

South Gloucestershire Council

Market Position Statement

March 2026

1. Introduction

This Market Position Statement sets out South Gloucestershire Council's strategic view of the care and support market. It provides detailed information on current supply, demand, and future commissioning intentions across Working Age Adults and Older People markets.

It is intended to support providers, investors, developers and partners in understanding local priorities and opportunities.

South Gloucestershire last published a full Market Position on all of our provision in 2020. Since then we have all experienced the COVID pandemic, with both short term and long-term implications for social care providers and impact on demand and complexity of need; a period of severe shortages in the social care workforce, (particularly severe in South Glos due to full employment and local context). The focus of South Gloucestershire Council has been to work in partnership with our providers to understand and, where possible, address these issues together. As we have transformed our approaches we have come to a view that to spend a significant resource trying to present what is inevitably a “snap shot” of all need and demand at one time is not of best use to our market. Instead, we are now providing shorter statements reflecting current demand and need, and current planned strategic activity.

For updated information on our Population Projections please see our JSNA at [South Gloucestershire Council \(ourareaourfuture.org.uk\)](https://www.southgloucestershire.gov.uk/ourareaourfuture) This is updated regularly.

2. Vision and Strategic Direction

At South Gloucestershire we are committed in our alignment to the Social Care Futures Vision. *‘We all want to live in the place we call home, with the people and things that we love, in communities where we look out for one another, doing the things that matter to us’*

We are working in partnership to develop approaches, provisions and services to help deliver this vision. We encourage all partners and providers to work collaboratively to expand the range of services and support available to enhance people’s experience of care, including welcoming new providers to the area.

Providers have an active part to play, fostering the innovation required to:

- Continue to develop a range of community-based solutions which support independence and promote greater choice and control for our residents, in line with strength-based approaches to care.

- Invest in and develop a range of supported living options, based on models of care and support that ensure that we can offer a range of options to best support each individual's needs and aspirations including longer term recovery and/ or progression and to effectively support residents with complex needs.
- Work with us to deliver housing with care solutions that support our vision.

We recognise that South Gloucestershire is becoming increasingly more diverse and that we will need to be able to effectively meet the needs of our population through the services we commission. This will impact on all services delivering care and awareness of and appropriate delivery to meet the needs of different equalities groups must be improved through training and practice. We are working with providers to ensure that we measure outcomes for individuals of different equalities groups. For example, we will expect to see satisfaction with services to be good across all equalities groups, and work to be carried out with us, by providers if it is not.

The Council's approach to tackling inequalities is set out in our [Tackling Inequalities Plan 2024-2028 \(southglos.gov.uk\)](#)

We are also keen to see further innovation in the following areas:

- Use of TEC to improve independence and outcomes for individuals
- Improved use of digital solutions to improve efficiency and effectiveness of services both individually and in terms of coordination.
- Offers from local community-based organisations working in partnership with care providers to deliver a greater focus to wellbeing and preventative services.

3. Relationship Commissioning

We have put Relationship Commissioning at the heart of our approach to both strategic commissioning and design, and to ongoing contract management. Our approach focuses on building strong, value-led relationships that enable honest dialogue and continuous learning. This ensures that commissioning decisions and contract arrangements evolve with local needs and foster innovation across the system.

We work with providers through a range of forums, for information on these please contact our Relationships Team by email at the Relationshipsteam@southglos.gov.uk

Data from the Office of National Statistics (ONS data) indicates that, based on current trends between 2020-2040 the South Glos population aged 65 and over living in a care home with or without nursing will grow from 1,687 to 2,594.

Whilst our aim is to reduce, relatively, the use of residential care, we expect the demand for complex nursing care and end of life care to continue. We will continue to source community services to maintain people in their original homes for as long as possible. Our intention, however, is to ensure that we have other move-on options as an alternative to residential care which maximise choice and control such as Housing with Care.

Current Position

We will update this section regularly, or if things change substantially, so that providers can see the areas where we have shortages. The data below is for February as this is reflective of a period of high demand.

Referral Snapshot	Referrals waiting list on 25/02/26	Mean Average waiting time in days
Community Based Support (home care)	6	15
CBS Mentoring	3	12
CBS Specialist	8	50
Day Services	7	70
Care Home Permanent	13	37
Care Home Short Break	1	0
Care Home Emergency Short Break	0	0
Specialist Care Home Permanent	11	250
Specialist Care Home Short Break	5	89
Specialist Care Home Emergency Short Break	0	0
Supported Living	21	166

The mean average statistic is used in the table above and includes individuals who are currently in provision and receiving support but are waiting on a vacancy within an alternative specific service.

3.1 Care and Support in Your Home

The Care and Support in Your Home Pseudo DPS (Home Care) has enabled us to develop the way we work with our providers in line with our relationship approach. It is designed to recognise types of service and delivery and support sustainable growth. It has also given opportunity for non-regulated provision to join within the same platform. We continue to work with providers within this framework to develop partnerships, achieving high quality ‘person-shaped’ services, which support choice and control for citizens through a fixed price. Overall, we have full capacity within the market for home care, but would welcome discussions with providers delivering services, that would support our changing demographic and our tackling inequalities plan.

3.2 Specialist Community Based Support

The ‘Specialist Provider Framework’ Pseudo DPS facilitates the provision of community-based support for people with specific needs, such as learning disability or mental health issues, including non-personal care support such as mentoring. The framework has been designed to focus on outcomes delivered, with recovery and progression as core values. While there has been an improvement in waiting times for these types of services, we continue to look to improve this further. Providers would

need to sign up for the Council's Specialist Provider Framework to be commissioned for delivery of services in this area. We would welcome discussions with providers delivering innovative services that support our citizens to achieve their aspirations and person-shaped outcomes, this should align with a key understanding of our tackling inequalities plan.

Specialist Community Based Support - [Specialist Provider Framework - Pseudo DPS \(due-north.com\)](#)

3.3 Housing with Care

An essential and ongoing element of this work is our changing vision for Age Friendly Housing (Extra Care Housing).

We set out to address:

- Flexible provision that better matches people's current and longer-term care needs
- Better management of demand and capacity
- Schemes that are viable and sustainable, able to offer the right type of care and support in the right setting for the numbers of people who need it
- Improvement in community hub and community engagement within the ECH and the community it operates within
- To support capacity in the home care market
- An alternative to individuals going into residential care
- Schemes that people want to work in to provide care

We see Age Friendly Housing with Care (ECH) as a home for life. This is a crucial element also of our emerging Age Friendly communities strategy. We have reviewed our specifications and recommissioned the care and support in our existing council-funded schemes.

Key aspects of the specification now include:

- Meeting more complex needs, to ensure people can remain in their flat, a "Home for Life", particularly being better able to support people living with dementia,
- Considering outreach models to deliver home care offsite and support transitions from the community into extra care offering the "right support at the right time"
- ECH settings to act as a community hub, both enabling people living in schemes to access the wider community and offering provision for the local community.

To deliver care and support services in local authority funded provision a care provider must have tendered and achieved the Community Level in our Care and Support in your Home Pseudo DPS.

These developments in our expectations for Age Friendly Housing with Care are also influencing our expectation of developers and landlords where we commission or

contribute to Age Friendly developments, and our expectations in terms of our emerging local plan.

There are 6 Extra Care Housing schemes in South Gloucestershire which offer 568 flats. The Council currently has nomination rights over 328 rented flats.

We are in early stages of bringing forward a 100% affordable Housing scheme in Thornbury to our new specification. The care and support for this provision will be tendered for in 2027 through the pro contract portal.

The current schemes are run by 4 registered landlords, with onsite care & support being provided by 3 CQC registered organisations who are all rated outstanding or good. They vary in size, location and facilities and offer care and support for people over 55 years of age.

We aim to maximise occupancy in all schemes to ensure that schemes and their facilities are sustainable. There is generally a void rate of 5-10% of council nominated flats

Working with colleagues in Housing Enabling, we have developed our Strategic Plan for Supported Living. This will be published shortly. We are working with partner provider to ensure that the models of care delivered within supported living meet the needs and aspirations of the people living there. This is a key focus within our Commissioning Transformation Programme and more information can be found later in this document. We would welcome conversations with innovative providers and landlord.

3.4 Care Homes

The current market in South Gloucestershire is showing an excess of residential care beds. Our increased emphasis on community-based provision will lead to a reduction in the number of standard residential placements in South Gloucestershire, and ultimately, it is anticipated that fewer residential homes will be required. We also anticipate that changing population needs will increase the number of nursing and dementia placements required. We will work collaboratively with providers to plan this change and look at how providers can be supported to work with people with higher levels of complexity. Where possible upskilling providers to deliver dementia and specialist care. At the same time developing locality-based models with higher delivery of short-term beds that enable independence, eg short breaks, step up and down provision.

There is a shortage of nursing beds particularly those providing support for:

- People with complex and or dual diagnosis Dementia
- People diagnosed with early onset dementia
- People with neurological conditions
- People with acquired brain injury

We are moving away from purchasing beds at individually agreed prices to negotiated fixed rates with care homes. The Council does not intend to purchase beds from homes that charge rates that are higher than the Council can afford and these homes

will exist for the self-funded market. Please read the [Market Sustainability Plan](#) for more information.

As at 09/03/2026 there are 2,088 beds available for older people (65+) of which 880 are residential and 1208 are nursing. There are currently 249 vacant residential beds and 108 available nursing beds – 17.1% in total.

As at 26/03/2026 there are 309 specialist beds (70 nursing and 239 residential) available for adults of working age of which 34 (11%) are currently vacant.

We would welcome the opportunity to hear from existing providers about their plans for care homes in South Gloucestershire at relationshipsteam@southglos.gov.uk.

3.5 Self-Directed Support

South Gloucestershire currently has approximately 800 Adults who arrange their own care and support via a Direct Payment on an ongoing basis. The number of Direct Payments recipients has remained stable at around this level for over 5 years, and new Direct Payments are set up at a rate of 10 to 15 a month. Direct Payment recipients engage with the market to purchase support such as becoming individual employers of Personal Assistants, accessing services of self-employed personal assistants, homecare & community-based agency support, supported living, short breaks and day-care, alongside other flexible and creative use for activities and equipment.

The council will progress plans to foster the market for self-employed ‘Micro providers’ via Direct Payments in rural areas to increase the supply of innovative and or diverse care and support options available. We will achieve this through a Membership Model which will enable quality assurance of this market through activities such as training and peer networks.

3.6 Unpaid Carers

A coproduced strategy was developed 2022-27. [South Gloucestershire Carers Strategy 2022-27 \(southglos.gov.uk\)](#). This sets out 4 priority areas for development. Recognition

- Information and advice
- Carers breaks
- Personalisation.

A 5-year action plan sets out the detail of how South Gloucestershire will improve the offer to carers with its stakeholders. A carers advisory partnership board has been set up to oversee and support the implementation of the strategy. This work has been fast tracked as a result of the Accelerating Reform Funding, which enabled South Gloucestershire to work with system partners across the ICB footprint in the development of carer breaks and improved information and advice services.

4. Commissioning Transformation Programme

South Gloucestershire has run a very successful Commissioning Transformation Programme over the past 3 years, working with providers to address both sustainability

and the development of new provision.

Transforming our approach to Community Based Support (home care and associated provision) was fundamental to the first stage of our programme. We have invested into this sector to enable partner providers to recruit, retain and develop a successful approach to Reablement and grown our understanding of the vital role of local community provision and VCSE in promoting independence and a persons ability to thrive at home.

This has culminated in our new Care and Support in Your Home Service. More information on this was found at section 3 of this document. The Partnership level of this framework requires evidence of the ability to work in close partnership across a system. We will utilise 'call offs from this framework of specialist block provision and or pilots, which builds on the council's relationship approach whilst offer stability to those providers who have demonstrated community and partnership approaches.

Other key work which is continuing from the first phase includes:

Personalisation and piloting of micro enterprises Supporting entry to the market on a self-employment basis or as small providers. This work is progressing through a partnership with WECIL. If you are a micro provider do please get involved.

- Locality and place-based offers particularly in the rural areas with the phased introduction of four village agents across rural areas during 2023. We now have village agent capacity across our area, joint funded with our NHS locality partnership.

We are now beginning Phase 2 of our Commissioning Transformation. Along with continuing work set out above, this will focus on transforming what and how we commission provision for working age adults, and for young people 16 -25 pre and post their transition into adult care services.

Key aspects of this will include:

- Development of a new Transitions framework, with a specification identifying required expertise, and dual CQC registration, to work with those 16-25, supporting progression and aspiration for our young people.
- Full strategic recommissioning of our spectrum of provision for people with mental health issues.
- Developing an improved pathway of accommodation and support. We want to move towards a more transparent fair pricing approach to supported living, and to develop models of care and support that match level of need/ required outcomes, with the right kind of staffing resource/ commissioning approach. To improve both cost effectiveness and outcomes.

5. Opportunities for Providers

- Development of supported living schemes
- Provision of complex nursing and dementia care
- Innovative community-based services, particularly where these align with our Tackling

Inequalities Plan.

- Partnerships in housing and care delivery

6. Contact and Engagement

Providers are encouraged to engage with the Council to discuss opportunities and future market development.

Contact: relationshipteam@southglos.gov.uk