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Who is the report for

- C-suite Professionals working in: Specialist Residential Care and Homecare; Supported Living and Community Service Providers; Addiction Support
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A market awaiting political decisions

Worth over £10.1 billion in 2015/16, the adult specialist care market - or perhaps more correctly 'markets', given the wide range of services and support mechanisms involved - has in recent times been able to sustain profitability much better than, for example, the older care sector, despite austerity driven pressures from their major contractors - local authorities.

The coming years, however, could present new challenges in the form of continued obligations to meet the National Living Wage, and more specifically in the government's proposals to reform Housing Benefit. Handled badly, government plans to contain the Housing Benefit in the special needs space could blight the funding and future development of the accommodation element of housing and support for adults with learning disabilities and other specialist needs.



The most fragmented market in UK healthcare

This report from LaingBuisson presents a picture of a fragmented market where the four leading providers account for only 7% (£700 million) of the £10 billion annual market size. The remainder is provided by a long tail of small to medium as well as micro enterprises which show remarkable resilience despite a challenging financial environment.

With the exception of acquired brain injury and substance misuse, where there is significant private funding, nearly all social care services for other working age adult client groups are paid for through public funds.

Challenges and opportunities within these markets are wide and varied. A public policy approach which favours personalisation and choice, and a move away from inappropriate residential care settings, on the surface drives interest in supported living and homecare solutions. However, as recent events have shown, the homecare market is losing operators at a rate of knots suggesting that an alternative solution may be required for a group of clients who have a range of medium to high intensity long term social care needs and who can ultimately spend a large number of years requiring specialist support.

What the report covers

UK social care and related services for working age adults, including:

- Learning disabilities
- Physical and sensory disabilities
- Mental health needs
- Memory and cognition disabilities
- Acquired brain injury
- Substance misuse

Market Size and Structure

Profiles of major operators

Funding

Market drivers

Operational KPIs

Profitability and enterprise values

Government policy

Regulation

Quality assurance and benchmarking

SWOT analysis

Trends

Future outlook

Financial Appendix

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