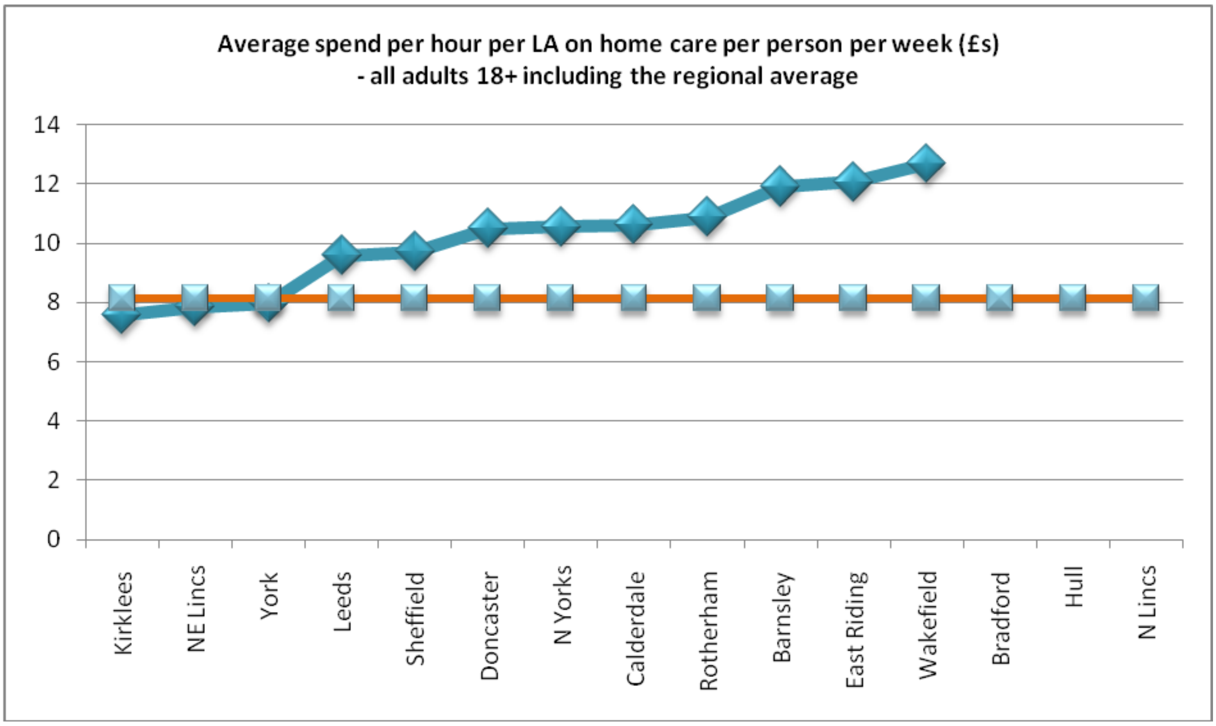
- There appears to be no distinguishing features within the data of the authorities that have the lowest and highest levels of fees for nursing care.
- Average spend per place per week on residential care seems to be lower in those areas that are more affluent – namely, East Ridings, North Yorkshire and York. This suggests that in areas where there is likely to be a larger self funding market this seems to result in lower than average weekly spend for residential care. This is supported by the fact that Hull is one of the most deprived areas within the region and as a result will have a higher percentage of people that will be funded by the local authority. The average weekly spend in Hull is above average and the second highest for the region, suggesting that in areas where the local authority is the main funder that this perhaps results in higher costs for services.

**Table 4**[16]

| **Average spend per hour per local authority on domiciliary care per person per week (£'s) (All adults 18+)** | |
|---|---|
| **Authority** | |
| **Barnsley** | 11.91 |
| **Bradford** | Unavailable |
| **Calderdale** | 10.63 |
| **Doncaster** | 10.50 |
| **East Riding** | 12.08 |
| **Hull** | Unavailable |
| **Kirklees** | 7.56 |
| **Leeds** | 9.58 |
| **N E Lincolnshire** | Unavailable |
| **N Lincolnshire** | 10.55 |
| **N Yorks** | 7.86 |
| **Rotherham** | 10.89 |
| **Sheffield** | 9.71 |
| **Wakefield** | 12.67 |
| **York** | 7.95 |
| **Average** | 8.13 |
| **Median** | 10.53 |

[16] *PSSEX, Unit costs homecare – actual annual activity per hour - all adults 18+*

**Diagram 16**[17]




As well as residential care, there also seems to be a considerable variation in the average spend per hour on domiciliary care across authority areas within the Yorkshire and the Humber region. Although data on three authority areas was not available, table 4 and diagram 16 shows that the average spend per hour across the region ranged from £7.68 in Kirklees to £12.67 in Sheffield. From this data alone it is difficult to extrapolate any obvious reasons in the variations in fees. One  observation however is that Sheffield who has the highest hourly spend, also as an authority provides intensive domiciliary care to the highest number of households  in comparison to its neighbouring authoritys within the region.

## 6 Who are the providers?

### 6.1 Observations of the whole market

Data collected suggests that Yorkshire and the Humber as a region has three separate sub–segments in the adult social care market: care homes, care homes with nursing and domiciliary Care.  Each of these has some quite distinct and unique characteristics which will be discussed below in more detail.

The regional market includes some larger providers who are dominant across some of the authority areas. These providers on the whole tend to be providers of services for older people.  Not one provider has a presence in all 15 authority areas, with the most presence being provision in 7 authority areas. What is unclear from data is that where provider organisations have services across authority areas, whether commissioners of the respective areas are collaborating

[17] *PSSEX, Unit costs homecare – actual annual activity per hour - all adults 18+*

together to exploit collective buyer power or instead choosing to do business on an individual level.

**Diagram 17**[18]

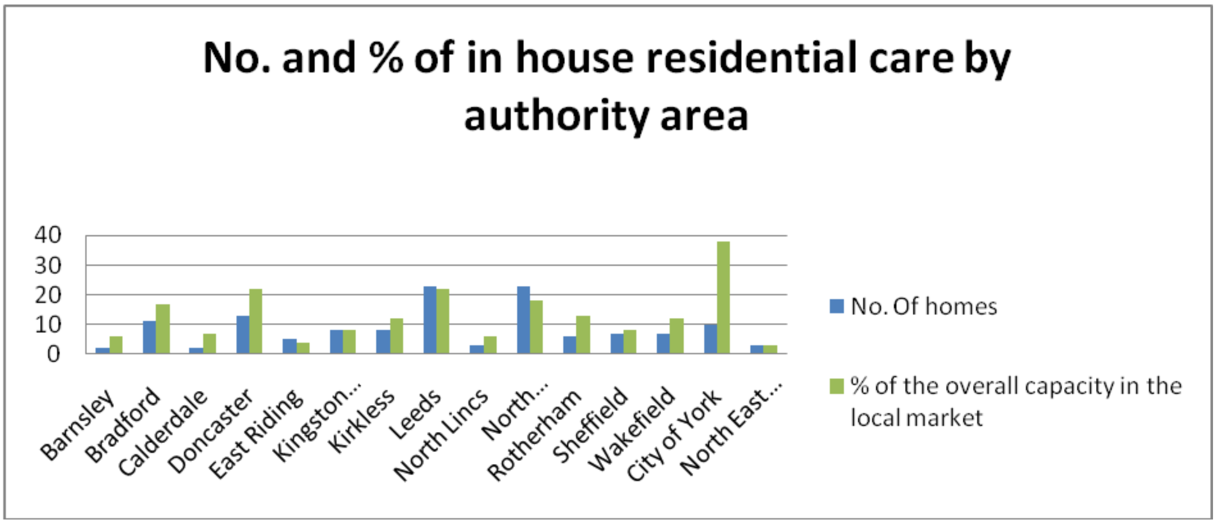
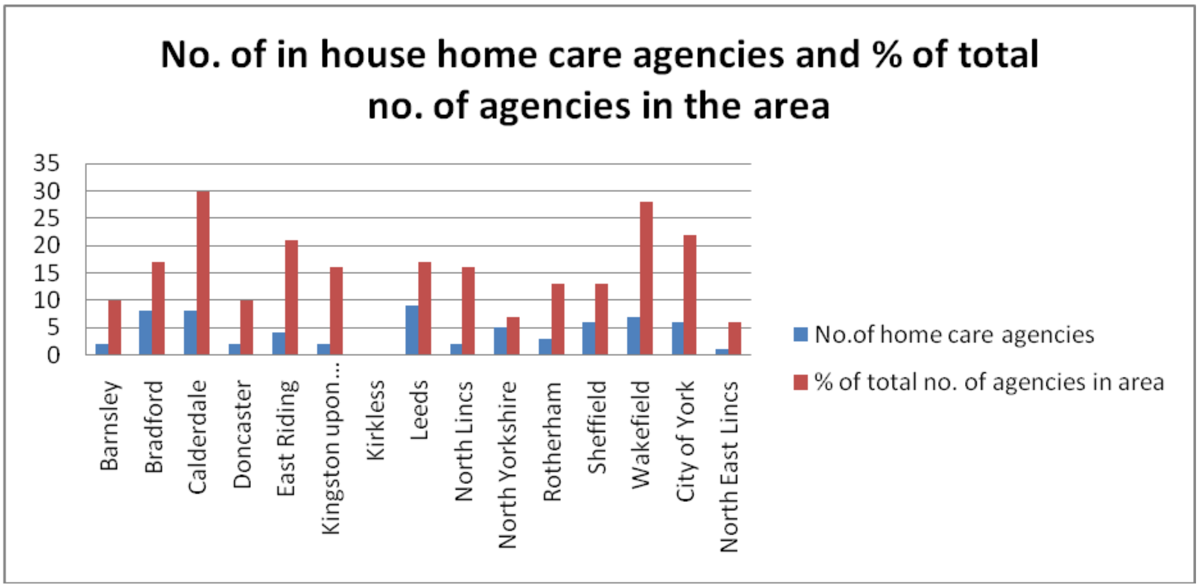



**Diagram 18**[19]




There are still a number of local authorities within Yorkshire and the Humber region who are direct providers of care homes and care homes with nursing ( See diagram 17 and 18). Given current financial pressures these local authorities may find themselves under more pressure to decrease their role in the provision of residential and domiciliary care services. If this were to be true, the assumption would be that this reduction would be coupled with an equivalent rise in the number of private or charitably provided residential or home care.

[18] *CQC web site – Y & H list of registered adult social care providers 2009*
[19] *CQC web site – Y & H list of registered adult social care providers 2009*

## 6.2 Residential Care

**Table 5**

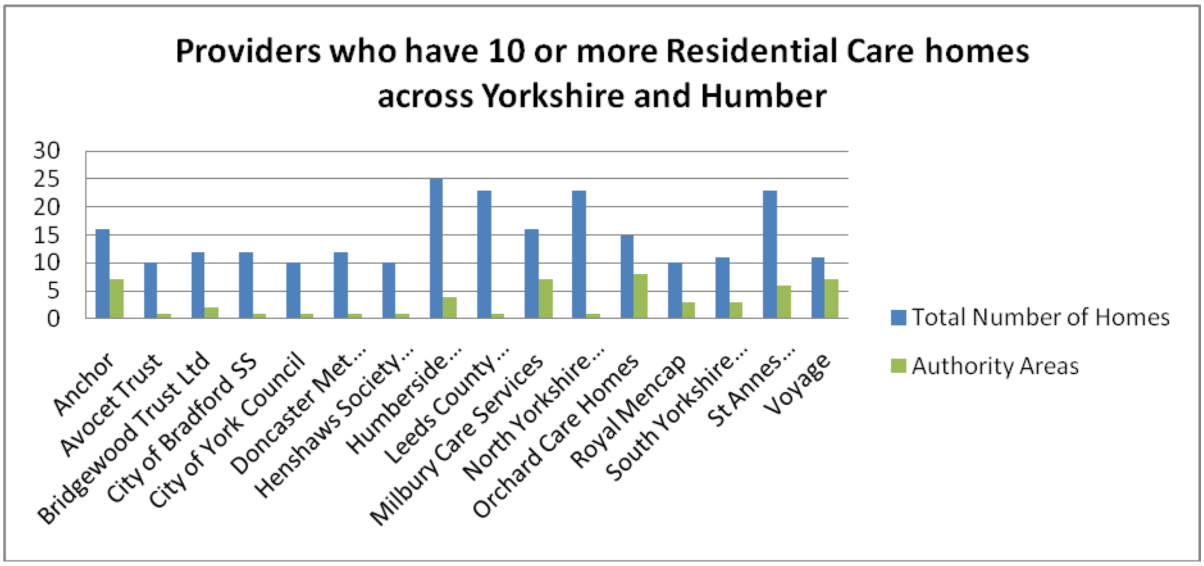
| Market | Demand | Approx Market Size | Market Structure | Dominant Sector | Perceived Capacity |
|---|---|---|---|---|---|
| Residential care homes | Regional aim to decrease sector | 495million | Fragmented – Some larger provider organisations and lots of small individual business | Private Sector (72 percentage of total no. of homes, and 75 percentage of total bed capacity) | Unknown |

There are over 200 different care home providers across the Yorkshire and the Humber region, who between them own 1227 properties and provide 27665 beds to adults with a social care need. Table 5 summarises the defining characteristics, where known of the care home market across Yorkshire and the Humber.

The market across the region appears very diverse. Despite there being 17 providers that have 10 or more residential care properties across different authority areas, there are also a large number of providers that have one or two residential care homes. The makeup of the residential care market suggests that the region is not largely dependent on the fortunes of one provider in the delivery of services but instead also relies on the ability of the smaller and individual business to successfully deliver services. Whilst this may spread the risk, smaller providers do tend to be more susceptible to changes in the market and economy.

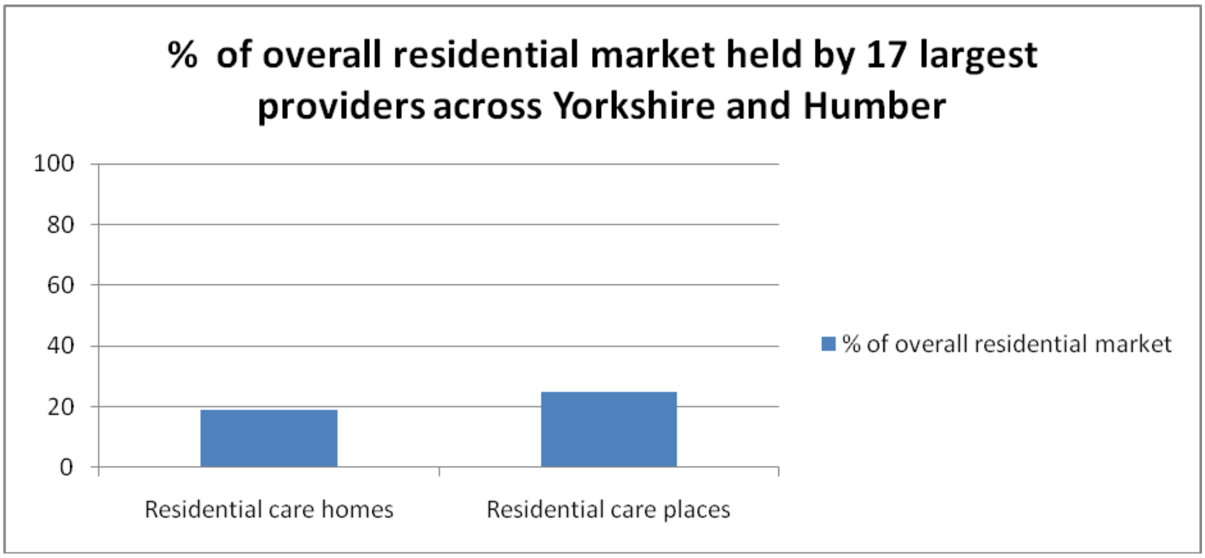
Due to economies of scale, the average size of residential care homes is growing nationally. Residential care homes in the Yorkshire and the Humber region seem to be following this trend with over 50 homes having 50 places or above within them.

**Diagram 19**[20]




No one provider has over 4 percentage market share of the regions residential care market. The two biggest providers are The Humberside group and Orchard Care homes, each with just over 3 percentage share of the market. Humberside has the largest number of residential care homes (25), whilst Orchard care homes has fewer homes but greater capacity within them.

**Diagram 20**




Of the 17 providers who have 10 plus residential care properties; 7 operate in a single authority. 4 operate across 2-4 authority areas, and only 3 operate across 5-7 authority areas.

[20] *CQC web site – Y & H list of registered adult social care providers 2009*

## 6.3 Nursing Care

**Table 6**

| Market | Demand | Approx Market Size | Market Structure | Dominant Sector | Perceived Capacity |
|---|---|---|---|---|---|
| Care Homes with Nursing | Unknown | 128 million | Consolidated – with a number of large providers having majority share of the market | Private Sector (88 percentage - of total no. of homes and 93 percentage of overall capacity) | Unknown |

There are over 100 different care home with nursing providers across the Yorkshire and the Humber region, who between them own 461 properties and provide 21258 beds to adults with a nursing care need. Table 6 summarises the defining characteristics, where known of the care home with nursing market across Yorkshire and the Humber.

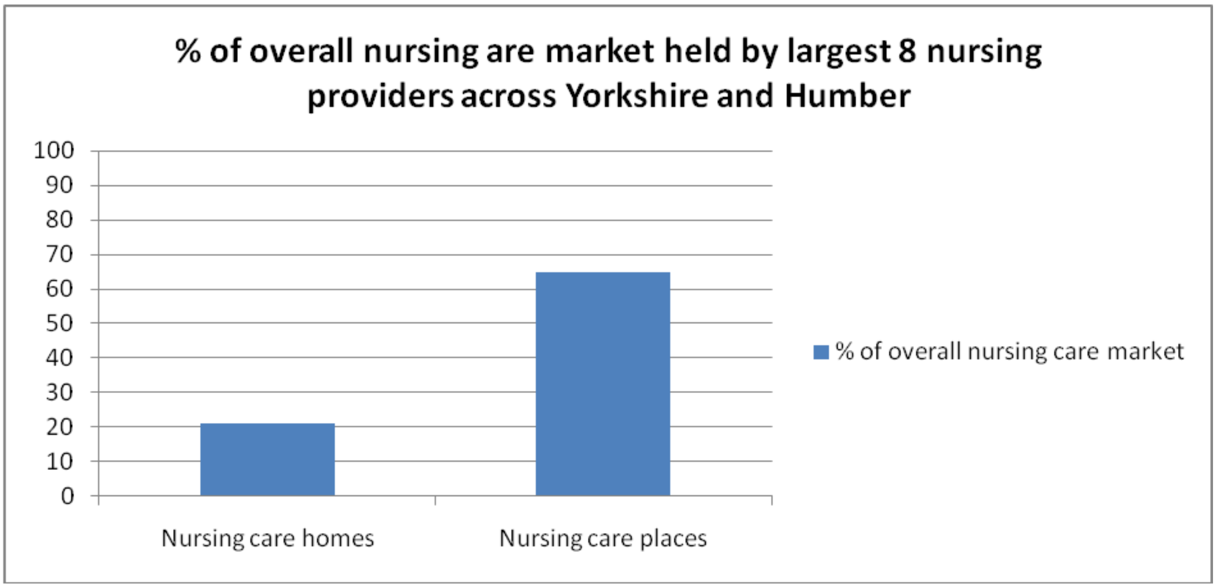
There are 8 providers that own 8 or more care homes with nursing across the region. Of these 8 providers there are 3 who have a significant share of the market. All three provide nursing care to older people across the region. These are:

**Table 7**

| Provider | Number of Homes | Overall Capacity | percentage share of market capacity |
|---|---|---|---|
| Barchester Healthcare Group | 15 | 935 | 17 percentage |
| BUPA | 12 | 1514 | 28 percentage |
| Southern Cross Group | 23 | 1513 | 27 percentage |

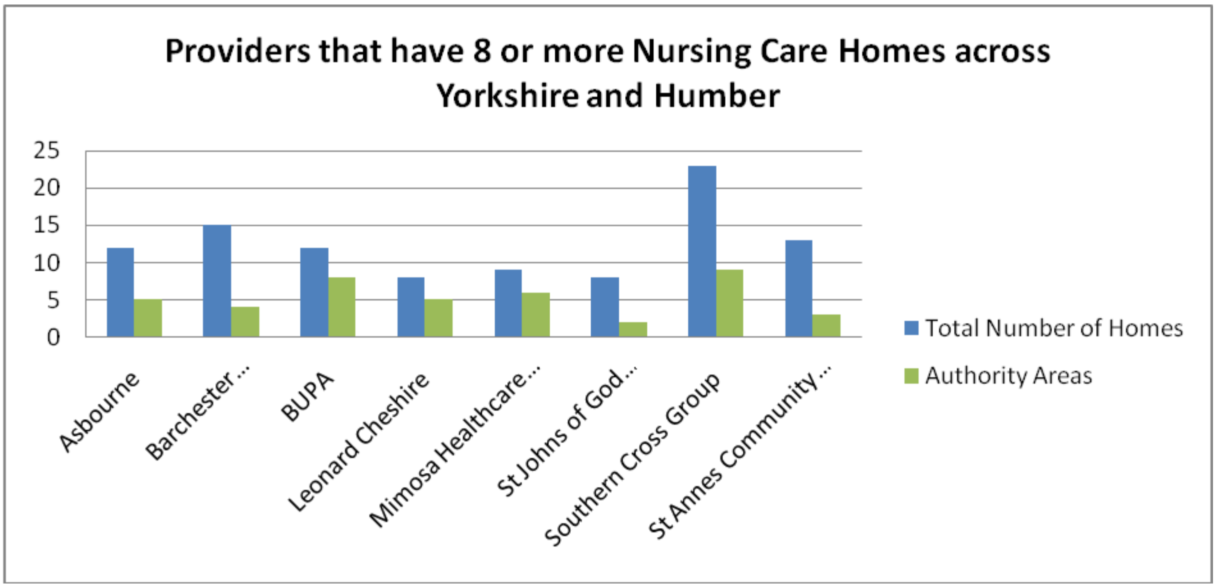
Between them the eight providers as a whole own 21 percentage of all care homes with nursing across the region and control 65 percentage of the overall capacity. The larger providers operate much bigger homes than the individual care homes with nursing providers which accounts for the difference in percentage of all homes owned and capacity controlled by them.

**Diagram 21**[21]




As diagram 22 demonstrates only 3 of the larger providers operate across 6 or more Yorkshire and the Humber authority areas. The remainder seem to operate within smaller locality areas and amongst them provide services to between 2 and 5 authority areas.

**Diagram 22**[22]




21 *CQC web site – Y & H list of registered adult social care providers 2009*
22 *CQC web site – Y & H list of registered adult social care providers 2009*

## 6.4 Domiciliary Care

**Table 8**

| Market | Demand | Approx Market Size | Market Structure | Dominant Sector | Perceived Capacity |
|---|---|---|---|---|---|
| Domiciliary Care | Increasing as more people choose to remain at home` | 284 million | Fragmented – with a large number of provider organisations from across a number of different sectors | `Private (72 percentage of total no. of agencies across the region | Unknown |

There are over 200 domiciliary care agencies across the Yorkshire and the Humber Region who provide services to support both adults and older people within their own home. Table 7 summarises the defining characteristics, where known of the home care market across Yorkshire and the Humber.

Across the region there are a number of domiciliary care agencies that are both reported to be most commonly used by commissioners and have the largest number of registered agencies. These are outlined in table 7.

**Table 9**

| Provider | Total of authorities commissioning services |
|---|---|
| Allied Healthcare Ltd | 7 |
| Careforce<br>Direct Health Ltd | 5 |
| HICA<br>Care UK<br>Claimar Care Group Plc | 4 |
| Goldsborough<br>Medica | 3 |
| Carewatch Care Services<br>Crossroads<br>Lifeways<br>Nestor Primecare Services Ltd<br>Reliance Care<br>Springfield Healthcare Group<br>Supporta Care PLC<br>United Response | 2 |

Aside from Kirklees all other authority areas across the region appear to still have a percentage of their domiciliary care provided in house. There is an assumption that those authority areas with a higher number of in house agencies[23] have a greater reliance on in house provision in the delivery of home care across their authority. In authorities that are more affluent there appears to be fewer in house agencies and greater numbers of private agencies. This is likely to be as a result of a strong local self funding market and therefore significant demand for private home care provision.

## 7 Conclusion

In conclusion the use of national data within this report has enabled the collation of a brief overview of the adult social care market across Yorkshire and the Humber region, and identification of key features and issues. This overview has shown Yorkshire and the Humber to be a region with a large and diverse adult social care market. It is a market that has a few but significant larger providers that deliver across regions, but with the majority of services being provided by locally based small provider organisations. It has a thriving private sector, significant voluntary and charitable sector and with the majority of local authorities still providing a number of adult social care services in -house. The report also highlights issues, such as performance and variations in spend across client groups and services.

What it has not been able to achieve is a detailed analysis of patterns of spend within authority areas and across the region, and nor has it been able to make any significant conclusions about market trends, the state of the market or what the adult social care may, or needs to look like in 10-15 years time.

In order to achieve a more in-depth picture of local markets within the region and to better analyse outliers and trends, greater collection and analysis of local data and intelligence is required. Should the region wish for this in-depth analysis IPC would recommend that the following data be collected:

- Detailed data on unit costs for services and adult social spend per thousand of population for years dating from 2007/08 to present day.
- The value of overall contracts with provider organisations, and information on market trends including current demand for services.
- Financial and market data on the self funding market from across Yorkshire and the Humber.
- Detailed information on the economic make-up of the region and individual authority areas.
- Individual local authority plans for the provision of adult social care services over the next 10-15 years.
- Information on provider markets assumptions about growth within the adult social care market over the next 10-15 years.
- Data on cross authority spending patterns.

[23] See Diagram 17