

CARE HOMES FOR OLDER PEOPLE UK MARKET REPORT

TWENTY-NINTH EDITION

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New data indicates there may not be a care home supply crisis

The UK market for Care Homes for Older People is estimated to be worth £16.9 billion in the year to March 2018, which represents nominal growth of approximately 3% with respect to the previous year.

New information has come to light that has led to a reappraisal of whether there is likely to be a care home supply crisis. LaingBuisson has collated and analysed data taken from CQC reports on individual care homes which shows that overall occupancy of care homes is lower than previously thought. It shows that the aggregate numbers of residents as a percentage of registered beds is 85%, whereas the widely accepted occupancy benchmark has been around 90%.

The research also points to there being a good deal of 'latent provision' in care homes, which suggests commissioners should look at ways of bringing this provision back into use.

The report also identifies a reversal in the recent trend of net closures during the yearly cycle. It, furthermore, reappraises predictions for care home demand based on a model originally developed by the Brookings Institute in the USA.



The balance between state-pay and self-pay clients continues to be a key determiner in the market. In the state-pay sector, there continues to be significant pressure on providers' prices and margins and this is bringing into question the sustainability of this model.

There remains strong evidence of a 'self-pay' subsidy, with 'pure' self-payers accounting for 52% of the market by value but only 45% by volume, making the market much more stable in areas of the country where there is a greater reliance on self-pay.

What the report includes

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