**CARE OF OLDER PEOPLE UK MARKET REPORT**

**EXTRA CARE HOUSING UK MARKET REPORT**
LaingBuisson’s update of a report focused on specialist housing with care for older people - a market which appears ripe for high levels of investor attention in the coming years based upon market demand and the economies of the UK housing market.

**HOME CARE UK MARKET REPORT**
LaingBuisson’s study on the £2bn a year market which helps to support older and disabled people to live in the community. It covers a wide range of social care and health services with a main focus on those services which are delivered into the home.

**LaingBuisson’s HEALTHCARE MARKET REVIEW**
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, out patient clinics, pathology laboratories and a private equity database.

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**CARE HOME DEMAND & CAPACITY**

**UK MARKET STRUCTURE - GROWING POLARISATION**

**FACILITY OPENINGS & CLOSURES**

**CORPORATE PENETRATION & CONSOLIDATION**

**SOURCES OF CAPITAL**

**POLITICAL & REGULATORY ENVIRONMENT**

**CQC RATINGS: WHO PERFORMS BEST AND WORST?**

**IMPACT OF PUBLIC SECTOR AUSTERITY**

**FUNDING SOURCES AND FEE RATES**

**FUTURE PROSPECTS - SOURCES OF CAPITAL**

**SERVICE INNOVATION**

**FUNDING SOURCES AND FEE RATES**

**COST STRUCTURE AND COST INFLATION**

**PROFITABILITY**

**IMPACT OF PUBLIC SECTOR AUSTERITY**

**FUTURE PROSPECTS - BEAK SOME FOR EXCELLENT FOR OTHERS**

The healthcare experts
**Executive Summary & Highlights**

- Each highlighted point is referenced to the relevant section of the report for further information and commentary
- Future scenarios - bleak for some, excellent for others in a highly polarised market

**Impact of Demographic Change**
- Expansion of the very old population
- Age specific rates of care home usage
- Compression of morbidity hypothesis - not proven

**Market Size & Trends**
- Care in residential settings
- Care in non-residential settings
- Drivers of demand and supply
- Polarisation - public pay / private pay
- Historical background

**Government Policy & Regulation**
- No political threat to privatised care sector
- Care Act 2014 - mainly uncontroversial policy streams
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- New home registrations and home closures
- UK on the cusp of declining capacity while underlying demand accelerates
- Competition
- Balance of market power between providers and payers
- Market concentration

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The big news this year has been postponement of Phase 2 of the Care Act. Providers and commissioners alike will have heaved a collective sigh of relief because of the very real risks of market destabilisation that implementation would have brought (as described in last year’s edition) without a great deal more prior preparation. But one challenge has been replaced by another, potentially of even greater magnitude, in the form of the National Living Wage (NLW).

While no-one begrudges more money for hard working, lower paid employees, the other side of the coin is that care service operators with a high exposure to public pay are looking into an abyss if central government fails to fund local authorities to pay for the additional cost of NLW, especially in the context of a 6% real terms fall in council paid care home fees in the last five years and a decline in operating profit margins to truly worrying levels.

This fully updated and revised edition of the well respected Care of Older People UK Market Report uses proprietary data available only to LaingBuisson to analyse market trends and describe what in the analysts’ view is the most likely scenario for the medium term future for both the public pay and private pay segments of the market.

LaingBuisson’s report provides the only independent, authoritative, comprehensive and up to date assessment of the present state and future prospects of the long term care market in the UK. As such it is essential reading for independent providers, care commissioners, regulators and policy makers as well as those people in the investment sector with an interest in this massive marketplace.

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**Exclusive Tables & Figures include...**

- Nursing and residential care of older and physically disabled people, capacity and annual market value available at April 2014
- Nursing, residential & long stay hospital care of older & physically disabled people, places by sector, UK, 1970-2014 & market value by sector, UK 1988-2014 (annualised in April in each year)
- Independent sector care homes for older & physically disabled people, capacity, volume of demand & market value, UK 1989-2014
- Volumes of local authority funded/community care services directly provided and contracted out, England 1992-2014
- Volumes of local authority funded/nursing home in Scotland
- Value of independent sector supply of home care services, estimates by source of funding, UK global estimates, 2014
- CQC Fundamental Standards – performance of English care homes for old age and dementia, snapshot at June 2015 by provider sector
- Private equity (broadly defined) owners of older people’s care home groups, 2015
- Delts and entires - components of national care home capacity change, private & voluntary care homes for older and physically disabled people, new registrations, closures and other not changes, 1995-2015
- New care home registrations by ownership group 1993, 2001-2014, UK for profit and not-for-profit homes for older and physically disabled people
- Market penetration of major providers, UK 1989-2015
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- Customer profiles
- Gaps in information on care home customers
- Physical environment
- Daycare, extra care & niche markets
- Innovation & new service models
- Financial Appendix
- Detailed analysis of the statutory accounts of major providers

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**Get access to the top decision makers working in the UK’s care home groups**

Excellent companion pieces to this report are LaingBuisson’s datasets on UK Care Home Operators. These come in a variety of formats and sizes dependent upon your exact needs with allional, senior management or board level office information.

**Price range from £450+VAT to £1,570+VAT**

For more details, including exercises when purchased alongside this report - call 020 7840 9406.

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

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- Projected numbers of older and physically disabled people living in residential settings, UK 2015-2025, independent and public sectors
- Volume of demand and total capacity for elderly and physically disabled people in residential settings in the private, voluntary and public sectors combined, UK 1999-2014
- Distribution of funding sources for independent care home residents, UK 1986-2014
- Occupancy rates in the for-profit & not-for-profit care homes for older or physically disabled people, by sector 1989-2015
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- Underlying profitability of major care home groups for older people, EBITDAR as a percentage of revenue, 2005-2014
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- Distribution of nursing care fee levels in private care homes, UK 2014/15
- Existence of cross-subsidisation from private payers to council funded care home residents
- Care in residential care of an ‘intermediate’ specification of 50–100 beds for older people, per resident per week 1988-2014
- Comprehensive index of care home costs, UK 2014/15 for private homes with an ‘intermediate’ specification of 50 old people per resident including communal areas
- Staff redistribution (hours per FTE) for UK care homes of an efficient (75–100 beds) for older people, hours per resident per week 2002 – 2014/15
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### Sources of Finance

- Public sources of finance - local authorities, NHS budgets under severe pressure
- Private payers - owner-occupied property a robust and durable funding model
- Quasi private payers (top-ups)
- Limited role of long term care insurance
- Absence of intermediation in private pay market

### Demand For & Supply of Care Home Services

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### Fees, Costs, Profits & Capital Returns

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- Fair Price for Care, revised LaingBuisson model
- Profitability, divergence of public a private pay providers

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Published June 2015

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