The Industry Insider Series: Health and Social Care Trends

An independent provider survey

Introduction

Between November and December 2009, psHEALTH ran an online survey with providers of health and social care to assess the current trends impacting the growth and provisioning of services.

Providers: 50 companies were contacted. 25 independent sector organisations participated in the survey ranging from large social care providers to specialist providers of healthcare at home.

Of the respondents, approximately 80% were private sector organisations whilst 20% were not for profit. Over 90% had 1,000+ people working for them.

Executive Summary

- Care Homes and Elderly Care represent the majority of service revenue today
- Over 60% of funding comes from the LAs and PCTs
- The highest growth potential comes from outside today's lead revenue services
- Staff retention, compliance and understanding contract profitability are the key areas that could undermine future growth potential
- Although technology is ranked as important in managing SLAs and understanding utilisation, a majority of providers track activities using excel or simple databases
- The biggest factor limiting technology development is NOT board level understanding, but cultural resistance followed by budgetary constraints

Key finding: Growth opportunities NOT in Care Homes and Elderly Care

- **Care at home services have the highest growth opportunities**
  - **Disability / mental health:**
    - Represents 18% of total service revenue
    - Growth potential: 70% of all providers rate Very High & High
  - **Disease management / chronic care:**
    - Represents 7% of total service revenue
    - Growth potential: 70% of all providers rate Very High & High

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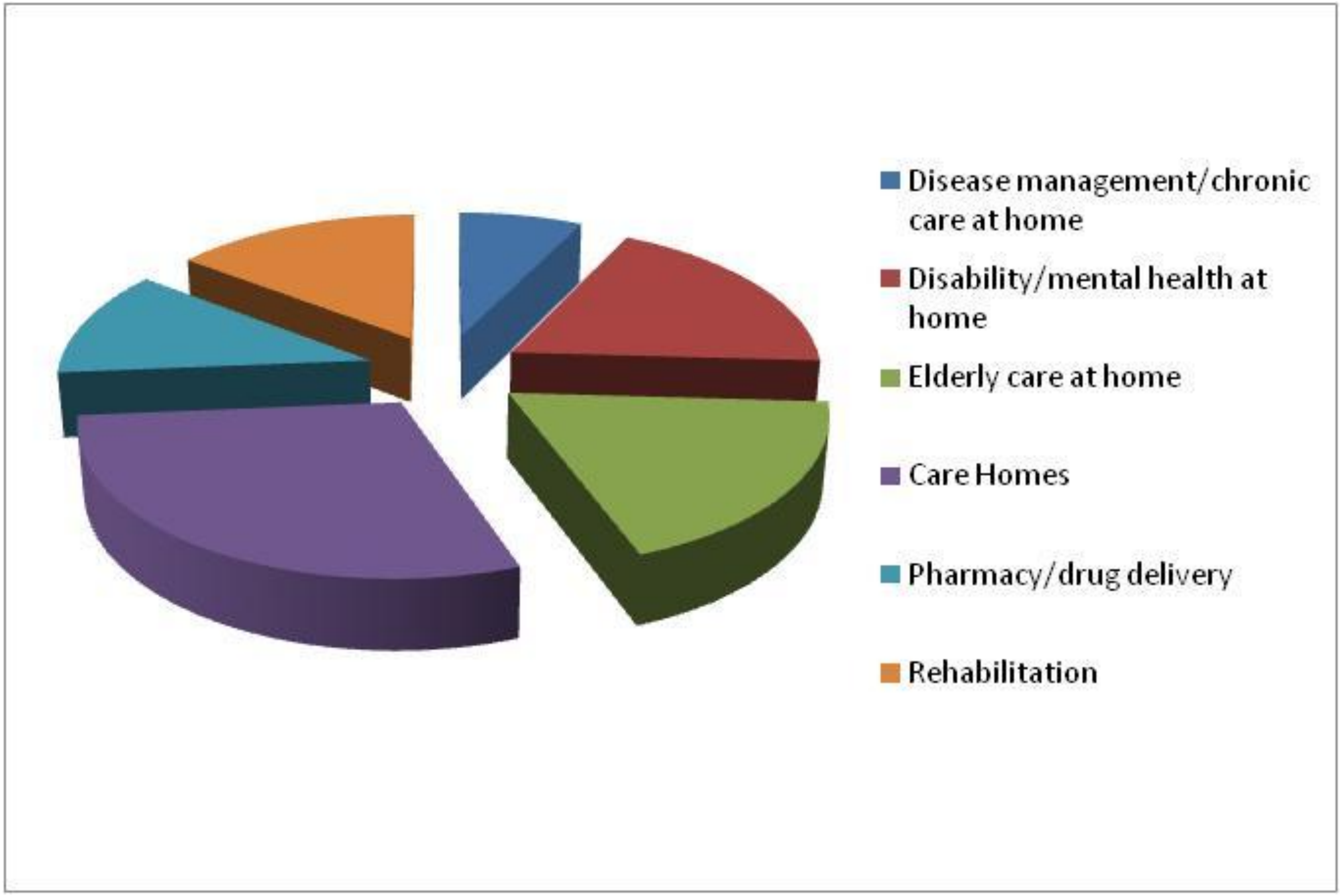
Nearly 50% of revenue comes from Care Homes and Elderly Care

Revenue distribution by service area



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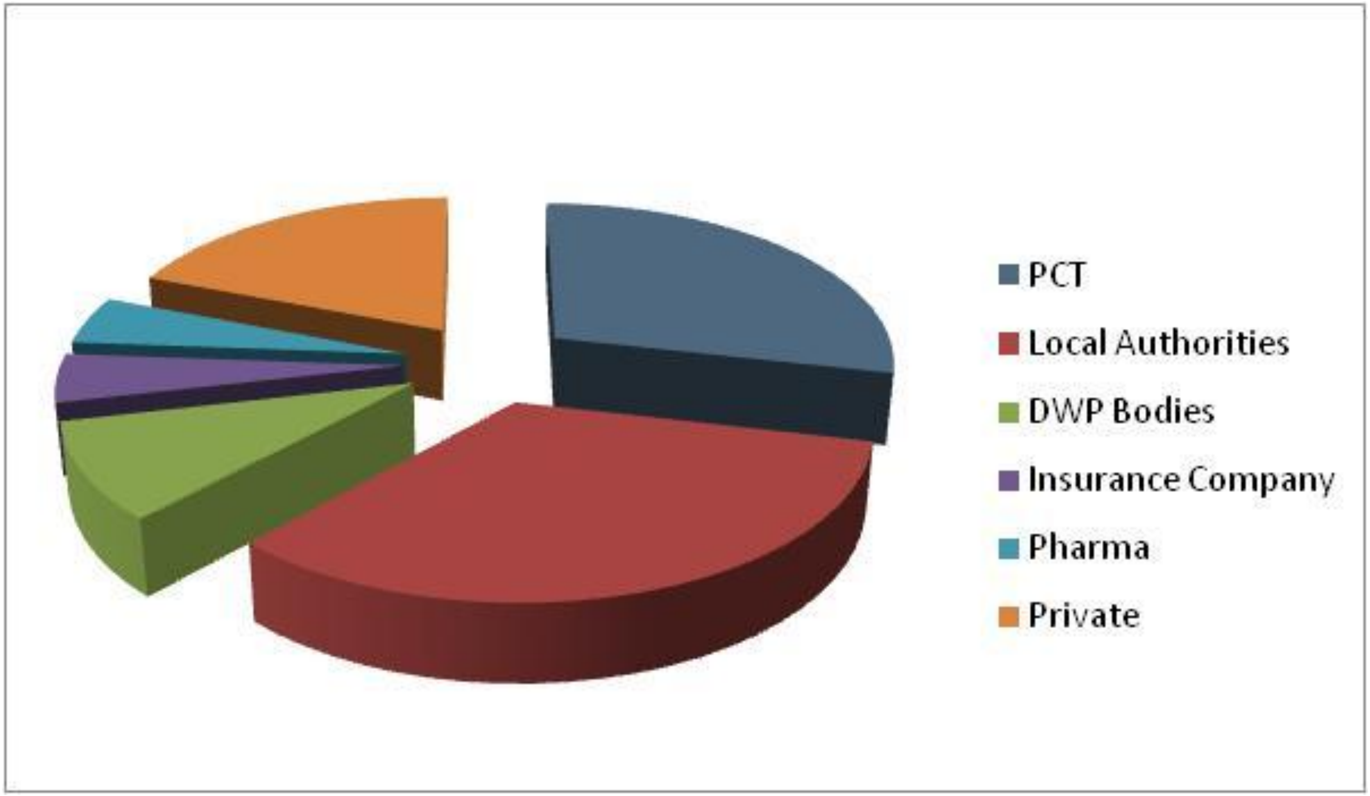
The majority of current funding comes from LAs and PCTs

Revenue distribution by funders



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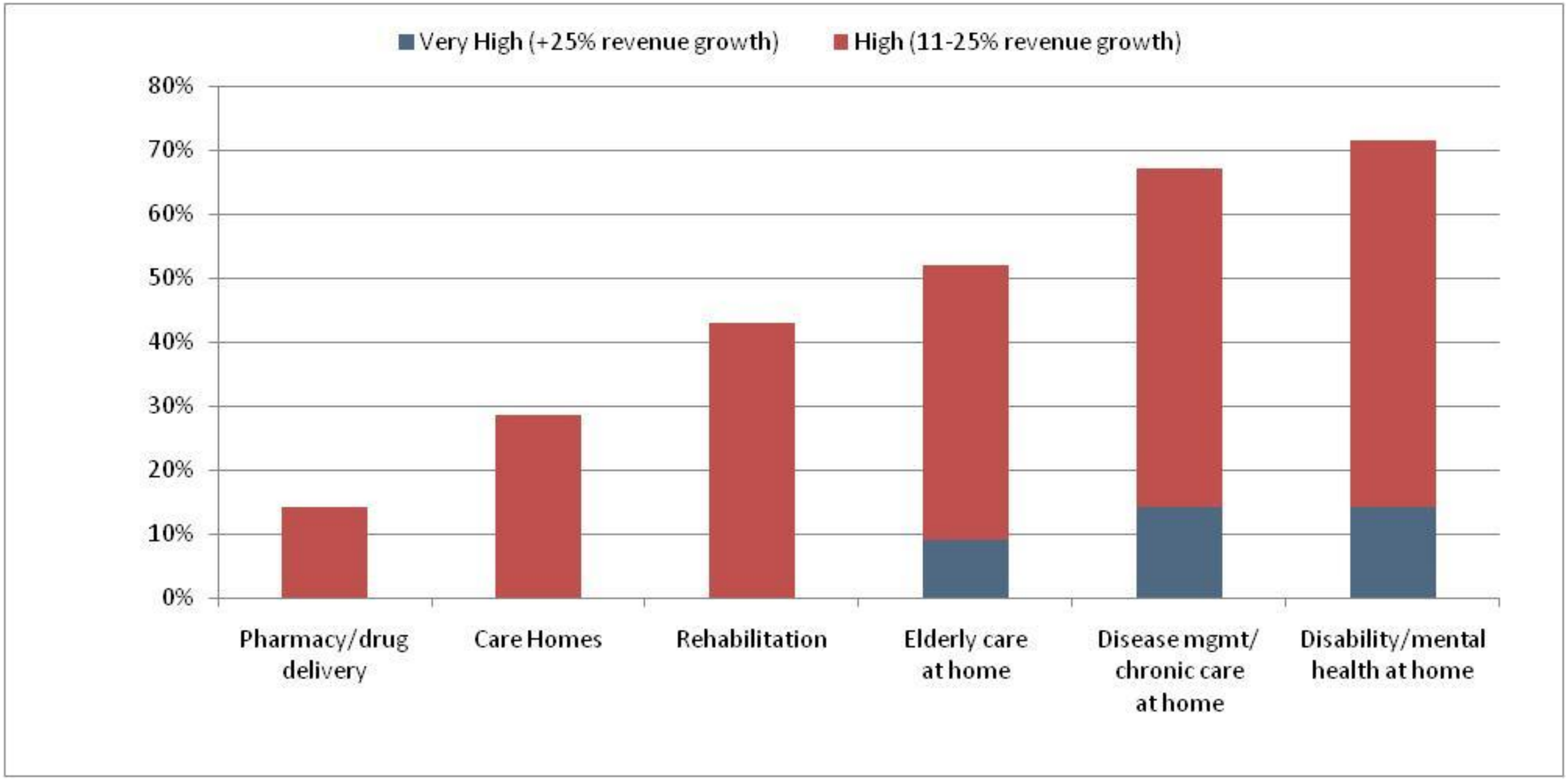
Disability/mental health and disease management services constitute the highest growth areas

Service areas with highest growth opportunities



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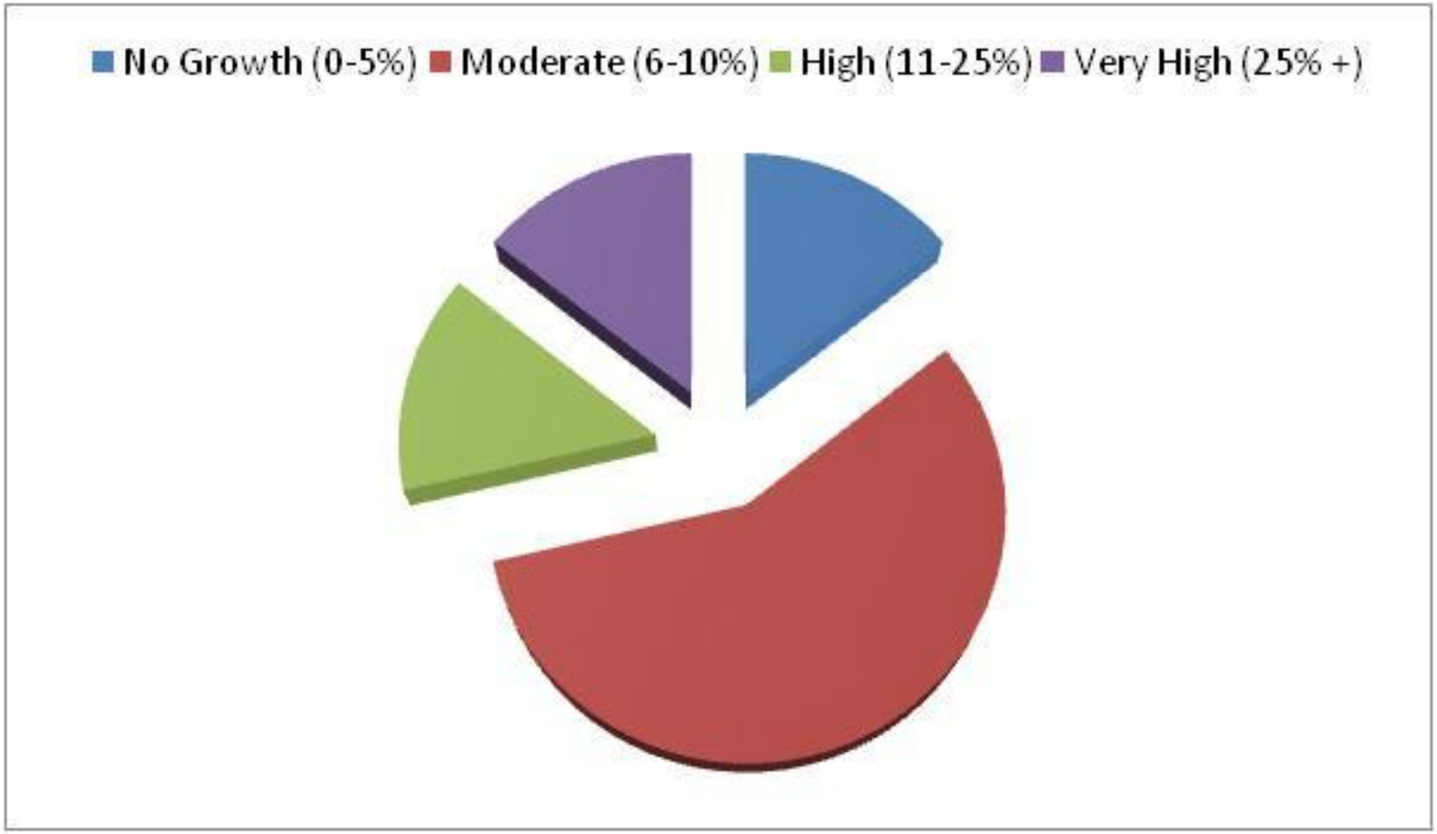
Historical revenue growth not maintainable given economic climate

Year on year revenue growth for last three years



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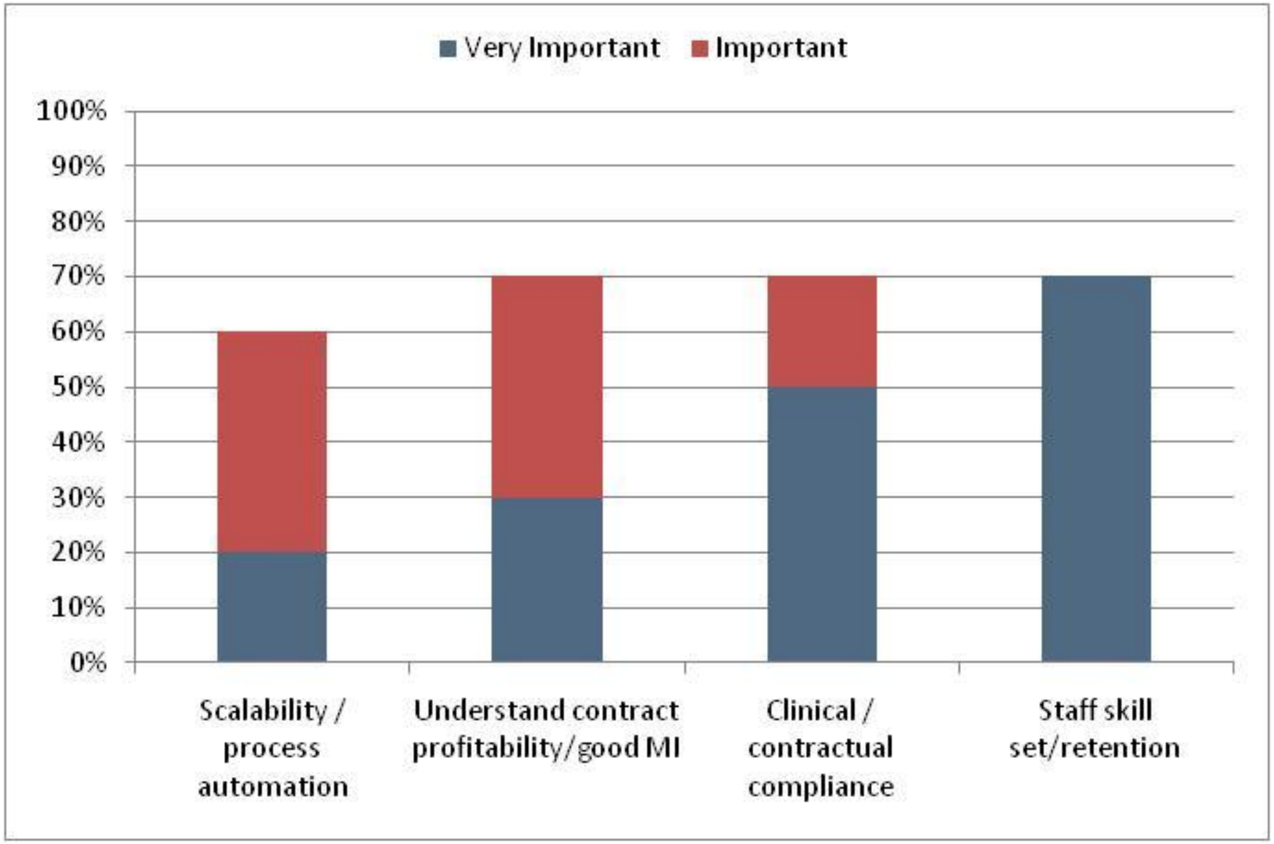
A significant portion of providers rate staff skill set / retention as very important for future ability to grow

Key areas that effect future ability to growth



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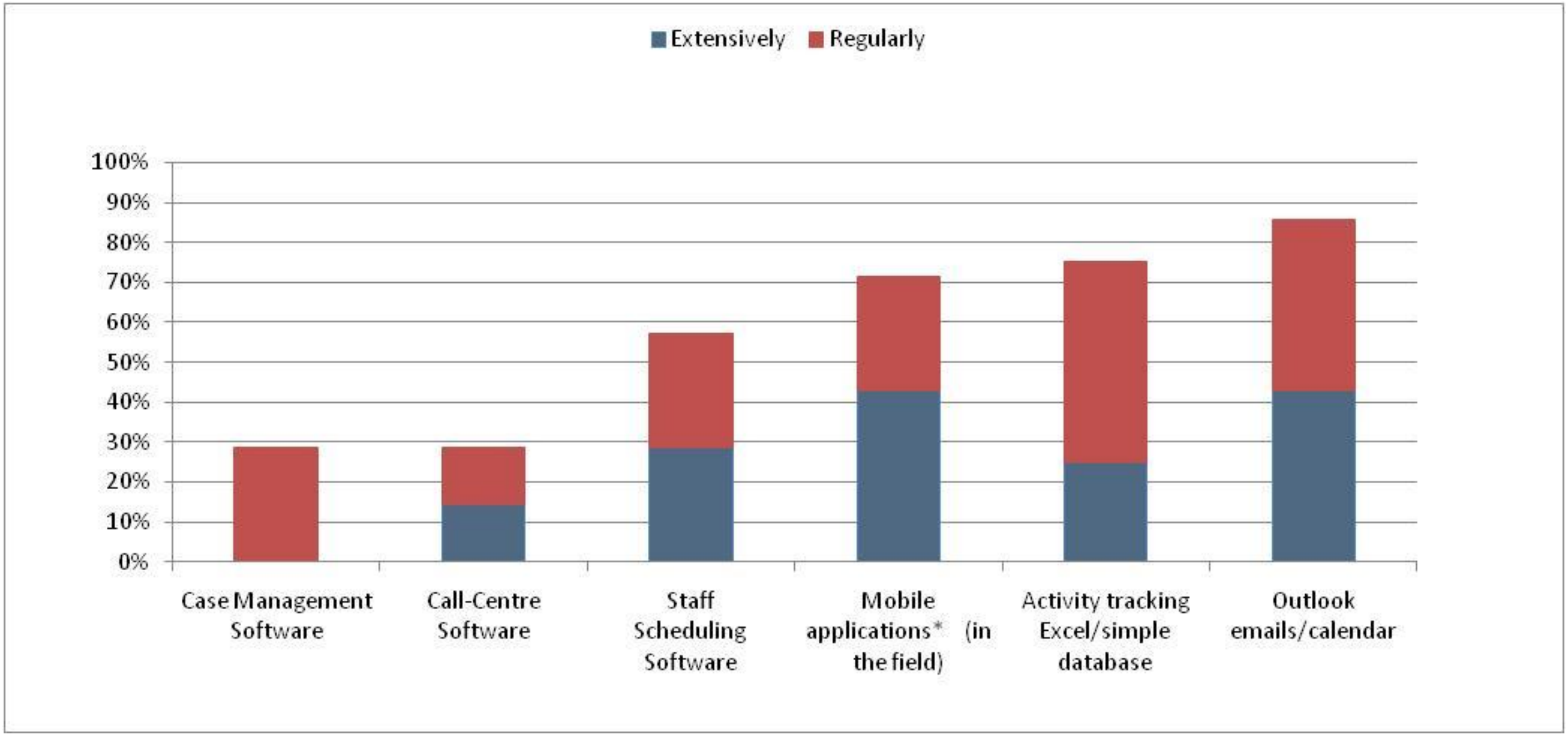
A significant portion of providers track activities using excel or simple database

Use of software



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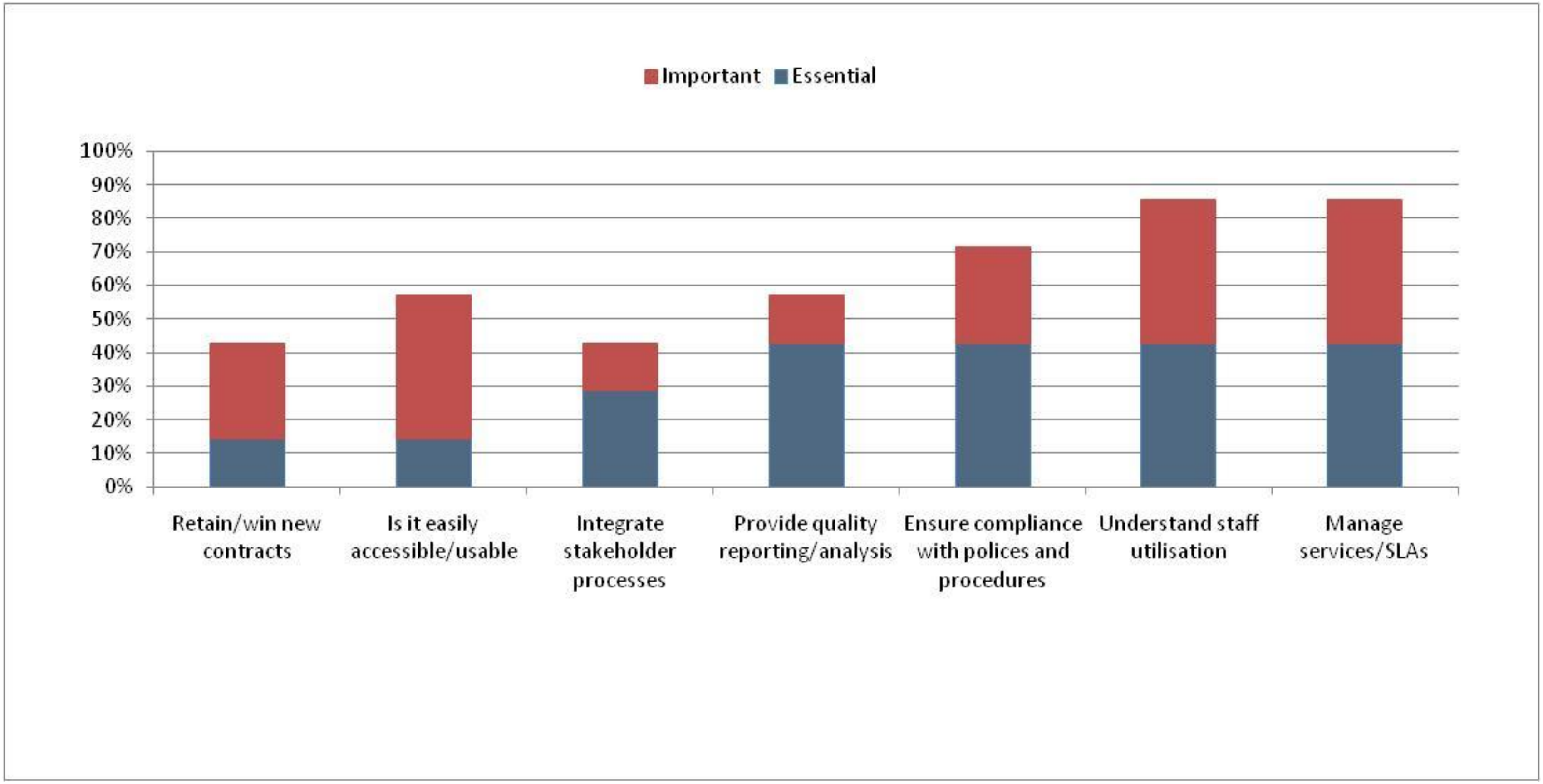
Providers agree that technology is vital in the management of SLAs and understanding staff utilisation

Key technology requirements



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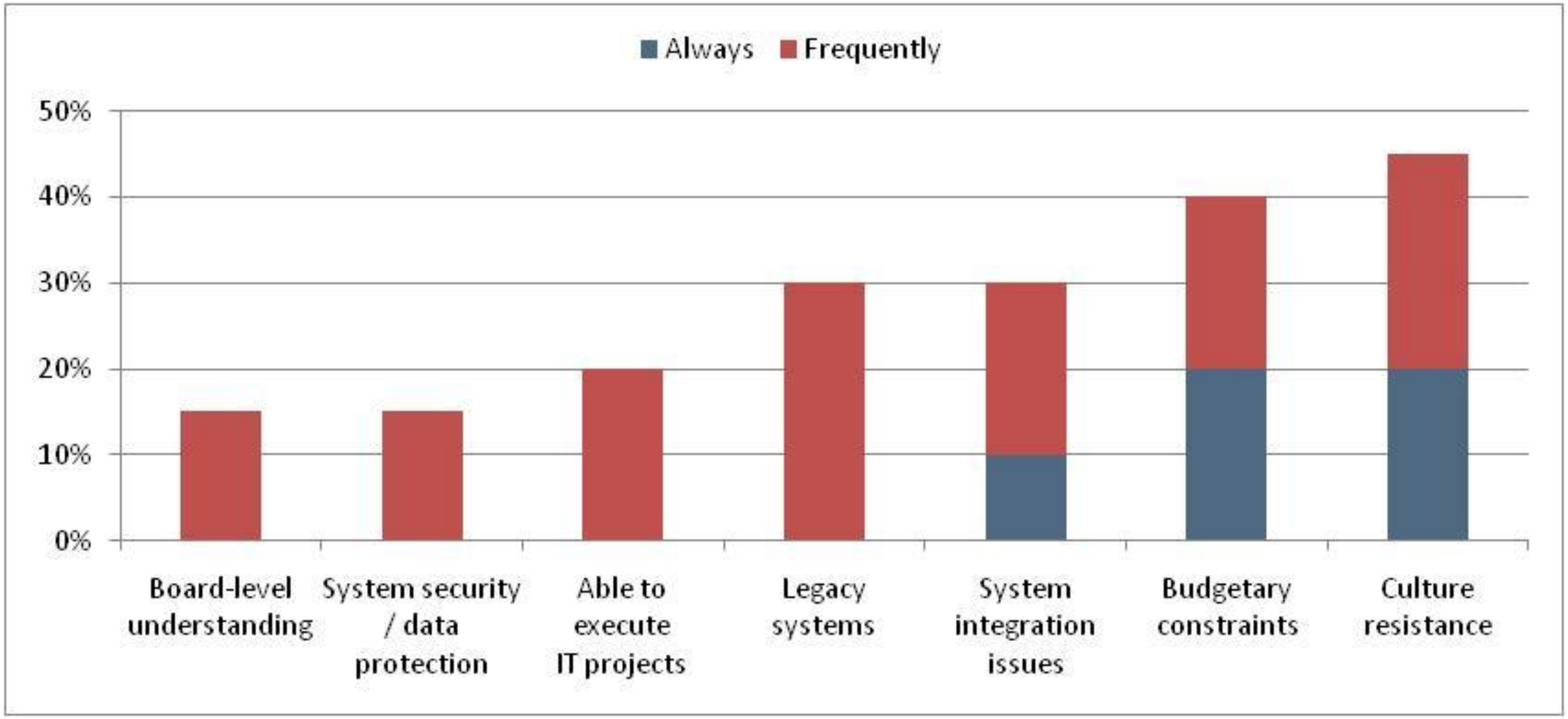
Cultural resistance and budgetary constraints are the most significant factors limiting technology development

Factors that limit further use of technology



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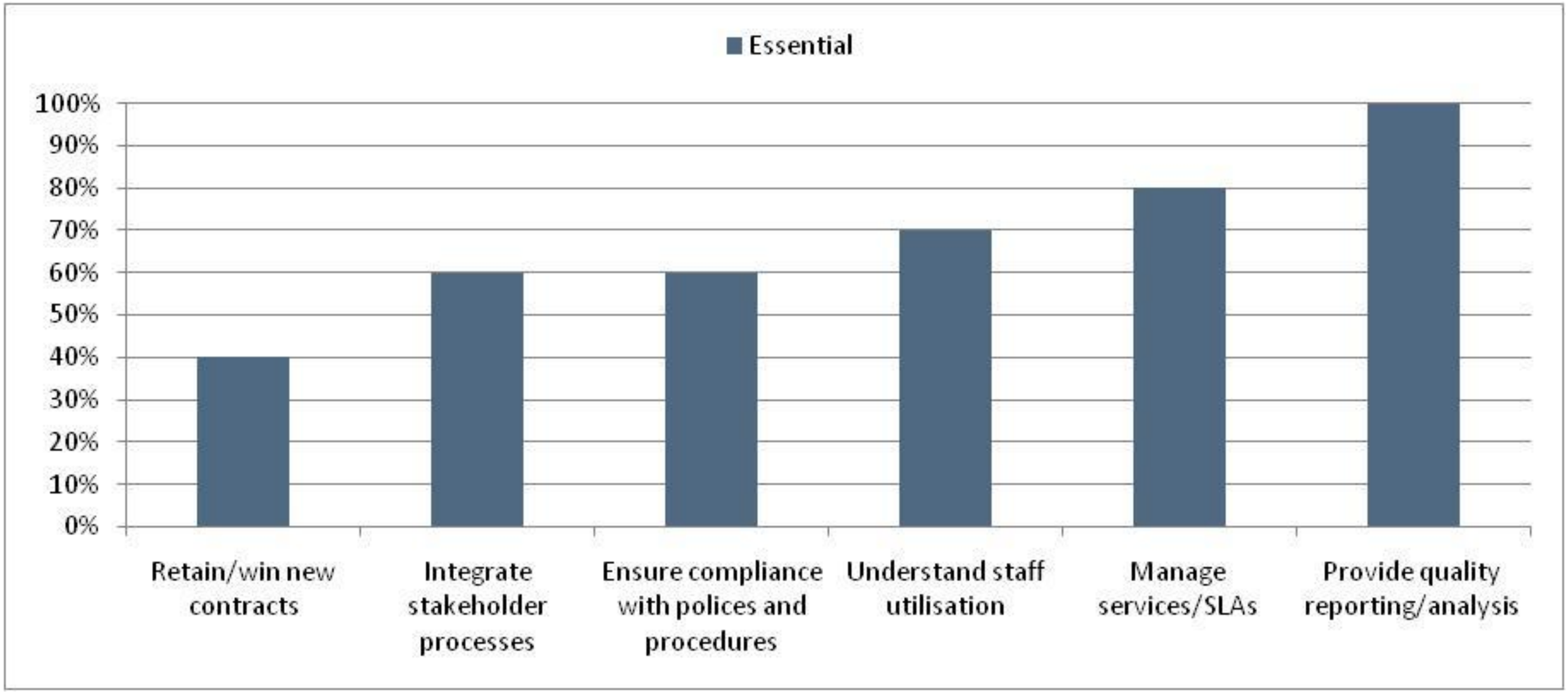
All providers agree technology is essential in providing quality reporting / analysis

Key uses of technology



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Key quotes on health and social care's future

"Scale of movement from hospitals into the Community is going to be without precedent."

David Nicholson, Chief Executive of the NHS

"*To deliver healthcare at home effectively, we are gearing up to support the high clinical intensity that is required. We know this is the future and we are preparing for it*."

Leading provider of Social Care

psHEALTH

This survey was commissioned by psHEALTH, a leading provider of low cost, customised software to health and social care providers in the UK and abroad.

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