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SOCIAL CARE SERVICES FOR YOUNGER ADULTS WITH LEARNING DISABILITIES & MENTAL ILLNESS

UK MARKET REPORT

2013

FIRST EDITION

COVERING:

KEY SECTOR STATISTICS

MARKET STRUCTURE

DEMAND AND SUPPLY

POLITICAL ENVIRONMENT

PROFITABILITY

PROFILES OF MAJOR PLAYERS

healthcare market intelligence

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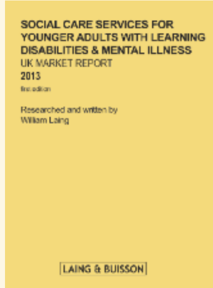
UK MARKET REPORT **2013**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Researched and written by
William Laing
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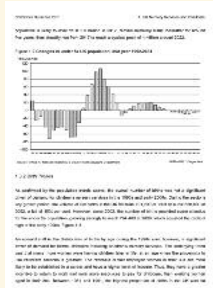

This new report* collates the latest market statistics and analysis on care homes and related community based social care services, including homecare and supported housing services, for learning disabled adults and adults with mental health conditions.

The overall value of public and independent sector (for-profit and not-for-profit) supply of specialist care services for learning disabilities and mental health conditions is estimated at over £8bn in the UK. The independent sector dominates supply with 79% of the market value.

During the 1990s, as services were privatised, overall capacity in residential facilities increased. From the turn of the century however this intially plateued and is now on a slow downward trend as local authorities and NHS commissioners seek where possible to make placements in supported housing in preference to care homes. Laing & Buisson's research breaks down the £4.4bn specialist residential services market as well as the £3.8bn non-residential care market, putting this in polticial, economic and health context.

As is standard across Laing & Buisson's report portfolio, this report is based upon a wealth of public and private information sources, including extensive use of proprietory surveys and interviews unavailable elsewhere. As such it is essenital reading for any healthcare professionals involved in the provision, commisisoning or investment of this niche area of the UK healthcare sector.

*****_This report was historically part of the_ **MENTAL HEALTH & SPECIALIST CARE SERVICES** UK MARKET REPORT - see the back page order form for more details on this split and how to purchase all three new reports in a specially priced bundle.

EXCLUSIVE TABLES & FIGURES INCLUDED IN

SOCIAL CARE SERVICES FOR YOUNGER ADULTS WITH LEARNING DISABILITIES & MENTAL ILLNESS

UK MARKET REPORT **2013**

- Supply and value of services for adults with learning disabilities and mental health conditions below age 65 in care homes + non-acute NHS provision, by sector, England April 2013
- Capacity (places) in residential settings; RSL provided supported living units; and home care recipients - learning disabled and mentally ill adults aged under 65, England 1997-2013
- Factors affecting future underlying demand for services for learning disabled people
- Gross public expenditure on mental health and learning disability services by the NHS and social services, England 1999/00 to 2012/13
- Service users aged 18-64 on Direct Payments and Personal Budgets in England 2011/12
- Leading independent sector providers of care homes for learning disabled and mentally ill adults by numbers of such homes owned or managed, UK end-2012
- Major provider penetration, independent sector care homes for adults with learning disabilities and mental health conditions, UK end-2012
- Share of care home capacity for adults with learning disabilities and mental health conditions by ownership group, homes and bed capacity, UK end-2012
- Care homes capacity for learning disabled and mentally ill adults operated by major providers1 by category of provider, UK end-2012
- Independent sector care homes for learning disabled and mentally ill adults, for-profit and non-profit registered homes, places and mean size, UK 2006-2012
- New registrations of independent sector care homes for adults with learning disabilities and mental health conditions, UK 2001-2012
- Closures of Independent sector care homes for adults with learning disabilities and mental health conditions, UK 2000-2012
- Value of services for adults with learning disabilities and mental health problems below the age of 65 by market segment, England April 2013
- Social care capacity (places in care homes and recipients of home care) for adults with learning disabilities, England 1989-2012
- Social care capacity (places in care homes / supported living and recipients of home care) for mentally ill adults aged under 65, England 1989-2012
- Major provider penetration, share of independent sector care home capacity for adults with learning disabilities and mental health conditions owned or managed by groups of 3 or more homes, UK 2003-2013

WHAT DOES

SOCIAL CARE SERVICES FOR ADULTS WITH LEARNING DISABILITIES & MENTAL ILLNESS UK MARKET REPORT **2013**

OFFER YOU?

EXECUTIVE SUMMARY
- Political environment for outsourcing
- Impact of spending cuts
- Shift from care homes to supported living
- Commissioning and care pathways
- Threats and defensive characteristics
- Market structure, consolidation and profitability

MARKET SIZE & GROWTH
- Market value trends - residential *vs* non-residential
- Capacity trends: care homes, supported living and homecare
- Supported living
- Non-residential care

DEMAND
- Underlying demand
- Occupancy rates
- Occupied and available beds in care homes - all funding sources (local authorities and NHS)
- Local authority supported care home residents and recipients of non-residential care
- Demand for 'appropriate accommodation' in the wake of Winterbourne View

FUNDING
- Historic trends in funding
- Transition to a cold financial climate
- Funding prospects

LEGISLATION & REGULATION
- Health & Social Care Acts 2008 and 2012
- Scope of regulation in England
- The essential standards

PURCHASING DYNAMICS - BALANCE OF COMMISSIONER/PROVIDER POWER
- Rejection of regionalisation of commissioning in social care
- Care funding calculators, brokers and pressures on operators' price and margins

GOVERNMENT POLICY
- Policy continuity
- Personalisation, self-directed care and the transformation agenda
- Integration of health and social care budgets

LEGISLATION & REGULATION
- Health & Social Care Acts 2008 and 2012
- Scope of regulation in England
- The essential standards

MARKET STRUCTURE AND PROFITABILITY
- Business models - strengths and weaknesses
- Concentration, consolidation & penetration
- Profitability and enterprise values

PROFILES OF MAJOR PROVIDERS
- Profiles of market leaders

FINANCIAL APPENDIX
- Detailed analysis of the statutory accounts of learning disabled/mental health service providers with date for up to five years

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As the country's leading provider of healthcare intelligence, the Laing & Buisson library of market reports feature prominently on the shelves of healthcare experts working in a range of roles - from the chief executives, financial directors and business development managers of independent care providers to key decision makers in private equity, the advisory community and the heads of both regional and national government making choices over care services and provision. Meanwhile, monthly business newsletters *CCMn* and *HMn* offer a regular window on market trends, legislation and company results. Laing & Buisson also organises a packed calendar of well-attended annual conferences, seminars and Forums which bring together delegates from every area of health and social care across the public, private and voluntary sectors.

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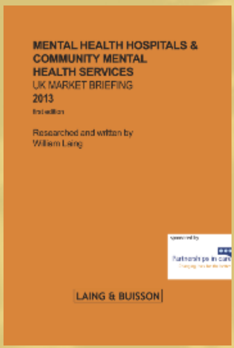

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