

ADASS Spring Survey 2025

139 survey returns (91% of Directors of Adult Social
Services)

Finances

The financial situation is as bad as it has been in recent history



£774mn overspend on adult social care budgets 2024/25, up from £586mn in 2023/24 and £73.66mn in 2022/23. The highest level for at least a decade.

3.46% the level of overspend compared to the adult social care net budget in 2024/25



80% of councils overspent on adult social care in 2024/25, up from 72% in 2023/24

More savings required, but little confidence they can be achieved



£932mn planned savings to ASC budgets in 2025/26. This is the highest level of planned savings since 2016/17 when the figure was £941mn.

This figure represents **4.2%** of ASC net budgets.

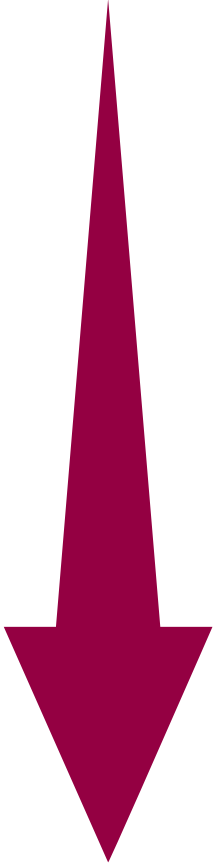


16% of Directors are fully confident they can deliver planned savings in full, **74%** are partially confident.

Other Finance figures

- **84%** of councils have increased council tax by the maximum allowance of 2.99% in 2025/26
- **99%** of councils increased the adult social care precept by 2% in 2025/26, up from 98% in 2024/25.
- **66%** of Social Care Grant funding will go to adult social care in 2025/26, an increase from 60% in 2024/25.

Directors' confidence in delivering their legal duties is dwindling

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- **Less than a quarter of Directors** are fully confident their budgets will be sufficient to meet the care and support needs of people who draw on care (as defined by the Care Act) for 2025/26
 - Directors' lack confidence in their budgets will be sufficient to meet their statutory duties, particularly around **Deprivation of Liberty Safeguards (only 25% fully confident)** and **Market Sustainability (only 13% fully confident)**
 - **Less than half (46%)** Directors are fully confident in their ability to meet their duties around safeguarding
 - **74%** of Directors either have partial or no confidence that their budgets are sufficient to meet their legal duties for prevention and wellbeing.

Care Market Sustainability

There is some improvement in care market stability



56% of council areas have seen providers closed/ ceased trading or handed back contracts in the past 6 months.



4,000+ people have been affected by provider closures or contract hand backs in these areas.

Both an improvement on last year (66% and 5,000+ people)

More homecare hours are being delivered

- **5.4%** The increase in the number of homecare hours delivered between Spring 2024 (45mn hours) and Spring 2025 (48mn hours)
- **118,673** The number of home care hours that could not be delivered. 26% reduction on last year

Understanding and meeting peoples needs

Fewer people are waiting for an assessment or care & support to begin



Continuing trend downwards:

- **28.5%** reduction in those waiting over 6 months for assessment
- **7.4%** reduction in those with an overdue Care Act review

Complexity of social care needs is increasing, meaning more care is required

Concern for impact on budget	Extremely concerned	Quite concerned	A little concerned	Not at all concerned
For older people				
Demographic pressures	26%	49%	25%	0%
Increased costs due to increased complexity of needs	43%	46%	10%	1%
For working age adults				
Demographic pressures	32%	43%	24%	1%
Increased costs due to increased complexity of needs	54%	41%	4%	1%

Directors say the size of care packages are increasing:

61% say size of care packages from Community Settings have increased

63% say size of care packages from hospital discharges have increased

14 hrs 23 mins– average number of homecare hours per week, per person in 2024/25, up from 13hrs 40 in 2021/22

Increased requests & referrals for care, support & safeguards



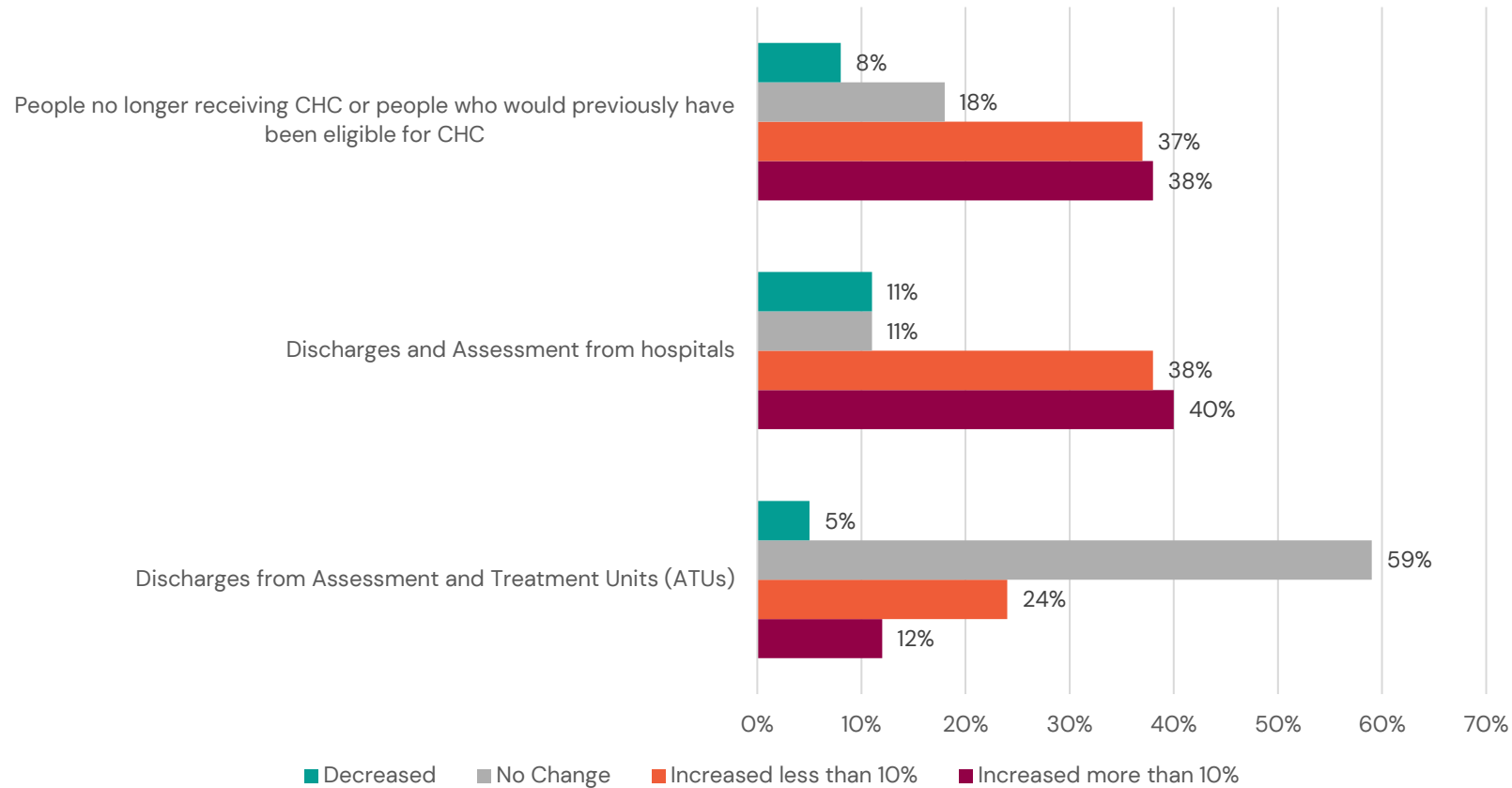
73% Directors report increases because of mental ill health

55% because of domestic abuse safeguarding concerns

60% because of the impacts of rough sleeping

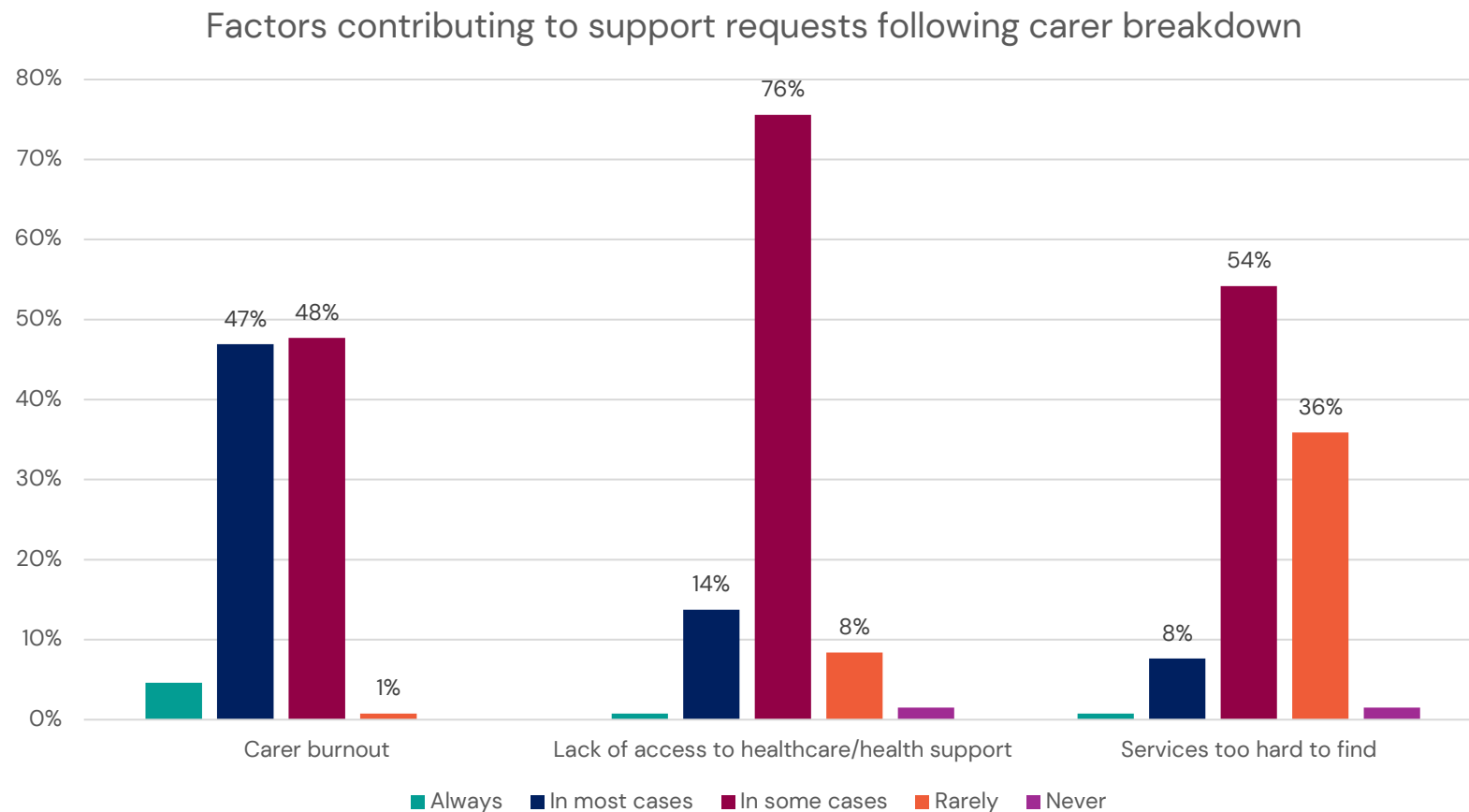
Increased requests for support from health settings

Change in people needing care and support in the last 12 months



Carers needs are increasing

76% of Directors reported an increase in the number of carers needing support



Prevention and early intervention

Consequences of financial pressures for prevention

5.6% – lowest recorded spend on prevention as a % of ASC net budget

	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26
Spend on prevention	£1,201m	£1,187m	£1,251m	£1,163m	£1,204m	£1,352m	£1,549m	£1,428m	£1,263mn
% spend on prevention as % of ASC net budget	8.3%	8.0%	8.4%	7.4%	7.5%	7.9%	8.2%	7%	5.6%
Difference in spend from previous year	N/A	-1.2%	+5.4%	-7%	+3.5%	+12%	+14.6%	-7.7%	-11.6%

Adult Social Care Investment strategies

Fewer councils are increasing investing in digital and technology, reablement rehabilitation and housing/accommodation-based models of care and support

	Disinvestment		Maintain Existing Levels		Investment	
Answers	2024/25	2025/26	2024/25	2025/26	2024/25	2025/26
Preventative services for people not meeting eligibility threshold	6%	8%	65%	65%	29%	28%
Equipment, aids or adaptations	2%	2%	66%	64%	32%	33%
Crisis resolution/reablement/ rehabilitation to prevent the need for long term support, residential or hospital admission or entry to the criminal justice system	0%	1%	45%	59%	55%	40%
Digital and Technology	0%	3%	28%	32%	72%	65%
Voluntary, Community Faith and Social Enterprise Sector	8%	7%	77%	73%	15%	19%
Housing/Accommodation based models of care and support	3%	6%	48%	51%	50%	43%
Support for carers	1%	4%	57%	57%	42%	39%
Information and Advice	1%	4%	77%	66%	22%	30%
Advocacy services	4%	1%	85%	83%	11%	16%

Digital and technology

In terms of Technology Enabled Care (TEC) – what would be the most beneficial?

1. Additional funding and resources to invest in preventative technologies
2. Improving digital skills and confidence among care staff and service users
3. Improving system interoperability between health and social care

We asked Directors about their council's current awareness and confidence in engaging with the following emerging technologies in ASC

	Aware and confident %	Aware but not confident	Limited awareness	Not aware
Remote monitoring / smart home technologies	65%	30%	5%	0%
Artificial Intelligence (e.g. generative tools, decision support)	32%	57%	11%	0%
Interoperability and data integration	26%	59%	14%	2%
Predictive analytics and forecasting tools	20%	55%	25%	1%
Automation (e.g. triage tools, administrative processes)	21%	53%	24%	2%

Care and health interface

Funding & service pressures in the NHS are having a knock-on effect in adult social care

100% of Directors said increased NHS pressures will increase pressures for ASC in 2025/26 .

94% of Directors said increased NHS pressures will lead to ASC taking more responsibility for services which previously the NHS would have arranged or delivered, up from 91% last year.

74% of Directors said increased NHS pressures will lead to ASC staff increasingly undertaking tasks on an unfunded basis that were previously delivered by NHS staff. This has fallen from 84% in 2024/25.

Trend continues of more NHS activity being shifted to the community

Almost three quarters of Directors reported an increase in the number of people no longer eligible for CHC.

Almost three quarters of Directors said they have seen an increase in delegated health care tasks being carried out by social care staff, with 18% seeing a large increase

Four in five Directors are concerned that essential daily care provided by community trusts through the NHS is starting to become a service that residents must pay for

Continuing Healthcare (CHC)

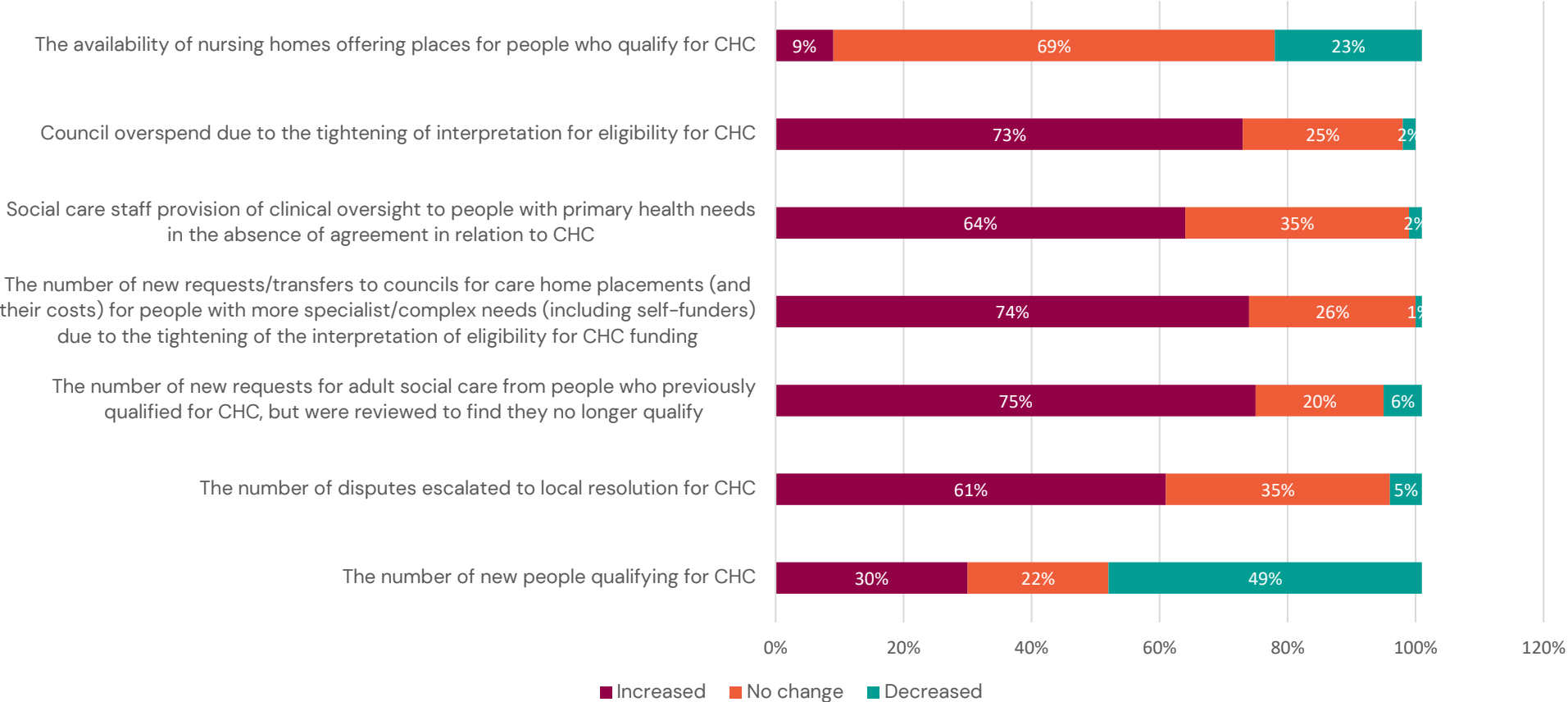
73% Directors saw a council increase in overspend due to tightening CHC eligibility (new)

49% Directors said fewer new people were qualifying for CHC

61% report an increase in disputes escalated. 2024 – 74% agreed there had been an increase. 2023 – 64%

Continuing Healthcare (CHC)

Changes in CHC access in the last 12 months

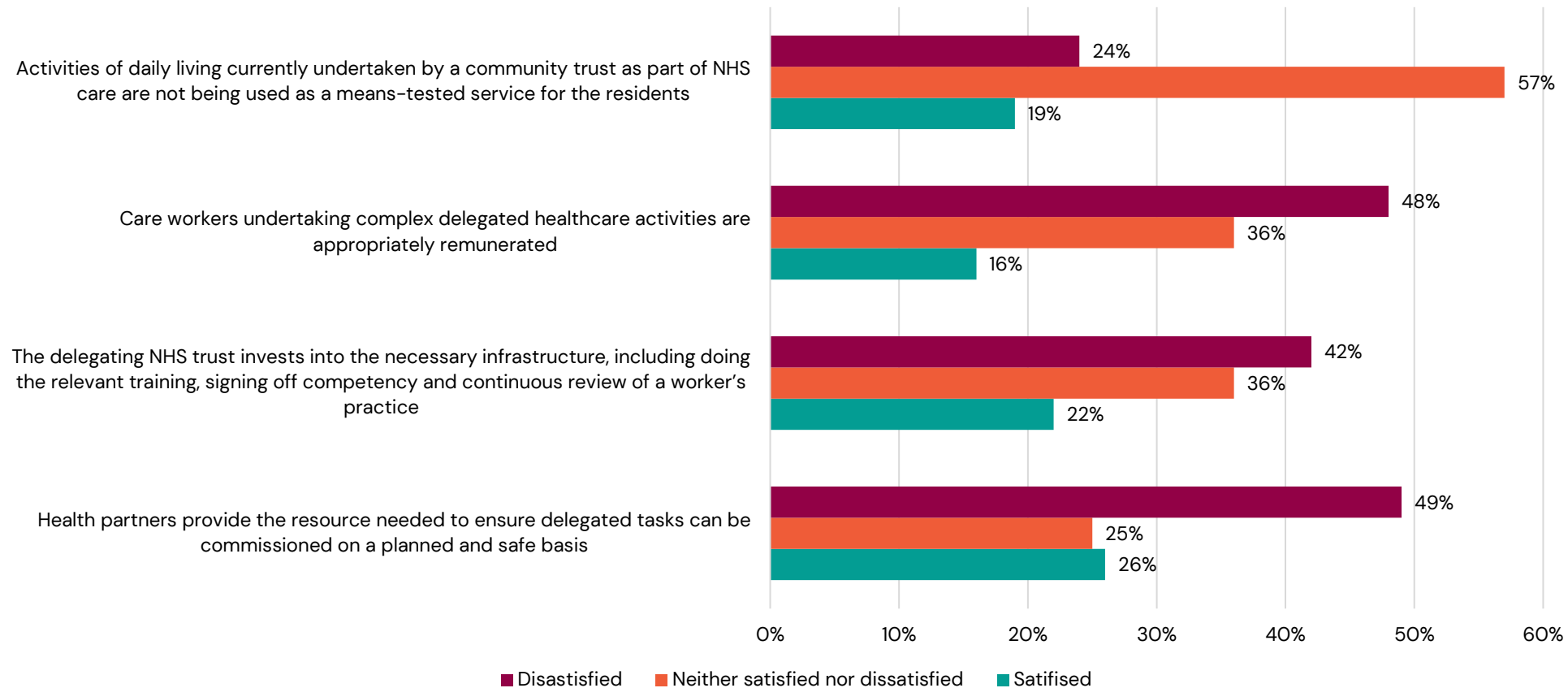


Funded nursing care (FNC)

- **10% agreed** that the NHS funded nursing care rate is sufficient to recruit and retain nurses working in social care in their areas, whereas **76% disagreed**, with **15% strongly disagreeing**. In **2024**, **14%** agreed rates were sufficient.
- **Only 9%** of councils say that FNC funding from the NHS covers the true cost of nurses working in care home settings. This is broadly the same as last year

Delegated healthcare tasks

Satisfaction with delegated health care activities



Better Care Fund

80% of total BCF allocation spent on core services, whilst only **16%** was spent on discretionary preventative activity.

Slight increase in the number of councils investing in prevention and early intervention (21% in 2024 to **26% in 2025**)

Decrease in the number of councils investing in Discharge to Assess (46%→**20%**)

