Market Position Statement 2024 Evidence Base

Contents

Overview of adult social care demand: trends across all client groups

During 2023-24 the proportion of service users receiving community-based services was 69% and the proportion in care homes was 31%. Table 1 indicates that older people represented the largest cohort.

Table 1: Overview of 2023-24 support needs

2023-24 Support needs	Care Home	*Community	Total	**% of total users
Older persons 65+ (including dementia, excluding 65+ LD & MH)	515	1,447	1,962	50%
Adults with learning disabilities 18+	216	661	877	22%
Adults with mental health needs 18+	111	555	666	17%
Younger adults with physical disabilities and sensory needs 18-64	36	370	406	10%
Total no. of service users 18+	**878**	**3,033**	**3,911**	

**Community based services includes extra care, supported living, home care, day care, outreach and direct payments and excludes community equipment*

*** Service users include people with eligible assessed needs who are receiving a care package*

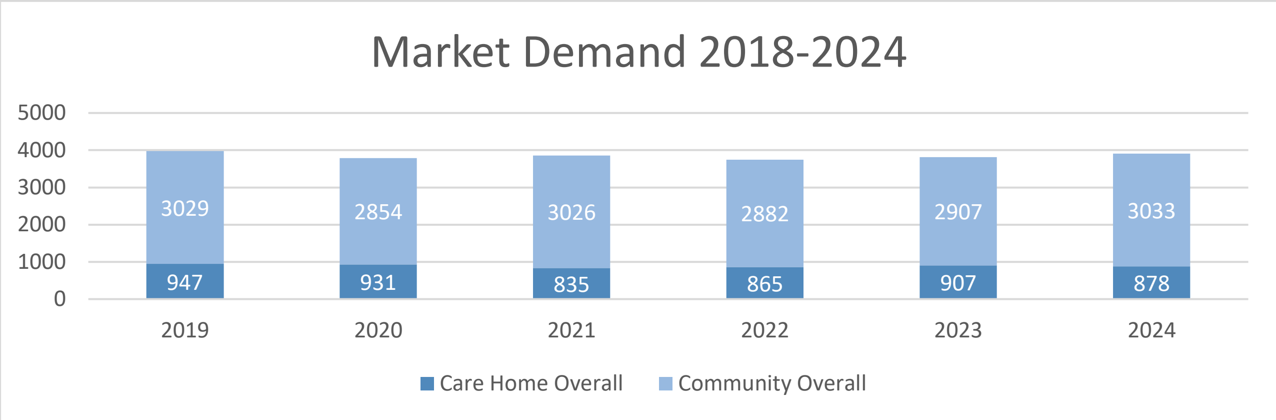
Table 2 below indicates a 31% increase in adults with mental health needs since 2018-19 which contrasts with the drop in relation to other service user groups.

Table 2: Overview of support needs 2018-2024

Support needs	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	% change
Older persons 65+ (including dementia, excluding 65+ LD & MH)	2,103	1,967	2,021	1,879	1,941	1,962	-7%
Adults with learning disabilities 18+	902	890	869	870	888	877	-3%
Adults with mental health needs 18+	507	509	533	562	580	666	+31%
Younger adults with physical disabilities and sensory needs 18-64	464	419	438	436	405	406	-13%
Total no. of service users 18+	**3,976**	**3,785**	**3,861**	**3,747**	**3,820**	**3,911**	**-2%**

Figure 1 below indicates that the total number of service users (18+) across all client groups residing in a care home decreased between 2018 and 2022, with numbers increasing in 2023, however, falling again in 2024.

Figure 1: Overall market demand by care home & community 2018-2024



Older people

(Excludes adults 65+ with mental health and learning disabilities)

Demographic prevalence

The 2021 census indicates that the 65 plus population comprises 10% (31,337) of the total population with the 85 plus population comprising 1% (4,024) of the population. The 65 plus population has grown by 16% since the last census and the 85 plus population has grown by 8.3% and is the highest in inner London.

In line with the national picture, the number of older people in Wandsworth is projected to increase, many of whom will live with age-related needs that will make them more vulnerable to experiencing difficulties with mobility and personal care[1]. GLA Projections indicate that the 65 plus population in Wandsworth is projected to increase at a rate of 38% by 2039, (which is in stark contrast to the rate of decrease of those aged between 18 and 64 at 1.5%)[2]. Within the 65 plus age group the greatest percentage increase is in the 65 to 74 plus age group at 42%[3].

Figure 2: Older people demographics

Age Group	2024	2029	2034	2039	% Change
65-74	17,956	21,089	24,564	25,556	42%
75-84	11,174	12,100	12,564	14,905	33%
85+	4,263	4,438	5,200	5,562	30%

[1] Wandsworth JSNA
[2] GLA population projections
[3] GLA population projections

Adult social care older persons service user profile 2023-24

Figure 3: Older persons service user profile (October 2024 snapshot)

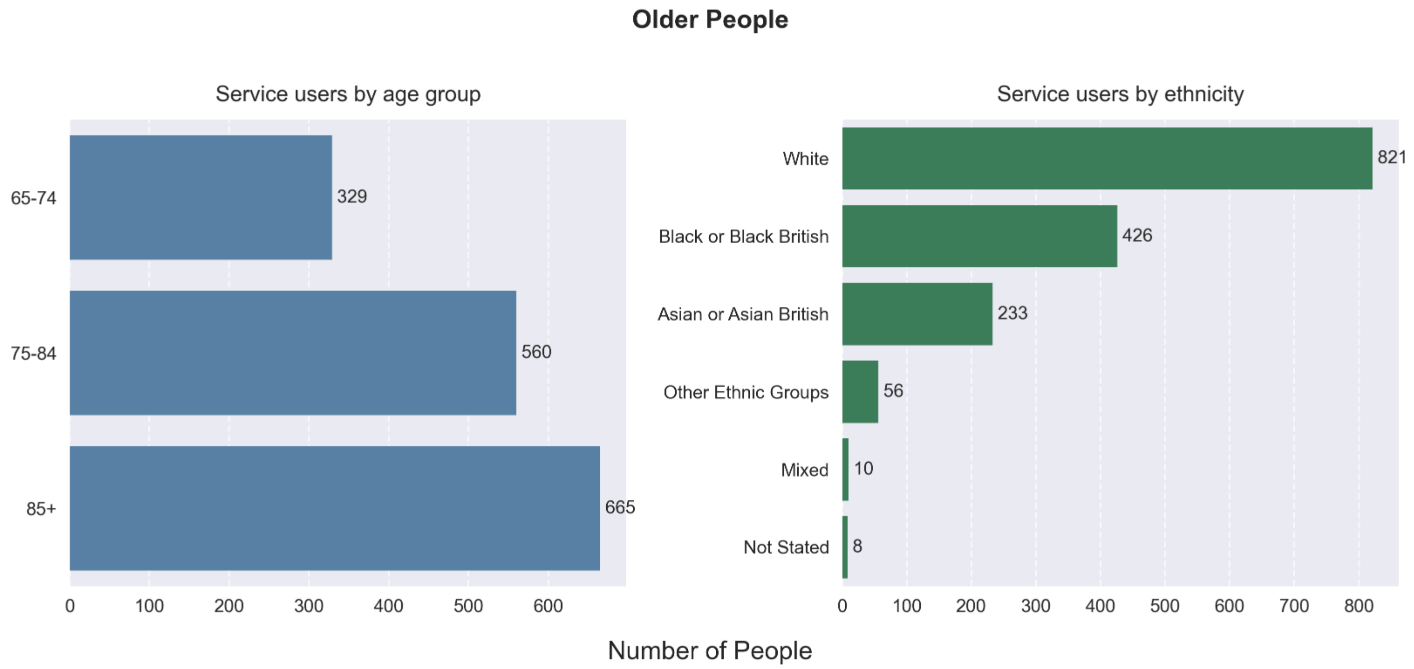
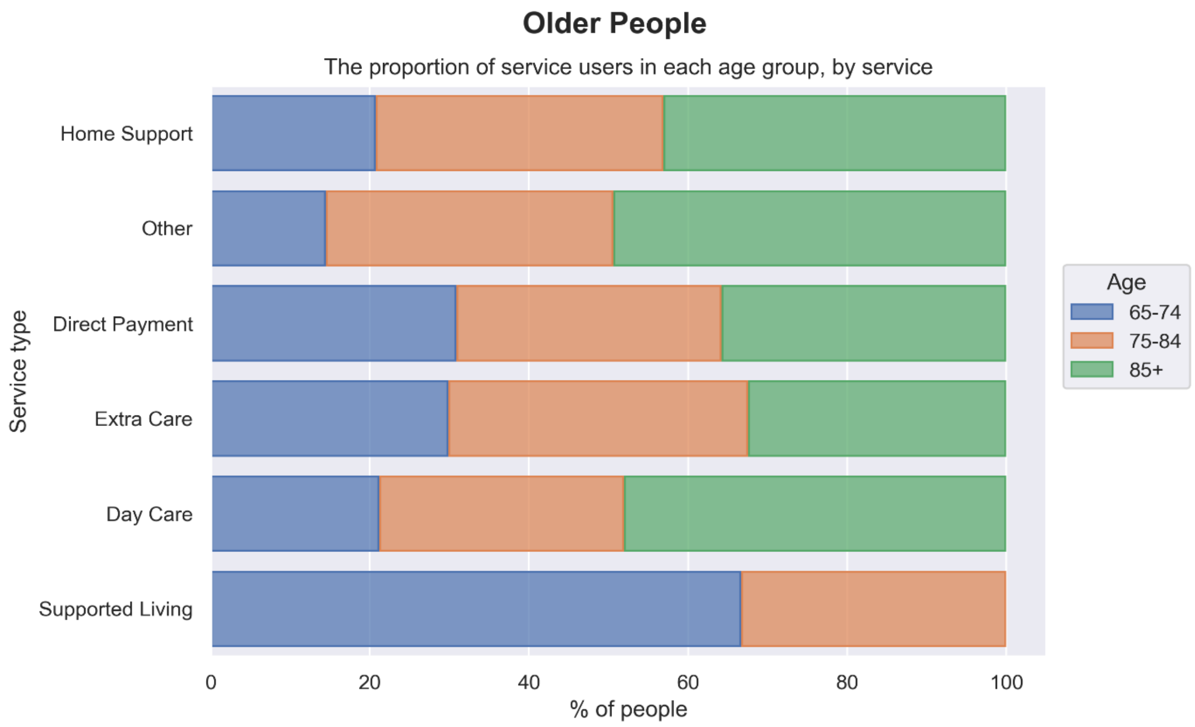


Figure 4: Older people age by service breakdown (October 2024 snapshot)



Service use trends and demand projections

There was a reduction in the number of people aged 65 and over accessing adult social care services funded by us between 2018-19 and 2023-24.

The table below shows service use over a six-year period highlighting the percentage changes since pre-covid to help understand the impact of coronavirus on demand, together with projections to 2030.

Table 3: Older people service use flows 2018-2024 and projections

Service type	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	% Change from 2018-2024	DOT since Covid 19 (2019-2020)	Projection for 2025	% Change for 2025	Projection for 2030	% Change for 2030
Res Care	224	199	181	189	208	215	-4%	8%	212	-1%	207	-4%
Nursing Care	361	351	269	281	317	311	-14%	-11%	308	-1%	317	2%
Supported Living	*	*	*	*	*	*	*	*	*	*	*	*
Extra Care	111	99	89	97	94	97	-13%	-2%	100	2%	109	13%
Day Care	169	149	100	56	71	56	-67%	-62%	56	0%	56	0%
Home Care	1,369	1,240	1,269	1,104	1,143	1,169	-15%	-6%	1193	2%	1323	13%
Direct payments	175	307	364	315	276	267	53%	-13%	278	4%	304	14%
****Total**	**2,103**	**1,967**	**2,021**	**1,879**	**1,942**	**1,962**	**-7%**	**-0.3%**				

** Not shown due to small numbers*
*** A service user may receive more than one service, but the total only counts a service user once hence will not equal the sum of all services.*

Care homes

Current provision

In terms of residential care, Wandsworth has 196 beds across 9 homes of which 5 can cater to some extent with those with dementia need (168). Existing in-borough nursing supply is approximately 883 care places across 9 homes, although a notable proportion are for private/specific use. CQC data reveals that there are 3 older people's homes in borough rated 'Requires Improvement', the rest are rated 'Good', and one is rated 'Outstanding'.

Service use

For both residential and nursing care, numbers of placements have been following a downward trend accelerating during the coronavirus pandemic, which may be due in part to people choosing to remain living in their own homes and receiving support from their own families for fear of placing them into care homes due to the perceived increased risk of coronavirus. However, we see an increase from 2022-23 which indicates a possible gradual return to pre-pandemic levels.

The number of older persons placed in residential and nursing care relative to population (2021) is middling and on par compared to the rest of London. However, Wandsworth is reliant on care home provision outside the borough. Compared to the rest of London, Wandsworth places a higher proportion of people out of borough, however a high proportion of these are in close proximity in Southwest London and neighbouring boroughs[4].

Future need

Projections to 2030 suggest that demand for residential care will decrease slightly, so a significant shortfall in standard residential care is not envisaged, with demand for nursing care forecasted to remain static.

The key in-borough capacity issue is for dementia-related care in both residential and nursing, as well as behaviour that challenges, and provision of bariatric care and this means that services users sometimes have to move out of borough.

Whilst our overall focus is on supporting more to live as independently as possible there will remain a need for nursing and residential care to support residents with more intensive or specialist support needs.

Extra care

Current provision

There are three (150 units) extra care schemes in Wandsworth, that are commissioned by us and there are also additional privately run schemes. These are mainstream physical health, mobility and sensory needs provision for people aged 55+.

A new 42 unit extra care scheme is under construction as part of a mixed development in a regeneration area. The Alton Road regeneration project is an exciting development featuring 95 homes including 54 Shared Ownership and 41 Extra Care homes for over 55s.

Individual clients are assessed for care technology solutions to support their independence.

Service use

Demand for service users accessing extra care services has remained stable between 2018-19 and 2023-24. Demand may have been impacted by availability and suitability of current provision for service users with dementia or high/complex needs.

Future need

Projections to 2030 suggest an increase in need for council commissioned placements. However, a further 40-unit scheme to be known as Alder House is currently being developed and due to open by Spring 2025, which should meet demand for the foreseeable future.

There is currently no standalone specialist extra care provision for those with memory and cognition or mental health needs. However the Alder House extra care scheme in Roehampton has been designed with best practice principles for accessibility and dementia care, to include secure fob access, tone and contrast with interior décor and design features of communal areas, flooring and clear signage to aid with way finding, thereby supporting future tenants with memory and cognition needs.

[4] ADASS market report analysis 2022

Home care

Current provision

We have contracts with 8 providers for the provision of council commissioned care to support service users with different needs. These contracts are currently in place until 2025. We also spot purchase from over 30 care agencies.

Across 2024/25 we will be completing a strategic review of our homecare services to ensure there continues to be a sufficiency of care at home services to meet the needs of our local population.

Service use

Demand for home care has decreased significantly between 2018-19 and 2022-23, albeit numbers have started to pick up from 2022-23. Numbers of older persons overall receiving services has fallen but this decrease represents a steeper fall. This may in part be due to the impact of adopting a strengths-based and preventative approach harnessing personal and community networks and a strong day care open access offer.

Future need

Projections to 2030 suggest that demand will increase, reflecting the increase in the older population.

Day opportunities

Current provision

Current day opportunities for older adults in Wandsworth are commissioned as either specialist services for those vulnerable residents with assessed eligible needs in accordance with the Care Act 2014, or as open access services that are universally accessible to all older adults and/or adults with physical disabilities regardless of their level of eligible need. One specialist centre is commissioned to support adults with eligible needs who may also need personal care assistance whilst at the day centre. A wide range of open access preventative services is provided by a number of providers throughout the borough as part of the Wandsworth voluntary sector prevention offer.

Service use

The number of service users taking up day care has decreased significantly from 2018-19 onwards. This is primarily due to a day centre closing during the height of the coronavirus pandemic, a revised number of block places due to reduced demand and building adaptations to be made to the specialist centre to facilitate clients with dementia. In addition, Wandsworth has a strong open-access offer.

Future need

Projections to 2030 suggest that demand will remain static. However, the service has operated a waiting list which is in part due to service transport capacity being filled and further adaptations required to the building to be a secure facility for people with dementia who wander with purpose. The provider monitors this wait list weekly to prioritise entry to the service and maintain a safe and balanced community. We therefore expect a slight increase to occur as the take up of digital support grows and older people are able to interact with different forms of day opportunities.

Direct payments

Current provision

We work in close partnership with one local user-led organisation to deliver a comprehensive direct payment support service to enable more people across Richmond and Wandsworth to take up DPs.

Demand

Overall, the numbers of older service users in receipt of direct payments saw an increase until 2020-21, with a decrease in numbers experienced after this period.

Future need

Projections show that the numbers receiving direct payments are likely to see some growth again. With the increased focus on using direct payments more flexibly and creatively, and a new support service commencing, there may be more opportunities for people to access less traditional day opportunities.

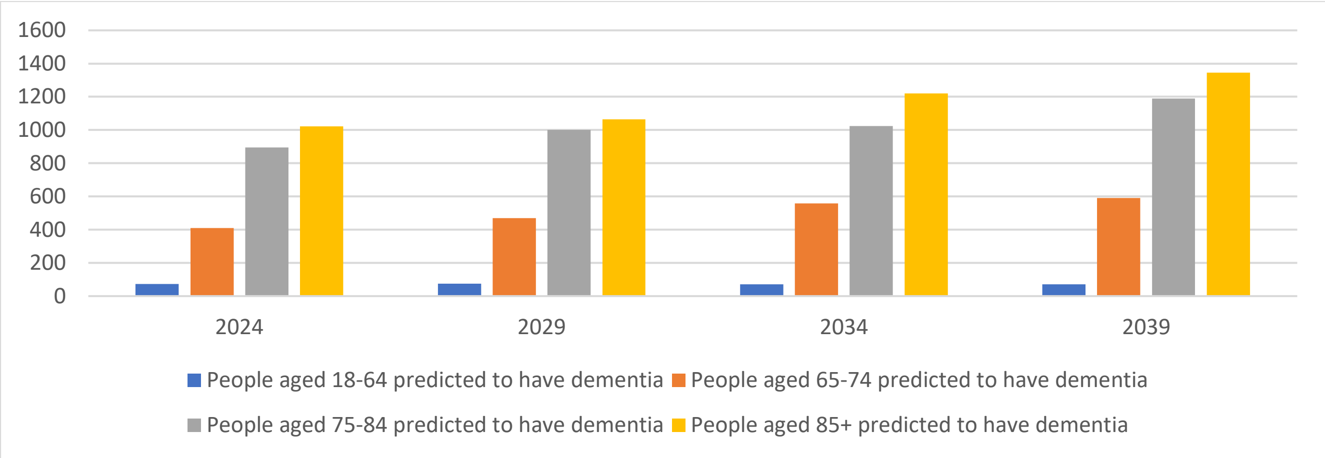
Adults with memory and cognition needs

Including dementia 18+ (subset of all client groups)

Demographic prevalence

People are now living longer with life limiting health conditions, it is therefore estimated that older age groups, while only a small part of Wandsworth's population overall, will be increasing at a higher rate than the rest of the population[5]. Since the prevalence for dementia increases with age[6], this will have a significant impact on the number of people in Wandsworth who are living with dementia. The graph below illustrates the impact of these two trends.

Figure 5: Estimated number of people living in Wandsworth with dementia[7]



It is estimated that in 2024 there are approximately 2,325 adults aged 65+ living with dementia which is estimated to increase by 34% by 2039 with an estimated 3,126 adults. Dementia also affects a small number of adults aged 18-64- estimated around 72 in Wandsworth in 2024, with numbers set to remain static until 2039.

[5] GLA population projections
[6] Dementia UK: Update (2014) prepared by King's College London and the London School of Economics for the Alzheimer's Society.
[7] GLA projections & Dementia UK: Update (2014) prepared by King's College London and the London School of Economics for the Alzheimer's Society.

Adult social care memory and cognition service user profile 2023-24

Figure 6: Memory and cognition service user profile (October 2024 snapshot)

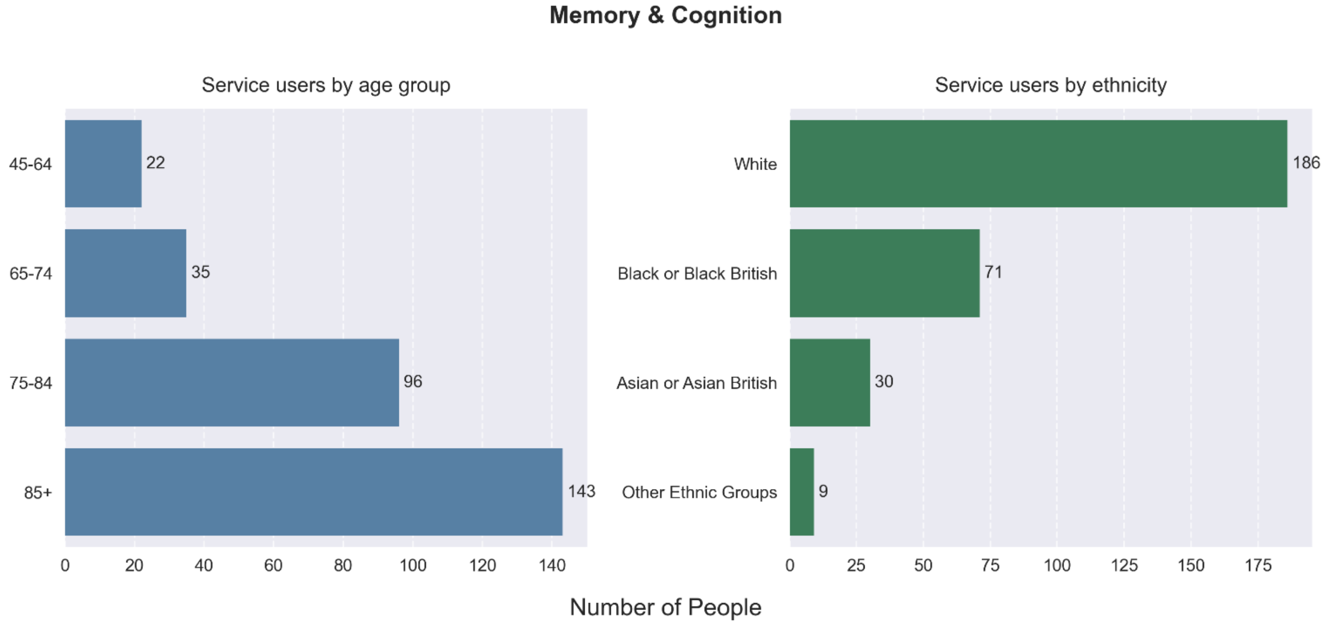


Figure 7: Memory and cognition age by service breakdown (October 2024 snapshot)

Service use trends and projections

The table below shows service use over a six-year period highlighting the percentage changes since pre-covid to help understand the impact of coronavirus on service use and demand together with projections to 2030.

Table 4: Memory & cognition service use flows 2018-2024 and projections

Service type	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	% Change from 2018-2024	DOT since Covid 19 (2019-2020)	Projection for 2025	% Change for 2025	Projection for 2030	% Change for 2030
Residential Care	71	75	84	139	153	168	137%	124%	174	4%	181	8%
Nursing Care	94	103	82	149	164	178	89%	73%	188	6%	198	11%
Day Support	22	23	13	*	9	7	-68%	-70%	11	58%	14	100%
Direct Payments	12	18	23	28	21	22	83%	22%	23	6%	29	32%
Home Care	83	94	105	77	73	79	-5%	-16%	83	5%	94	19%
****Total**	**208**	**249**	**270**	**347**	**376**	**405**	**95%**	**63%**				

** Not shown due to small numbers.*
*** A service user may receive more than one service, but the total only counts a service user once hence will not equal the sum of all services.*

Care homes

Current provision

There are 9 nursing care homes in Wandsworth for older people with a total of 883 beds. In addition, there are 9 residential care homes with a total of 196 beds. None of these is a specialist dementia service, however 9 of the nursing care homes and 5 of the residential care homes will support residents with dementia in some of their units. In addition, the borough has 5 nursing care homes for mental health (368 beds) that are all also registered to support some dementia residents.

Service use

There has been a substantial increase in the number of people in care homes with dementia over the last few years which reflects the increase in people living with the condition in Wandsworth. However, there was a fall in the number of people in nursing care during 2020-2021 reflecting the effect of the coronavirus pandemic. The numbers in residential care during that period, although they did not fall, were relatively static where an increase would have been expected. During 2022-2023 and 2023-24 there was a continued increase in both residential and nursing care, indicating a return to the pre-pandemic increases.

Future need

It is expected that the number of people needing a residential or nursing care placement due to a memory and cognition need is likely to continue to rise over the next few years and more provision will be needed for this group.

Day support

Current provision

The number of day centre places available for older people, adults with dementia and people with a physical disability was revised in line with a transformation of day opportunity services within the borough. During the pandemic an individual day centre provider made an organisational decision to close the service permanently.

There is one specialist council commissioned day centre where 'access control' provision is being implemented so that clients with dementia who 'wander with purpose' can remain safely within the building and this will provide capacity to accept referrals of moderate to high needs dementia clients.

A further challenge relates to transport. Currently there are limited number of places available on provider transport to day services and the majority of those with memory and cognition needs and wheelchair users require a door-to-door transport service to attend a day service.

In addition, the Alzheimer's Society provide a bespoke befriending service for residents within the borough.

Demand

The number of service users taking up day care places dropped during the coronavirus pandemic and has continued to decrease in 2023-24.

Future need

With the transformation of day opportunity services in Wandsworth, which aims to provide a variety of community-based options to meet people's needs and aspirations, we expect numbers to increase.

Some open-access day centres have highlighted that a number of the people attending currently have early diagnoses of dementia, some of whom may need more comprehensive day services in the future.

Home care

Current provision

Currently home care is provided predominantly by 8 providers in Wandsworth who are contracted to support service users with different needs. These contracts are currently in place until 2025. We also spot purchase from over 30 care agencies.

Across 2024/25 we will be completing a strategic review of our homecare services to ensure there continues to be a sufficiency of care at home services to meet the needs of our local population.

Demand

The number of people with memory and cognition needs receiving home care has fluctuated significantly over the last six years. There was a large drop between 2020-21 and 2022-23 mirroring the rise in nursing and residential care placements during that period. There has been a slight increase in 2023-24, which may indicate that numbers have stabilised.

Future need

While there has been an overall drop in people receiving home care, commissioning intelligence suggests this drop is unlikely to continue indefinitely and it is expected that the number of people receiving home care with a memory and cognition need is likely to rise over the next few years.

Direct payments

Current provision

We work in close partnership with one local user-led organisation to deliver a comprehensive direct payment support service to enable more people across Richmond and Wandsworth to take up DPs.

Demand

There has been a steady increase in the number of people with a memory and cognition need who have a direct payment.

Future need

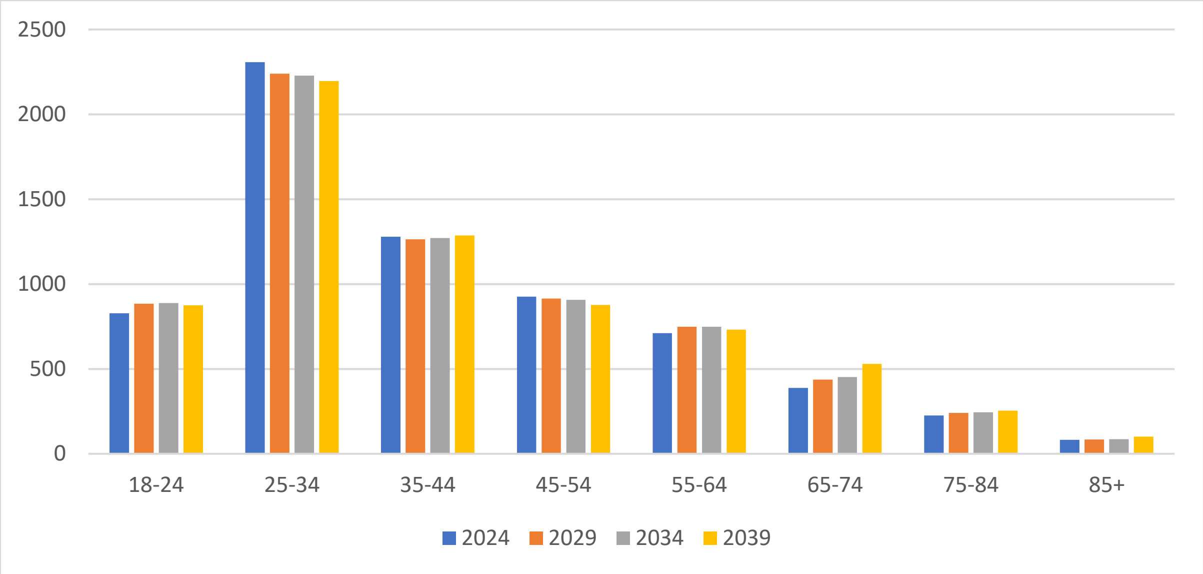
Commissioning intelligence shows that further increase in these overall numbers is unlikely to be significant and that there is likely to be a relatively small increase in numbers by 2030.

Adults with learning disabilities

Aged 18+

Demographic prevalence

Figure 8: Learning disabilities demographic prevalence



- There are an estimated 6,748 residents aged 18 and above with a learning disability in Wandsworth as of 2024.
- Whilst the projected increase for those with a baseline disability aged between 18 and 64 is set to decrease slowly by 1% (6,052 to 5,965) to 2039, for those aged 65 and above, there is a greater increase of 38% (696 to 962)[8].

[8] Emerson & Hatton, Estimating Future Need/Demand for Supports for Adults with Learning Disabilities in England, June 2004 - national prevalence rates, Public Health Profiles

Adult social care learning disabilities service user profile 2023-24

Figure 9: Learning disability service user profile (October 2024)

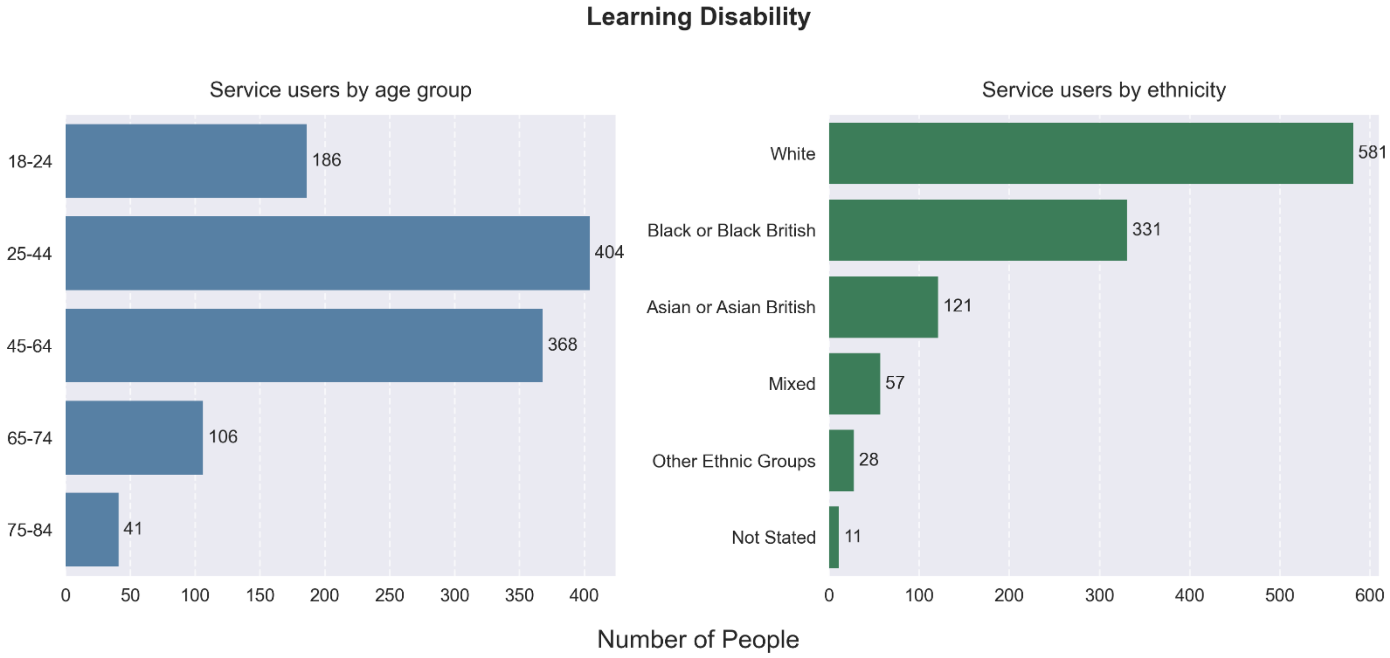
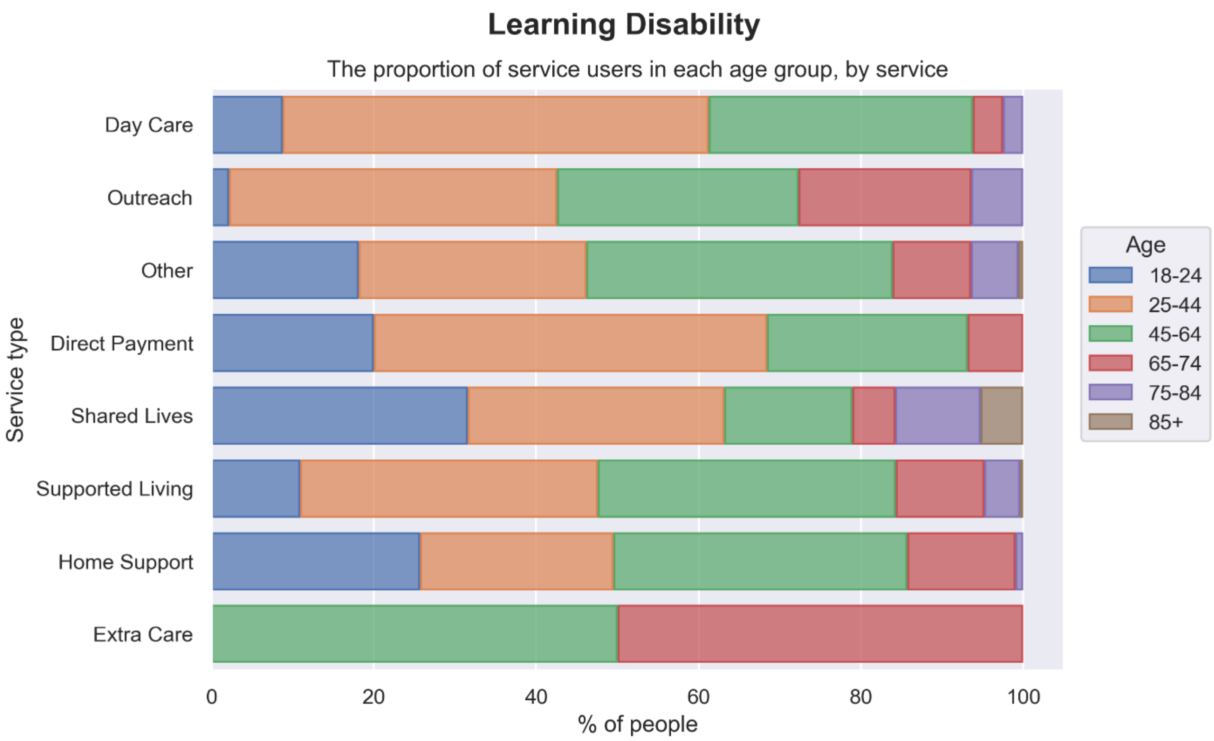


Figure 10: Learning disability age by service breakdown (October 2024)



Service use trends and demand projections

The table below shows service use over a six-year period highlighting the percentage changes since pre-covid to help understand the impact of the coronavirus pandemic on service use and demand together with projections to 2030.

Over the past six years there has been a decrease in the use of residential care and an increase in the use of supported living and home care to support people with a learning disability in Wandsworth. This reflects our ambition to support people to be as independent as possible and a preference for supported living over residential care for the young adult population.

Table 5: Learning disability service use flows 2018-2024 and projections

Service type	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	% Change from 2018-2024	DOT since Covid 19 (2019-2020)	Projection for 2025	% Change for 2025	Projection for 2030	% Change for 2030
Residential Care	247	260	239	236	230	212	-14%	-18%	213	0%	187	-12%
Nursing Care	9	9	12	11	13	10	11%	11%	9	-10%	10	0%
Supported Living	180	193	197	205	225	234	30%	21%	234	0%	259	11%
Extra Care	7	10	8	7	8	7	0%	-30%	7	0%	10	43%
Day Support	313	208	190	179	178	173	-45%	-17%	178	3%	176	2%
Direct Payments	274	236	227	215	206	205	-25%	-13%	208	1%	212	3%
Home Care	52	50	73	92	128	124	138%	148%	135	9%	136	10%
Outreach	176	160	136	99	63	57	-68%	-64%	54	-5%	57	0%
***Total**	**902**	**890**	**869**	**870**	**888**	**877**	**-3%**	**-1%**				

** A service user may receive more than one service, but the total only counts a service user once hence will not equal the sum of all services*

As people with a learning disability age, similarly to the rest of the population, they may develop age-related conditions. Since social care records capture only one primary care need, it is likely that some older people with a learning disability have a primary care need of physical disability or memory and cognition. The analysis here is based on this primary need code and may exclude those where their physical needs or conditions such as dementia have taken over as the primary need for support.

Care homes

Current provision

There are 82 specialist residential care beds across five specialist homes in-borough that cater for people with learning disabilities. We also use out of borough beds.

There are no specialist nursing places for people with learning disabilities in-borough and placements are made in mainstream provision, of which there is one general needs provider, with 67 beds catering for people with learning disabilities. But with low numbers there is no urgent need for additional provision.

Service Use

For residential care, numbers fell between 2018-19 and 2023-24. This is due to the drive to support people to live as independently as possible and reflects the increase in numbers of people accessing care and support through supported living and home care models. Numbers in nursing care have remained low and relatively static.

A snapshot of data from March 2022 showed 59% of residential care placements and all nursing placements were outside the borough[9].

Although the numbers of service users with learning disabilities being supported in care homes is decreasing, demand for learning disability care home services in Wandsworth and Southwest London is fourth highest among all London boroughs, the three other boroughs that rank higher are also in SW London: Richmond, Croydon, and Sutton. This may be due to a higher level of need across the borough and region and a learning disability population who increasingly have greater needs as they age[10].

Future need

With the increased focus on promoting choice, control and independence through providing a range of accommodation-based care and support services such as supported living, the demand for residential care is reducing. It is likely that there will always remain some need for high-quality residential care which can support people with complex needs. The policy is to place locally as much as possible but lack of specialist provision for those with more complex needs means that sometimes placements are made in more specialist services out of borough. The solution is likely to be working in partnership with other SW London commissioners.

We expect the demand for nursing care to remain fairly static increasing marginally in line with the population. It will be limited in part by the lower life expectancy of people with learning disabilities (average 65 years) and the fact that as people get older, the primary need for services is more likely to change from learning disability to either physical health or memory and cognition needs.

There is also a small but emerging need to develop bespoke services for people who have been discharged from long-stay hospitals or who are experiencing crisis and require emergency/unplanned accommodation to prevent admission to hospital or a full breakdown of their current arrangements and support network.

Supported living and extra care

Current provision

There are currently 264 supported living units across five providers in Wandsworth. Ensuring appropriate fit with tenant's needs is key and this can sometimes result in voids even though supply is limited. New initiatives completed in December 2023 include a 7 single unit supported living scheme in Colson Way and a refurbished shared housing scheme of 5 units (with a focus on developing independent living skills to support move on) at Bolingbroke Grove. There is an 8-unit scheme at Bessborough Road planned for completion in 2025.

The quality of provision is inconsistent; however, work is currently ongoing to ensure that current provision is developed and improved so that it remains fit for purpose and is able to meet the

[9] Mosaic client information database
[10] ADASS market report analysis

changing expectations of the population which will include having modern facilities (en-suite bathrooms) and technology as standard.

There are no learning disability specific extra care providers in the borough. Mainstream providers of extra care are not designed to fully meet the needs of the learning disabilities population because existing locations need to be adapted, and specialist staff are needed.

Service use

Council placements in supported living have increased since 2018-19. Demand exceeds supply which results in some residents having to move outside of the borough and an over reliance on residential care. There are very low numbers in extra care services, and these are likely to be over 55's residing in older persons extra care schemes. With no specialist provision for those with a learning disability we expect numbers to remain low within extra care.

Future need

Our aim for learning disability services is to continue to reduce reliance on residential care and to support people to live as independently as they can by offering a range of housing with care options including supported living. The supported living model promotes greater independence through a strengths-based approach to planning care support and inclusion. Projections indicate an increasing need for supported living over the next few years, possibly an additional 4-5 units per year.

Supported living is a key destination for those transitioning from children's services as well as for older service users with different levels of need, including those with more complex needs and challenging behaviour. There is a gap in short term accommodation services for younger adults, who are moving away from home for the first time, so intense support is needed to develop their independent living skills and enable them to progress into alternative living arrangements.

The key priority for new accommodation is flexibility. This means accommodation that can be tailored to the requirements of service users who may have complex health needs and physical disabilities and those that are able to live more independently. New accommodation that will be conducive to the specific needs of people on the autism spectrum or who have behaviours that challenge and incorporate design principles and technology as standard to meet these types of needs.

There is a preference for self-contained accommodation with the option of on-site support and communal areas including outdoor space to promote independent living and a sense of community. Accommodation needs to be near public transport networks whenever possible, as this is key for attracting and retaining staff.

Home care

Current provision

We have contracts with 8 providers for the provision of Council commissioned care to support service users with different needs; we also spot purchase from over 30 care agencies.

A framework for home care, accommodation-based care, support and life skills and wellbeing, has been developed, which provides an opportunity for specialist providers who can meet the requirements of these specifications to deliver home and community support which can support a person to develop independent living skills and achieve the outcomes that matter most to them.

Demand

Demand for home care has increased significantly from 2018-19 to 2023-24. This may be due to the drive to move people towards promoting a strengths-based approach and supporting people to live independently in their own homes.

Future need

Demand for home care has seen significant growth and with the increased focus on supporting people in the community, projections to 2030 suggest this increase will continue.

Day opportunities and outreach

Current provision

Approximately 20% of people with a learning disability supported by adult social care access day services, with a further 15% estimated to access day services using a direct payment. Most day services are spot purchased from one of four main providers in the borough. There is one block contract in place with One Trust who support people with PMLD and/or autism.

There is a drive to shift from the more formal institutionalised day care to more dynamic, person centred and diverse services. This will include specialist place-based support, community support, home support, virtual support, independent travel training and specialist transport.

Demand

Demand for day care services shows a significant decrease between 2018-19 to 2023-24. This may be due in part due to the impact of the coronavirus pandemic and also due to changes in recording, with 1:1 day support and outreach being recorded as home care, illustrated by the increases in this category.

Day support has not returned to pre-pandemic levels, and there are a number of different factors which may have impacted on this, including people still not feeling comfortable in big groups, people moving into supported living and/or residential care, and people managing their support differently.

Future need

Projections for 2030 suggest a slight increase in the number of service users accessing day opportunities. This is due to a predicted increase in the uptake of the new high specification day facilities, which will provide further day opportunities for those requiring support with a learning disability. It is not expected that numbers for outreach services will change significantly.

Direct payments

Current provision

We work in close partnership with one local user-led organisation to deliver a comprehensive direct payment support service to enable more people across Richmond and Wandsworth to take up DPs.

Service use

There is a relatively high proportion of people with a learning disability in receipt of a direct payment, and they are particularly popular in the younger age groups, including young adults who have transitioned from children’s services. However, numbers have fallen since 2018 by 25%.

Future need

Projections show that the numbers receiving direct payments are likely to decrease. With the increased focus on using direct payments more flexibly and creatively, and a new support service commencing, there may be further opportunities for people to access less traditional day opportunities.

Autism

Diagnosis is the formal identification of autism, usually by a multi-disciplinary diagnostic team. Although autism is a lifelong condition and often diagnosed in childhood, there are significant numbers of adult diagnoses where the condition was not recognised during their childhood. Nationally, between April to December 2018, 5,255 adults were referred for assessment where their need was suspected autism (see level of need for more detail).

Although autism is different in every person, for a diagnosis to be made a person will usually have had:

- Persistent difficulties with communication and social interaction
- Restricted and repetitive patterns of behaviours, activities or interests that limit and impair everyday functioning

Demographic prevalence

The estimated prevalence of autism in the adult population is 1.1% in the younger adult population and reduces with age to 0.8% in the 75+ age group.

Table 6: Estimated number of adults with Autism living in Wandsworth[11]

	2024	2029	2034	2039
18-64	2,254	2,238	2,182	2,200
65+	210	245	277	290
Total adults	**2,464**	**2,483**	**2,460**	**2,490**

In January 2021, there were 737 pupils in Wandsworth schools with a diagnosis of autism. This equates to 1.65% of the school population. The prevalence rate in children young and adults is closer to the London and England averages.

It is estimated that number of people aged 18-64 predicted to have autistic spectrum disorders in Wandsworth will decrease over the next 15 years. The increase is expected in people aged 65+.

The total number of people with autism that are likely to be eligible for support for adult social care is less than 400, of which 60% will have a disability or other primary support reason.

[11] Adult psychiatric morbidity survey (APMS) 2007 and GLA population projections

Current provision

The JSNA highlights that there remain significant health and care inequalities for people with autism and there is a need for greater understanding and acceptance across the system to reduce these inequalities.

Adults with autism who are not eligible for statutory services may benefit from universal services and preventative services primarily provided by the voluntary and community sector, including those commissioned or delivered by the local authority. There are currently no dedicated resources for Autism commissioned by adult social care.

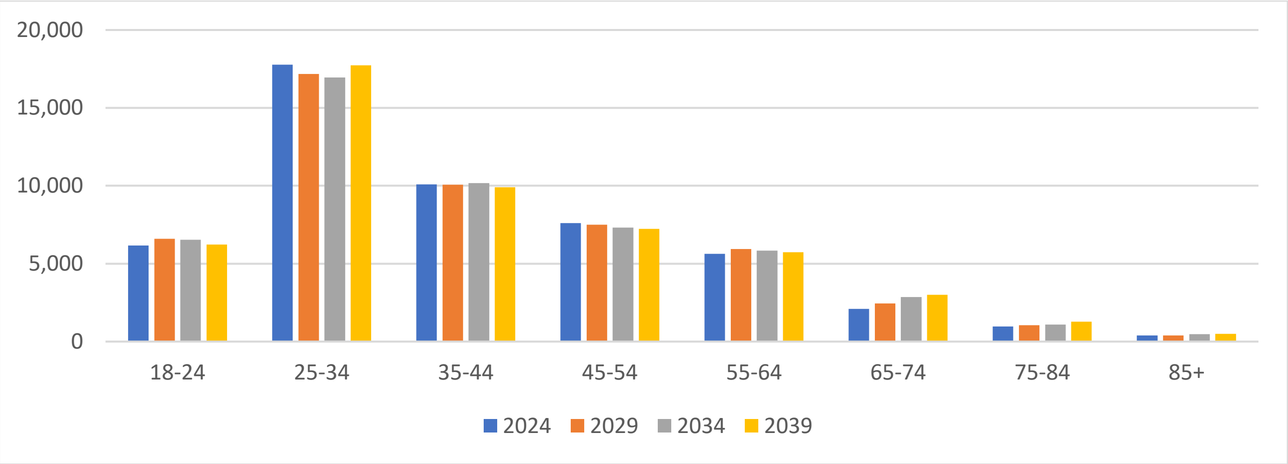
Our commissioned supported employment service (provided by Choice Support) supports people with a disability, including autistic people in both obtaining and maintaining employment by working both with the autistic person and with their employer.

Adults with mental health needs

Aged 18+

Demographic prevalence

Figure 11: Mental health demographic prevalence



- There are an estimated 50,708 residents aged 18 and above with a common mental disorder in Wandsworth as of 2024.
- Whilst the projected increase for those with a common mental disorder aged between 18 and 64 is set to decrease slowly by 1% (47,261 to 46,851) to 2039, for those aged 65 and above, there is a greater increase of 39% (3,447 to 4,785)[12].

[12] Adult Psychiatric Morbidity Survey, 2014 - national prevalence rates, GLA population and prevalence projections

Adult social care mental health service user profile 2023-24

Figure 12: Mental health service user profile (October 2024)

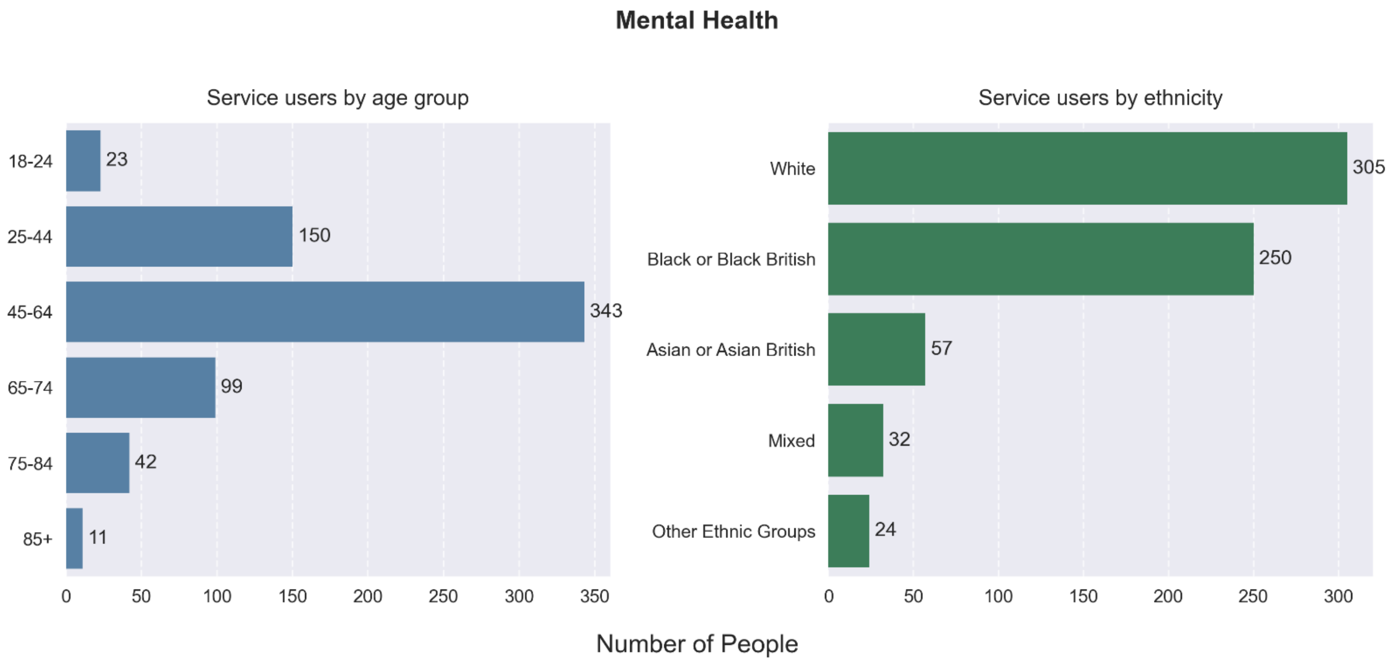
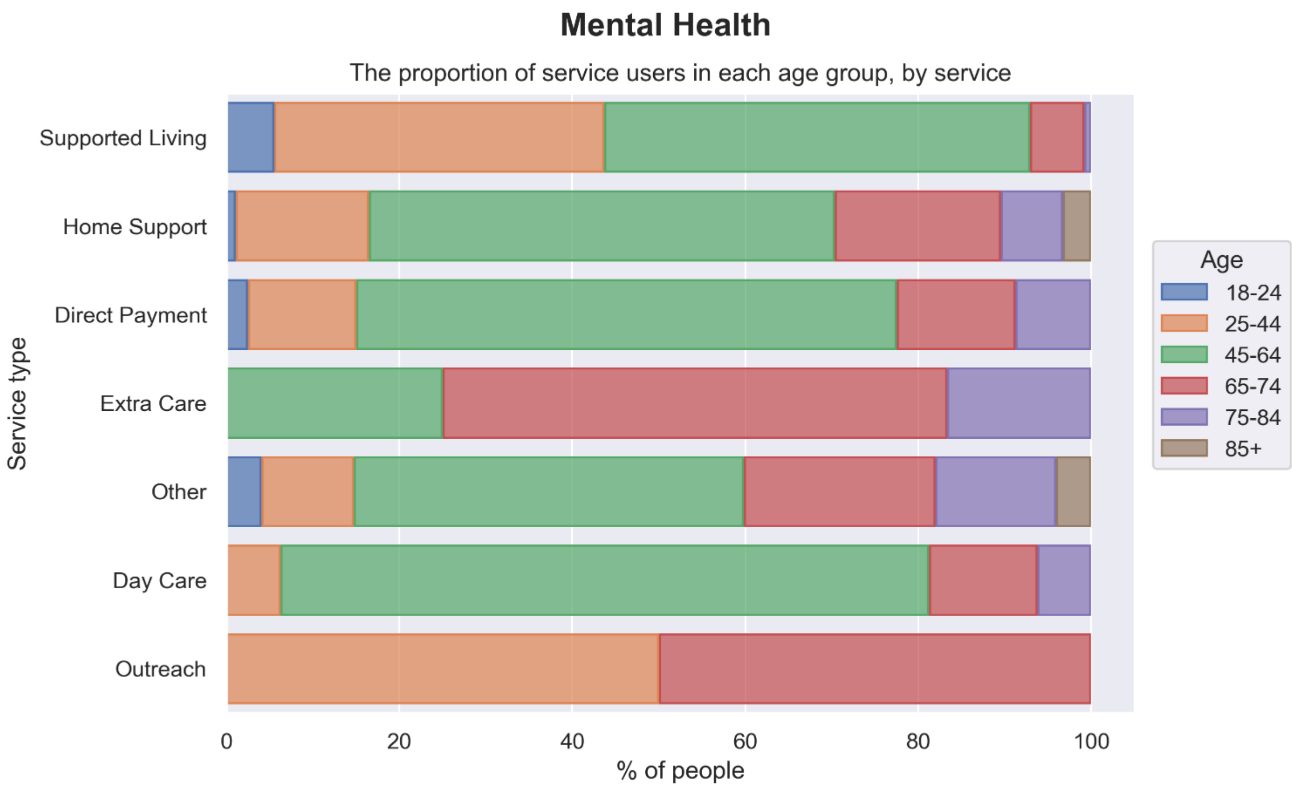


Figure 13: Mental health age by service breakdown (October 2024)



Service use trends and demand projections

The table below shows service use over a six-year period highlighting the percentage changes since pre-covid to help understand the impact of the coronavirus pandemic on service use and demand together with projections to 2030.

There has been an increase in the number of adults with a mental health condition accessing adult social care services since 2018-19. This is primarily due to the increase in numbers being supported in supported living settings and through homecare packages. Supported living is a key destination for service users with mental health needs.

Table 7: Mental health service use flows 2018-24 and projections

Service type Breakdown	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	% Change from 2018-2024	DOT since Covid 19 (2019-2020)	Projection for 2025	% Change for 2025	Projection for 2030	% Change for 2030
Residential Care	87	89	93	101	95	91	5%	2%	89	-2%	95	4%
Nursing care	31	23	25	30	27	22	-29%	-4%	21	-5%	27	23%
Supported living	113	159	180	208	238	269	138%	69%	293	9%	355	32%
Extra Care	8	16	14	17	16	17	113%	6%	17	0%	18	6%
Day Support	47	35	27	24	20	16	-66%	-54%	14	-13%	8	-50%
Direct Payments	134	120	100	100	89	88	-34%	-27%	91	3%	116	32%
Home Care	103	98	124	138	149	222	116%	127%				
***Total**	**507**	**509**	**533**	**562**	**580**	**666**	**31%**	**31%**				

** A service user may receive more than one service, but the total only counts a service user once hence will not equal the sum of all services.*

Care homes

Current provision

There are 4 specialist residential homes (22 beds) for service users with mental health needs. There are available units within more general provision but there is limited specialist provision for this cohort in-borough which sometimes results in out of borough placements.

Service use

Council commissioned placements in residential care for those with a mental health need has remain steady between 2018 and 2024. Placements in nursing care have decreased slightly but not significantly.

Future need

The focus for accommodation-based care and support for this cohort is on rehabilitation and reablement to encourage residents to move towards more independent living. If the move-on to lower-level support is facilitated, to schemes such as supported living, we are expecting demand for care homes not to change too much, although there is a continuing need for some specialist intensive support provision for service users with more complex needs.

Supported living and extra care

Current provision

There are 37 schemes with a total of 238 units, 27 of them under block contract and the rest from whom we commission support as required: 134 units in 15 schemes are high support, 45 units in 6 schemes are medium support, 104 units in 22 schemes are low support. Currently the move-on pathway is held up by the lack of appropriate general needs housing meaning that people cannot progress to lower levels of support in a timely manner.

Service use

There has been a significant increase in the number of council placements in supported living since 2018-19. This increase is due to a drive to step-down people in residential and nursing care into supported living where appropriate, and to a lack of available general needs housing to support move-on. This caused the number of placements in supported living spot purchases to increase significantly.

The number of people in extra care from this cohort are low, as many of the existing places are not designed to support those with a significant mental health need.

Future need

Projections for supported living indicate a significant increase in demand for additional provision. However, sufficiency of supply depends on whether existing service users can move onto more independent accommodation, but this is held up in part by limited general needs housing. Only if the move-on pathway is cleared and all future residents are enabled to move towards independence, is it anticipated that there may be sufficient existing units until 2035. Numbers for extra care are projected to remain static.

Home care

Current provision

We have contracts with 8 providers for the provision of council commissioned care to support service users with different needs; we also spot purchase from over 30 care agencies. Over the next 12 months we plan to implement a Homecare platform. The platform is a hybrid model taking the best of a Framework Agreement and Dynamic Purchasing system which will be in place for the next 10 years and be open for new providers to join. This will ensure there continues to be a sufficiency of care at home in the future.

Service use

Demand for home care has increased substantially from 2018-19 to 2023-24. This reflects a corresponding drop in the number of people from this cohort with a direct payment.

Future need

Projections to 2030 suggest that this increase will continue.

Day opportunities

Current provision

The local authority commissions a range of support from the voluntary sector and Southwest London and St George's NHS Mental Health Trust for people with mental health needs, providing daytime activities which support recovery and self-management in the community. In addition, services support people with mental health needs to access and utilise mainstream services.

Service use

Council commissioned day care places have significantly decreased from 2018 to 2024. This is likely due to service users accessing other forms of community-based support including home care and reablement services and may in part be due to the closure of an older person's day centre during the height of the pandemic.

Future need

Current projections to 2030 suggest that there will be a continued decrease in day care services, as we see a continued growth in the use of other forms of community support.

Direct payments

Current provision

We work in close partnership with one local user-led organisation to deliver a comprehensive direct payment support service to enable more people across Richmond and Wandsworth to take up DPs.

Service use

The number of people receiving a direct payment from this cohort has fallen steadily since 2018-19. This may be partly due to other forms of community-based support such as increased use in home care, the strong rehabilitation offer, as well as due to the difficulties in the availability of PAs with specialist skills and experience.

Future need

Projections show that the numbers receiving direct payments are likely to increase. With the increased focus on using direct payments more flexibly and creatively, and a new support service commencing, there may be more opportunities for people to access less traditional day opportunities.

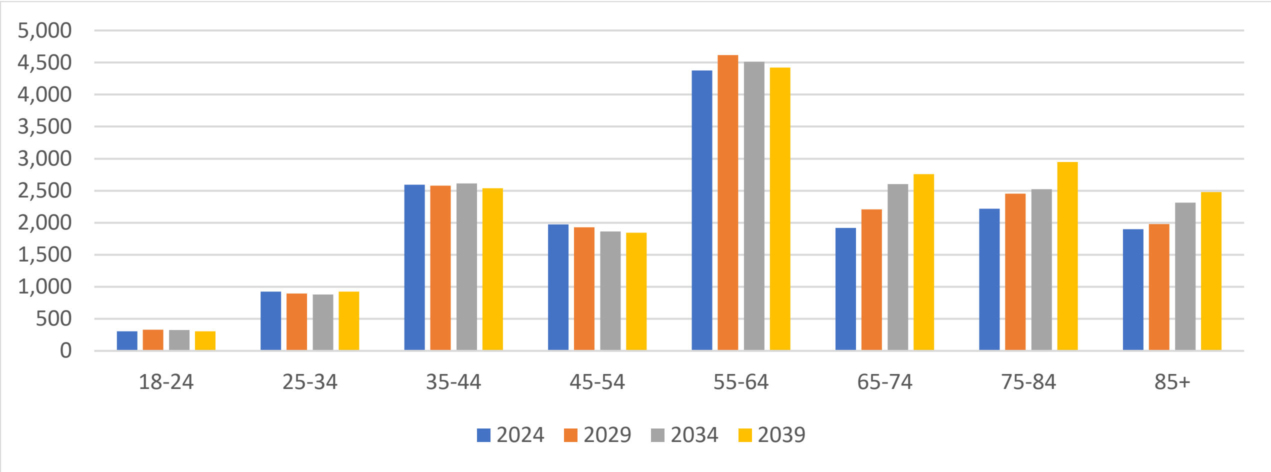
With the continued focus on promoting direct payments to help maximise choice and control projections show that the numbers receiving direct payments are likely to increase significantly and, as the new support service commences, there may be further opportunities for people to receive a direct payment as part of their overall care package to access less traditional day opportunities.

Adults with physical and sensory disability needs

Aged 18 to 64

Demographic prevalence

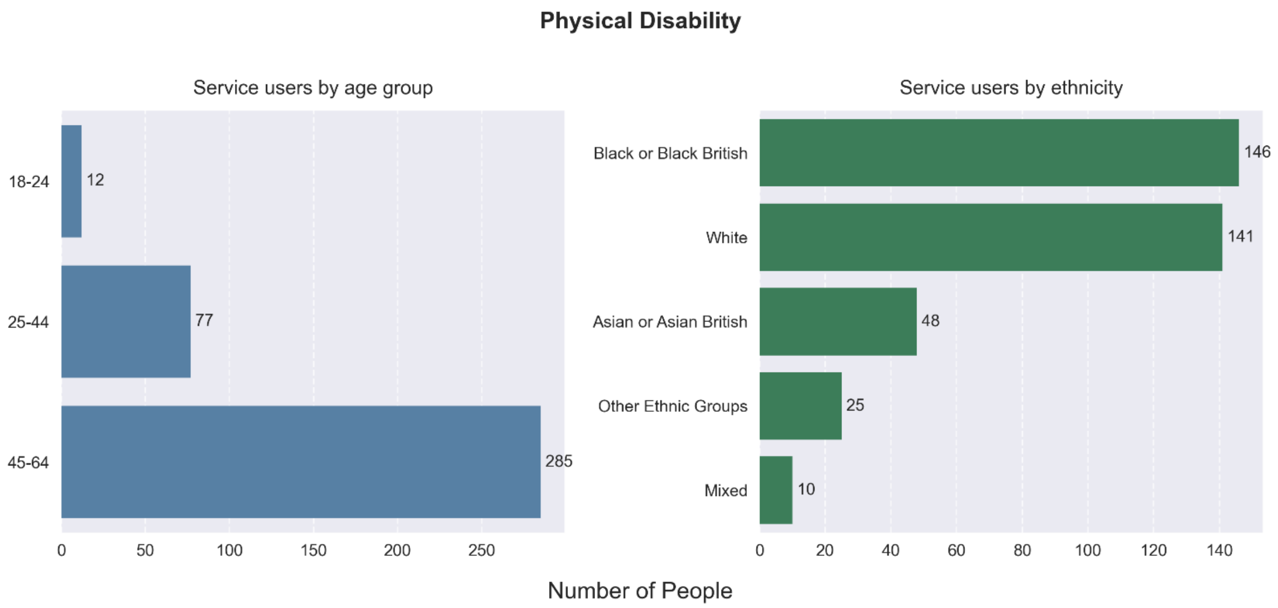
Figure 14: Physical & sensory disability demographic prevalence



- There are an estimated 16,214 residents aged 18 and above with impaired mobility in Wandsworth as of 2024.
- Whilst the projected increase for those with impaired mobility aged between 18 and 64 is set to decrease slowly by 1% (10,177 to 10,038), for those aged 65 and above, there is a greater increase of 36% (6,037 to 8,182)[13].

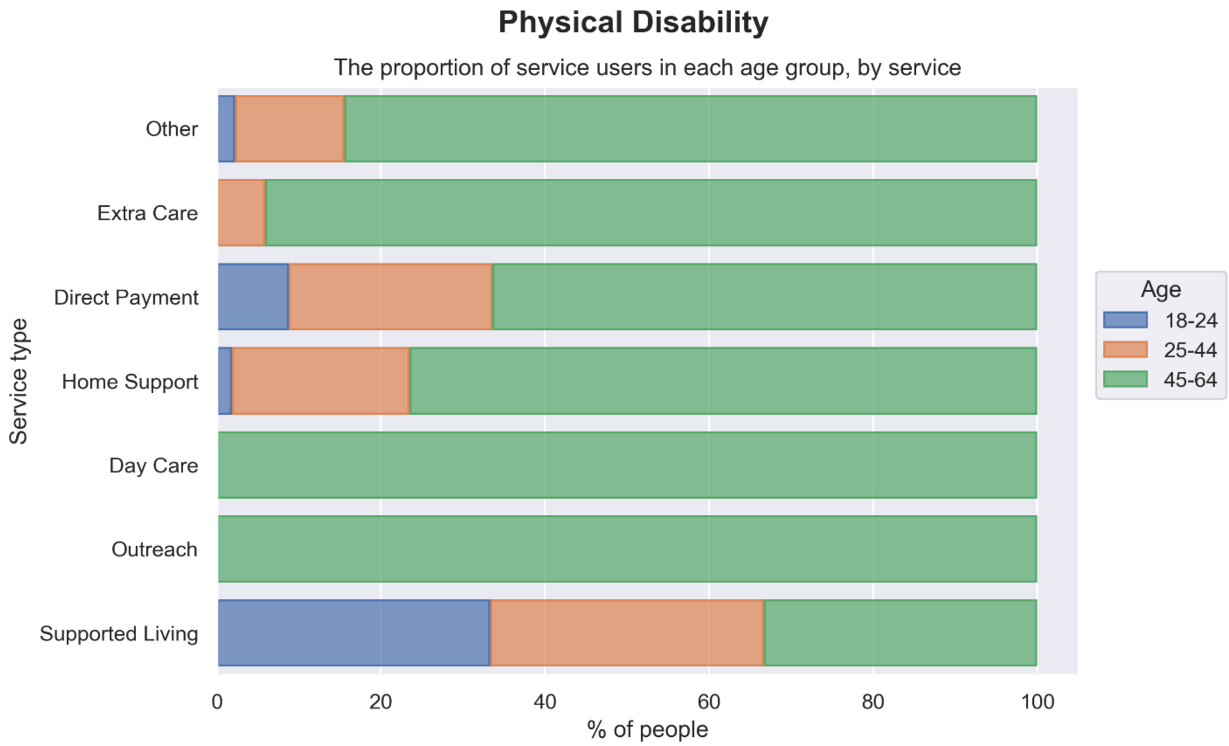
Adult social care physical disability service user profile 2023-24

Figure 15: Physical & sensory disability service user profile (October 2024)



[13] GLA population and prevalence projections, Life Opportunities Survey Office for Disability Issues (2011) HM Government, & Living in Britain Survey (2001) - national prevalence rates

Figure 16: Physical & sensory disability age by service breakdown (October 2024)



Service use trends and demand projections

There has been a 13% decrease in the number of adults with a physical disability accessing adult social care services funded by us between 2018-19 and 2023-24.

The table below shows service use over a six-year period highlighting the percentage changes since pre-covid to help understand the impact of the coronavirus pandemic on service use and demand together with projections to 2030.

Table 8: Physical & sensory disability service use flows 2018-2024 and projections

Service type	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	% Change from 2018-2024	DOT since Covid 19 (2019-2020)	Projection for 2025	% Change for 2025	Projection for 2030	% Change for 2030
Residential Care	13	12	11	10	11	9	-31%	-25%	10	11%	11	22%
Nursing care	30	24	20	26	27	27	-10%	13%	26	0%	27	0%
Supported Living	*	*	*	8	*	*	*	*	*	*	*	*
Extra Care	17	19	17	16	23	22	29%	16%	23	5%	26	18%
Day Support	33	28	22	21	12	10	-70%	-64%	13	30%	21	110%
Direct payments	174	180	187	172	150	149	-14%	-17%	153	3%	166	11%
Home Care	258	218	214	205	209	211	-18%	-3%	214	1%	220	4%
Overall	**464**	**419**	**438**	**436**	**408**	**406**	**-13%**	**-3%**				

**Small numbers are not reported*
*** A service user may receive more than one service, but the total only counts a service user once hence will not equal the sum of all services*

Care homes

Current provision

There is some specialist provision in the borough including specialist residential provision for people with dual hearing impairments and mental health conditions, and also one residential and nursing provision combined with rehabilitation services for people with neuro-disability which attracts residents from outside the borough.

We acknowledge that a greater understanding of how we can best support residents with neurological conditions is required. Data around these residents is limited and often relates only to hospital rather than community based care. We intend to work with our health colleagues in order to best understand the needs of those with neuro-disability and ensure these are met going forward.

Service use

For both residential care and nursing care, council placements have remained steady between 2018-19 to 2023-24. However, these are small numbers and not statistically significant.

The demand in Wandsworth for care home services for under-65s with physical support needs is low. The borough places approximately 0.29 younger adults with physical support needs in residential care and 0.83 in nursing care (in or out of borough) per 10,000 of the adult population. In total this is the 3rd lowest among London boroughs and the lowest among SW London boroughs[14].

Future need

We predict no significant changes in numbers as we plan to continue our focus on community-based services. Also, the small numbers also make this forecast statistically insignificant, and care home numbers could increase if the needs of future cohorts require higher levels of support.

Extra care

Current provision

Most extra care schemes have an age restriction of 50,55 or 60+ so availability for this cohort is low. All new extra care housing developments and general housing developments include fully accessible flats for adults with needs around their physical disabilities, including the new Alton Road site.

Service use

There has been a slight increase in the number of service users accessing extra care but again these are small numbers.

Future need:

We will work with key providers and partners to explore the possibility of a model that caters for younger adults including those with degenerative conditions, which is flexible and accessible. For this reason, we expect small increases of service users in extra care over the decade.

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[14] ADASS Market Report Analysis

Supported living

Current provision

There is currently no specific specialist supported living schemes for this cohort

The focus for this group is on reconfiguring care to better meet the needs of individuals. Key generic requirements are for flexible accommodation to promote independence and meet changing needs and also ensure accessibility to communications (including BSL, Makaton and Braille). Proximity to local community and facilities and transport links as well as accessibility of premises is also important.

Service Use

Due to the small numbers in this cohort, and the lack of provision in this borough, placements remain very low.

Future need

We are exploring the possibility of developing some accessible, flexible supported living provision for this group as required. Small-sized schemes might be useful for people with long-term conditions looking to move towards independence. Whilst demand is too small to estimate future demand, we expect a small increase of service users in supported living over the next decade.

Day opportunities

Current provision

There are currently two specialist day centres within Wandsworth which provision specifically for service users with a physical or sensory disability. These centres provide a range of activities and support and require referral from adult social services to access.

Demand

Placements in day opportunities have shown a significant decrease between 2018-19 and 2023-24. The rate of decrease between 2018 and 2024 is 70%, which may be due in part to the strong open-access offer.

Future need

Projections to 2030 suggest that there will be a steady increase. We expect this slight increase to occur as the wider transformation of day opportunities takes place, which will allow more opportunities for people, including digital support in their own homes. We will continue to ensure access to employment/education/training and volunteering opportunities particularly for people with long-term conditions.

Home care

Current provision

We have contracts with 8 providers for the provision of council commissioned care to support service users with different needs; we also spot purchase from over 30 care agencies.

Across 2024/25 we will be completing a strategic review of our homecare services to ensure there continues to be a sufficiency of care at home services to meet the needs of our local population.

Service use

Council commissioned home care has decreased since 2018 but remained relatively static the last three years.

Future needs

Projections to 2030 suggest that there will be a small increase in the number of service users accessing home care due to wider population increases within Wandsworth, and especially due to projected increases in those with a physical or sensory disability.

Direct payments

Current provision

We work in close partnership with one local user-led organisation to deliver a comprehensive direct payment support service to enable more people across Richmond and Wandsworth to take up DPs.

Service use

The number of people receiving a direct payment from this cohort has remained fairly static since 2018.

Future need

Projections show that the numbers receiving direct payments are likely to increase slightly. With the increased focus on using direct payments more flexibly and creatively, and a new support service commencing, there may be opportunities for people to access less traditional day opportunities.

Carers

Demographic profile

According to the 2021 census, around 6.8% of the population are estimated to be carers within Wandsworth, which is an estimated 22,270 residents.

From the 2011 census, this can be broken down by age group as follows with the greatest proportion falling in the 25-49 age group category:

- 0-24: 1,719 (2.1%)
- 25-49: 9,015 (5.7%)
- 50-64: 5,944 (16.7%)
- 65+: 3,050 (11.8%)

The table below outlines numbers of those providing unpaid hours of care per week (from the 2021 census):

Table 9: Breakdown of unpaid hours of care

Population	Carer population (%)	No unpaid care		1-19 hours unpaid care		20-49 hours unpaid care		50+ hours unpaid care	
		Total	% of total population	Total	% of total population	Total	% of total population	Total	% of total population
327,500	6.8	305,230	93.2	11,790	3.6	4,585	1.4	5,895	1.8

Carers in Wandsworth are less likely to be in good health than people who provide no care. People who do 50 or more hours of unpaid care each week are much more likely to be in poor, or very poor, health.

The 2011 census highlighted that 45% of carers were from a Black, Asian and Minority Ethnic Group, which is similar to the overall population rate of 47%[15].

Current provision

We are committed to recognising and supporting unpaid carers in their caring role and offer a range of services including carer's assessments, short breaks from caring, carer's direct payments and voluntary sector support.

Wandsworth Carers Centre is the main provider of local carer support services, who sub-contract respite to Bluebird Care Wandsworth.

The services provided include information, advice, and advocacy, peer support, carer's respite, back care and therapies and health and social care liaison and training. The Carers Partnership is currently developing several new services including end of life care, mindfulness, support for young carers in schools, a wider range of short break options, greater support for carers from LGBTQ+ communities and the development of a carer's passport. At the same time, work continues with other open access providers to improve the recognition and support they offer to unpaid carers through day activities.

[15] Wandsworth JSNA

Young carers (children and young adults) have the same right as other children to enjoy life as fully as possible. Young carers may have different needs to other carers. Specific services for this group in Wandsworth include Carers Trust, Children's Society and Youth Legal services.

Demand

There were 929 carers either assessed and/or supported by Wandsworth adult social care services in 2023-24 and over 6,271 known to the Carers Centre (June 2024).

Table 10: Carers demand overview

Assessed and/or supported adult social services 2023-24	929
Known to the Carers Centre June 2024	6,271

The number of carers in the census compared to the number of carers known to services, indicates there is a gap in identification. Carers often do not recognise their role and only associate with their primary relationship to the person or choose not to be labelled as a carer.

The average number of carers assessments and reviews undertaken (over 5 year period) is 668 and the number of carers services provided shows an increase of 11% between 2022-23 and 2023-24.

Table 11: Number of carer assessments & services

Year	Carers	Carers assessments/ reviews	Carers Services		
			Support Direct to Carer		Carer support to the cared for
			DPs only	Information/ advice	Respite or other support
2023/24	929	809	248	638	579
2022/23	858	769	215	606	501
2021/22	760	537	124	594	439
2020/21	770	649	94	639	352
2019/20	738	578	142	549	Not available

Data source: Mosaic client information database and SALT returns

Future need

The need for carers services and support is expected to increase. As people are living longer with health and social care needs, the gap between the number of carers and the number of people with limiting long-term conditions is increasing. This means an increasing number of people will become unpaid carers with all the increasing attendant needs as well as an increasing need for social care support for people without an unpaid carer. The number of "sandwich carers" (those looking after young children at the same time as caring for the older generation) is expected to rise as are the number of people with ageing parents increases. While the recent 2021 census indicated a slight decline in the number of people providing unpaid care (perhaps due to pandemic restrictions) it also revealed an increasing number of carers providing 20 or more hours of care each week.

Self-Funder demand

"A self-funder is typically an individual who organises or funds their care in residential or community settings, as opposed to receiving financial support from the local authority or another third party"[16].

We want to work with providers and partners to ensure flexible, responsive and innovative services that are adaptable to meet the needs of everyone, not just those whose care and support is directly funded by us. For those people in care homes who self- fund, the challenge is the relatively high cost of care home beds which can result in self-funders' levels of income reducing quickly and falling below the national threshold of £23,350, resulting in us having to meet the cost of their care. It has been estimated that 25% of self-funders become eligible for local authority support due to depleted funds[17]. The impact of the funding care reforms if or when introduced will have an impact on the proportion and volume of those funding all or part of their care.

Data on people who self- fund their care is limited. Estimates:

Table 12: Estimated self-funder demand

Service type	National data	Wandsworth
Residential	37.0%	42.2% (RBC is 37.6%)
Community	23.0%	18.5% (RBC is 41.1%)

Data source: ONS- An estimation of the size of the self-funding population in care homes & regulated community services in England, using an experimental method March 2022-February 2023. Weighted annual data broken down by geographic variables and care home characteristics.

We want providers and partners to improve our data to understand changes in the number of self-funders in future years, compared to individuals in receipt of council funded support, so we can plan resources to support self-funder pickups. Identifying key characteristics of the self-funding population will help self-funders receive better advice, earlier, so they can make more informed choices about the care they receive.

[16] ONS: Care homes and estimating the self-funding population, England
[17] ONS: Care homes and estimating the self-funding population, England

Equalities demand analysis

Understanding the different protected characteristics of service users enables us to ensure the provision of tailored, person-centred care that is respectful and inclusive and meets the diverse needs of individuals. Equalities needs assessments and equalities monitoring helps to identify disparities in service user access, outcomes and experience.

- The majority of service users who access services are older people, 1315 (44%), 323 (11%) adults with physical disability needs, 825 (28%) adults with learning disability needs and 495 (17%) adults with mental health needs. Older people and adults with learning disability needs have the highest proportions of residents in care homes, 26% and 27% respectively.
- The proportion of service users who are male (47%) and female (53%) are similar to the proportions in the local population.
- The overall total profile of those currently using adult social care services in terms of ethnic background shows a greater proportion from a Black, Asian and Ethnic background (46%) compared to the local population (30%). This indicates that broadly, services are accessible to people from Black, Asian and Minority Ethnic backgrounds, with the proportion of those from a Black British background (28%) accessing services above the proportion in the local population (11%) whilst there is slight under representation from Mixed Ethnic groups. However, we recognise the position is variable across different services and equality needs assessments and equalities monitoring help to identify and address disparities and develop services that meet the diverse needs of individuals.
- For Black, Asian and Minority Ethnic groups, there is ongoing work through the EMHIP project to analyse and innovate tailored services for Black, Asian and Minority Ethnic residents[18]

[18] https://emhip.co.uk/

Table 13: Equalities breakdown of service users compared to borough population

Ethnic Group	% Of borough population	% Of service users receiving a service	Gender	% Of borough population	% Of service users receiving a service	Age	% Of borough population	% Of service users receiving a service
Asian/Asian British	12%	12%	Female	53%	54%	18-24	11%	5%
Black/Black British	10%	28%	Male	47%	46%	25-34	32%	8%
Mixed/multiple ethnic groups	6%	3%	**Known Religion**			35-44	20%	8%
Other ethnic groups	4%	3%	Christian	43%	25%	45-54	15%	11%
White/white British	68%	54%	Other Religion	14%*	11%	55-64	11%	16%
Not stated	N/A	3%	No Religion	36%	4%	65-74	6%	14%
Black, Asian and Mixed/Multiple Ethnic Groups	*32%*	*46%*	Not Stated	7%	60%	75-84	4%	18%
						85+	2%	20%
			Known Sexuality					
			Heterosexual	86%	49%			
			Lesbian/Gay	3%	<0%			
			Bisexual	2%	<0%			
			Not Sure	0%	<0%			
			Unknown	8%	51%			

**Other religion for the borough population derived from the Census 2021 includes: Buddhist, Hindu, Jewish, Muslim, Sikh & Other.*

Data sources: Census 2021, Mosaic March 2022

Geographical maps of in borough service provision

Older People

On the right is a map of current care homes for older people provision in the borough (irrespective of whether they are commissioned by the council). There is a marker for each service in the area, the colour of the marker represents a service type.

Legend

Marker	Accommodation type
	Residential
	Nursing
	Extra care
	Day services
	Activity centre

Figure 17: Older people geographical mapping

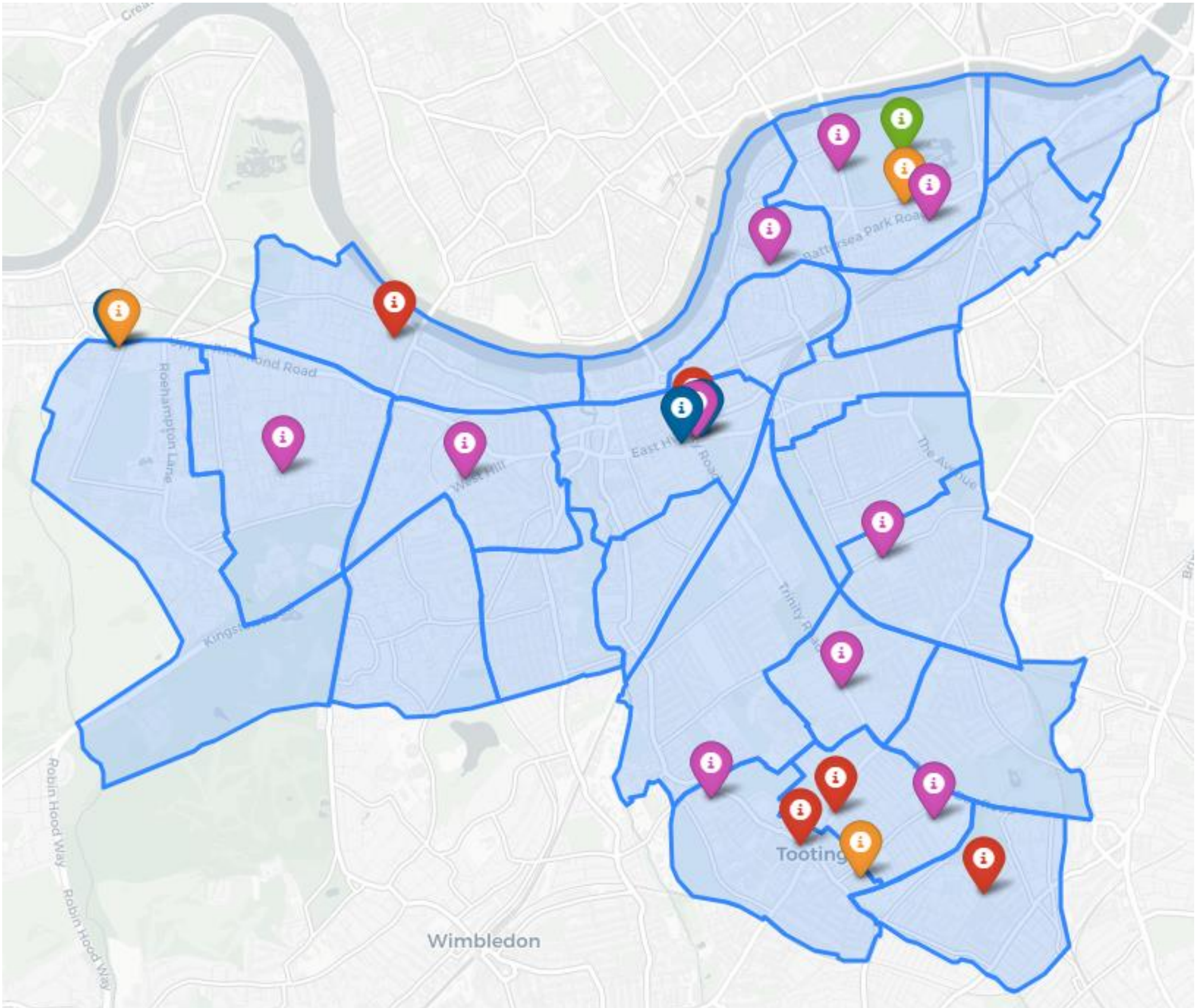
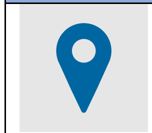
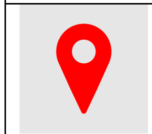
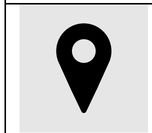


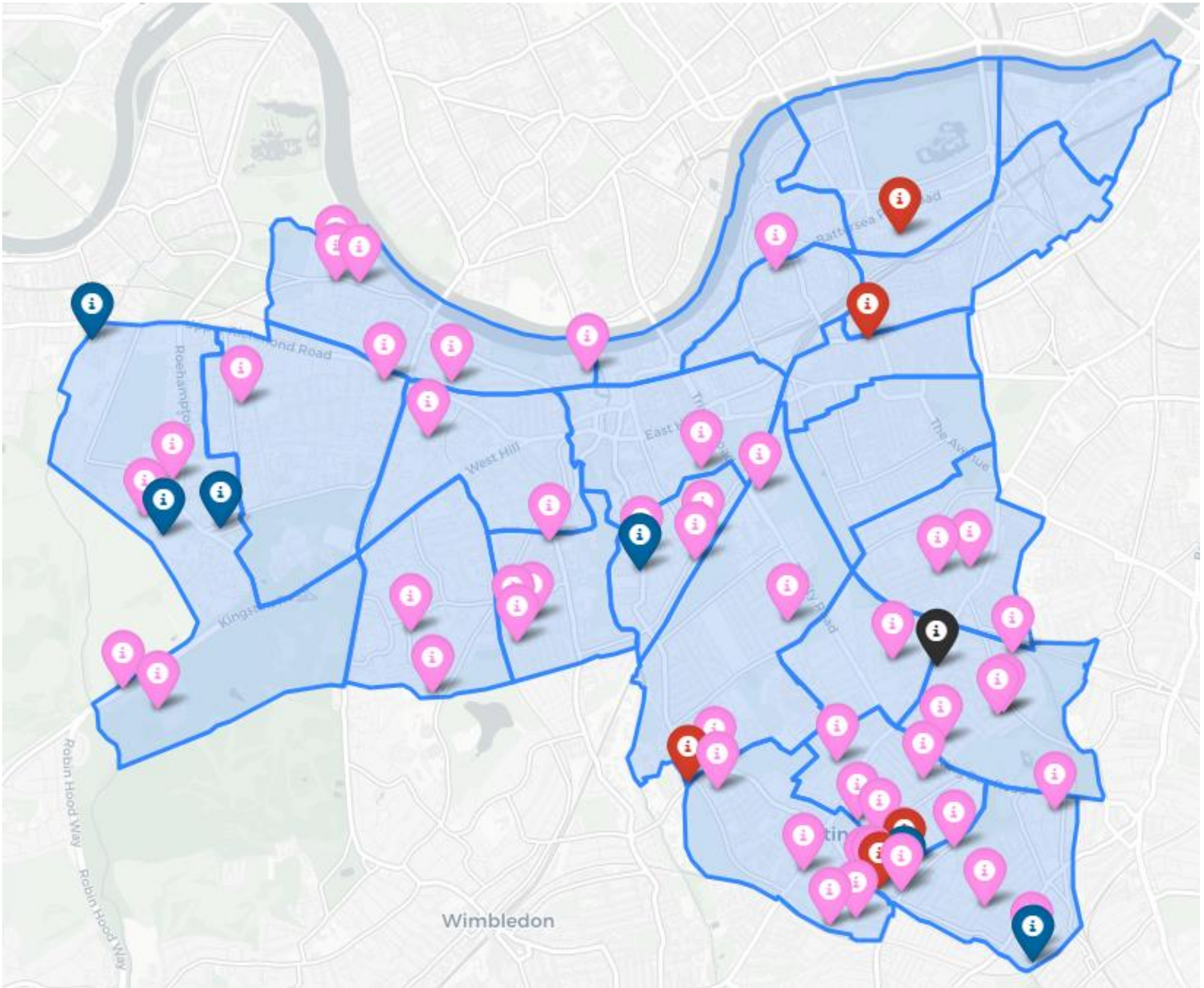
Figure 18: Learning disability geographical mapping

Learning disability

Below is a map of current care homes for people with learning disabilities provision in the borough (irrespective of whether they are commissioned by the council). There is a marker for each service in the area, the colour of the marker represents a service type.

Legend

Marker	Accommodation type
	Residential
	Supported living
	Day services
	Shared lives



Mental health

Below is a map of current care homes for mental health provision in the borough (irrespective of whether they are commissioned by the council). There is a marker for each service in the area, the colour of the marker represents a service type.

Legend

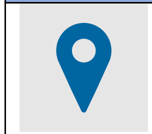
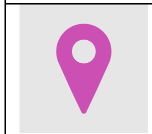
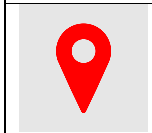
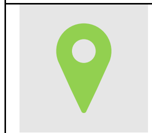
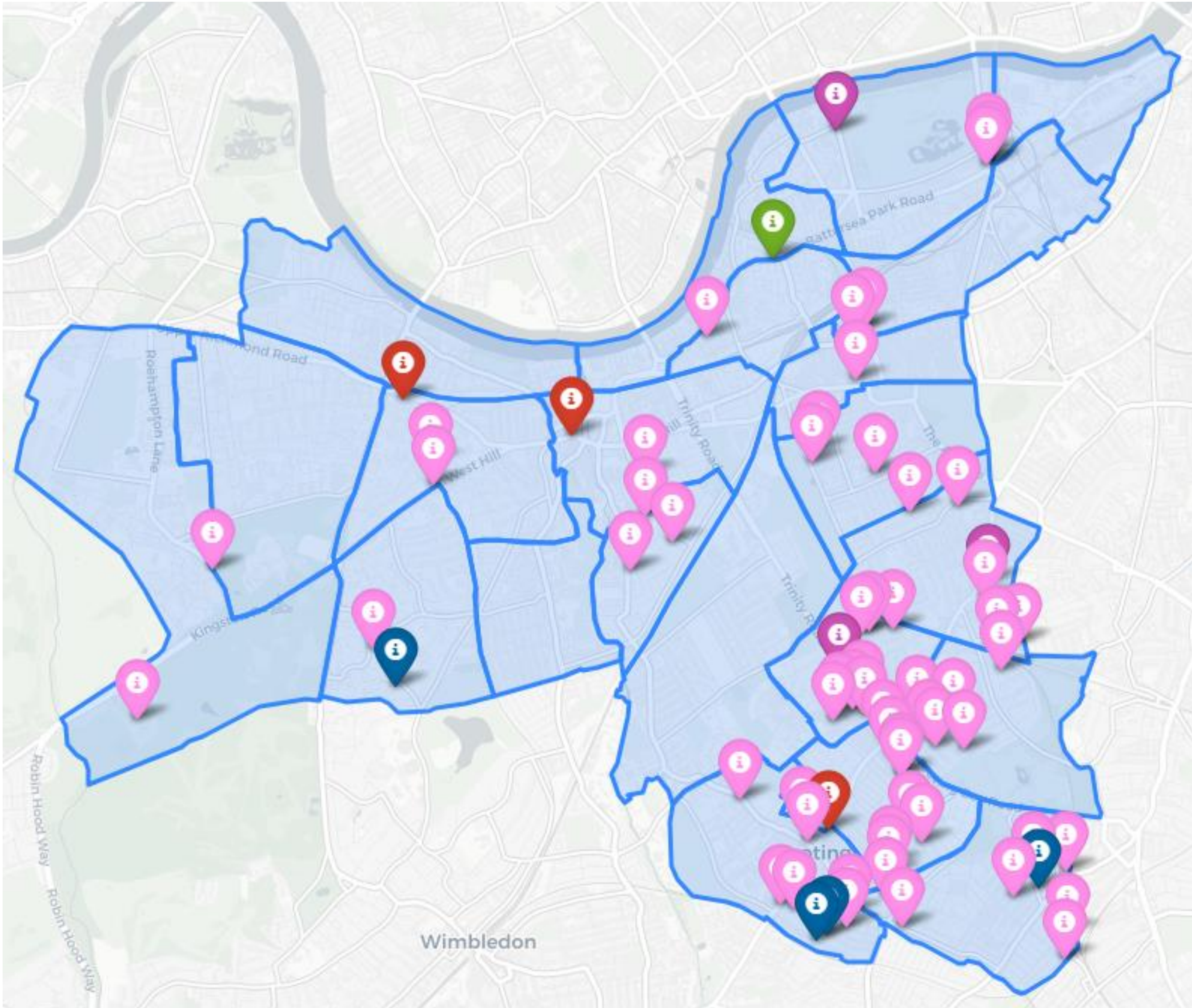
Marker	Accommodation type
	Residential
	Nursing
	Supported living
	Day services
	Activity centre

Figure 19: Mental health geographical mapping



Physical disability

Below is a map of current care homes for mental health provision in the borough (irrespective of whether they are commissioned by the council). There is a marker for each service in the area, the colour of the marker represents a service type.

Legend

Marker	Accommodation type
	Residential
	Nursing
	Physical disability
	Sensory disability
	Physical and sensory disabilities

Figure 20: Physical disability geographical mapping