

HEMOCARE AND SUPPORTED LIVING MARKET REPORT

SECOND EDITION

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Demand rising but fee rates, rents and wages put homecare and supported living under pressure

The UK market for homecare for the over 65s and supported living for younger adults with learning disabilities are experiencing growing demand driven by increased longevity for both groups and a growing trend for delivering care outside of formal care settings. Overall, the UK market was worth £9.1 billion in 2016/17, and £7.3 billion in England of which £4.6 billion was 'social' homecare, £1.3 billion complex care and £1.5 billion supported living.

Supported living has grown significantly in the three years to 2016/17, with around 100,000 people receiving local authority funded supported living services in England. The sector has benefited from the Government policy to make enhanced rates of Housing Benefit available to underwrite the expansion of supported housing for younger adults with long-term needs. However, the model faces risks owing to liabilities for back pay for sleep ins not paid at National Minimum Wage; and for liabilities for the cost of rental voids for sole rights to place service users.

In contrast, while demand for homecare is growing, and its potential is similar to supported living, it is held back by austerity. Homecare providers are handing back contracts as the prices are unviable but the real costs of delivering care look too high for local authorities.

Highly fragmented, the market is ripe for consolidation but this will not happen without fundamental changes to how homecare and assisted living is delivered. Bringing health and social care closer together through Integrated Care System could be transformative, moving publicly paid homecare and supported living from the 'time and task' model to one based on outcomes. In the longer term, change may also be achieved through digitally-enabled homecare and also by a growth in private pay.

What the report includes

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Politics and Regulation
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