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Market position statement-Care at home

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Care at home summary

Care at home also referred to as domiciliary care, is an essential service that helps individuals maintain their independence and dignity in their home while receiving the care and support they need. Care at home plays a vital role in helping to keep people supported in their homes for longer; and in turn helps reduce demand on NHS provision.

For many individuals, care at home is the preferred option for receiving care and support, as it allows them to remain in their own homes and maintain their independence. Home care services can provide a range of support, including assistance with personal care, medication management, and other forms care and support.

Home care services are particularly important for older adults and individuals with disabilities, who may require assistance with daily living activities. These individuals may also have complex health needs that require ongoing monitoring and management. Home care services can provide the support and care needed to help these individuals remain in their homes and prevent the need for hospitalisation or residential care services.

Blackpool are experiencing an overall continued increase in demand for care at home services. This growth correlates with Blackpool’s population profile and also the current health demographic in Blackpool. Increased hospital attendance and admissions add further to this demand; especially in the need for short-term care at home packages.

In order to ensure sufficient provision is available for the next three years, Blackpool Council have two care at home contracts. The first contract consists of 10 primary providers and a new contract that commenced April 2024 has 3 secondary providers to help ensure sufficient provision going forward.

In terms of delivery, one of the biggest challenges reported by a number of Blackpool’s services is staff recruitment and retention. Both locally and nationally staff shortages have become apparent in a large number of sectors but specifically across the health and care sector.

Given the expected population growth for older adults in Blackpool, and decline in health often associated with age, we anticipate that overall demand for care at home services in the next 3 years will increase, however, week to week commissioned hours will rise and fall and it is anticipated that demand may vary with overall increases seen over a longer period of time.

This has been the pattern of demand over the past few years and we anticipate this will continue.

Future developments

At present Blackpool have sufficient provision in the care at home market and are able to meet both current and predicted future demand in the short to medium term. Future developments in care at home delivery will take account of the emerging priorities at a Blackpool place based partnership level. This collaboration with the Lancashire and South Cumbria Integrated Care Board (ICB) in the Blackpool locality will work to align with the community hub based model of care delivery going forward, which may lead to further opportunities and engagement with our Blackpool provider base. The relationship with providers through our forum remains vital and is a key mechanism for shaping future market provision.

Key messages

* At present Blackpool have sufficient provision in the care at home market and are able to meet both current and predicted future demand in the short to medium term.

*Provision is sourced and established in a timely manner

Introduction

Blackpool's population profile

Blackpool has an estimated population of 139,445 people, with a larger than average proportion of people aged 65+ people (20.8%) as compared to the national average (18.4%).

Blackpool is one of the most deprived boroughs in England by rank of average score, across the health, deprivation, disability and employment domains. 42% of lower super output areas (geographic areas of around 1,500 residents) are in the most deprived 10% of areas in England and currently life expectancy across the borough is the lowest amongst men and women across the UK.

Projections from the Institute of Public Care estimate, from their Projecting Older People Population Information (POPPI) and Projecting Adult Needs and Service Information (PANSI) information services, the current populations of supported housing client groups as of 2020 are as follows:

Public Health Population Projections 2016 to 2041

Blackpool's population pyramid for 2020 shows that there is a higher proportion of people aged over 49 years of age than there is when compared to the rest of England and a much lower proportion of people aged younger than 45. The age bands 20 to 44, in particular, have a considerably lower proportion than England. This shows that Blackpool has an older than average population when compared against other areas of the country. In all age ranges from 50 to 80 years old Blackpool exceeds the national average, in both males and females. This is particularly true for the age ranges between 50 and 65. This cohort will be entering 'old age' within the next 20 years and will be the people more likely to require day care services in the coming years.

The Office of National Statistics predicts that the overall population of Blackpool will gradually increase over the next 20 years, going from 139,300 in 2018 to 141,500 in 2044. Projections predict that there will be a considerable increase in the proportions of residents aged above 65. The over 65 population is projected to rise by 24% from 28,400 in 2018 to almost 36,000 in 2039. This will mean that the over 65's will make up over a quarter (26%) of Blackpool's total population. Looking at the shorter term it is predicted that the proportion of those aged over 65 will increase by 7% between 2020 and 2025 (from 28,000 to 30,000). And the same population will have increased by 18% by 2030 (from 28,000 to 33,000).

Current market

Blackpool Council currently provides a care at home service through commissioned providers and the in house extra care service.

There are 10 providers on the care at home contract that was established in 2019. Additional contracts were awarded in 2024 to allow for increases in demand and flexibility in increasing capacity.

Care at home services for people with learning disabilities is accessed under a separate contract.

Care at home provision	Description	Current providers	Contract status
			Current contract due to expire

Care at home provision	Description	Current providers	Contract status
Care at home contract	Providers in the Blackpool market that deliver care at home services under our existing care at home contract	10	March 2029. Initial term to March 2024, the contract has been extended for a further 5 years.
Care at home ancillary provider contract	An additional contract for secondary providers to ensure there is enough capacity to deliver care at home in Blackpool	3	5 years to end same time as main contract in March 2029
Extra care service	In-house service to support providers specifically with short-term packages and packages of care that existing providers are unable to deliver.	Blackpool Council	N/A
Other	Out of area provision or more specialist provision delivered under a different contract	10	Varies dependent on provision

Location

The chart below shows the spread of demand for care at home services across the Blackpool region. This information is correct as of April 2024 and although most demand is shown in Blackpool central (postcodes FY1 and FY3) these figures change daily.

- Blackpool south 28%
- Blackpool north 30%
- Blackpool central 42%

Capacity and demand

There are on average 15,496 care at home hours commissioned weekly by Blackpool and these are accessed by 1,209 people (these figures are an average of April to August 2024/25).

Hours delivered weekly	Number of providers
Providers delivering over 1000 hours a week	6
Providers delivering between 500 to 1000 hours a week	4
Providers delivering between 100 to 500 hours a week	3
Providers delivering less than 100 hours a week (usually out of area or specialist arrangements)	11

Patterns of demand

Chart A below, displays the number of care at home hours commissioned every 4 weeks by Blackpool Council from April 2020 to March 2024.

As can be seen in chart A, there has been fluctuation in the number of hours needed to support people, but overall we have seen growth in the past four years, from 47,500 hours over a four week period in April 2020, to 59,500 hours over a four week period in March 2024.

Predicted future demand

Given the expected population growth for older adults in Blackpool, we anticipate that overall demand for care at home services will continue to increase, however, week to week commissioned hours will continue to rise and fall and it is anticipated that demand may vary with overall increases seen over a longer period of time.

This has been the pattern of demand over the past few years and we anticipate this will continue. In response to this and to ensure Blackpool Council are able to meet anticipated demand in a flexible way, the additional care at contract for ancillary provision (as described above) has been established.

Delivery

Market challenges for providers

Providers have reported a number of ongoing challenges and these vary depending on the service and how it is delivered but some of the key challenges are as follows:

Staff recruitment and retention

Feedback from providers is mixed, some indicated they were not experiencing any staffing challenges at present but others reported difficulties in recruiting and retaining staff; which corresponds with the wider care sector who are also facing serious workforce challenges.

Care at home fee rates have increased annually; and have been structured around the Real Living Wage (RLW) and National Living Wage (NLW), however due to recent significant increase in the cost of living providers have advised that they struggle to pay their staff competitive wages in comparison to other occupational sectors e.g. retail and NHS. The result of this is an increase in care staff experiencing financial difficulties and leaving the care sector for better pay elsewhere.

Cost of living

Providers have advised that more staff are struggling with the current cost of living and have been requesting additional financial support.

Transport

Providers report there are a lack of carers who are able to drive; providers advise that the barrier is due to costs, the initial costs of learning to drive and ongoing costs of tax, mot, insurance and petrol. Carers who are able to drive are finding petrol costs difficult.

Cost of services

Care at home annual spend

2021/2022	2022/2023	2023/2024
£10,958,291	£11,158,140	£13,000,000

*Please note this does not include the cost of Blackpool Council's extra care service.

Spend on adult care at home services currently represents 12% of the adult social care budget.

Care at home fee rates

2022/2023	2023/2024	2024/2025
£18.38 per hour	£19.04 per hour (NLW)	£20.70 per hour (NLW)

Quality

The care at home Blackpool contract updated the quality standards recently and below outlines the different areas of quality assurance and the standards within each domain.

Quality assurance standards

Domain 1: Involvement and information	Domain 2: Personalised care and support	Domain 3: Safeguarding and safety	Domain 4: Suitability of staffing	Domain 5: Leadership and quality of management
		Safeguarding people who use the service from abuse		

Respecting and involving service users	Care and welfare of service users Meeting nutritional needs	Cleanliness and infection control Management of medicines	Requirements relating to staff Suitability of staffing	Assessing and monitoring the quality of service provision Complaints
Consent	Co-operating with other providers	Safety and suitability of premises Safety, availability and suitability of equipment	Supporting staff	Records

In addition to the domains listed, there are six sections in which to assess the provider’s quality. Standards are assessed in all appropriate areas in order to “triangulate” the evidence:

1. Assessment, care planning and review
2. Service user experience
3. Staff knowledge and understanding
4. Staff training and recruitment
5. Environment, equipment and general safety
6. Leadership, quality assurance and management

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