

Meeting: Adult Social Care and Health Overview and Scrutiny Sub-Board

Date: 15th January 2026

Wards affected: All

Report Title: Overview of the Adult Social Care Market

When does the decision need to be implemented? Not applicable

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1. Purpose of Report

1.1 The purpose of this report is to provide an overview of the Adult Social Care provider market for 2025, including a focus on skills and workforce. This report is an update on the previous reports for home care dated the 7th of November 2024 and residential and nursing care dated 17th April 2025 and combines the two single reports into one overarching report.

2. Reason for the Proposal and its benefits

2.1 To update Adult Social Care and Health Overview and Scrutiny Sub-Board on the current position in relation to the quality and sufficiency of our care provider market, including any challenges and opportunities.

3. Recommendation(s) / Proposed Decision

That the Overview and Scrutiny Sub-Board note the content of the report.

Supporting Information

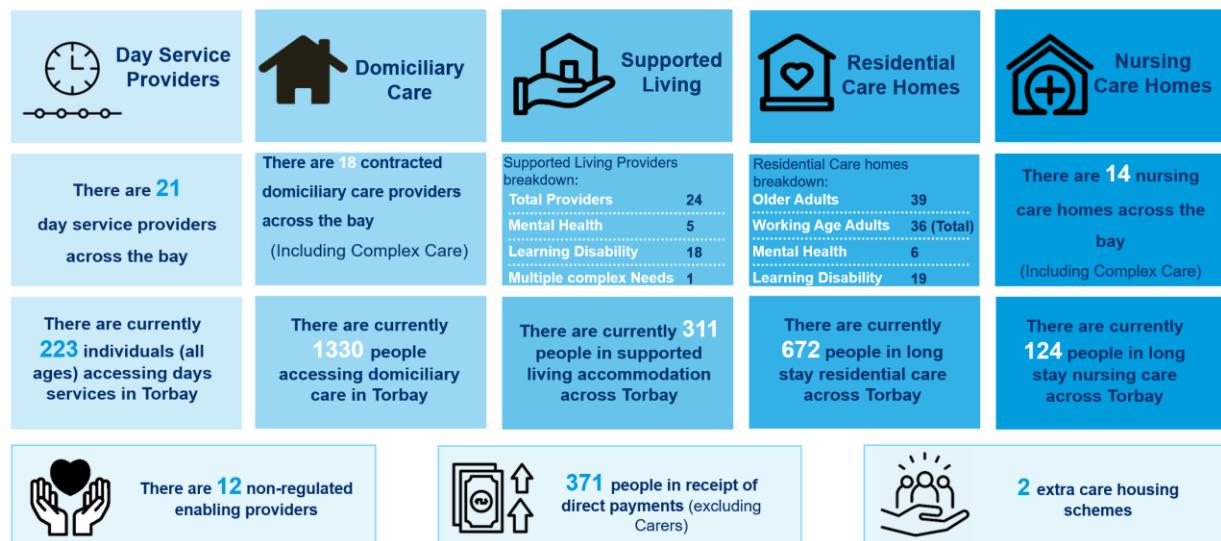
1. Background

1.1 The vision for Adult Social Care in Torbay is for our residents to have a place to call home, in a community they can be part of, while being empowered to achieve what matters most to them through the best care and support available.

1.2 We have a statutory duty to ensure that a range of care and support services are available for those drawing on Adult Social Care. This includes a range of preventative services, but also direct delivery of care through the provision of home care, supported living and residential and nursing care. The aim is to support people to be able to remain living independently in their own home for as long as possible.

The illustration below shows the range and size of the current care market in Torbay:

Torbay Adult Social Care Market



TORBAY COUNCIL

1.3 Overall a number of actions have taken place in relation to the Torbay Adult Social Care provider market in 2025:

- Regular provider forums are back in place across all sectors of the market and diarised through to 2027.
- Groups of our care and support providers were directly involved in the CQC inspection of Adult Social Care and also met with the Casey Commission when they visited us in September.
- A specific reablement service to provide extra support to help people maintain their skills to live independently has been commissioned from the home care sector.
- A replacement care service has been commissioned from the home care sector and is in the process of being commissioned from the residential care sector. This is as a result of responding to direct feedback from carers seeking to be able to have a safe break from their caring responsibilities.
- Working closely with Skills for Care to ensure that our providers are maximising their access to funded training via the Adult Social Care Learning and Development Support Scheme, including funding for Oliver McGowan training.

- Worked with three care home providers to support them through closure, and to ensure all residents were safely moved to new homes. This represented 50 residential beds in Torbay.
- Worked with a number of providers through our provider safety and quality processes to ensure the quality of care was improved. Concerns have included the quality of care, leadership and management and the financial viability of provision.
- Liaised regularly with the local CQC inspection team to share intelligence about providers of concern, and meetings remain ongoing.

1.4 While the market management function in relation to the provider market is carried out within the Integrated Care Organisation, staff from Strategic Commissioning within the Council work closely with the Trust team on provider quality and sustainability and in informing and making commissioning plans for the future.

1.5 We know we need to focus more on market shaping, and refreshing our contract specifications and requirements, so that our provider market is clear on the scale, number and type of care and support services we will need in Torbay in the years ahead to drive our ambition to improve long term outcomes for the people we support. We also know that in some areas of the market we have an oversupply of providers, and that this is contributing to areas of market instability.

1.6 We are in the process of considering our position regarding fee uplifts for 2026/27. We know that providers remain concerned about the cost of providing care, and also the possible costs of new legislation for employers such as the Employment Rights Act

1.7 We also know that some of our providers are more reliant on overseas workers than others and are concerned about the changes to immigration rules and the impact this may have on existing staff, as well as the sustainability of the workforce going forward.

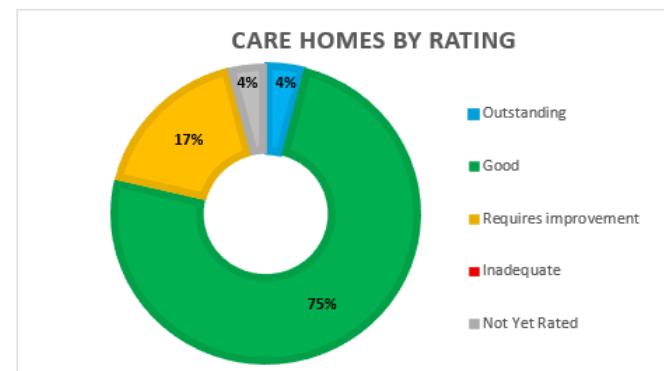
1.8 In terms of our care market, this report will describe each sector in turn, with information about the quality and sufficiency of provision.

Residential and nursing care

1.9 There are 75 residential or nursing care homes in Torbay, with the majority (79%) graded good or outstanding by CQC. The data below is as of the end of October 2025 and shows that 93% of homes were considered to be operating as 'business as usual', with 4 considered of concern. These homes are being closely monitored through our provider care and quality processes which include regular meetings with the providers and visits to the homes by professionals.

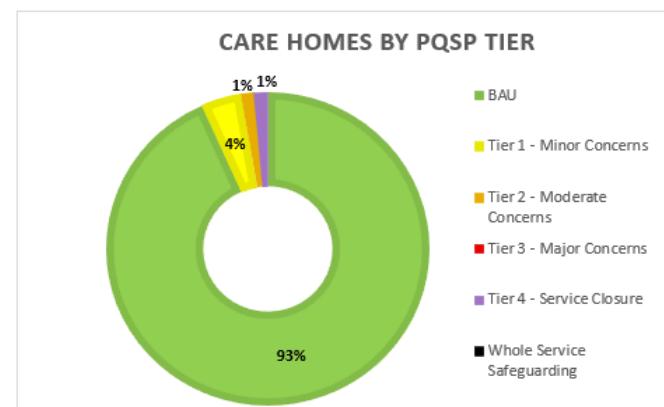
CQC Information

CQC Rating	Number of Homes	% of Homes	CQC Registered Beds
Outstanding	3	4%	73
Good	56	75%	1,464
Requires improvement	13	17%	313
Inadequate	0	0%	0
Not Yet Rated	3	4%	83
Grand Total	75	100%	1,933



Provider Quality Support Protocol (PQSP)

PQSP Tier	Number of Homes	% of Homes	CQC Registered Beds
BAU	70	93%	1,818
Tier 1 - Minor Concerns	3	4%	78
Tier 2 - Moderate Concerns	1	1%	31
Tier 3 - Major Concerns	0	0%	0
Tier 4 - Service Closure	1	1%	6
Whole Service Safeguarding	0	0%	0
Grand Total	75	100%	1,933



1.10 Three care homes closed this year, affecting a total of 50 beds across Torbay. However, all residents were supported to find new homes and the table below shows that in spite of the closures there remains significant capacity (vacant beds) in order to be able to continue to support people needing residential care. There are some difficulties in sourcing care for some people with very complex needs, including dementia, and this continues to be a focus of our future commissioning plans.

Occupancy (Capacity Tracker 17/11/2025) care homes

Home Type	Homes	Maximum Capacity	Vacancies (Total)	Vacancies (Admittable)	Vacancies (Admittable)
Under 65 Residential	26	379	43	35	9%
Over 65 Residential	37	1,054	131	102	10%
Nursing Homes	12	500	76	54	11%
Total					

Supported living

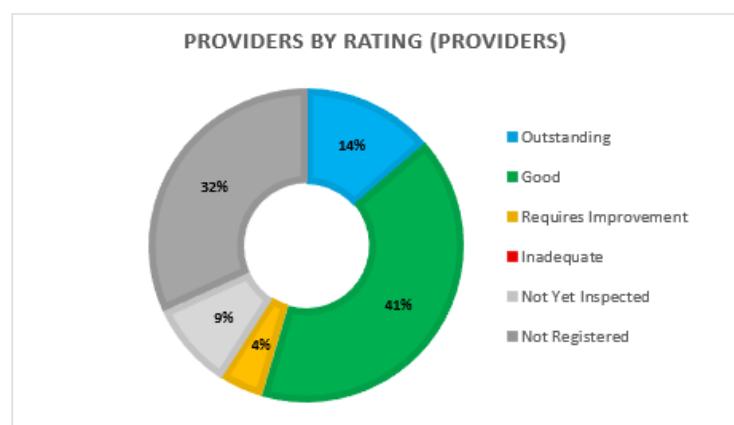
1.11 Supported living has been our area of greatest concern during 2025, both in terms of quality but also in terms of sustainability of provision. The information below is as of the end of October 2025, but in December one provider has been downgraded by CQC from good to inadequate, meaning that just over 50% of current providers are considered to be good or outstanding. Several supported living providers deliver services which do not require them

to be registered with CQC, and this means that we have to ensure that we monitor them closely for any issues of concern.

- 1.12 The provider who has been graded inadequate is part of a whole service safeguarding process, to ensure that improvements are made.
- 1.13 in terms of wider activity, one supported living provider closed during the period, affecting 5 beds, with Trust and Council staff working closely with the provider to ensure that the residents were fully supported.
- 1.14 We will be working closely with our supported living providers around the introduction of the Supported Housing Oversight (Regulatory Oversight) Act to ensure that they are prepared for the introduction of new quality and licensing standards.
- 1.15 We will continue to work with providers to develop new provision, including where we currently can struggle to place those with more complex needs or mental health challenges.

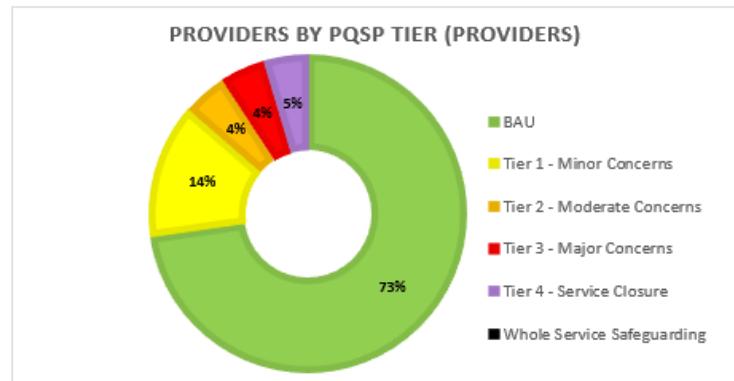
CQC Information

CQC Rating	Number of Providers	% of Providers	Beds
Outstanding	3	14%	20
Good	9	41%	205
Requires Improvement	1	5%	4
Inadequate	0	0%	0
Not Yet Inspected	2	9%	110
Not Registered	7	32%	78
Grand Total	22	100%	417



SL Provider Quality Support Protocol (PQSP)

PQSP Tier	Number of Providers	% of Providers	Beds
BAU	16	73%	316
Tier 1 - Minor Concerns	3	14%	27
Tier 2 - Moderate Concerns	1	5%	54
Tier 3 - Major Concerns	1	5%	11
Tier 4 - Service Closure	1	5%	9
Whole Service Safeguarding	0	0%	0
Grand Total	22	100%	417



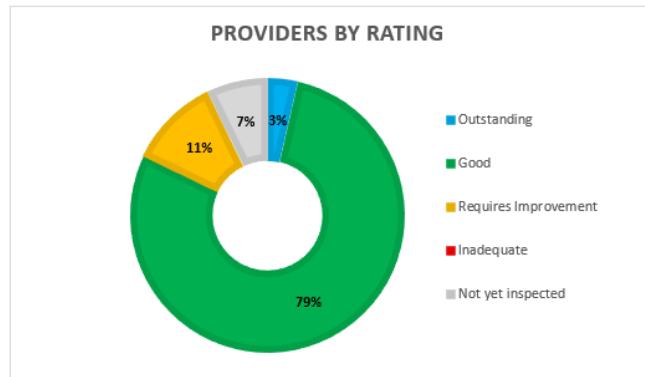
Home care

- 1.16 Homecare or domiciliary care in Torbay is contracted via the Living Well at Home contract with approximately 18 providers and around 10 other providers used occasionally on a spot purchase basis. Waiting lists for homecare support continue to be low, with good capacity in the market; there are consistently between 10 and 20 people waiting for either new support or a change of support at any one time and this is tracked and reported daily.
- 1.17 83% of providers are graded good or outstanding and there have been no significant quality issues with homecare providers in 2025.

1.18 The current contract ends in March 2028, and work will shortly begin to plan for the future contract specification and requirements.

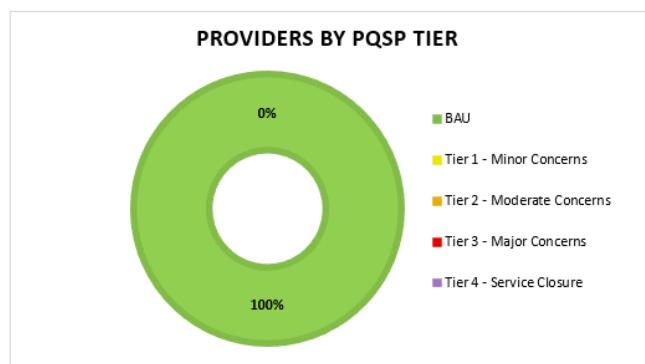
CQC Information

CQC Rating	Framework	Non-Framework	Total Providers	% of Providers
Outstanding	1	0	1	4%
Good	14	8	22	79%
Requires Improvement	2	1	3	11%
Inadequate	0	0	0	0%
Not yet inspected	1	1	2	7%
Grand Total	18	10	28	100%



Provider Quality Support Protocol (PQSP)

PQSP Tier	Framework	Non-Framework	Total Providers	% of Providers
BAU	18	10	28	100%
Tier 1 - Minor Concerns	0	0	0	0%
Tier 2 - Moderate Concerns	0	0	0	0%
Tier 3 - Major Concerns	0	0	0	0%
Tier 4 - Service Closure	0	0	0	0%
Grand Total	18	10	28	100%



Adult Social Care workforce

1.19 All data is from Skills for Care and relates to 2024/25. The data will next be updated in October 2026 and relate to 2025/26.

1.20 The total number of Adult Social Care posts in Torbay was around 5,400 in 2024/25. This included 5,100 filled posts and 275 vacant posts across all sectors. Since the previous year, the total number of posts has increased by 375 (7.5%), the number of filled posts has increased by 375 (7.6%) and the number of vacancies were similar. The vacancy rate in Torbay is estimated at 4.7%, which was lower than the regional average of 6.4% and lower than England at 6.8%.

1.21 Skills for Care estimates that the staff turnover rate in Torbay was 30.4%, which was higher than the regional average of 25.1% and higher than England at 23.7%. It is important to note that not all turnover results in workers leaving the sector, around half (46%) of starters were recruited from within the adult social care sector, and we know that staff also leave to work in health-related roles within the NHS.

1.22 Workers in Torbay had on average 8.8 years of experience in the sector and 67% of the workforce had been working in the sector for at least three years. The majority (74%) of the workforce in Torbay were female, and the average age was 42.6 years old. Workers aged under 25 made up 9% of the workforce and workers aged 55 and above represented 25%. Given this age profile approximately 1,100 posts will be reaching retirement age in the next 10 years.

1.23 Across England 69% of the workforce identified as British, while in the Southwest region this was 72%. An estimated 72% of the workforce in Torbay identified as British, 23%

identified as a non-EU nationality and 5% identified as an EU nationality, therefore there was a higher reliance on non-EU than EU workers.

- 1.24 We have actively encouraged our providers to sign up to the Adult Social Care Workforce Dataset, which enables key workforce data to be shared with national, regional and local decision-makers so they can understand and evidence trends, opportunities and areas of concern.
- 1.25 We are working with colleagues in Economic Development to scope a Health and Social Care Skills pathway, to consider how we can further work with education and skills providers and our adult social care employers to encourage and support prospective candidates into a career in adult social care and actively retain and develop those who are already working in the sector. The need to provide additional focus on identifying and developing our local workforce is likely to be exacerbated by the new rules on immigration in the short to medium term and by our aging population in the longer term.

2. Options under consideration

Not applicable for this report.

3. Financial Opportunities and Implications

- 3.1 Adult Social Care is a significant part of the Council's budget. To ensure the best possible value for the public purse we continue to monitor the use of care and support from our commissioned providers, for trends in terms of the numbers of placements but also any challenges or trends in sufficiency and quality. We also monitor the spend and any changes in both the volume of spend and our average costs. We use statistical neighbour, regional and national benchmarking to analyse our costs and level of spend.

4. Legal Implications

- 4.1 The Care Act 2014 places a duty on us as a local authority to "facilitate a diverse, sustainable high-quality market for their whole local population and to promote efficient and effective operation of the adult care and support market as a whole. They must also ensure continuity of care in the event of provider failure".

5. Engagement and Consultation

- 5.1 We continue to engage with the Adult Social Care provider market through our provider forums, which are currently booked until 2027.

6. Purchasing or Hiring of Goods and/or Services

- 6.1 Not applicable for this report.

7. Tackling Climate Change

7.1 Our intention is to be able to provide Adult Social Care services as close to home in Torbay as possible, to enable our residents to be able to use local services which are familiar to them and to minimise travel and the associated climate impact.

8. Associated Risks

8.1 We continue to work closely with our provider market to understand their risks and pressures in terms of quality, sufficiency and cost, and to feed this intelligence into our future commissioning plans.

9. Cumulative Council Impact

9.1 None identified.

10. Cumulative Community Impacts

10.1 The delivery of Adult Social Care aims to support our residents to have a place to call home, in a community they can be part of, while being empowered to achieve what matters most to them through the best care and support available.