HCCI Home Care Data Series

Review of 2023

About the HCCI Data Series

The HCCI Home Care Data Series is the definitive source for information and statistics on the Irish home care sector. Using data from a variety of sources including parliamentary questions, HSE publications and sectoral reports, the HCCI Data Series is an accessible and insightful study of key statistics in home care, HSE home support delivery and waiting lists.

This issue – Review of 2023

A record 22.1m hours of HSE-funded home support was delivered in 2023, an increase of 1.3m hours from 2022, that has brought the waiting list down by 12% to 5,863. Strong growth nationally in home support delivery is reason for optimism about the future of Ireland's home care sector.

However, **the Eircode lottery for home care persists** with this issue revealing stark differences in waiting lists and home support growth between Dublin and its commuter belt compared to the rest of the country.

Home & Community Care Ireland

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Published: September 2024

Key Events in Home Care 2023

Record €723m funding for home support

With a record budget of €723m, the HSE's National Service Plan 2023 targeted the delivery of 23.9m hours to 55,910 older people.

Employment permits contribute to growth

Following years of campaigning, home care providers were given access to non-EEA employment permits from January 2023. Take up of the permits accelerated after the Authorisation Scheme was agreed, with 450 permits granted in 2023 and the sector surpassing its initial 1,000 quota in July 2024, leading to the Department of Enterprise, Trade and Employment granting an additional 500 permits in September 2024.

HSE Authorisation Scheme improves rate for providers and home care workers

The HSE Home Support Authorisation Scheme came into effect in August 2023, replacing the 2018 home support tender. It sets a fixed price of €31 per hour of care delivered and mandates that home care workers be paid the living wage as a minimum and receive payment for time spent travelling between clients. However, these welcome measures came at a price; to fund the Scheme, the Department of Health reduced their home care targets down by 1.9m hours, to 22 million. Nevertheless, the Authorisation Scheme has made a positive impact on recruitment and retention which, as seen in this issue, has led to growth in delivery and waiting list reduction in parts of Ireland.

Wider health budget overruns stymie home support

Home support received no increase in funding in Budget 2024, despite meeting its budget and the cost saving offered by home care through rapid hospital discharge and preventing hospital admissions. Ireland ages regardless of home support funding and the failure to grow the service leads to unmet need in the community. Areas with high HSE delivery will have also suffered from the HSE recruitment embargo.

Further delays to the Statutory Home Support Scheme

Little progress was made in developing the Statutory Scheme, with much of 2023 devoted to developing regulations for home support providers. As a result, the heads of legislation to license home support providers were published in April 2024. However, with pre-legislative scrutiny extending into the Autumn Oireachtas term, this Government will likely leave office without having completed any significant aspect of the Statutory Scheme.

HSE Home Support – Key Statistics in 2023

Key Statistics – HSE Home Support	
Waiting Lists (31st December 2023):	
• National waiting list: **5,863**	• Change Dec 2022: ↓ **810** **(↓12%)**
• Highest waiting list: **1,400 -** Cork/Kerry (CHO 4)	• Lowest waiting list: **19 -** North Dublin (CHO 9)
• Biggest increase: ↑ **235** **(↑ 40%)** West (CHO 2)	• Biggest decrease: ↓ **507** **(↓ 56%) -** South/ West Dublin (CHO 7)
HSE Home Support Delivery (2023):	
• No. of clients: **55,652**	• Funding: **€723m**
• National Home Support Delivery: **22.1m hours**	• Change from 2022: ↑ **1.3m** **(↑ 6%)**
• Independent delivery: **13.9m (63%)**	• HSE delivery: **8.2m (37%)**
• Biggest growth: ↑ **330k** **(↑ 10%) -** North Dublin (CHO 9)	• Biggest decline: ↓ **138k** **(↓ 7%) -** Southeast (CHO 5)

Table 1

Three Key Takeaways

1. Waiting list reductions are primarily occurring in Dublin and its commuter belt with waiting lists growing or stagnating in the rest of the country.
2. Delivery trends suggest the emergence of a two-tier home support service with growth in delivery occurring in Dublin, the commuter belt and the border counties, and Munster, Connaught and the southeast achieving little or no growth.
3. The independent sector's growth in delivery suggests improved recruitment and retention in parts of the country, and capacity to deliver additional hours in 2024 & 2025.

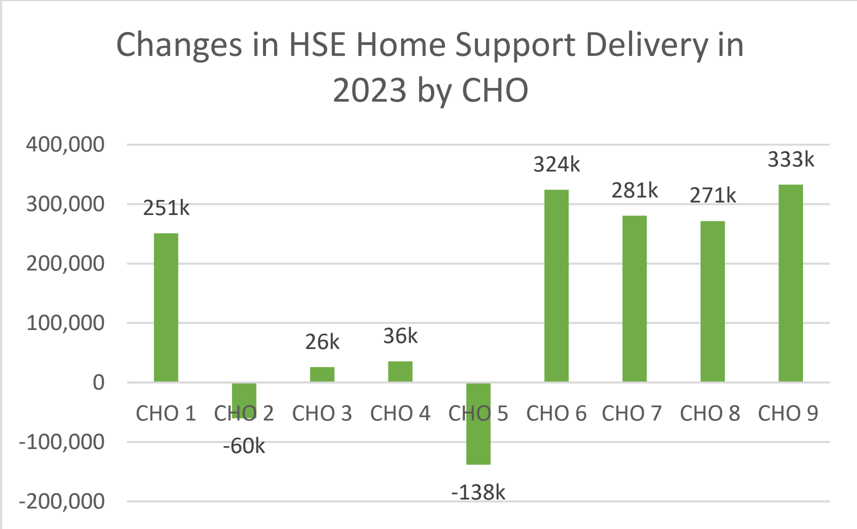

Figure 1

In Depth – Home Support Waiting List 2023

Waiting Lists (31st December 2023):	
• National waiting list: **5,863**	• Change Jan 2023: **↓ 810 (↓12%)**
• Highest waiting list: **1,400 -** Cork/Kerry (CHO 4)	• Lowest waiting list: **19 -** North Dublin (CHO 9)
• Biggest increase: **↑ 235 (↑ 40%)** - West (CHO 2)	• Biggest decrease: **↓ 507 (↓ 56%) -** South/West Dublin (CHO 7)

By CHO – HSE Home Support Waiting List (Carer):

CHO	31st Dec 22	31st Dec 23	Change 2022 to 2023	
1	735	632	↓ 103	(↓ 14%)
2	586	821	↑ 235	(↑ 40%)
3	568	761	↑ 193	(↑ 34%)
4	1501	1400	↓ 101	(↓ 7%)
5	1043	877	↓ 166	(↓ 16%)
6	445	235	↓ 210	(↓ 47%)
7	913	406	↓ 507	(↓ 56%)
8	755	712	↓ 43	(↓ 5%)
9	127	19	↓108	(↓ 85%)
Total	**6673**	**5863**	**↓ 810**	**(↓12%)**

Table 2

Key Insights

Dublin dominates the decline:

The decline in waiting lists is not spread evenly; the three Dublin CHOs (6,7 & 9) had significant reductions in waiting lists of between 47% and 85%.

Concerning trends on the west coast:

CHO 2 (Galway, Mayo, Roscommon) and CHO 3 (Clare, Limerick, North Tipp) saw concerning rises of 40% and 34% respectively and, despite record delivery, were the two CHOs that saw an increase in waiting lists.

High waiting lists are difficult to bring down:

Trends for other CHOs with high waiting lists suggests that once waiting lists reach high levels, they tend to stagnate for an extended period. CHO 5's waiting list peaked at 1,632 in 2021 and remains above 800. CHO 4 passed 1,500 in 2022 and remains above 1,300.

Bottom line: Rural Ireland continues to lag

With waiting lists declining in Dublin, increasing on the west coast and stagnating from a high base elsewhere, this data confirms trends that the benefits from increased funding and workforce measures are heavily skewed toward Dublin & the commuter belt.

In Depth – Home Support Delivery 2023

HSE Home Support Delivery (2023):	
• No. of clients: **55,652**	• Funding: **€723m**
• National Delivery: **22.1m hours**	• Change 2022: **↑ 1.3m (↑ 6%)**
• Independent delivery: **13.9m (63%)**	• Change 2022: **↑ 1.2m (↑ 10%)**
• **HSE delivery: 8.2m (37%)**	• Change 2022: **↑ 103k (↑ 1%)**
• Biggest growth**: ↑ 330k -** North Dublin (CHO 9)	• Biggest decline: **↓ 138k -** Southeast (CHO 5)

By CHO – HSE Home Support Delivery 2022 to 2023:

CHO	Independent Delivery 2023	HSE Delivery 2023	2022 Delivery	2023 Delivery	Change 2022 to 2023	
1	28%	72%	2.29m	2.54m	↑ 250k	(↑ 11%)
2	61%	39%	2.28m	2.22m	↓ 60k	(↓ 3%)
3	58%	42%	1.88m	1.91m	↑ 26k	(↑ 1%)
4	23%	77%	2.77m	2.81m	↑ 36k	(↑ 1%)
5	29%	71%	2.06m	1.92m	↓ 138k	(↓ 7%)
6	100%	0%	1.63m	1.95m	↑ 324k	(↑ 20%)
7	87%	13%	2.24m	2.52m	↑ 281k	(↑ 13%)
8	67%	33%	2.38m	2.65m	↑ 271k	(↑ 11%)
9	100%	0%	3.27m	3.60m	↑ 333k	(↑ 10%)
Total	**63%**	**37%**	**20.79m**	**22.12m**	**↑1.33m**	**(↑ 6%)**

Table 3

Key Insights

Record year for home support:

The 22.1m hours of home support delivered in 2023 is the most in a single year and the first time that home support targets have been exceeded since 2018 (albeit after targets were reduced midyear to fund the 2023 Authorisation Scheme).

Independent sector drives delivery:

The independent (private & non-profit) sector delivered 63% of all home support hours and was responsible for 1.2m of the 1.3m increase in 2023. Areas with higher independent sector involvement see greater delivery growth and shorter waiting lists. The independent sector has consistently led growth in home support; they have increased their delivery by 4.3m (+45%) hours from 2018 to 2023 compared to the HSE's increase of 676k (+9%) hours in the same period.

Bottom line: Two tier home support service emerges

Growth in home support delivery is occurring in the east coast of the country with the three Dublin CHOs (6,7,9), CHO 1 and CHO 8 growing by at least 10%. Primarily rural CHOs in the south and west of Ireland have not achieved growth in recent years resulting in high waiting lists seen in Table 3.

Key Takeaways

Signs recruitment challenges lessening in areas of the country

The growth in Dublin and parts of Leinster suggests that the recruitment challenges faced by the home care sector in the years since Covid-19 are starting to lessen as providers successfully increase capacity in 2023 by 6% nationally and 14% in Dublin. This suggests that if funding for home support hours is expanded in Budget 2025, there will be capacity to successfully deliver those additional home care packages.

Eircode lottery of home support remains

2023 saw massive disparities in the growth of home support, with the country effectively split with Dublin, its nearby counties and the border region achieving nearly all the growth. Munster grew by only 1% and much of Connaught and the Southeast saw a decline in home support delivery. This stagnation outside of Dublin and some other urban areas suggests that rural areas require targeted measures to improve delivery and reduce waiting lists.

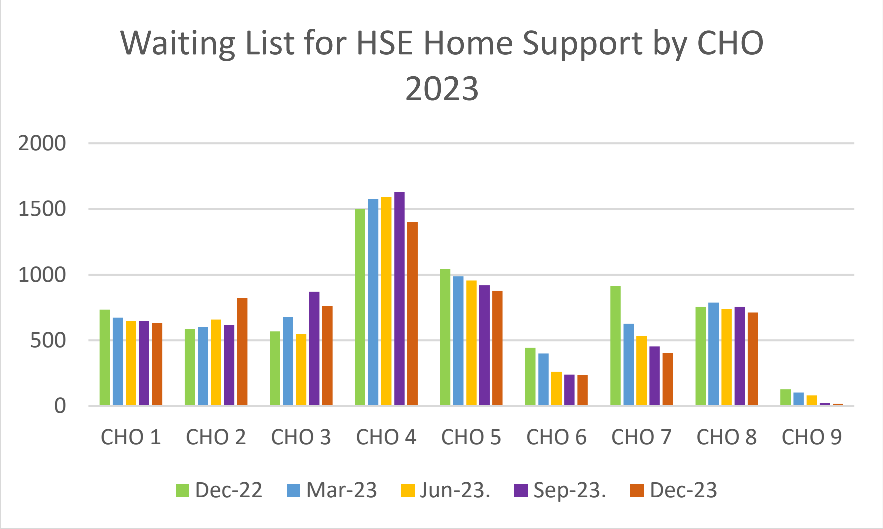

Figure 2

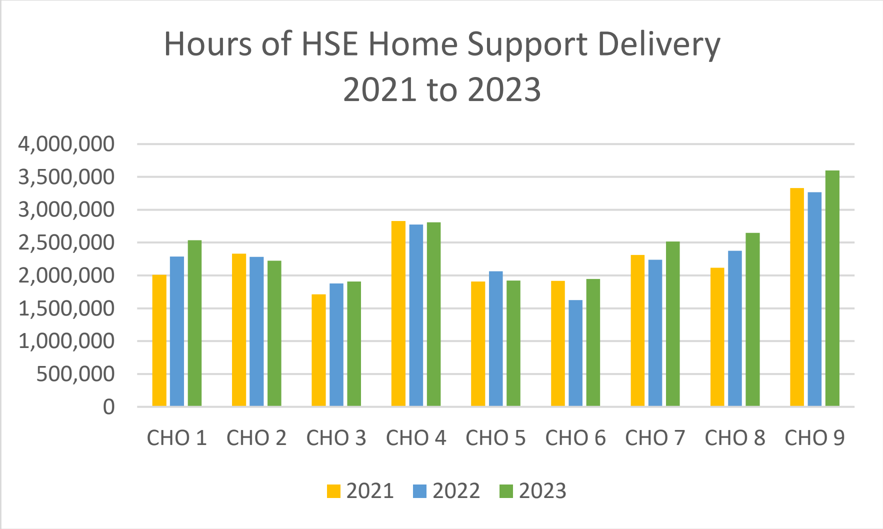

Figure 3

Independent sector drives growth in home support

The independent sector's leading role in driving growth for 2023 reflects trends in delivery, with the private sector delivering an additional 4.3m hours compared to 2018 – a 45% increase. Areas with stronger independent sector involvement benefit from reduced waiting lists and greater access to care for older people; particularly in Dublin.

Lacklustre HSE growth should be questioned

The HSE's lacklustre increase of 103k in 2023 is a cause for concern and reflects historical trends shown in Figure 6; the HSE have only grown delivery by 675k (9%) compared to 2018. Areas with high HSE delivery like CHO 4 & 5 have lengthy waiting lists and less growth; the waiting list is 19 in North Dublin (100% Independent) and 1,400 in Cork & Kerry (77% HSE).

HSE recruitment challenges are known; as of 2020, [42% of HSE caregivers] were aged 60 or older and its workforce has only [grown by 2.7% since then.] This points to a serious failure in workforce planning by the HSE.

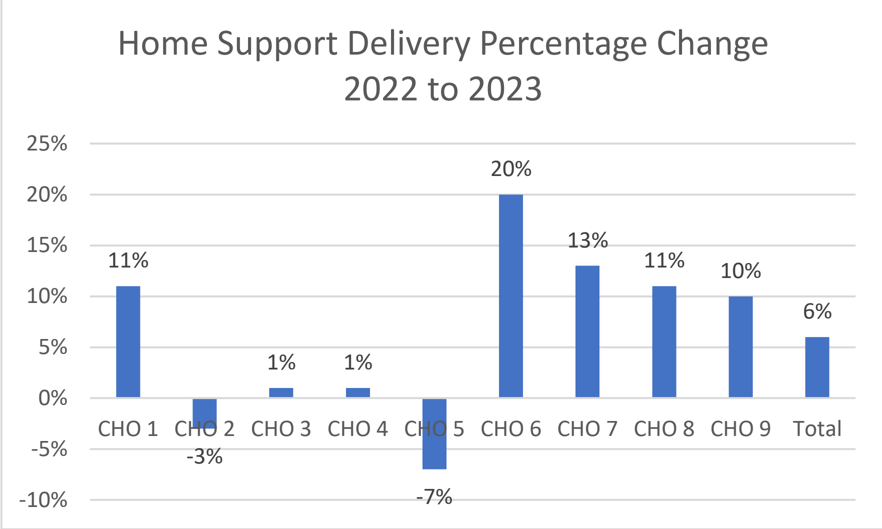

Figure 4

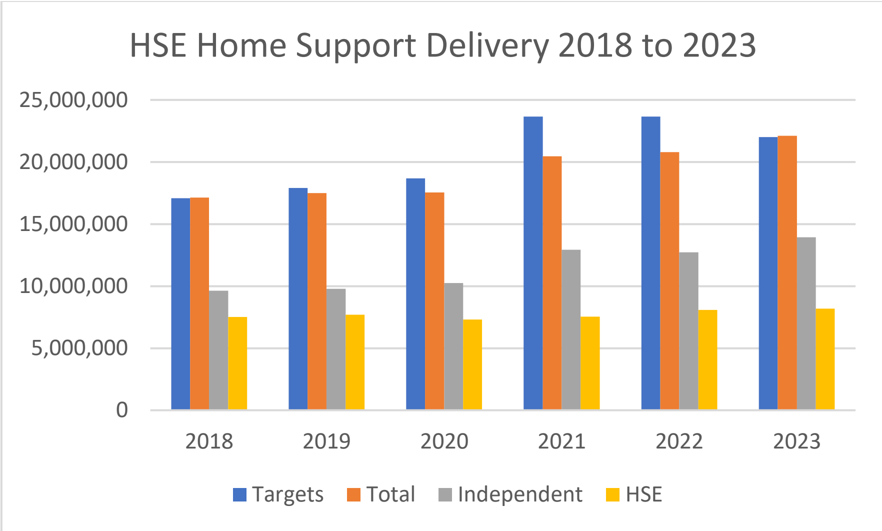

Figure 5

A lesser-known factor contributing to high waiting lists is HSE rostering. Typically, HSE caregivers do not deliver care at the [weekend](). [Minister Mary Butler recently suggested]() that this would be changing with the roll-out of a new rostering system, but nevertheless the existing system often leaves people with a partial home care package, waiting a long time for the additional care they have been accessed as needing.

These fundamental issues with HSE growth, waiting list reduction and recruitment should be addressed by policymakers in the context of future strategic planning for the sector.

A high waiting list is difficult to bring down

The stark rise in CHO 2 & 3's waiting lists should be a cause for alarm. Trends for other CHOs with high waiting lists suggests that once waiting lists reach high levels, they tend to stagnate for an extended period. CHOs 4 & 5's waiting list both exceeded 1,500 and continue to have the first and third highest lists respectively. Targeted waiting list reduction measures are necessary if CHO 2 & 3 are to counter these trends.

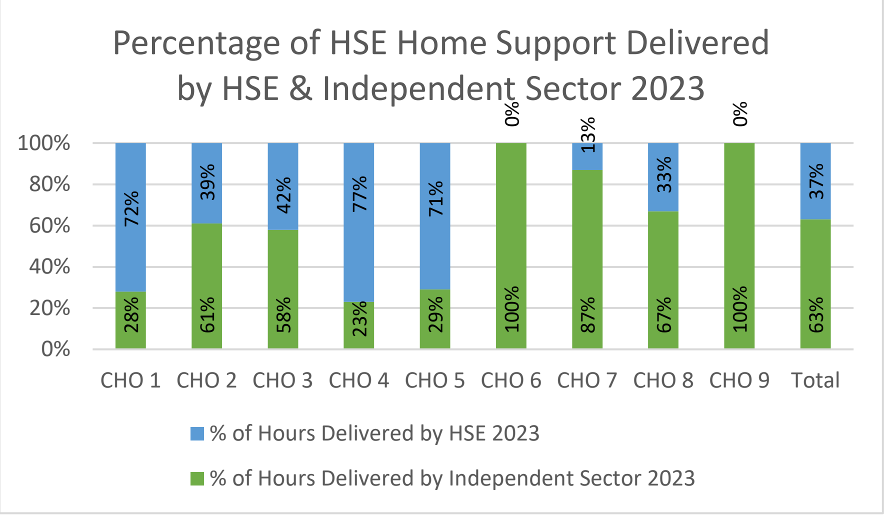

Figure 6

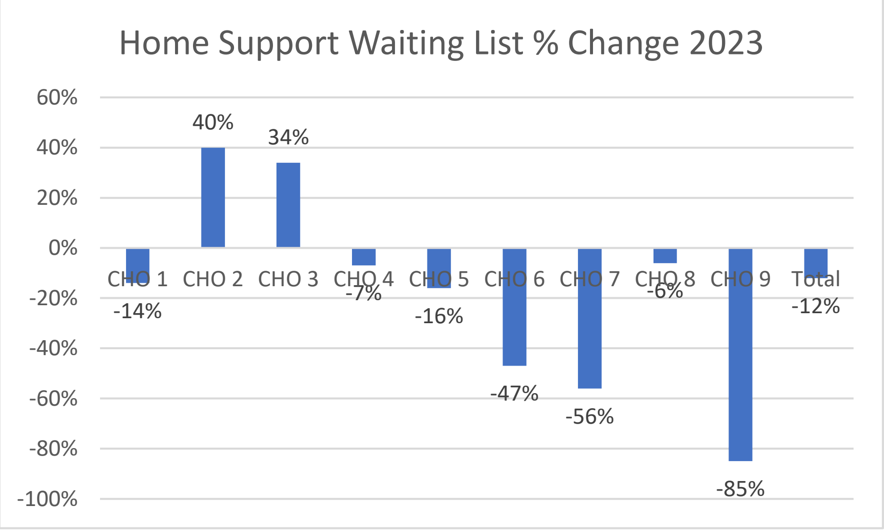

Figure 7

Indicators for 2024 & 2025

Potential to grow home support by 2 million hours in 2024

At least 23 million hours of home support will be delivered in 2024 if current growth trends continue. There are positive indications that growth will exceed 2023 levels this year, potentially growing by over 2 million to 24 million, provided funding is not restricted by the Government.

Dublin and the commuter belt can deliver even more care

Figure 7 shows clear evidence that the Dublin CHOs (6,7,9) have consistently been able to grow home support delivery and has capacity to deliver even more hours, if supported by the Government. The Government must meet this potential for additional capacity with funding for additional hours and workforce measures.

Two tier home support service to consolidate in 2025

Post covid-19 trends suggests that waiting lists on the west coast (CHO 2,3) will continue to rise, exceeding 1,000 by the end of 2025. Cork and the southeast will struggle to significantly reduce their lists; both rely on the ageing HSE workforce. Within Dublin, capacity will continue growing to the point where waiting lists are negligible across the county. Commuter and border counties will achieve positive but less far-reaching growth and waiting list reductions.

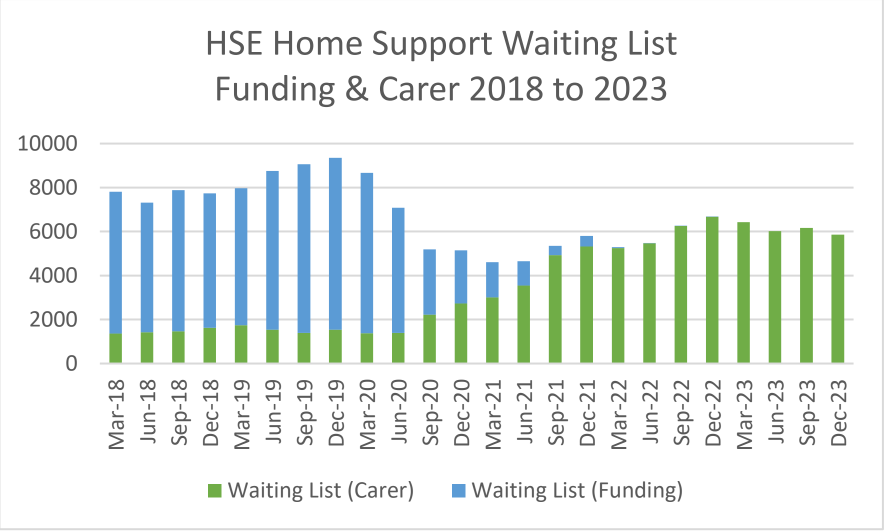

Figure 8

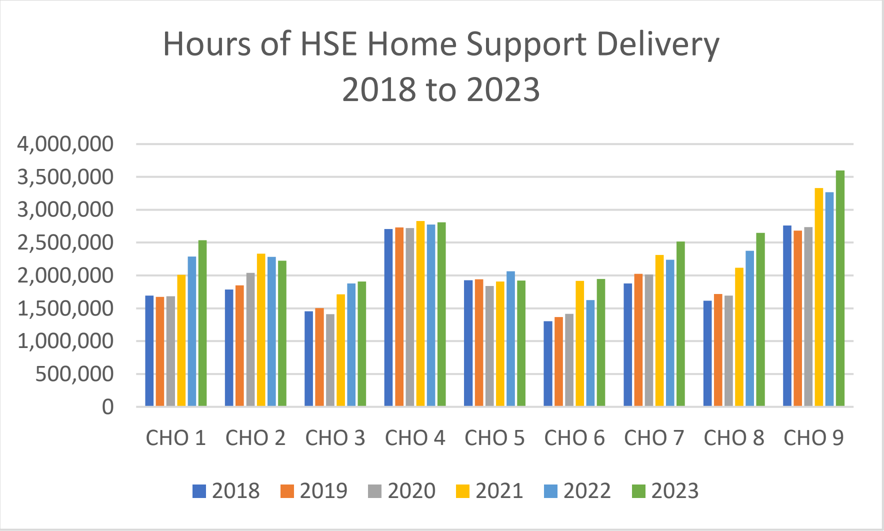

Figure 9

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