

Excerpts from the full set of slides which were used at Cordis Briefing on Thursday 21<sup>st</sup> April 2022. Full slides are available for subscribers. Please click [here](#) to find out more.

# Cordis Briefing

## April 2022

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# Today's Briefing

- Introduction
- Viewfinder
- Local Authority Finances

## > Break

- Health and Care Bill and Integration Update
- CQC Inspections and Care Market data

# CQC Inspections Outcomes and Market Changes

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# Introduction

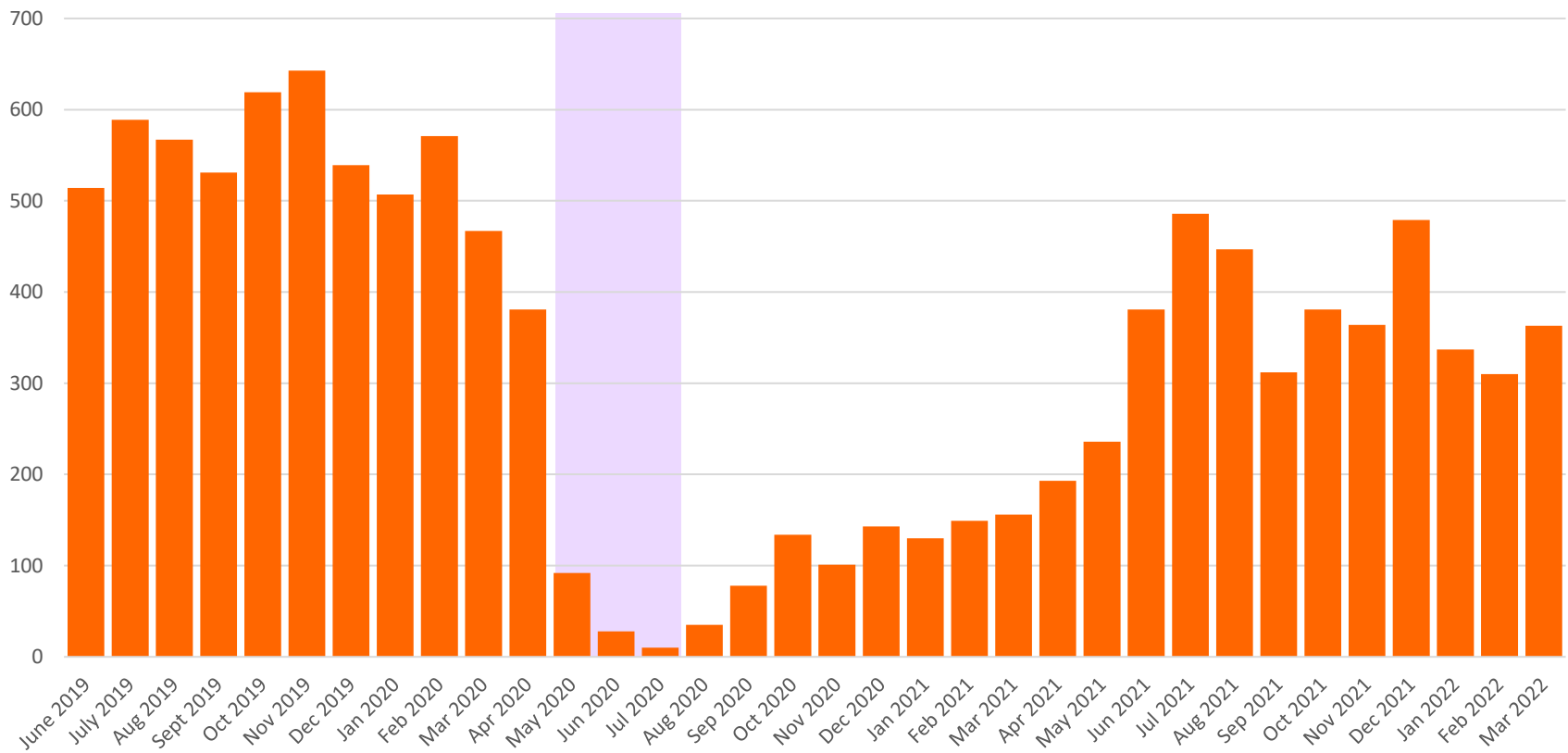
- We are looking again at CQC inspections to see whether the trends that were established during Covid have continued.
- We are also looking at the wider trends in the care market, following reports of widespread home closures in recent months. The reality is that the shift from care home provision to home care / home support type services is continuing as before.
- We have dug into CQC data to explore all of these issues:
  - Number of Inspections
  - Outcomes of Inspections pre- and post-Covid-19
  - The change in the number of care home and domiciliary care locations from 2016

# Inspections

- CQC publish monthly data on the quality ratings of all services. These list the 5 inspection domains (Safe, Effective, Caring, Responsive, Well-Led) plus the Overall rating for the location with the date of the last inspection.
- The dates are based on the date of publication of the report, so these may lag several months behind the date of the inspection visit – something to bear in mind when you look at the months that the first lockdown ran.

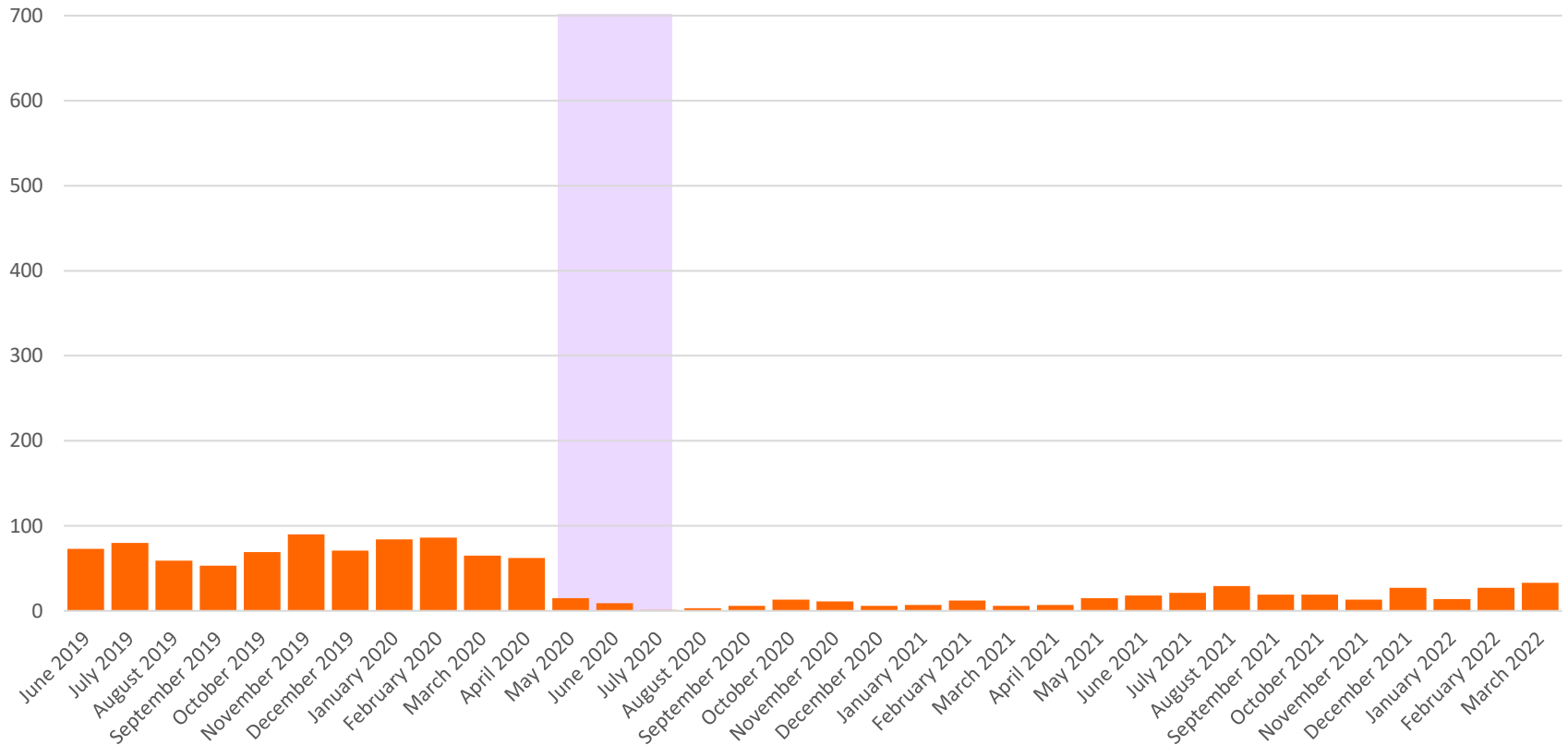
# Inspections (all client groups)

CQC Inspections by Month (All)  
Based on Report Publication Date



# Inspections (Learning Disabilities)

CQC Inspections by Month - LD Care Homes  
Based on Report Publication Date



# Inspection Outcomes

- A reduction in the number of CQC inspections as a result of a risk-based approach is likely to mean that a greater proportion of inspections result in a change in rating.
- This appears to be borne out in the data, which look at the outcome of inspections in the period January to March 2022 compared to a three month pre-pandemic period in 2019.

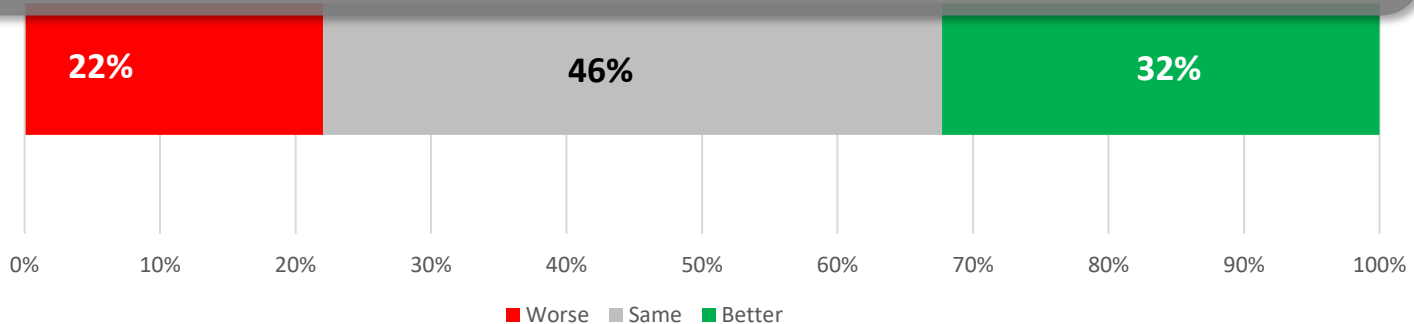


# Older Adults – Care homes

Overall Quality Rating for Care Homes  
Older Adults

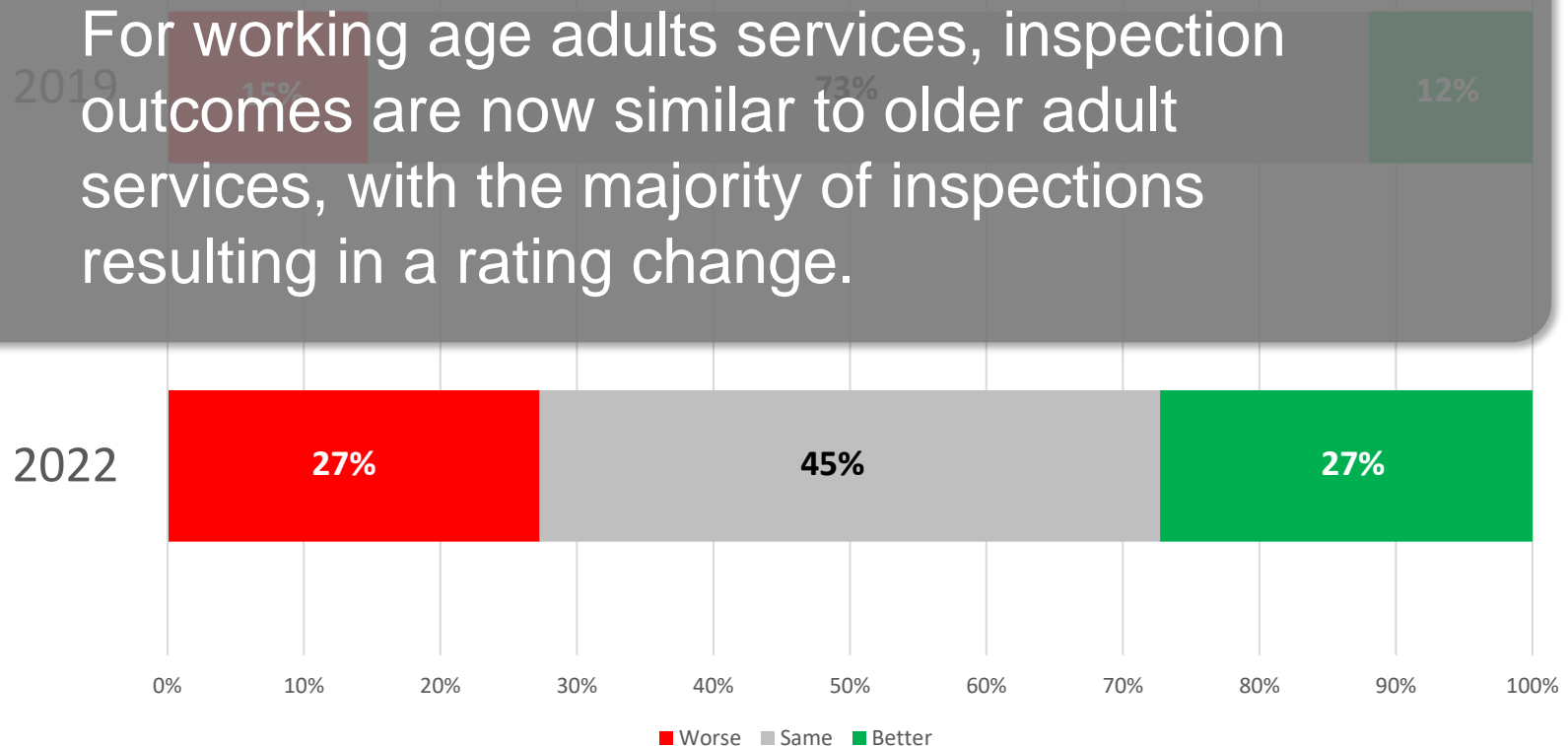
Inspection outcomes are now similar to pre-pandemic levels, with just over half of inspections resulting in a changed rating. Better ratings are more likely

2022



# Working Age Adults – Care homes

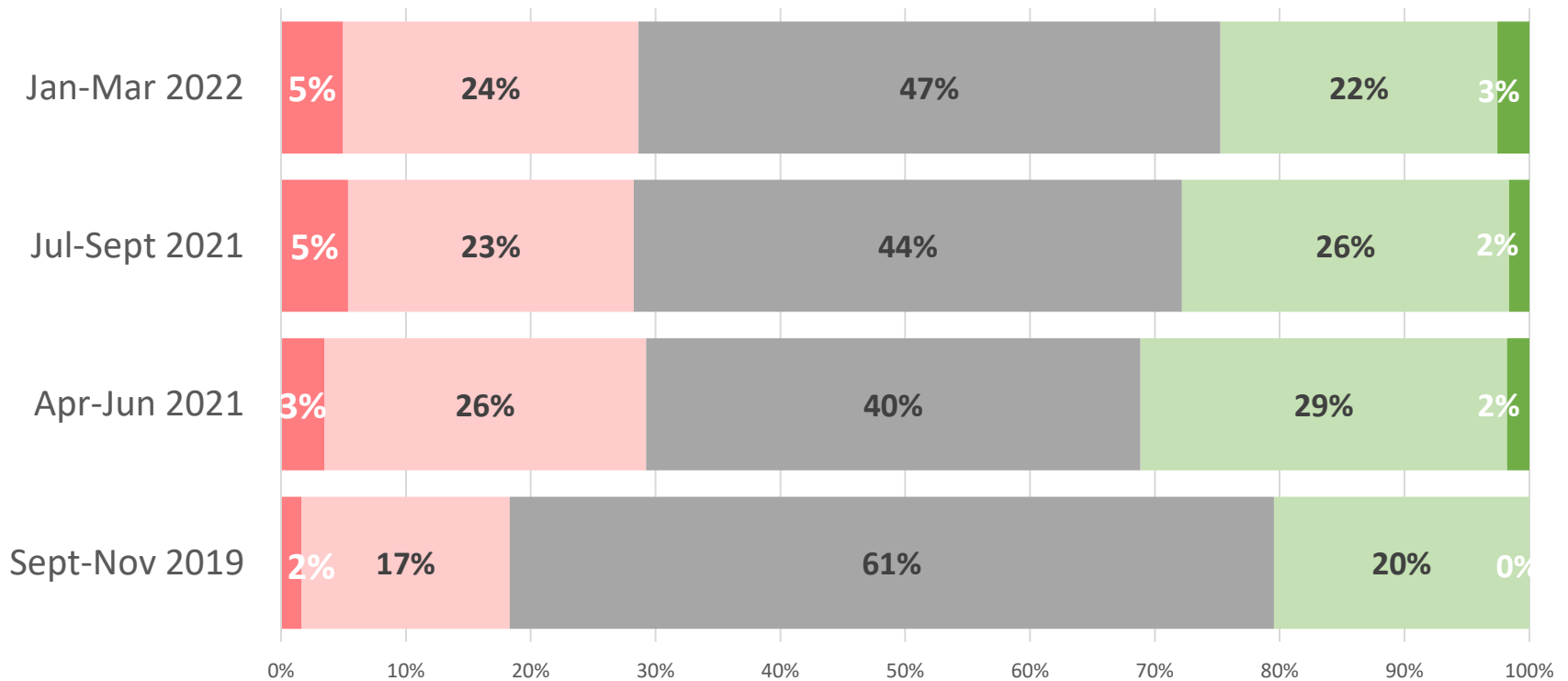
Overall Quality Rating for Care Homes  
Working Age Adults



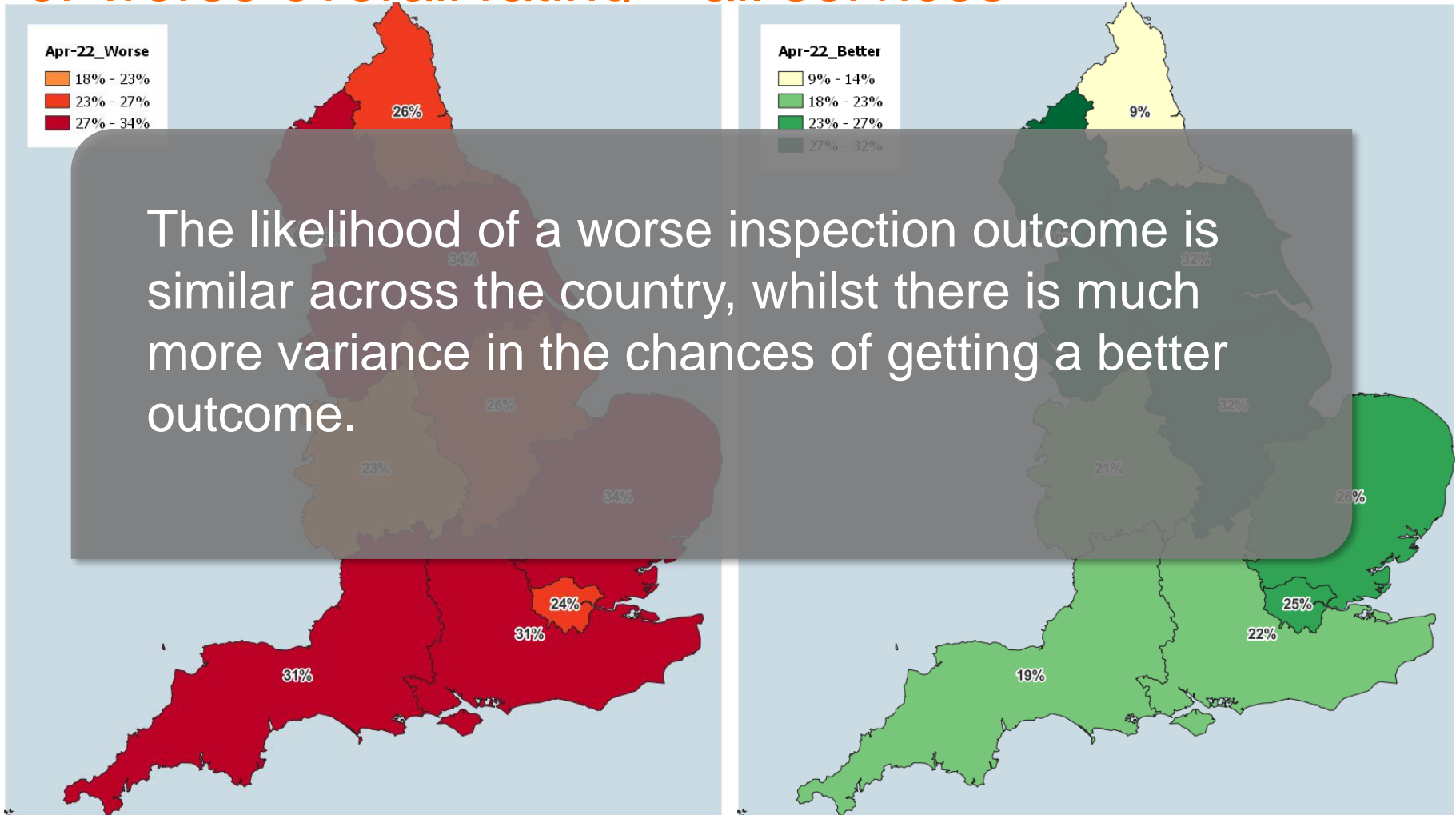
# Rating Change – all care homes

Change in Quality Rating from Previous Inspection  
All Care Homes

■ -3 ■ -2 ■ -1 ■ Same ■ 1 ■ 2



# Percentage of Inspections resulting in a better or worse overall rating – all services



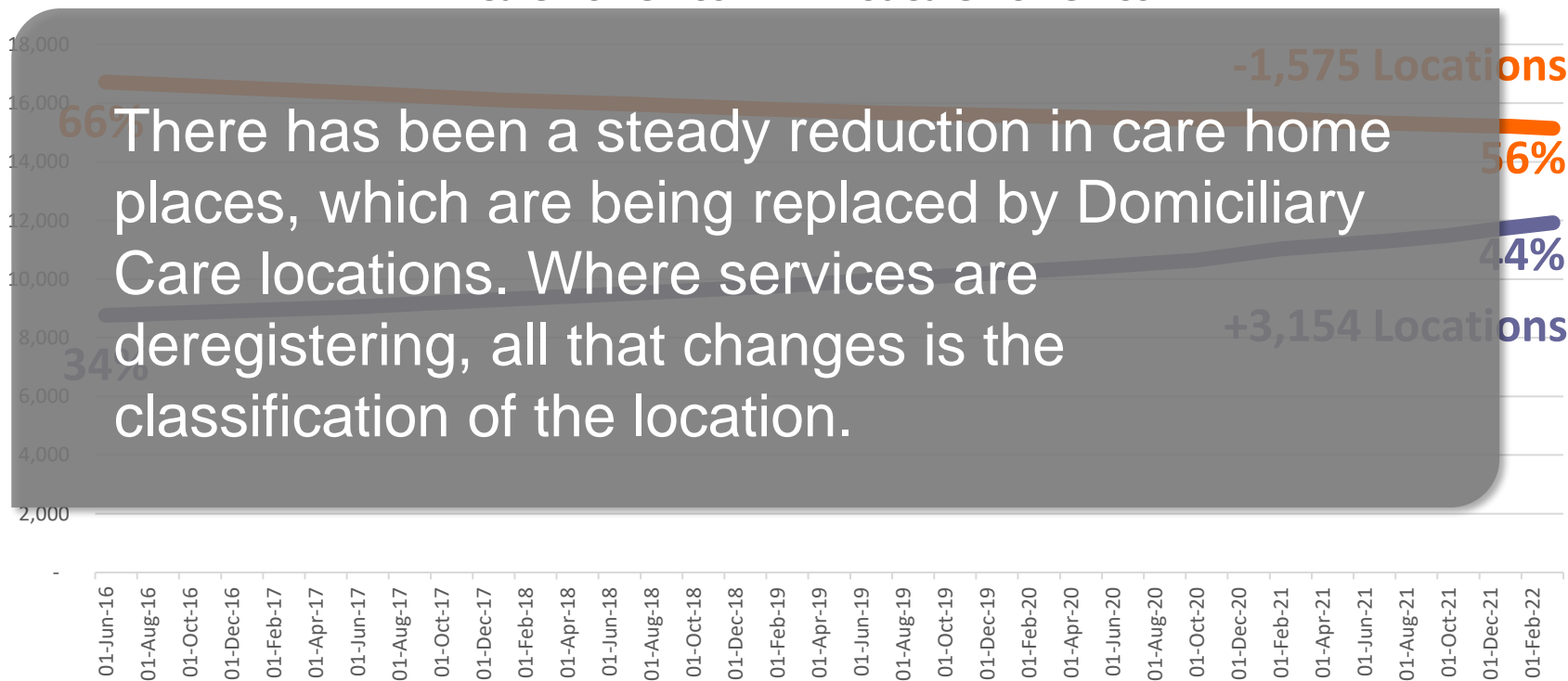
# Changing Care Home Market

- The last 12 months has been difficult for care home providers, particularly older adult care homes which have been faced with a loss of residents due to Covid-19 outbreaks and a large drop-off in referrals from local authorities and self-funding residents.
- Various authorities have reported home closures, but there are little hard data.
- We have used the CQC Directory of Registered Services from 2016 to 2022 to look at what is happening to registered services
- We have looked care homes and domiciliary care services (which includes supported living, extra care, home care and shared lives services)

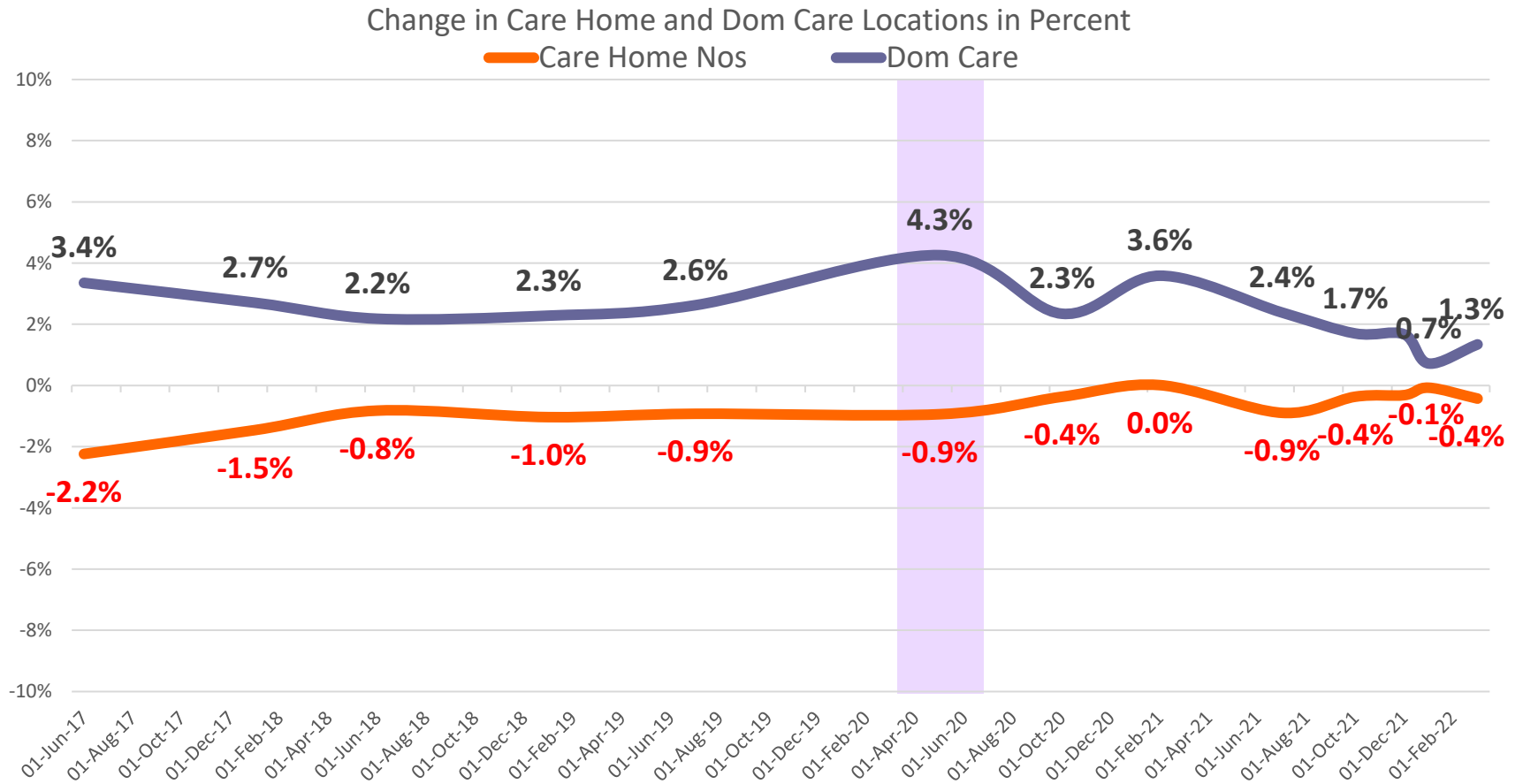
# Location Type Change

Care Home / Dom Care Split - 2016-22  
 Number of Locations and Percentage of All Locations

Care Home Nos    Not Care Home Nos

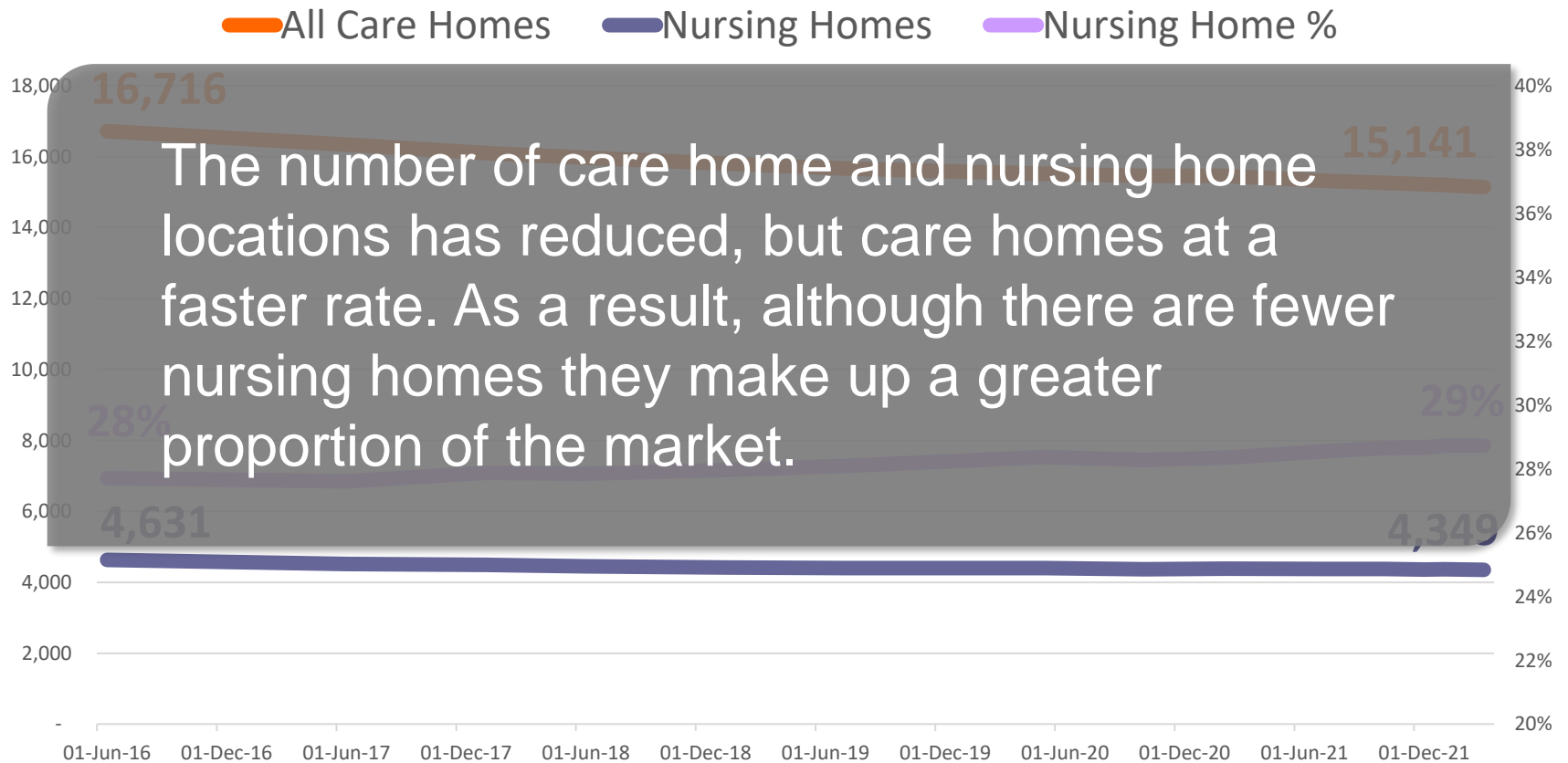


# Rate of Change



# Care Homes and Care Homes with Nursing Homes

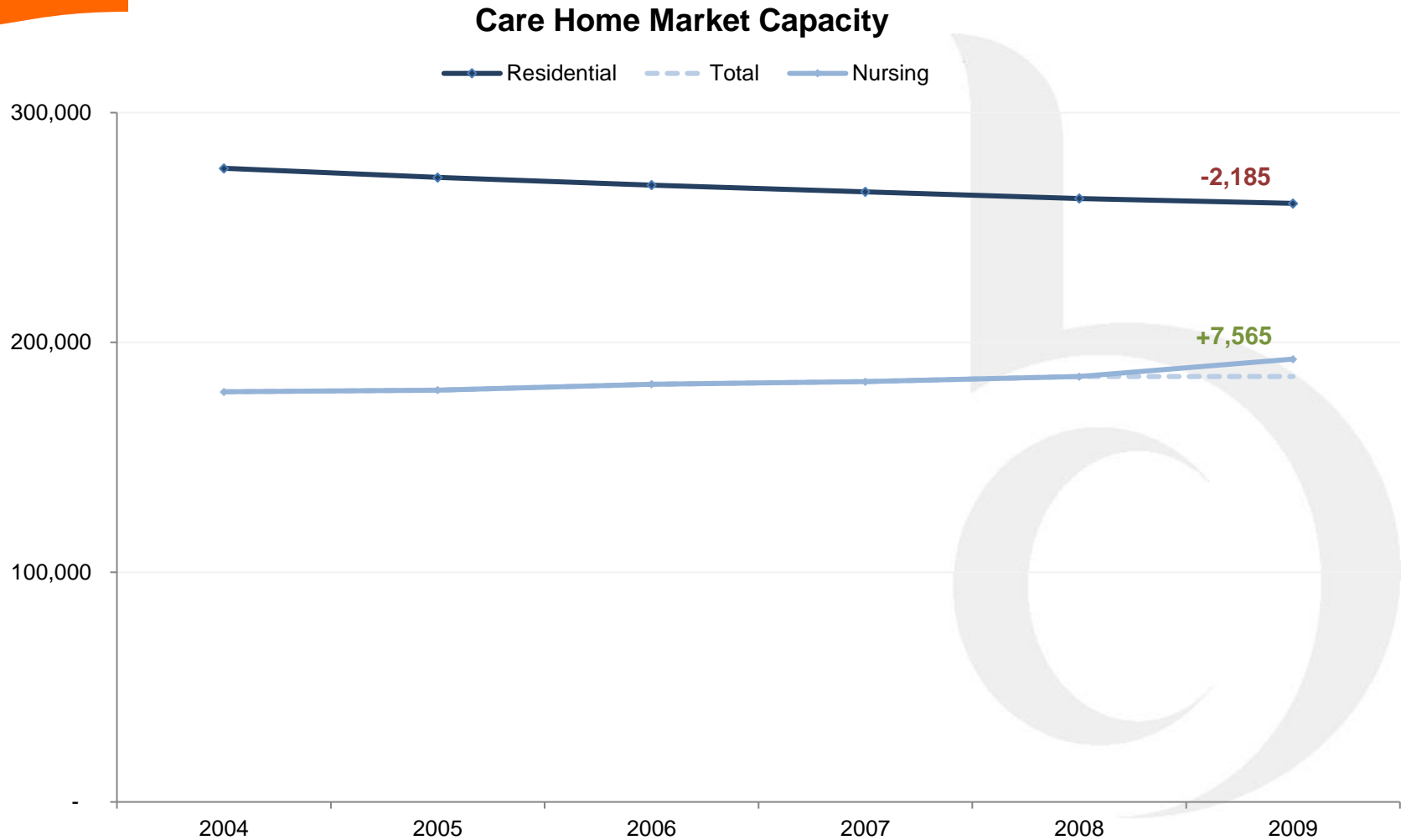
Nursing Homes as a Percentage of All Care Home Locations





# Care Home Market 2004-2009

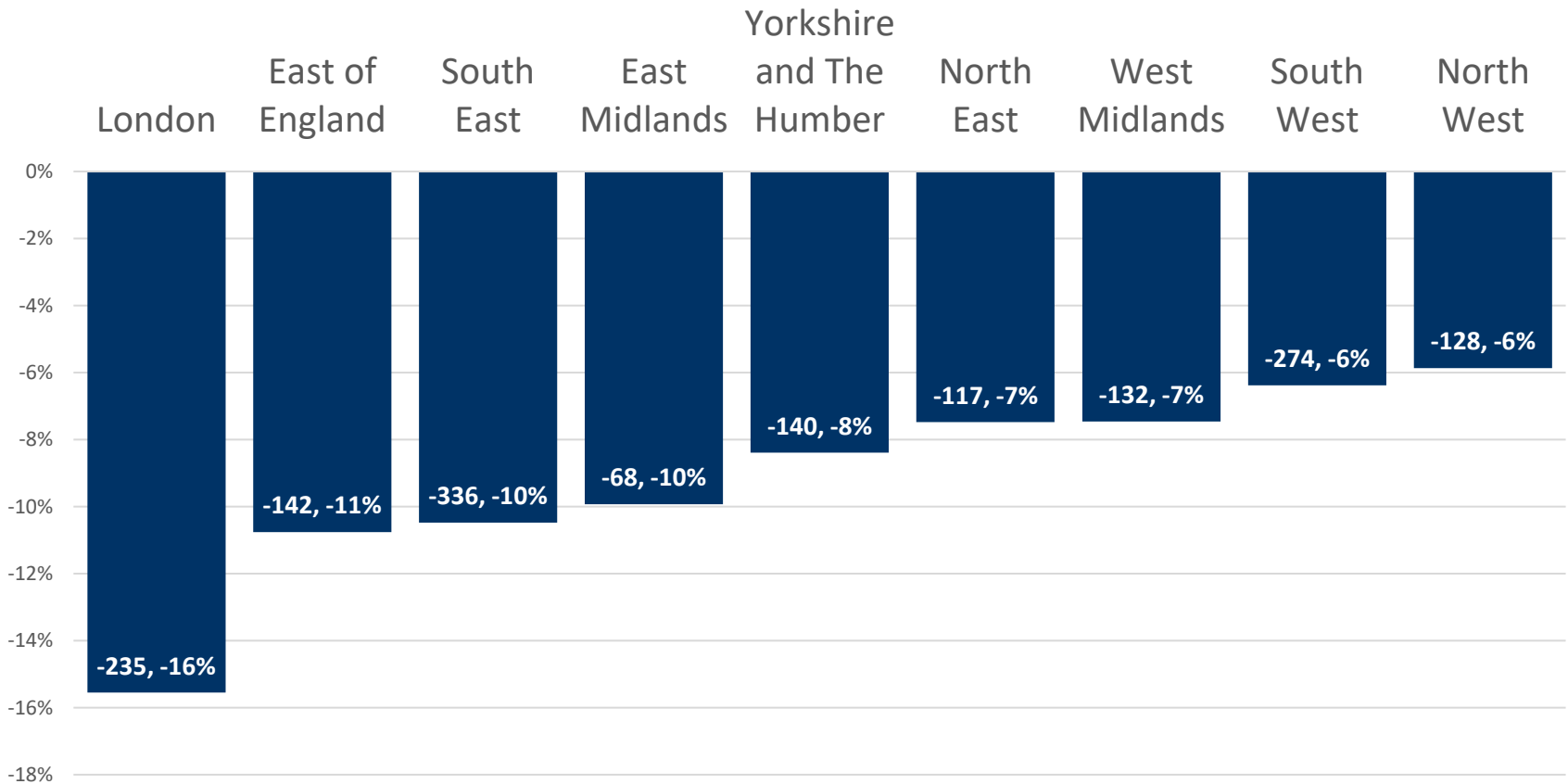
Extract



Source: Social Care Briefing January 2010

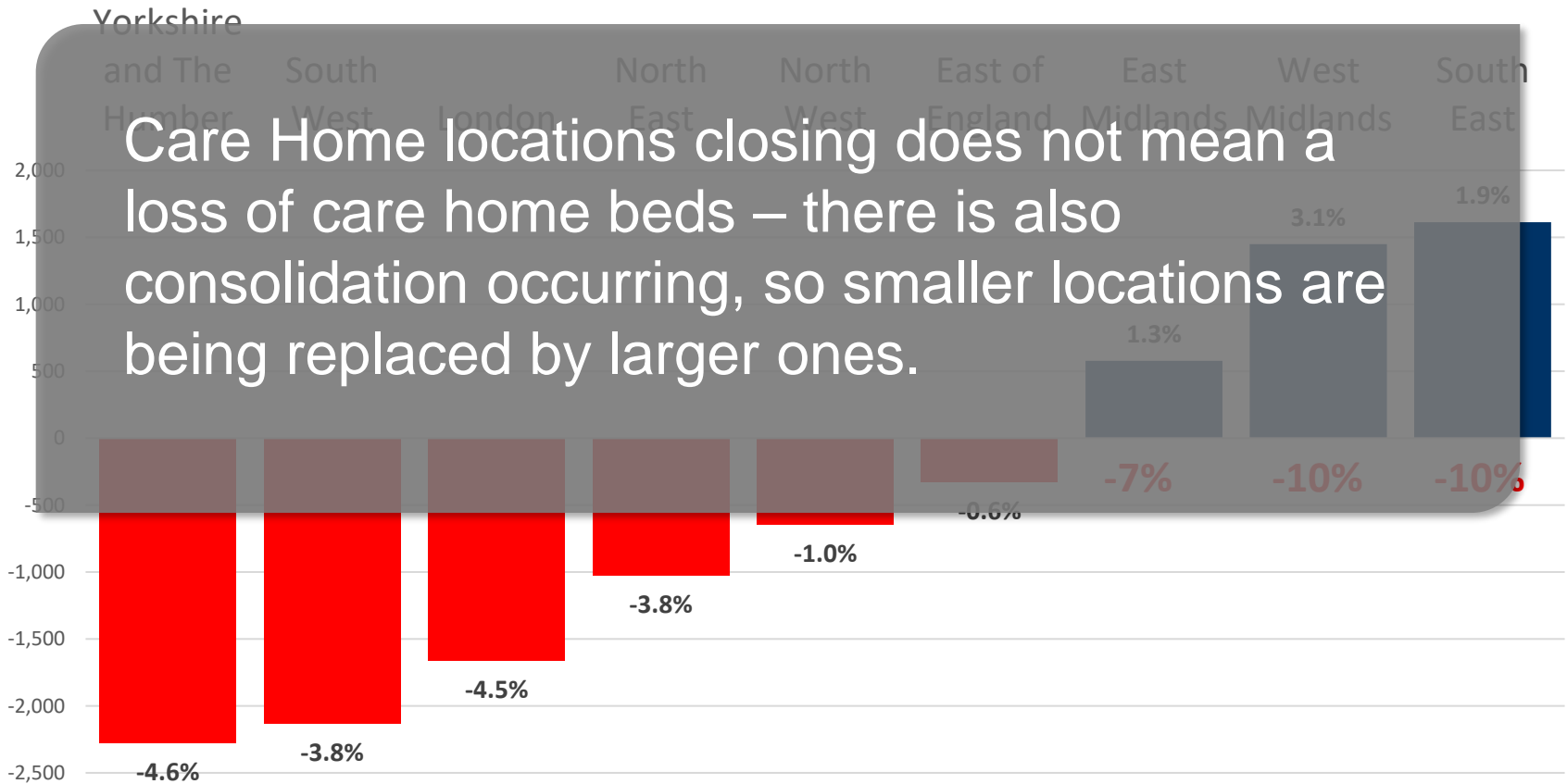
# Change in Care Homes by Region

Change in Care Homes as a Percent of All Locations, 2016-22 (Number of locations)



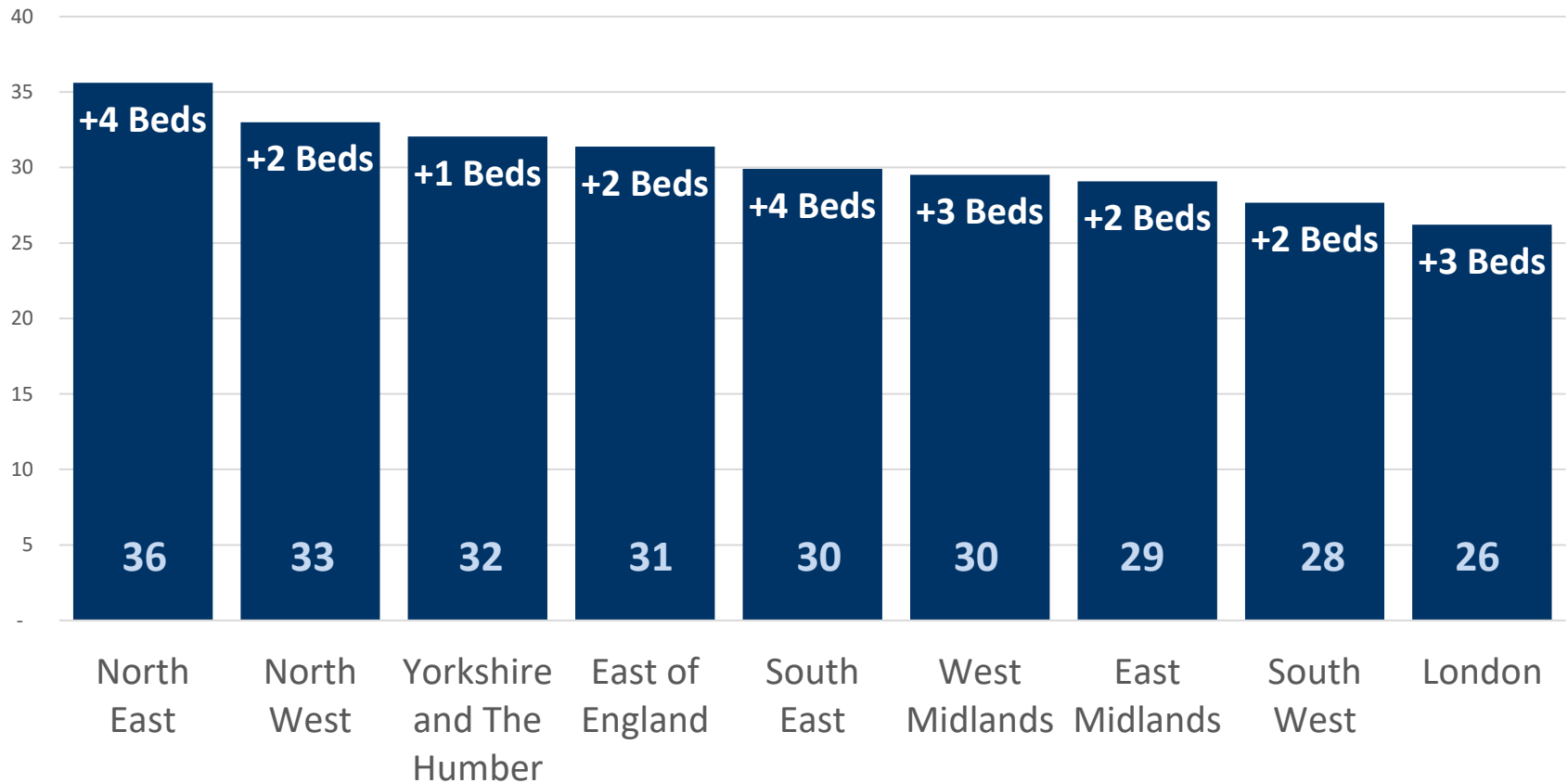
# Change in Care Home Beds by Region

Change in number of care home beds 2016-2022



# Average Number of Beds Per Location

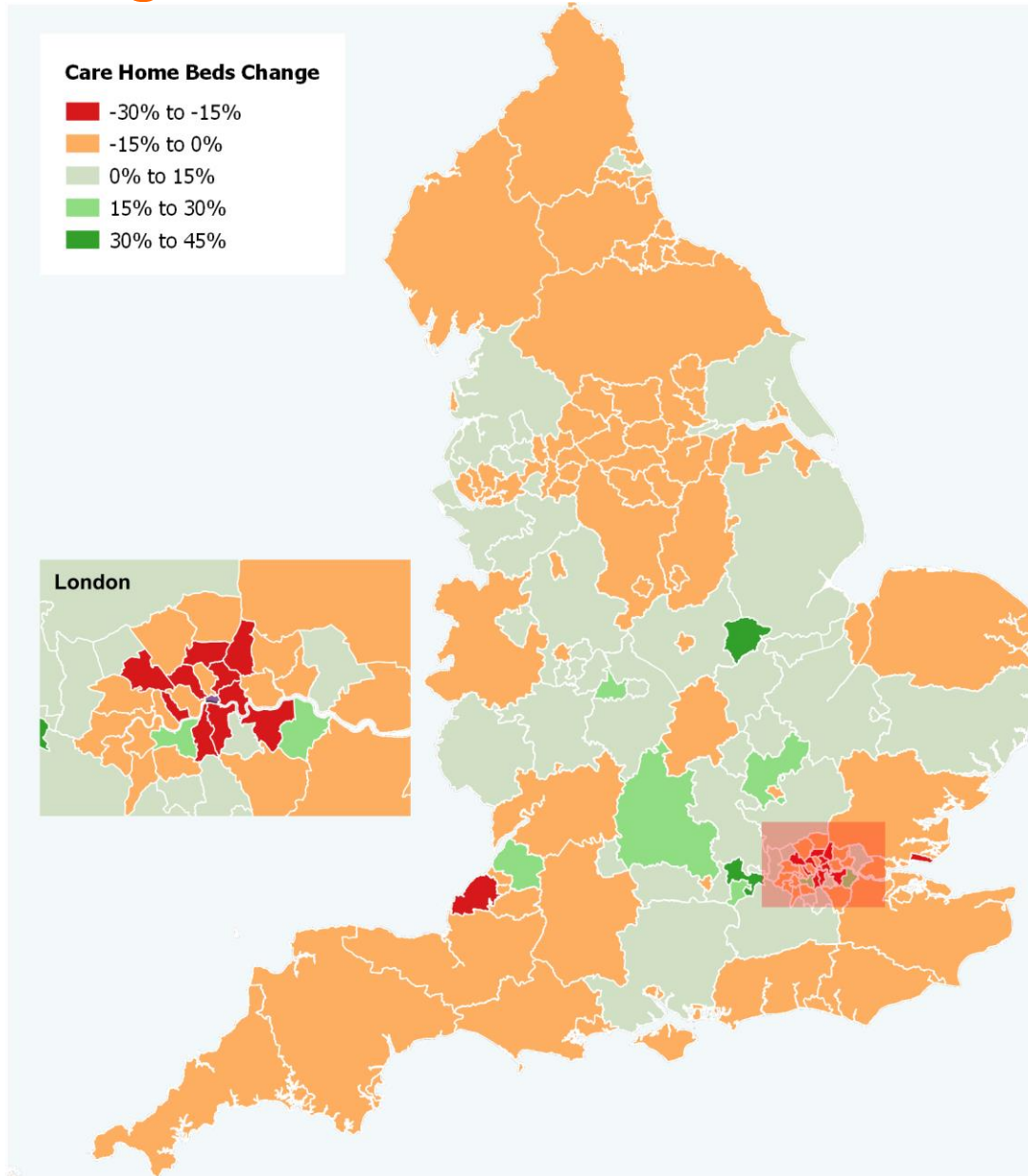
Beds per Care Home Location, April 2022 (change since 2016)



# Beds Change – Local Authorities



Extract



# Beds Change Local Authorities

Local Authority	Reduction
Haringey	-30%
Waltham Forest	-28%
Camden	-23%
Greenwich	-22%
Southwark	-21%
Kensington and Chelsea	-18%
Southend-on-Sea	-16%
Hackney	-16%
Tower Hamlets	-16%
North Somerset	-15%
Lambeth	-15%
Brent	-15%

# Locations by Client Group %

Percentage of all location types that include specific client groups in their registration

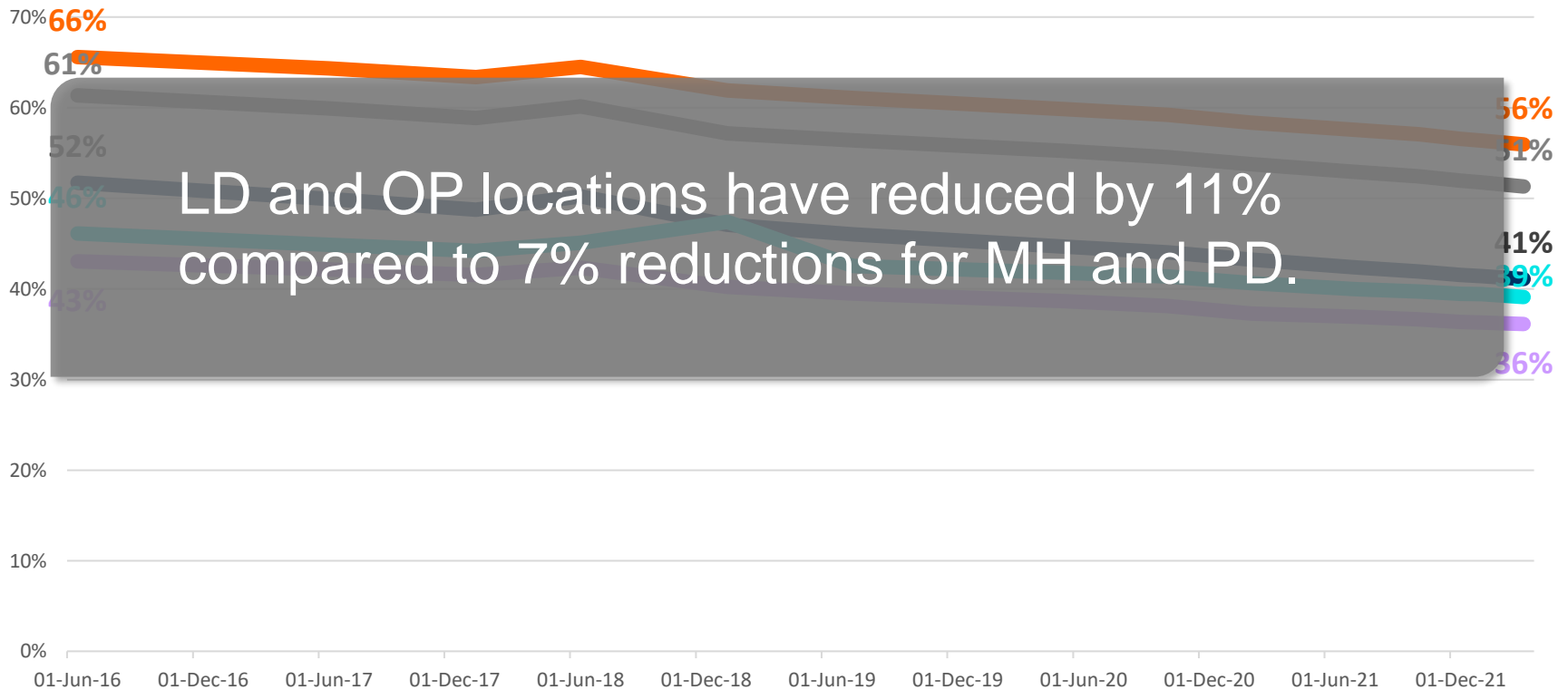
LD % OP % MH % PD %



# Care Home Percent by Client Group

Care Home Locations as a percentage of all locations by client group registration

Locations LD OP MH PD

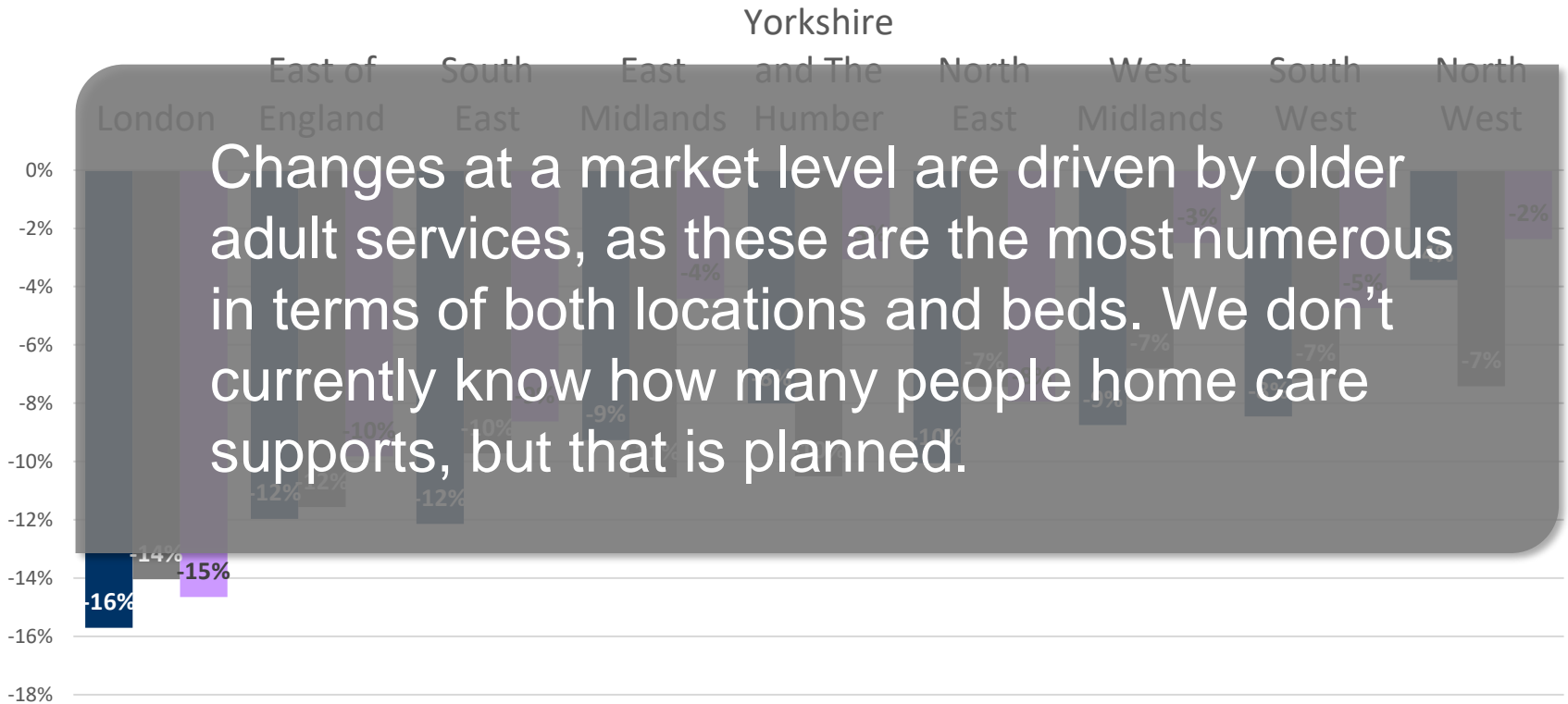




# Care Home Reductions by Region and Client Group

Reduction in Care Homes as a percentage of all locations by region and client group

■ LD ■ OP ■ MH



# The Changing Landscape

- A risk-based inspection process means that inspections are likely to be less frequent, but when you do get one, it is more likely to result in change.
- If it is a working age adult service, the most frequent outcome is a downgrading of the service, but that might change over time and it is likely that the outcomes of inspections will be similar for all services, with around 50% resulting in a change, which could be good or bad.
- The wider market continues the slow decline of care home provision in absolute numbers and in terms of percentages. However, the big wave of care home closures has not happened, and shows no sign of starting yet.
- As the domiciliary care market grows, it becomes increasingly difficult to estimate the size of the market in terms of people supported. That may change.



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