LaingBuisson

# HOMECARE, SUPPORTED LIVING & ALLIED SERVICES
## UK MARKET REPORT

FIRST EDITION

**COVERING**:

HOMECARE, SUPPORTED LIVING,
HOME HEALTHCARE & COMPLEX CARE
TELECARE, REABLEMENT
ALLIED SOCIAL CARE SERVICES
MARKET VALUE & TRENDS
GOVERNMENT POLICY & REGULATION
MARKET STRUCTURE
DEMAND & SUPPLY
FUNDING SOURCES
MARKET ENVIRONMENT
PAYROLL, PRICES & PROFITABILITY
LATEST DATA & AUTHORITATIVE
LaingBuisson COMMENTARY & ANALYSIS

*The healthcare experts*

# HOMECARE, SUPPORTED LIVING & ALLIED SERVICES

## UK MARKET REPORT

### FIRST EDITION

This first edition of Homecare, Supported Living & Allied Services is the successor to the Domiciliary Care Markets series last published by LaingBuisson in 2013. In its new format, the report has been **fully revised, updated and re-focused** on the core **homecare and supported living markets** valued at £6.5 billion a year, with additional coverage of **home healthcare** (a £2 billion market), **telecare** and related services.

With its emphasis on **commercial opportunities** and risks, the report continues to offer the most comprehensive business guide to a growing marketplace for supporting people with specialist care needs to live within the community.

With **deep insights** into the economics of health and care services generally, the LaingBuisson team has collated all of the latest available data and intelligence on how these markets are currently operating, highlighting the **severe challenges** faced by **public providers** and the opportunities in the smaller **private** facing segment. At the same time, the report recognises that the **entire public health** and **social care system** may be on the **cusp of a transformation**, driven by the government's imperative to deliver **major efficiencies** as public spending overall remains tightly constrained and as **demand continues to rise** inexorably.

There is **broad consensus** that success will depend on **genuinely effective integration of health and social care**. If this 'holy grail' can be achieved, the report concludes, it could in the space of a few years **revolutionise the environment** in which independent sector providers of state-funded homecare and allied services currently operate – replacing unprofitable, price driven 'silo' procurement on a time and task basis to strategic, outcome-based commissioning giving consortia or alliances of providers the opportunity to enhance their earnings by delivering 'whole system' efficiencies.

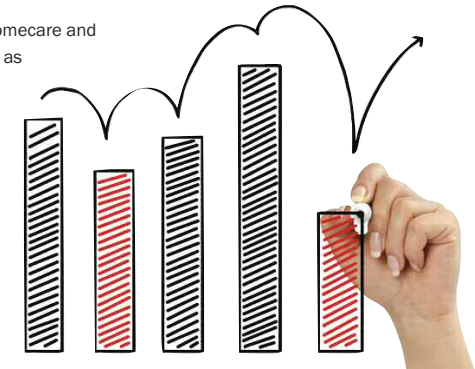
This report blends **quantitative data and authoritative**, **punchy analysis** providing a unique and exclusive overview of the market as well as being an invaluable reference work and data source for business planning.

**Essential reading** for organisations **purchasing homecare** or other **domiciliary** care, as well those **providing** care services in the community and those considering entering the market, this report is the best way to keep abreast of latest developments.

It brings readers who are already active in the market up-to-date while also offering newcomers a full breakdown of the marketplace and how it operates. These factors equally make it the **ideal resource** for investors looking at this niche of UK social care provision.

# Exclusive Tables & Figures include...

- Estimates of market value for homecare and supported living, by sector, age and client type, England 2014/15 (£m)
- Gross expenditure on selected domiciliary personal social services in Scotland and Wales, 2013/14 (£m)
- Gross current expenditure on adult social care services by primary support reason, England 2014/15
- Fundamental standards ratings of homecare service providers, by sector & by ownership type, England 2016
- Compliance of homecare service providers, by sector, England 2016
- Direct payments and self-directed care, people using services commissioned by English councils during 2014/15
- League table of major independent sector providers of homecare and supported living services (all client groups), by turnover, UK 2014/15
- Factors affecting future underlying demand for services for learning disabilities
- Independent sector penetration of social care markets: care homes for older people and younger adults (all funding sources) and local authority funded homecare
- Estimated value of independent sector supply of homecare and supported living, by age, primary reason for support and source of funding, England 2014/15 (£m)
- Delayed transfers of care, patients in acute NHS beds, England, 1998-2015
- Trends in residential care for younger adults (18-64) with learning disabilities and mental health conditions, occupied beds England 1989-2015
- Overall satisfaction with long term care and support provided, and self-perceived quality of life, England 2014/15
- Annual home help/care contact hours (millions) purchased by local authorities by sector of provision and number of households / persons receiving local authority funded home care services at a given point of time, England 1992-2015
- Sources of funding for homecare and supported living, all provider sectors England 2014/15 (%)
- Rates of National Minimum Wage in £ per hour, 2005-2015
- Median care assistant and homecare worker hourly pay rates by region, England 2015 (£ per hour)
- Comparison of care worker hourly pay rates in care homes and domiciliary care, England 2015
- Profitability of major for-profit homecare and supported living groups, EBITDA as a percentage of revenue



LaingBuisson

# What does the HOMECARE, SUPPORTED LIVING & ALLIED SERVICES UK MARKET REPORT offer you?

Executive Summary & Highlights
- Overall value of homecare services
- Key trends and developments
- Opportunities and challenges going forward

Scope of the Report
- Historical background
- Expansion of the independent sector
- Contraction of the care home sector
- Adult social care environment - non-residential; homecare; supported living; home healthcare; day care; meals; occupational therapy; mental health support; reablement

Market Value & Trends
- Market value of homecare and supported living
- Sources of funding
- Market trends
- Home healthcare
- Telecare (& telehealth)

Government Policy & Regulation
- Policy context
- Impact of public sector austerity
- Regulation of social services
- Regulation of payroll costs
- Transformation and integration
- Personalisation

Market Structure
- Regional distribution of homecare outlets
- Market concentration
- Business models: strengths and weaknesses
- COBIC model
- Major operators' profiles

Demand & Supply
- Current volume of demand
- Demand drivers
- Customer satisfaction
- Provision of homecare services

Funding Sources & Market Environment
- Local authority funding and commissioning
- NHS funding
- Private purchase of homecare
- Long term care insurance
- Equity release
- Pensions

Payroll, Prices & Profitability
- Payroll costs
- Recruitment and retention of care workers
- Cost inflation
- Profitability of major operators in homecare and supported living

Financial Appendix
- Detailed analysis of the statutory accounts of major providers with comparative data for up to five years



## Market Reports, Forums, Conferences, Newsletters, Data, Consultancy...

As the country's leading provider of healthcare intelligence, LaingBuisson's products and services are used by healthcare experts working in a range of roles - from chief executives, financial directors and business development managers of independent health and care providers to key decision makers in private equity, the advisory community and the heads of both regional and national government making key spending decisions.

In addition to Market Reports, LaingBuisson publishes business newsletters and holds a number of well-attended annual conferences and Forum events which bring together delegates from every area of health and social care across the private, public and voluntary sectors.

**For readers interested in this report, LaingBuisson has a range of complementary products available:**





To find out more
**w.**laingbuisson.co.uk
**e.**info@laingbuisson.co.uk
**t.** 020 7841 0045


*The healthcare experts*

LaingBuisson

# HOMECARE, SUPPORTED LIVING & ALLIED SERVICES UK MARKET REPORT

FIRST EDITION

## PURCHASER DETAILS

Tick if details are same as address label to the left

Name

Job Title

Organisation

Address

Postcode

Telephone/Fax

Email Address

**Authorised signature**

| | PRICE | QTY |
|---|---|---|
| **HOMECARE, SUPPORTED LIVING & ALLIED SERVICES** UK MARKET REPORT — FIRST EDITION | *Individual Package* £1,155 [1] | |
| | *Office Package* £3,055 [2] | |
| **CARE OF OLDER PEOPLE** UK MARKET REPORT — TWENTY-SEVENTH EDITION. LaingBuisson's unrivalled study on the UK elder care market - the only authoritative, comprehensive and up-to-date assessment of the present state and future prospects of the long term care market for residential, nursing and dementia care services. Published September 2015 | *Individual Package* £1,240 [1] | |
| | *Office Package* £3,140 [2] | |
| **PRIMARY CARE & OUT OF HOSPITAL SERVICES** UK MARKET REPORT — SECOND EDITION. A unique study drawing together an apparently disparate range of healthcare markets where LaingBuisson has identified important interconnections and potential synergies for creating truly integrated pathways of care. Published January 2015 | *Individual Package* £1,195 [1] | |
| | *Office Package* £3,095 [2] | |
| LaingBuisson's **HEALTHCARE MARKET** *REVIEW* — TWENTY-EIGHTH EDITION. A unique annual review of trends in acute healthcare, insurance, mental health services, primary medical care & long term care and many other specialist care sectors. The publication includes special articles and comprehensive directories of healthcare provider organisations and insurers, independent hospitals, clinics and a private equity deals table. Published February 2016 | *Individual Package* £805 [1] | |
| | *Office Package* £2,705 [2] | |
| **CCM*n*** (Community Care Market *news*) & **HM*n*** (Healthcare Market *news*). The premier publications for independent sector care professionals – featuring latest business activities across their respective areas. For full details of the title specifics - and for sample issues - visit the LaingBuisson website or contact our sales team. Subscription prices are for a single title and include ten print copies a year and online access to an extensive archive. Subscription to both titles is available - call for details. Office package PDF licences are available upon request - speak to our sales team to find out more. | *Hard copy only* £695 standard rate / *Including PDF* £950 [3] standard rate | |
| | £510 healthcare provider rate / £695 [3] healthcare provider rate | |

TOTAL VALUE OF ORDER £

## PAYMENT DETAILS (please tick appropriate box and fill in the details required)

Please invoice my company

Invoice Address (if different from address above)

Post Code

Purchase Order No (if required)

Payment by BACS

Please quote ref: dom13 Barclays Bank Sort Code 20 65 82 Account No. 40393711

Please debit my credit/debit card

Card No.

Valid From M M / Y Y Expiry Date M M / Y Y Security Code

If you would prefer to pay by credit card over the telephone please call 020 7923 5396

I enclose a cheque for £ payable to Laing & Buisson Ltd

A VAT invoice will be issued. VAT Reg. No. 454 2637 46

[1] Individual Packages include a hard copy book accompanied by a PDF file and Microsoft Excel file for use by **one person**. [2] Office Packages include a hard copy book accompanied by a PDF and Microsoft Excel file for **multiple users** across a 'single office location' - telephone for full Ts & Cs. [3] VAT is charged on datasets and digital newsletters. NB: We also sell Permissions Packages which allow for reproduction of the data in your own reports - contact us on peta@laingbuisson.co.uk for full details.

To purchase online visit www.laingbuisson.co.uk and follow the Market Reports links. Digital files will be available to access immediately, with hard copies to follow by courier.

Purchase online, or post, fax or email this order form to:


LaingBuisson

29 Angel Gate
City Road
London
EC1V 2PT

**t.** 020 7833 9123
**f.** 020 7833 9129
**e.** info@laingbuisson.co.uk
**w.** laingbuisson.co.uk