Insight and analysis of the social care market 2022 – 2024

A report by Access Health, Support and Care (HSC), in collaboration with Casson Consulting and Bay Care Group, examines recent trends and shifts within the social care market from 2022 to 2024, leveraging data from Access HSC's extensive network of 1,846 care providers.

Key Trends and Insights
The data shows that privately funded home care generally offers longer visits compared to nonprivate funded care. Data from our customers reveals that in 2024, 30-minute visits accounted for 38% of all privately funded visits, while 60-minute visits comprised 31%. Conversely, 30- minute visits were predominant in non-privately funded home care at 56%, with 45 and 60- minute visits representing 15% and 14%, respectively.

The National Institute for Health and Care Excellence (NICE) quality standard recommends visits of at least 30 minutes, except for specific shorter tasks. This data indicates that privately funded care more frequently adheres to this standard, with only 2% of visits being 15 minutes long, compared to 6% in non-privately funded care.

Comparing visit lengths from 2024 to 2022, the proportion of 30-minute visits has increased by 3%, while 60-minute visits have decreased by 3%. This trend indicates a shift towards shorter visits, which can have significant implications, particularly for vulnerable populations such as the elderly and people with learning disabilities.

Impact on Outcomes
Reducing the duration of home care visits can have several adverse effects:

- Quality of Care: Shorter visits can diminish social interaction, vital for maintaining positive mental health.
- Health Outcomes: With a greater focus on complex treatments at home, shorter visits may prevent care workers from adequately addressing ongoing immediate health needs.
- Hospital Admissions: Insufficient care at home can lead to a person's condition deteriorating, potentially leading to the person having to be admitted to hospital as an emergency case.
- Caregiver Stress: Compressed visit times can increase stress and burnout among care workers, impacting their ability to provide effective care.

Bay Care Group comment on the findings, "*The prominence of 30-minute visits in both the private and non-private sectors is consistent with what we've observed. While 30-minute visits may seem efficient, they often don't allow enough time for the quality of care we strive for, especially for clients with complex needs. Our preference leans towards 45-60 minute visits, as they provide more comprehensive care and ensure client satisfaction. The 15-minute visits, especially in the non-private sector, often do more harm than good, as care becomes rushed and less effective.*"

Additional findings in the report include:
The average cost per visit has increased by 12%
The average care worker works an additional 26minutes per week compared to two years ago
The average duration an individual uses domiciliary care services increased by 26% in two years.

The social care sector is at a critical juncture. This research demonstrates that the increase in privately funded clients, coupled with a decline in visit lengths and hours, underscores the urgent need for action from policy makers.

For the sustainability and quality of care, it is imperative to establish guidelines and funding to ensure that non-privately funded care is adequately supported. This will help improve care quality, alleviate financial pressures, and support the long-term viability of care providers.

Read the report in full online: Care Market Analysis
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