LAING & BUISSON

FLEXIBLE STAFFING IN HEALTH & CARE
UK MARKET REPORT
2013

FOURTH EDITION

COVERING:

HEALTHCARE RECRUITMENT AGENCIES

SOCIAL CARE RECRUITMENT AGENCIES

INDEPENDENT HOMECARE (DOMICIILIARY CARE) PROVIDERS

healthcare market intelligence

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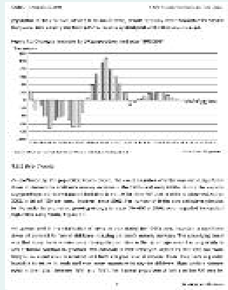
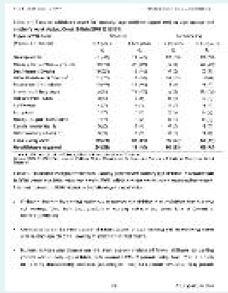
UK MARKET REPORT **2013**





This report brings together key statistics, trends and analysis on the role of flexible staffing services in UK health and care markets, covering temporary placements provided by commercial recruitment agencies of: Nursing Staff/Doctors/Allied Health Professionals/Health Scientists & Technicians/Health Care Assistants/Social Workers/ & Other Social Care Workers.

It also covers: Provision of homecare by the independent sector & Doctor deputising services (Out of hours/urgent medical care) supplied by commercial providers.

Based on a wide range of quantitative, qualitative and financial sources including Laing & Buisson's annual surveys of health and care markets including homecare, the report offers unique data on UK market values by purchasing sector, with a strong focus on NHS's spending on flexible staffing services, past, present and in the future.

While the economy waits for the business cycle to regain its momentum, and fiscal prudence continues to dominate government policy and strategy, demand for flexible staffing services in 2012 and 2013 have shown signs of strengthening and developing on a more stable foundation following cutbacks to agency staff spending in 2010 and 2011. This report highlights these trends and key developments which include a shift back towards more predictable volume based contract procurement by the public sector, the increased use of flexible staffing management solutions provided commercially, and the diversification of services offered by health and care staffing operators, driven by the shifting delivery of health and care within hospital and community settings.

A mainstay of this report is its detailed coverage of leading health and care recruiters and homecare providers, highlighting the 'movers and shakers' in recent years, the sector's significant deals, the role of private equity investors, market size of the current major providers, and profit performance of operators.

This report is essential reading for all organisations involved in the provision or purchasing of flexible health and care staffing services in the UK.

EXCLUSIVE TABLES & FIGURES INCLUDED IN

FLEXIBLE STAFFING IN HEALTH & CARE UK MARKET REPORT **2013**

- Value of the UK recruitment industry, *1985-2012*
- Number of employees and temporary employees in the United Kingdom, *1984-2012*
- Temporary employees (full and part time) by type of recruitment, *1992-2012*
- Reasons for temporary working, *1992-2012*
- Spending on flexible health and care staffing services by user/sector, *UK 2012*
- NHS hospital and community services spending on NHS Staff and non-NHS (Agency/Contract) Staff in England, *1988/89-2011/2012* – Separate tables for Nursing, Medical & Dental, HCAs, and Scientists, Therapists & Technicians
- Breakdown of NHS hospital and community services non-NHS staff spending by type of Trust, *2011/2012*
- Regional split for non-NHS staff spending by NHS Trusts, *2011/12*
- Number of WTE agency nurses ('temps') and bank nurses employed by NHS hospital and community Trusts England, *1974-2012*
- Number of NHS hospital and community services locum doctors in England, *1982-2012*
- Whole time equivalent (WTE) nursing and other, mainly hourly paid, staff in independent sector care homes, all client types, UK estimates *1990-2012*
- Percentage of care home staff hours supplied by UK flexible health and care staffing agencies, *2012*
- Number of WTE locum/agency social work staff employed by Local Authorities in England, *2002-2012*
- Value of homecare provided by independent sector providers, England & UK, *2012*
- Latest revenues and market share indicators of major flexible health and social care staffing providers in the UK, *2011/2012*
- Major acquisitions and mergers of heath and care staffing companies & independent homecare operators *2008-2013* including transaction value and enterprise value
- Major providers with homecare revenues £10 million plus, UK, *2007* & *2012*
- Profit/ (loss) indicators (EBITDAR and pre-tax) of UK flexible health and care staffing major providers in the UK, *2011/2012*

Plus many more...

WHAT DOES

FLEXIBLE STAFFING IN HEALTH & CARE
UK MARKET REPORT **2013**

OFFER YOU?

EXECUTIVE SUMMARY

- Market Overview
- Flexible staffing purchasing trends
- Future prospects for purchasing
- Major provider review
- Government policy & regulation

THE UK RECRUITMENT INDUSTRY & FLEXIBLE STAFFING

- UK recruitment industry market size, growth trends, and leading players in the industry
- Size of the UK temporary labour force, demand for 'temps', and supply of 'temps'

THE UK FLEXIBLE HEALTH & CARE STAFFING SERVICES MARKET

- Value of UK flexible health & care staffing services market in 2012, and growth trends
- Breakdown by sector (hospital, community, general practitioners, social work, homecare, others)
- The health and care flexible labour force including career 'temps', locums, 'moonlighters' (permanent staff working as agency 'temps' or in staff banks), and workers with zero-hour contracts (e.g. homecarers)

PURCHASERS OF FLEXIBLE HEALTH & CARE STAFFING SERVICES

- NHS's hospital and community spending – Detailed analysis and trending of non-NHS staff spending by occupation group (including Nursing, HCAs, Doctors, AHPs & Scientists / Technicians), supported by new analysis on bank spending by the NHS
- Family health services agency spending – estimates for locum & agency spending by practitioner group (GPs, Pharmacists, Opticians, and Dentists)
- Care homes agency spending
- Independent hospitals and clinics agency spending
- Local Authorities social work and other social care agency spending
- Other private and public sector purchasers
- Purchasing of commercial out-of-hours/urgent medical services
- UK homecare market – spending and workforce estimates, and broad analysis of demand trends

MAJOR PROVIDERS

- A detailed timely review of leading health and care staffing agencies, and a separate review of major homecare providers
- Ranking of Top 25 health and care staffing agencies by revenue, and Top 20 independent sector homecare providers by revenue with indicative market share
- Comparison of major provider market structure – Then (2007) and Now (2012)
- Listing and analysis of most significant acquisitions and mergers by major providers in the past 5 years including acquirer and acquiree, acquisition value, and enterprise value (profit multiple)
- Latest profit indicators (EBITDAR & pre-tax profit/loss) of the major health and care staffing companies and independent homecare operators

GOVERNMENT POLICY & REGULATORY CHANGES

- Review of government's flexible staffing strategy past and present
- The development of the Government's national procurement of agency staff from commercial health and care agency staffing services
- Coverage of important regulatory changes affecting the supply of temporary staffing

FINANCIAL APPENDIX

- Financial results for major flexible health and care staffing companies

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