



Growing the care market

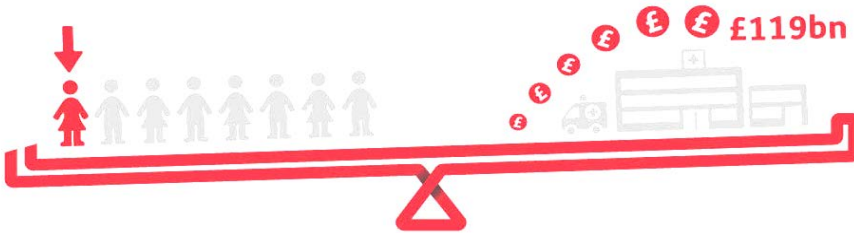
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There are **6.5 million carers**
in the UK today. That's 1 in 8 adults.



3 million carers combine paid work with care.

That's 1 in 9 people in any workplace.

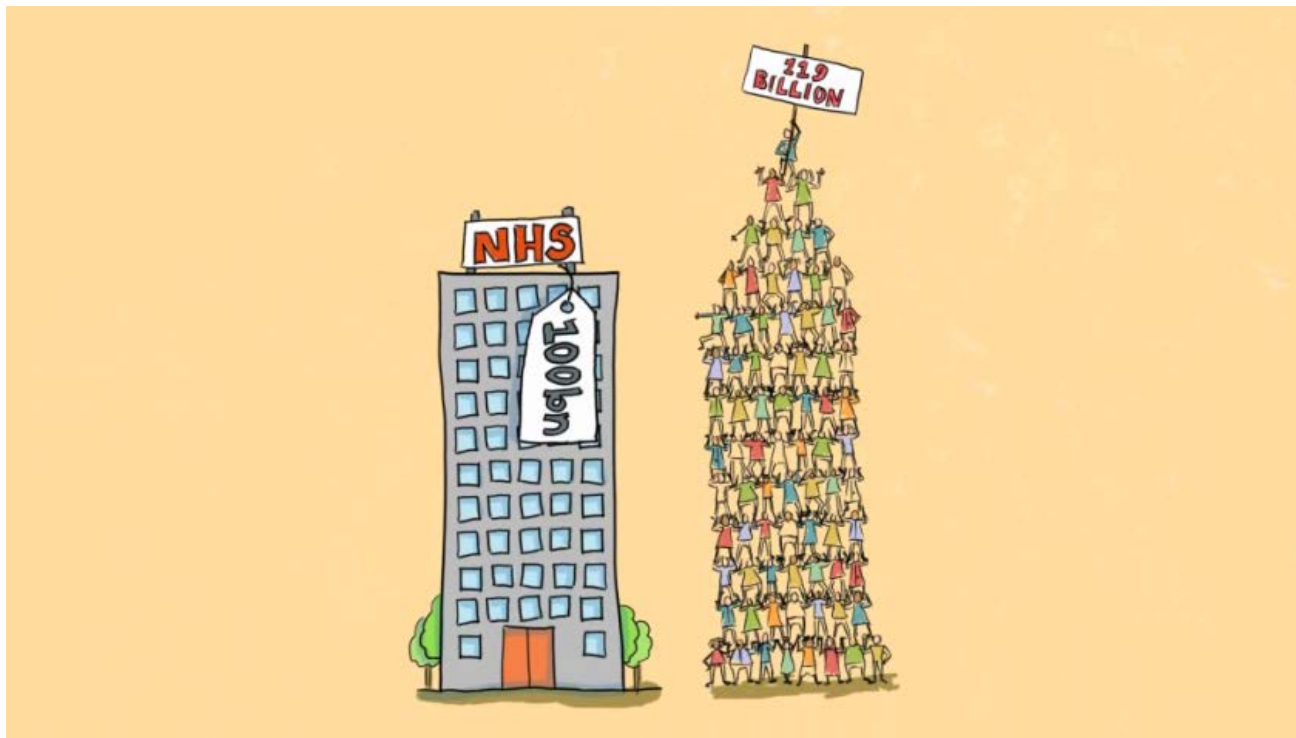


The case for change

- People living longer with illness and disability
- Pressures on families – 6.5 million people currently caring, nearly 3.5 million additional carers needed in the next 20 years
- By 2017 the tipping point for care will be reached when the numbers of older people needing care will outstrip the numbers of working age family members available to meet demand
- Pressures on health and social care services – rising demand, less funding and tighter eligibility criteria



Carers contribute £119 billion to the UK economy – the equivalent of a second NHS



Impact of caring

- **Work**
 - 2.3 million have given up work to care. 60% of those in work worry about ability to stay in work over the next year.
- **Finances**
 - 48% of carers are struggling to make ends meet
- **Health and wellbeing**
 - Those caring over 50hrs a week are twice as likely to be in bad health as non-carers

- **Relationships**



carers have felt **lonely or socially isolated** as a result of their caring responsibilities

The Goal

Can we deliver an adequate supply of care and support services that meets the needs of modern families, modern economies and modern societies?

- ✓ Enabling families to care for children and adults
- ✓ Enabling families to work
- ✓ Enabling families to participate in social and community lives



Structural obstacles 1

- Locally delivered public funded care system rationed by means test and level of need
- Chronic underfunding. Central spending cuts.
 - Higher numbers excluded from public system
 - Increasing charges for those within it
- Poor signposting from universal services
- Complex system

Structural obstacles 2

- Difficult operating conditions for providers
- Poor quality care delivered by a low skilled workforce
- Lack of diversity. Anaemic care market dominated by large providers
- Short termism: failure to act on demographics

Societal obstacles

- Ignorance of social care provision and delivery
- Unwillingness to plan for an undesirable future and tendency to hope for the best.



Threat or opportunity?

Can we turn the care challenge on its head? Can we see the growth in demand as an opportunity to transform supply?

- ✓ An opportunity to reshape services that fit the changing shape of families and longer working lives
- ✓ An opportunity for economic growth in a self-funding market



The Policy Levers to achieve it



- Care Act 2014 *duties on local authorities*
 - a new market **shaping duty to ensure a sufficiency of supply of services**
 - a universal **information** service for the whole local population, including self-funders
 - **Personalisation** agenda
 - Care costs **cap**
- Technology
- Employers – care and support services as a condition for employment

Market shaping – what does it mean?

- **Section 5** of the Care Act places a duty on local authorities to promote a diverse and high quality market of care and support services (including prevention services) for people in their local area.
- This should ensure that there is a range of different services and providers to choose from
- When considering current and future local demand and how this might be met by providers, local authorities must consider the need for there to be sufficient services to meet the needs of people in their local population – a ‘sufficiency of supply’

Delivery Plan

- *Developing Care Markets for Quality and Choice* – programme to support local authorities to build their capacity to shape a diverse, vibrant and high quality market for social care services
- Market Position Statements designed to:
 - Understand the needs of a local authority population
 - Map existing services
 - Identify gaps
 - Build delivery partnerships

Market Shaping – story so far

- Mapping
 - Variable, but with some good examples of mapping and understanding of the local population
 - However – there is little or no evidence of mapping the needs of the ‘self-funder’ population
- Services to support employment
 - A mixed picture, with many not mentioning services that support carers to stay in work
 - The majority of Market Position Statements do not cover engaging with Local Enterprise Partnerships (LEPs)



Information, personalisation & the cap

- Too early to fully understand progress
- Hampered by funding pressures
- Need to take diverse approaches in providing information and advice
- Fulfilling duties towards self-funders
- Cultural change to consider carers' needs
- Delays to cap on care cost – now to be implemented in 2020

Technology

New innovation is needed to deliver on market growth

- While 7 out of 10 people use technology in their everyday lives, only 3 in 10 use it to support health and care
- Technology enabled care services (TECS) are a critical element in delivering a diverse market in health and care
- TECS need to be embedded as mainstream solutions, for systems and for individuals, families and carers



European models

Low level household services – learning from Europe

- French Borloo Plan, 2005: Creation of 500,000 jobs, with growth through the recession
- Belgian subsidy for domestic services: 1% of Belgium's population working in personal and household services, equating to 650,000 jobs in the UK
- European Consultation on PHS: Each working person in the EU27 externalising one hour a week of domestic or care activity would create 5.5 million jobs



What next?

- The UK must turn the care challenge on its head, and see growth in demand as an opportunity to transform supply
- The UK must follow the lead of other countries and extend and promote the range of services we see as supporting health and well-being, self-funded or not
- The UK must ensure local mechanisms for growth include care and support
- Tax incentives including for care micro businesses



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