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# From ambition to action

Technology enabled care: State of the sector 2024



#### About the report

This report is the result of a collaboration between the TEC Services Association (TSA) and PA Consulting (PA). It has been compiled using a mix of qualitative and quantitative research, including analysis of primary data collected through online web surveys and TSA data sets, alongside secondary data from sector stakeholder literature and national data sets (e.g. from ONS, NHS). Every effort has been made to use data from within the last three years. The Survey of Senior Leaders in Adult Social Care, conducted between December 2023 and January 2024, was shared with 205 councils across the UK and asked a range of quantitative and qualitative questions. Overall, 42 responses were received from 40 councils.



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#### **About TEC Services Association (TSA)**

TSA is the independent advisory body for the technology enabled care (TEC) sector.

We support organisations that commission, provide and supply TEC services and solutions to over 2 million older and disabled people. Our vision is to enrich, enhance and enable people's everyday lives through technology enabled care.

TSA members include NHS trusts, local authorities, care providers, housing associations and technology suppliers. We act as a strategic convenor across care, health and housing, supporting hands-on delivery of actions to embed TEC into services. TSA regularly provides advice on proactive and preventative care to governments and regulators in the four home nations.

Find out more at www.tsa-voice.org.uk

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### Introduction

Welcome to the first ever state of the sector report on technology enabled care (TEC).

TSA and PA have come together to create this report to help raise the profile of the TEC sector while supporting those across the health and care system. It explores how TEC can help service commissioners meet a tidal wave of demand amidst severe financial pressures. This report also highlights the areas of TEC development that commissioners will be focused on in the next 12 months, and the challenges they expect to face in doing so.

The report compiles various research and insights to demonstrate the current use of TEC in helping individuals to live independently and safely. It also highlights the plans of TEC service commissioners, including councils and central government, to invest in further development over the next 12 months. As well as being of interest to local and central government, the report will also be useful for the NHS and the broader TEC sector.

At the heart of this report are the findings of a new in-depth survey of adult social care leaders. With representatives from one in five councils in the UK responding to the survey, the results provide new insight into the TEC sector, while highlighting the many opportunities ahead.

#### What is TEC?

TEC is use of technology to provide health and care services that enable people to:

- Stay well by being connected to others;
- live well and safely in and around the home;
- access quality information, advice and support; monitor and manage their own care, health and wellbeing;
- draw on proactive support to maintain wellbeing, health and care.¹

#### Examples of technology used in TEC service models

Home safety devices and adaptations, such as:

- Telecare alarms and sensors
- Door alarms

Home consumer electronics, such as:

- Smart speakers
- · Home domestic units including vacuum cleaners

Internet of Things solutions and wearables, such as:

- Smartwatches
- · Activity sensors and monitoring

Independence and communication tools, such as:

- Communication aids and tablets
- Telehealth type solutions

<sup>1</sup> TEC Action Alliance, Implementing TEC so we can all live gloriously ordinary lives (2024)

In the UK, TEC services are delivered in various ways, increasingly so as intelligence-led solutions enable a proactive rather than reactive response. Typically, TEC services have variants of the seven elements of the service model shown below.

#### A typical TEC service model



# The TEC opportunity

From our research, one thing is clear: there is huge potential for TEC to transform the lives of people of all ages but it is currently underutilised.

TEC can support some of the most vulnerable people in our society to live good lives in the place they call home, break down barriers to employment, support carers, and enable children and young people with special needs and disabilities to fulfil their potential.

The eligibility criteria and pathways by which people can access TEC vary from area to area, with many different people involved in referrals using various types of assessment – including in person and via forms. Some areas fully fund TEC, some part-fund, and others do not fund it at all.

## Who can benefit from TEC?

Traditionally, TEC has predominantly been a service commissioned or delivered by councils, often as an element of a social care package, but also within supported housing environments with a focus on safety and raising an alert in an emergency. TEC is no longer just for older people, but can support people of all ages. Some progressive councils have pushed beyond this, demonstrating how technology can transform the way people's social care outcomes are supported.

There is an opportunity to support people who have not traditionally been served by TEC.

#### Examples include:

- Younger adults and people with learning disabilities
- Unpaid carers
- Children with special educational needs
- Disabled students in higher education



#### Younger adults and people with learning disabilities

It has been 18 years since the UN declared assistive technology a human right and integral to some disabled people interacting equally within society.<sup>2</sup> Successive parliamentary reports<sup>3</sup> have highlighted how technology can be used to support people with special educational needs and/or disabilities in order to make employment more accessible, if implemented correctly and inclusively.

TEC can support outcomes for younger adults and people with learning disabilities based around an individual's progress – enabling people to move towards greater independence, choice, and control over their lives at their own pace. This is a significant opportunity.

Supported living providers can use TEC to assess levels of independence so that care and support can be right-sized. TEC solutions can also be used to reduce or entirely remove the requirement for nighttime support.

#### 870,000

working age adults in the UK have a learning disability<sup>4</sup>

51.3%

of disabled people are employed, compared with 81.3% for those who are not disabled<sup>5</sup>

**29**%

of those with autism are in employment, and 26.2% of people with 'severe or specific learning disabilities' are in employment<sup>5</sup>

<sup>2</sup> United Nations (UN), Convention On The Rights Of Persons With Disabilities (CRPD) (2006)

<sup>3</sup> Nicole Winchester, House of Lords Library, Assistive technology in education and employment, accessed 02 February 2024

<sup>4</sup> Mencap, How common is a learning disability? (n.d.), accessed 02 February 2024

<sup>5</sup> Office for National Statistics (ONS), <u>Outcomes for disabled people in the UK: 2021</u> (2022)

#### **Unpaid carers**

While official figures put the number of unpaid carers at 5.7 million,6 Carers UK believes it is actually around 10.6 million (more than 1 in 6 people in the UK), with many carers not recognising themselves as such.7

In 2023, the Department of Health and Social Care (DHSC) launched a £42.6m grant fund aimed at boosting the quality and accessibility of adult social care.8 This fund recognises the opportunity to support unpaid carers through technology and innovation, as each council is expected to use part of the funding in this way.

Some 66% of councils say they plan to invest time, effort and resources into TEC to support unpaid carers to enable them to continue to provide care.9

Personalised TEC solutions can enable unpaid carers to take short breaks from caring and reduce carer burnout. These short breaks can be incredibly important for carers to rest, recharge and reduce stress levels.

#### Carers UK reports<sup>10</sup> that:

20%

of carers say using remote monitoring such as motion sensors, fall detectors, personal alarms, or GPS trackers makes their role easier

**22**%

of carers say using technology to enable 'remote health care', such as virtual GP appointments, makes their role easier

**17**%

of carers don't feel confident using technology or digital services

> in the UK are estimated to be unpaid carers

- 6 Carers UK, <u>Key facts and figures about caring</u> (n.d.), accessed 02 February 2024
   7 Carers UK, <u>State of Caring 2023: The impact of caring on: finances</u> (2023)
- Department of Health & Social Care (DHSC), Accelerating Reform Fund for adult social care: guidance for local authorities (2023)
- 9 TSA and PA survey of senior leaders in adult social care, 2024
- 10 Carers UK, State of Caring 2022 (2022)

#### Children with special educational needs

The scale of the opportunity for TEC to support children and their families is underlined by two-thirds of councils saying they do not currently use TEC at all, or only occasionally, with no plans to increase usage to support this group.<sup>11</sup>

TEC has the opportunity to support these children and their families by:

- Supporting physical disabilities and complex needs
- Promoting safety in and around the home by supporting children and their families to manage risks
- · Promoting independence and wellbeing

TEC has the potential to address the gap in attainment for children with special educational needs. As research commissioned by the Department for Education sets out: "Policy initiatives and investments in assistive technology [AT] have the potential to reverse the historical disadvantages experienced by pupils and students with special educational needs and disabilities in ways that improve opportunities." Yet TEC remains under-utilised in the education sector.

There are opportunities to use communication aids to support non-verbal children to engage with teachers. TEC can support children to interact within lessons alongside their peers, for example by using text-to-speech software and assistive listening devices.

17.3%

of pupils (1.57 million) in England have special educational needs (SEN)<sup>12</sup>

22.5%

of children with SEN achieve GCSE grades 5 or above in English and maths compared to 55.8% of those without additional needs<sup>12</sup>

22.5%

of children with SEN progress to higher education compared to 48.6% for students with no identified needs. 12

<sup>11</sup> TSA and PA survey of senior leaders in adult social care, 2024

<sup>12</sup> Department for Education (DfE), Special educational needs and disability: an analysis and summary of data sources (2023)

<sup>13</sup> Dave L. Edyburn, DfE, Rapid literature review on assistive technology in education (2020)

<sup>14</sup> DHSC, Research and development work relating to assistive technology: 2020 to 2021 (2022)

#### Disabled students in higher education

Disabled people make up a growing proportion of the student population, rising every year from 311,100 in 2017-18 to 451,580 in 2020-21.<sup>15</sup> However, they can face many barriers that adversely affect their outcomes. For example, 36% of autistic students drop out without completing their studies (the highest of any group, compared to 29% for all students).<sup>16</sup>

**15.7**%

of higher education students in the UK are disabled<sup>17</sup>

One way for people to access TEC to support their needs is via the Disabled Students' Allowance (DSA), which includes £5,849 a year for specialist equipment.

DSA's stated aim is to remove barriers and improve participation in higher education of students with disabilities, and there is a wide range of TEC eligible for funding.<sup>18</sup>

DSA assessors review applications to determine the type of support depending on the individual's needs, therefore their awareness and knowledge of TEC is critical to ensure students are supported by the most appropriate solutions for their needs.

Higher education can open up a wider world for students, however progressing studies in new environments can be a challenge. Using TEC such as time management software and apps to manage anxiety can result in students maintaining their place on education courses.

<sup>15</sup> Higher Education Statistics Authority (HESA), <u>Higher Education Student Statistics: UK, 2021/22</u> (2023)

<sup>16</sup> North East Autism Society, Autistic students most likely to drop out of university: investigation (n.d.), accessed 02 February 2024

<sup>17</sup> HESA, Higher Education Student Statistics: UK, 2021/22 (2023)

<sup>18</sup> Barry Bennett, *DSA approved software, hardware & ergonomic equipment* (n.d.), accessed 02 February 2024

#### Where is the opportunity?

There is a crisis in health and social care that is resulting in councils struggling to meet our ageing population's increasingly complex needs within constrained budgets.

434,000+

people are waiting for a care assessment<sup>19</sup>

12,000-13,000

patients remaining in hospitals in England with no criteria to reside (1 in 8 general and acute beds)<sup>19</sup>

#### 6.7 million

increase in the number of 75 to 85-year-olds by 2028, with the number of those aged 85+ rising by more than a fifth $^{20}$ 

33%

It's predicted the number of 75 to 85-year-olds will increase by a third and those aged 85+ by more than a fifth in the space of 10 years by 2028<sup>20</sup>

461,000

more people aged 75+ will be living alone by 2028<sup>20</sup>

4.9%

rise in requests for care per 100,000 people between 2017-18 and 2021-22, while the numbers receiving care fell by 2.2%<sup>19</sup>

Councils need to prevent demand and reduce costs. There is a consensus among directors of adult social care and politicians that innovative technology-enabled solutions should play a key role in addressing these challenges.

#### Our research suggests:

- TEC can support more people
- TEC is a crucial part of strategies to support people
- The case for wider use of TEC has been proven, but the pace of change is inconsistent.

<sup>19</sup> Care Quality Commission (CQC), State of Care 2022/23 (2023)

<sup>20</sup> Toby Watt et al., The Health Foundation, Health in 2040: projected patterns of illness in England (2023)

#### TEC can support more people

Across the country, TEC connects millions of people to care and support that enables them to live independently. More than two million people use TEC connected to an alarm receiving centre across the UK.<sup>21</sup> The largest five TEC alarm receiving organisations account for almost half of those connections, with many of them monitoring on behalf of other bodies. The vast majority of TEC connections (84%) have Quality Standards Framework certification, the benchmark for TEC services.<sup>21</sup>

The COVID-19 pandemic pushed TEC to the fore as councils and their partners adapted the ways they support people. TEC established itself as a way to deliver better outcomes for people at a lower cost. In our survey, 100% of adult social care leaders told us TEC is a vital part of their social care offer.<sup>22</sup> TEC is no longer only for older people and those with physical disabilities, as councils are now using TEC to support a range of different people (figure 1).

Figure 1: Where is TEC being used at the moment?

To support older people

To support people with physical disabilities

To support the hospital discharge pathway

To support the reablement pathway

To support people with learning disabilities

To support care act reviews

To support people who are socially isolated

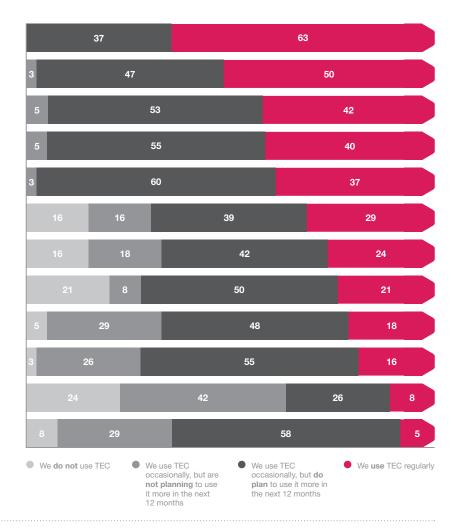
To support people living with dementia at the point of diagnosis

To support people with autism

To support people with mental health needs

To support children and their families

To support transitions to adult social care

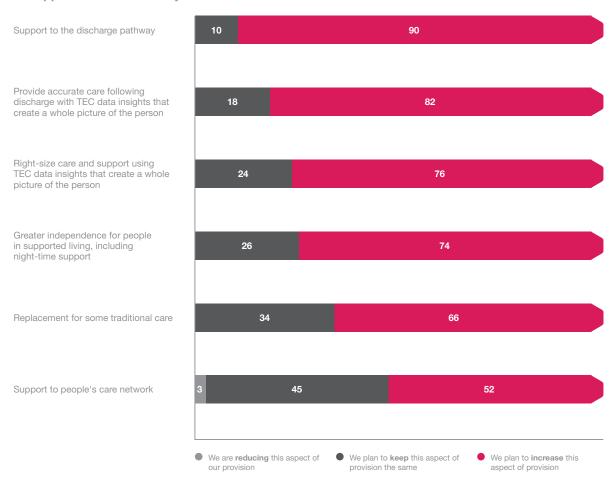


<sup>21</sup> TSA analysis, January 2024

<sup>22</sup> TSA and PA survey of senior leaders in adult social care, 2024

Some 97% of leaders in adult social care<sup>23</sup> said they are planning to increase their use of TEC in the next 12 months. Support to the discharge pathway has been identified as the top priority (figure 2).

Figure 2: What are your personal priorities for the role TEC will play to support the council's objectives over the next 12 months?



<sup>23</sup> TSA and PA survey of senior leaders in adult social care, 2024



With increasing demand for older people services, we plan to increase our use of TEC even more, as a preventative measure and also to decrease the need for the more traditional care.

Survey of senior leaders in adult social care, 2024

#### TEC is a crucial part of strategies to support people

Councils have told us they see TEC as part of their response to the crisis in social care, with 97% of adult social care leaders agreeing that TEC is an important part of the way councils are planning to respond to the tidal wave of demand and compexity (figure 3). They are using TEC to support the independence and safety of people in their community – effectively preventing demand, managing complexity and proactively reducing an escalation in the cost of care.<sup>24</sup>

Beyond publicly funded services, the TEC opportunity is also driven by the growth of consumer technology, such as smart devices, that supports people's health and wellbeing. There is increasing awareness and acceptance of using technology in this way. For example, 34% of people in the UK use wearable technology and apps to manage their health.<sup>25</sup>

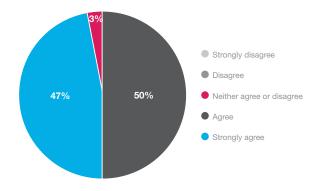
The advent of smart gadgets and other consumer devices and apps has opened up new opportunities and heightened awareness of the potential for technology to support health and wellbeing. Indeed, 78% of people say they use the internet to support their wellbeing.<sup>26</sup>

A combination of living through a pandemic, society's desire to remain connected with family and support networks, and the continued growth in the use of smart technologies in everyday life are changing the TEC landscape.

Growth in the private pay market is attracting new players to enter the TEC sector, for example, insurance companies, utilities, and consumer electronics and high street retailers. These organisations are leveraging their trusted brands and consumer knowledge to create innovative products and services that cater to a wider range of needs and outcomes.

Figure 3: To what extent do you agree or disagree with the following statement?

TEC is an important part of the way councils will respond to the tidal wave of demand and complexity



<sup>24</sup> TSA and PA survey of senior leaders in adult social care, 2024

<sup>25</sup> NHS Confederation, Patient empowerment: what is the role of technology in transforming care? (2023)

<sup>26</sup> Good Things Foundation, Digital Nation UK 2023 (2023)

# The case for the wider use of TEC has been proven, but the pace of change is inconsistent

Eight out of 10 councils believe the case for the wider use of TEC has been proven.<sup>27</sup> This is driving many councils to seek to transform the way technology is used to support better outcomes for people. As councils progress along that transformation journey, we expect TEC will start to support a far wider range of people, such as supporting children with complex needs.

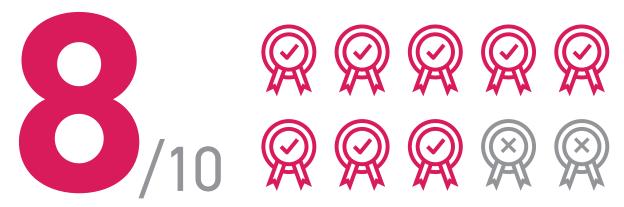
Although councils see the transformational potential of TEC, the pace at which they are driving transformation of care models with TEC embedded has been inconsistent. Progress towards supporting more people of all ages with a broader range of needs remains slow.

Councils have identified the challenges and enablers of change that need to be addressed if they are to translate their TEC ambitions into the accelerated action that delivers great outcomes for people in the place they call home.

Our research suggests local authorities that wish to achieve this will need to prioritise sustainable transformational change with TEC embedded, with a focus on outcomes, not on technology.

This will be achieved by:

- Defining the outcomes and building the investment case
- Tackling the challenges ahead and identifying the enablers of success
- Igniting momentum with a seniorchampioned plan for success



> councils believe the case for the wider use of TEC has been proven

# Defining the outcomes and building the investment case

The potential roles for TEC can be seen across society, whether it's helping to break down barriers to work for people with disabilities, or boosting attainment in schools. The public's desire to utilise technology is also clear.<sup>28</sup>

Eight out of ten adult social care leaders identified constructing a credible financial case for TEC investment as the primary obstacle to achieving their TEC goals within the next year.<sup>29</sup> The starting point in building a compelling case for investment is by being clear about the outcomes you want to achieve. Clearly defined outcomes become the north star for TEC development, guiding and optimising the design of pathways and services.

<sup>29</sup> TSA and PA survey of senior leaders in adult social care, 2024

## What people want from TEC

TEC solutions are most effective when they are configured around the individual needs of the person. This requires an understanding of the outcomes the TEC needs to support and the risks it needs to manage.

Technology of all kinds, including TEC, is playing an increasing role in helping people manage their health and wellbeing, and maintain independence. Consumer devices such as smartphones and tablets have made TEC more accessible, raising awareness of how it can benefit people in everyday life and helping to drive a growing appetite to use technology as a health aid.

#### 74%

of people in receipt of care own a smart speaker, 84% know it can support health and 54% use or know someone who uses smart speakers for this purpose<sup>30</sup>

#### 18%

of all connected or smart home products sold in the year to March 2023 were health related<sup>31</sup>

There is an appetite to use more technology and TEC to support people's health and wellbeing. In a survey of 1,000 people, a third of which have long-term conditions, 72% said they would use technology to avoid hospitalisation, and 79% would be happy to use TEC to manage their health if it was recommended by their doctor (rising to 89% for over-75s). While 80% of 18 to 24-year-olds use a health app, the figure drops to 24% for over-65s. This age group is also 91% less likely to be recommended to use an app by a health professional than the former, despite half saying they would "value the opportunity" to use them.

As well as delivering personalised outcomes, TEC must fit seamlessly into people's lives and not be stigmatising to ensure adoption and adherence.

## Building the investment case

With local government struggling to cope with financial challenges (see next section), spending is being scrutinised to an even greater degree. Investment cases for TEC must be able to demonstrate how TEC will help to reduce demand while delivering better outcomes.

Councils in England are spending between £170m and £200m on TEC services – equating, on average, to 0.8-1.1% of adult social care budgets. The financial benefit that could be achieved through TEC is estimated at £0.4-0.6bn over five years $^{35}$  – a return on investment of 60%.

TEC is not statutory and therefore is not protected by legislation prescribing what should be provided, when it should be used and who should provide it. As a result, the level, type and funding of TEC services can vary enormously from one area to the next

#### Our research reveals:

#### 74%

of adult social care leaders say building a case for financial investment in TEC – and developing a long-term funding approach – are key challenges they will have to overcome<sup>36</sup>

#### 95%

of adult social care leaders say being able to measure the financial benefit of TEC and its positive impact on people will help them reach their TEC objectives<sup>36</sup>

<sup>30</sup> Vocala research, 2023

<sup>31</sup> TechUK, State of the Connected Home 2023 (2023)

<sup>32</sup> NHS Confederation, <u>Patient empowerment: what is the role of technology in transforming care?</u> (2023)

<sup>33</sup> ORCHA, Digital Health in the UK Attitudes and Behaviour Report 2023 (2023)

<sup>34</sup> Sulayman Z. et al., BMC Geriatrics, An age-old problem or an old-age problem? A UK survey of attitudes, historical use and recommendations by healthcare professionals to use healthcare apps (2023)

<sup>35</sup> PA analysis

<sup>36</sup> TSA and PA survey of senior leaders in adult social care, 2024



Any savings on care at home services may be invested to fund the development of technology further if we can embed it into personal budgets and this will help staff engage with the use of technology if they can also see outcomes improving individuals' lives.

Survey of senior leaders in adult social care, 2024

#### How TEC is funded

Our research reveals 30% of councils are increasing the funding for TEC services over the next 12 months, with 60% expecting funding in TEC to remain the same. A further 10% expect their funding of TEC to decrease.

Funding for TEC services comes from a number of different sources, with the main source being adult social care budgets. Research reveals 30% of councils are increasing the funding for TEC services over the next 12 months, with 60% expecting funding in TEC to remain the same. A further 10% expect their funding of TEC to decrease.<sup>37</sup>

#### 24%

of councils expect to generate extra funding via reinvestment of the financial benefits realised by TEC<sup>37</sup>

#### 11%

of councils say there will be a significant rise in funding through the adult social care TEC budget<sup>37</sup>

#### Better Care Fund (BCF)

The two objectives of BCF are to enable people to stay well, safe and independent at home for longer and provide people with the right care, at the right place, at the right time. Both of these objectives can be supported by TEC. A total of £343.5m of BCF funding (3%) was directed towards assistive technology and equipment in 2022-23,38 although the figure may be higher due to different definitions and reporting arrangements.

#### 32%

of adult social care leaders expect funding from the Better Care Fund to increase in the next 12 months, with 13% expecting it to decrease<sup>37</sup>

#### Disabled Facilities Grant (DFG)

DFGs are capital grants available to people of all ages and in all housing tenures (i.e. whether renting privately, from a social landlord or council, or owneroccupiers) to contribute to the cost of adaptations. They are awarded via local authorities who, through their housing assistance policies, have flexibility around how they are used. UK government guidance states they can be used for assistive technologies, improvements to digital infrastructure within the home to support further TEC, and for environmental controls such as smart lighting and heating. One of the key perceived barriers to the use of DFGs to fund TEC is they cannot fund ongoing maintenance and support costs - the cornerstone of many quality TEC services. However, the UK government has made it clear those costs can be managed "in tandem with other local and national public services and programmes".39

#### 34%

of adult social care leaders expect funding from the Disabled Facilities Grant to increase in the next 12 months, with 8% expecting it to decrease<sup>37</sup>

<sup>37</sup> TSA and PA survey of senior leaders in adult social care, 2024

<sup>38</sup> NHS England (NHSE), <u>Better Care Fund: end of year report 2022 to 2023</u> (2023)

<sup>39</sup> GOV.UK, Disabled Facilities Grant (DFG) delivery: guidance for local authorities in England (2022)

#### CASE STUDY

# Creating a virtuous circle of investment in TEC



Hampshire County Council recognised that successfully positioning TEC at the heart of its approach to Adult Social Care required a lot more than just the technology itself. Initiated in 2013, Hampshire County Council's work with the PA Consulting Argenti Care Technology partnership introduced an approach to TEC that focused on the effective transformation, culture change, and innovation needed to deliver the best outcomes for people by mainstreaming the use of TEC. The council's Director of Adult Social Care described this approach as a "managed leap of faith", emphasising the need for tangible results.

To accurately measure the financial benefits of their partnership, the council and Argenti co-designed a comprehensive approach that created an audit trail directly back through the local authority's own financial systems. This methodology, which built the council's confidence in the results, set the benchmark for measuring the financial benefit of TEC services across the UK. In its inaugural year, the partnership delivered a return on investment of 60%, surpassing expectations and confirming the success of the leap of faith.

Over the following ten years, the council consistently increased the net financial benefit – the financial benefit remaining after all costs related to the delivery of the partnership – while garnering extremely positive feedback from users and care practitioners. It had the confidence to continuously develop and innovate the service because the council was assured its care technology partnership was reducing, avoiding, and delaying the cost of care and support. In doing so, a virtuous cycle was created, enabling further innovation and development of services.

Three factors proved pivotal in realising the benefits of care technology. First, the council fostered a culture of curiosity, inventiveness, and creativity, steering clear of adopting devices for novelty's sake and only using them where the improved outcome for the individual was clear. Second, an emphasis on continuous education and support for the workforce, led by visible leadership, ensured the seamless integration of care technology into ways of working. Lastly, the council recognised that whilst ideas are easy, execution is everything, and broke with convention by commissioning a partner, PA Consulting, with the expertise to translate ideas into practice.

# Tackling the challenges ahead and identifying the enablers of success

A number of trailblazers have demonstrated the transformational impact that TEC can have, but they are scarce and small in scale. This is due to myriad challenges facing councils, which stand in the way of them achieving their ambition for TEC in the next 12 months.

Councils have shared with us the challenges they need to overcome to achieve their TEC objectives over the next 12 months (figure 4). The challenges can be summarised as:

- **Financial pressure** Building the case for TEC investment and determining the long-term funding of services.
- Integration of health and social care Developing an integrated approach across health and social care.
- Workforce Removing barriers and raising awareness of TEC across the social care and health workforce.
- The digital challenge The impact of the digital migration on costs and operations.

#### Financial pressures

Local authorities across the UK are in the midst of a dire financial situation. At the time of writing, eight councils have issued section 114 notices in the last six years, of which seven were unable to balance their budgets. Many more local authorities fear they will follow suit. Up until 2018, just two councils had issued notices since the legislation came into force in 1989.<sup>40</sup>

Adult social care alone accounts for more than a third of spending for unitary and county councils in England, and there are rising concerns about local government's ability to carry out its statutory duties. It's a similar picture within the health system, with growing waiting lists and delays.<sup>41</sup>

#### £4bn

budget gap for local authorities in England for the next two years just to maintain current services<sup>42</sup>

#### £725m

budget gap for Scotland's local authorities in 2023-24 – up from £476m in the previous year<sup>43</sup>

#### £744m

budget gap predicted for councils in Wales by 2027-2844

#### +20%

real terms rise in social care spending in Northern Ireland. 45 Councils in Northern Ireland have been able to balance their budgets but they are not responsible for a number of high spend areas, including social care (overseen by the Department of Health) 46

<sup>40</sup> Stuart Hoddinott, Institute for Government, Local government section 114 (bankruptcy) notices (9 Oct 2023), accessed 02 February 2024

<sup>41</sup> ADASS, *Spring Survey 2023* (2023)

<sup>42</sup> Local Government Association (LGA), Section 114 fear for almost 1 in 5 council leaders and chief executives after cashless Autumn Statement (6 Dec 2023), accessed 02 February 2024

<sup>43</sup> Audit Scotland, Local government in Scotland: Financial bulletin 2022/23 (2024)

<sup>44</sup> Cardiff University, The medium-term fiscal outlook for local government in Wales (2023)

<sup>45</sup> Northern Ireland LGA

<sup>46</sup> Graham Atkins et al, Institute for Government, Devolved public services: The NHS, schools and social care in the four nations (2021)

TEC offers solutions that can help shift the focus towards prevention – reducing the cost of care and driving better outcomes for the public. The overriding message emerging from commissioners is that TEC is now integral to the ways in which councils are addressing the rise in demand for care support from people with increasingly complex needs.

Figure 4: What challenges will your organisation need to overcome to achieve its TEC objectives over the next 12 months?

Building a financial case for investment in the TEC approach that the council believes in

Determining how the TEC approach will be funded in the long-term

Developing an integrated approach to TEC across health and social care

Removing barriers stopping the council's workforce using TEC

Raising awareness of TEC within the council's workforce

Access to the appropriate skills, experience and capability required to deliver change and make it stick

The impact of the digital migration on service users and the increased cost of our TEC services

The capacity of our TEC services to deliver growth at pace and scale

Existing TEC contracts

No clear understanding of the role that TEC can play in transforming the health and social care system



## Integration across health and social care

Collaboration across social care and health has the potential to deliver joined-up care through integrated pathways, but progress is patchy. Councils identified the third largest challenge in achieving their TEC ambition as developing an integrated approach across health and social care. However, only 27% of councils have stated that they either have firm plans to address this, or are already making good progress in addressing this challenge.<sup>47</sup>

Our survey47 showed:

#### 2 in 3

councils expect building an integrated approach to TEC across health and social care to be a challenge – with the remainder saying it might be

#### 1 in 5

councils say they currently receive direct referrals into TEC services from health practitioners, and there are examples of greater collaboration across integrated care systems around the utilisation of TEC to achieve objectives

#### 40%

of councils either already collaborate strongly with the ICS or have firm plans to grow joint working

#### **79**%

of councils currently have no plans for joint commissioning of TEC



#### Workforce challenges

At the heart of the TEC workforce are call handlers, responders, technology assessors and installers. But in reality the workforce extends far beyond those core roles, cutting across social care, the NHS, housing and many other sectors.

A key challenge in realising the TEC opportunity is changing the workforce's culture so that TEC becomes embedded in ways of working. Sustained culture change is achieved when the workforce confidently advocates for TEC within care packages because they believe it enables people to live the lives they want.

Councils aim to raise awareness about TEC and encourage care and health practitioners to use it to support people<sup>48</sup>. However, the current understanding of TEC among these practitioners is mixed, as shown in figure 5. Roughly half of respondents from adult social care surveyed believe there is either no or low understanding of TEC across the workforce, while the other half consider the understanding to be good or high.<sup>48</sup>

#### 45%

of councils either have firm plans in place or are already making good progress in raising awareness of TEC across their workforce<sup>48</sup>

#### 34%

of councils either have firm plans in place or are already making good progress in removing barriers stopping their workforce from using TEC - such as skills gaps, awareness raising, and building a financial case for investment<sup>48</sup>

While there is a clear desire to make greater use of TEC, workforce issues around skills, knowledge and understanding must be addressed to turn that into reality. Some 40% of adult social care workers are secure in terms of digital confidence, but more than a quarter (27%) lack confidence.<sup>49</sup> Research shows 40% want to use more technology to support people, but lack understanding around what is available.<sup>49</sup>

After budget pressures, care providers believe digital skills is the biggest barrier to TEC being more widely adopted. Some 21% of the adult social care workforce say they are "too busy to undertake training and development in digital skills" and 16% say their employers are not offering the necessary training.<sup>50</sup>

#### NHSX<sup>49</sup> reported that:

#### 82%

of adult social care workers believe digital technologies are "important in adult social care"

#### 80%

believe digital technologies "can help them do their job better or more efficiently"

#### 76%

feel digital learning is an "essential part of their career progression"

#### 64%

of care providers say "upskilling of the workforce" would enable adoption and scaling up of digital technology

<sup>48</sup> TSA and PA survey of senior leaders in adult social care, 2024

<sup>49</sup> Margaret Blake et al., *Ipsos MORI & Institute of Public Care & Skills for Care*, NHSX Adult Social Care Technology and Digital Skills Review (2021)

<sup>50</sup> Ipsos MORI & Institute of Public Care & Skills for Care, <u>Digital Skills Review: Snapshot</u> (2021)

Figure 5: To what extent do you think there is an understanding amongst frontline workers about how TEC is used?

The council's approach to eligibility and/or charging for the TEC service

The role your TEC approach plays as part of the social care offer

Knowledge of how and where to access support and materials to help them

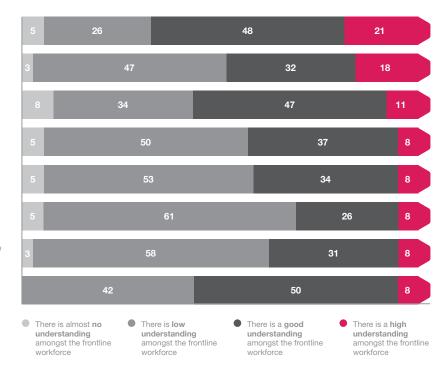
How to speak confidently to service users about the benefits of TEC

How TEC supports your frontline workforce to do their job

How to make a high-quality TEC referral

The full range of outcomes and people TEC can deliver positive outcomes for

The positive outcomes TEC can deliver for people who draw on care and support





A key area is ensuring our infrastructure and resources are right to enable workforce colleagues to train and upskill and work within simple systems that provide us with digital tools and knowledge to further support our communities.

Survey of senior leaders in adult social care, 2024

#### CASE STUDY

# Embedding TEC awareness in the workforce



South Tyneside Council's ambition is for TEC to be part and parcel of social care – not an add on – and it has revamped staff training to make that happen.

A newly developed induction process will see all new staff in operational roles within adult social care (ASC) will spend time with the ASC front door team (Let's Talk) and the council's in-house TEC and wellbeing services, along with other inter-linked services.

"Spending time with these preventative services at an early stage of their employment enables us to promote our approach to independence, which is a key objective within our ASC strategy, Living Better Lives. Staff will have the opportunity to observe TEC assessments and installations, getting to see first-hand how TEC can support people, putting it at the forefront of their thinking when addressing people's needs and desired outcomes," explains Craig Danks, the council's service manager for ASC assurance and service improvement.

The council has embraced TSA's virtual house tool, an immersive learning experience that is designed to build knowledge and confidence in understanding and prescribing TEC in a series of real-life training scenarios within a digital world.

So far more than 180 staff have completed the tool's e-learning modules, raising awareness within the organisation – with TEC referrals so far increasing by 32%.

The workforce is also supported via monthly drop-in sessions at a TEC demonstration flat. The council also runs tailored sessions for teams including on dementia, learning disabilities and mental health.

To gauge the success of the new induction programme, and the other initiatives, the council is tracking referral and outcome activity for TEC in order to create a baseline from which progress will be measured.

# Health and social care workforce shortages

Workforce shortages and rising demand are creating a perfect storm. An estimated 627,000 extra social care staff will be needed to improve services and meet need – four times greater than increases seen in the past decade – while the NHS workforce needs to grow twice as fast as in the past 10 years.<sup>51</sup>

TEC can help address workforce shortages. Digital services are increasingly demonstrating how technology can enable people to take greater control over their health and care, improve quality of provision and shift the emphasis towards prevention, and free up staff time.<sup>52</sup>

9.9%

of adult social care posts are unfilled53

15%

fall in homecare hours in the past two years due to workforce challenges<sup>52</sup>

8%

of NHS posts are vacant54

44%

of working age adults caring 35+ hours a week are in poverty<sup>55</sup>

**75**%

of carers in employment worry about juggling work and  $\mbox{care}^{56}$ 

1 in 3

older carers have felt overwhelmed by the care and support they provide<sup>57</sup>

<sup>51</sup> Shembavnekar et al, The Health Foundation, REAL Centre Projections: NHS workforce projections 2022 (2022)

<sup>52</sup> DHSC, A plan for digital health and social care (2022)

<sup>53</sup> Skills for Care, <u>The state of the adult social care sector and workforce in England</u> (2023)

<sup>54</sup> NHS England, NHS Workforce Statistics - July 2023 (Including selected provisional statistics for August 2023), (2023)

<sup>55</sup> Joseph Rowntree Foundation, <u>UK Poverty 2023</u> (2023)

<sup>56</sup> Carers UK, State of Caring 2022: A snapshot of unpaid care in the UK (2022)

<sup>57</sup> Age UK, One in three older carers have felt overwhelmed because of the care and support they provide (2023)

#### The digital challenge

Digital exclusion is a key challenge, and growth in the popularity of technology is likely to exacerbate the UK's digital divide as costs and skills gaps leave some sections of society marginalised.

Lack of skills and confidence has been cited as the biggest barrier to wider use of technology by both NHSX<sup>58</sup> and Carers UK.<sup>59</sup> On top of that, 2.5 million households struggle to afford fixed broadband and 1 in 14 have no home internet access.<sup>60</sup>

Another key challenge is the digital migration, which is due to be completed by the end of 2025. While the digital migration brings with it many opportunities, there are concerns about the deliverability of full transition across the UK.

The unreliability of digital connectivity via broadband and mobile SIM cards has been identified as a top five concern for the first time in the TSA's annual TEC Sector Risk Survey for 2023. The digital migration is also absorbing time and resources within the public sector, which may be limiting opportunities for TEC to be an integral part of strategic investment to deliver transformation. More than half of councils cite digital migration as a challenge that could have an impact on people using services and the cost of TEC.<sup>61</sup>

#### 12x

more likely not to use digital technology if someone is aged 65+60

#### 2x

more likely to be non-users of the internet if someone is disabled or has a long-term condition<sup>60</sup>

#### 70%

of people in the UK cite lack of interest as their top reason for not being online, with the next most common responses being cost (20%) and because it's too complicated (20%)<sup>60</sup>

#### 10.2 million

people in the UK lack the most basic digital skills<sup>60</sup>

#### 80%

of the UK population have 'some knowledge of' connected home technology such as smart speakers<sup>62</sup>



The digital migration with be a challenge for all, and will probably lead to councils having to review their charging policy on TEC.

Survey of senior leaders in adult social care, 2024

<sup>58</sup> Margaret Blake et al., *Ipsos MORI & Institute of Public Care & Skills for Care*, NHSX Adult Social Care Technology and Digital Skills Review (2021)

<sup>59</sup> Carers UK, Key facts and figures about caring (n.d.), accessed 02 February 2024

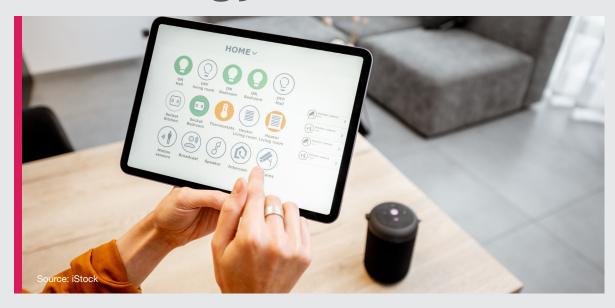
<sup>60</sup> Good Things Foundation, <u>Digital Nation UK 2023</u> (2023)

<sup>61</sup> TSA and PA survey of senior leaders in adult social care, 2024

<sup>62</sup> TechUK, State of the Connected Home 2023 (2023)



# Bringing the health and care benefits of smart technology into the home



Smart technology is increasingly becoming the norm in a variety of settings.

One example is the Alexa Smart Properties programme. It has already integrated devices into various areas of hospitality, such as hotels and theme parks, and has more recently been introduced into care homes and hospitals.

Vocala, an Amazon solution provider, and the consultancy Connect4Healthcare are currently working with local authorities in the north east of England to test out smart technology in people's homes.

Pilot projects will monitor a range of outcomes, from the number of calls to telecare before and after installation, to hospital discharge and readmittance.

The goal of the Alexa Smart Properties pilot is to create smarter, more connected communities.

Social care consultant Alison Tombs, who started one of the projects, explains: "Our shared mission is clear: by seamlessly integrating Alexa devices into people's homes, we aim to reduce social isolation, uplift overall wellbeing, and minimise the number of people needing long-term care after reablement."

"I take great pride in my involvement in this initiative, ensuring by incorporating Alexa devices into our social care approach we deliver the right size package of care to every resident."

# Igniting momentum with a senior-championed plan for success

An appetite to embrace the opportunities offered by TEC is evident within local government across parts of the UK. But feedback from adult social care leaders highlights that there is still much work to be done to increase the understanding of TEC's role across the workforce. Senior leadership can drive this change and there's evidence that local government is making some progress in this area.

#### Future plans for TEC

Our survey of adult social care leaders shows TEC is becoming embedded in the ways councils support people. Feedback from participants has provided encouraging signs that practitioners are looking for ways to boost independence and better outcomes for the individual through more cost-effective approaches that harness the advantages of TEC.

Overall, 59% of councils either have plans to invest time, effort and resources in TEC in the next 12 months or are making progress in implementing them (figure 6).



TEC is part of the plans we have to refresh our strengths-based approach and also manage our budgets while maintaining improved outcomes for people.

Survey of senior leaders in adult social care, 2024

#### **97**%

them to continue to provide care

Supporting the independence and

Supporting progression-based outcomes for people with learning

disabilities that lowers cost of care

Developing new models of care

Managing increasing demand for adult social care at the front door

Supporting transformation of your

Improving the quality

of care and support

provider network

Managing increasing

time supporting people Supporting demands

on the acute sector

complexity of needs Integrating health and social care services

cost of care

of councils plan to keep current TEC plans or increase them across six key areas: supporting discharge; using TEC data to provide more accurate care after discharge; using TEC data to get the right size of care and support; promoting independence for people in supported living; replacing some traditional care; and supporting people's care networks<sup>63</sup>

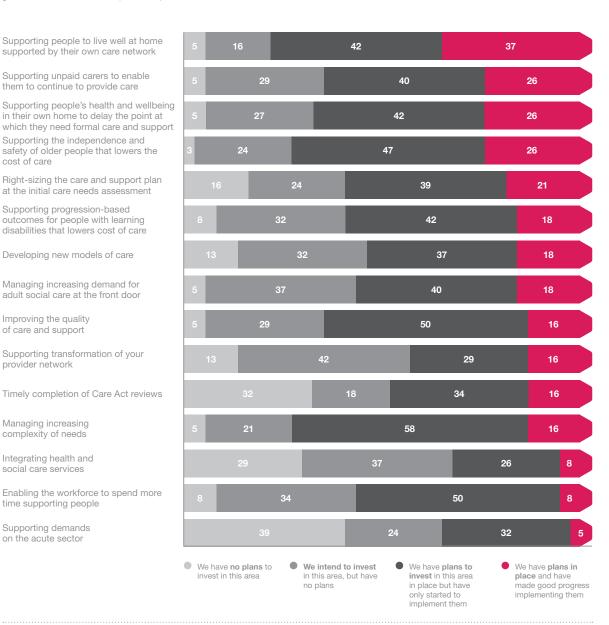
#### 1 in 3

councils plan to do more in every area (including support for hospital discharge and replacing traditional care)63

#### 82%

of councils aim to improve care following discharge using "TEC data insights that create a whole picture of the person".63

Figure 6: What plans do you have for the areas along the care journey where you will invest time, effort, and resources in TEC innovation?



63 TSA and PA survey of senior leaders in adult social care, 2024

#### Progress is being made

Councils are making progress against these challenges (figure 7) with around a third (35%) reporting having either made good progress or having plans in place to address challenges.

It is notable that 50% of councils are still considering how they respond to the challenges they need to overcome to achieve their TEC objectives for the next 12 months, suggesting that many still need to prioritise sustainable transformational change with TEC embedded, with a focus on outcomes, not on technology.



We need financial investment and resources to develop our tech offer and to embed this within ASC but also need senior leadership and commissioning to support this change and develop a long-term offer.

Survey of senior leaders in adult social care, 2024

### Leadership is the key to success

As this report highlights, TEC offers huge potential in helping the UK to address pressures across the health and social care system in a way that delivers better outcomes for people of all ages. Ensuring TEC is embedded in solutions will require effective leadership as areas move towards greater integration between health and social care.

Evidence from integrated care systems (ICSs) in England<sup>64</sup> suggests strong relationships between all partners are vital to enabling buy-in from ICS leadership teams, which in turn ensures digital adoption becomes a "key programme of work within system strategies and plans".



We have plans to address our challenges and have senior management support to develop our offer further to embed technology into individuals' personal budgets to make a sustainable long-term investment into technology, whilst improving outcomes for individuals, enabling them to take control and potentially releasing savings on care provision.

Survey of senior leaders in adult social care, 2024



We have dedicated hospital posts in our five main hospitals in test and learn phase looking at TEC on discharge. We have a regular scheme review process where TEC is looked at as part of the assessment and are seeing positive results from this work.

Survey of senior leaders in adult social care, 2024

Figure 7: In what ways is your organisation planning to overcome the challenges to achieving its TEC objectives over the next 12 months?

The impact of the digital migration on service users and on the increased costs of TEC services

Building a financial case for investment in the TEC approach that the council has belief in

Rising awareness of TEC within the council's workforce

No clear understanding of the role that TEC can play in transforming the health and social care system

Removing barriers that are stopping the council's workforce using TEC

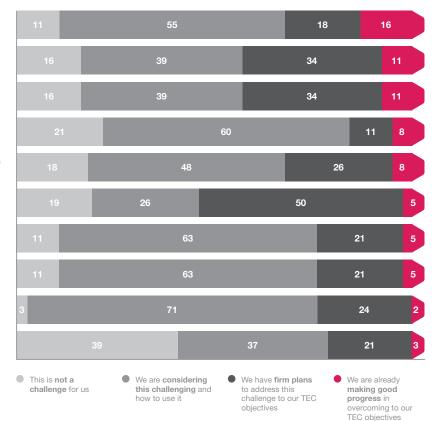
Access to the appropriate skills, experience, and capability required to deliver change and make it stick

The capacity of the TEC service to deliver growth at pace and scale

Determining how the long-term future of the TEC approach will be funded

Developing an integrated approach to the TEC across health and social care

Existing TEC contracts





[We are] moving away from a reactive risk-based solutions to a more proactive approach with service providers to ensure that people are supported in an enabling, proactive way with technology that reduces intrusion in their lives but offers reassurance and builds confidence.

Survey of senior leaders in adult social care, 2024

# Contacts and acknowledgments

This is our first state of the sector report. We are keen to continue the conversation to understand what this research means for commissioners and the wider TEC sector, and would welcome the opportunity to further discuss our findings with you.



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PA has a unique position in the care technology sector. As well as advising one in five councils on how to transform their approach to mainstreaming the use of care technology to support better outcomes for people, we have directly supported over 55,000 people to live safer independent lives through the PA-led Argenti Care Technology partnership. This partnership has delivered a net financial benefit of over £35m to the council's we partner with. All of this is achieved through awardwinning, groundbreaking innovation that stretches the boundaries of how technology can support people, and which delivers life-changing outcomes.

TSA is the industry and advisory body championing technology enabled care (TEC) across the UK. With over a quarter-century's legacy, we strive to bring transformation and growth to the TEC industry. We believe in the power of technology to enrich people's everyday lives and envision a future where everyone can draw on TEC for an enhanced living experience. Our membership network of over 350 organisations includes NHS trusts, local authorities, care providers, housing associations and technology suppliers.



We'd like to take the opportunity to thank everyone who completed the survey of senior leaders in adult social care, and everyone else who contributed to the report.



