

# ADULT SPECIALIST CARE

## UK MARKET REPORT

FIFTH EDITION

## New public policy announcements drive change in adult social care

The fifth edition of LaingBuisson's Adult Specialist Care UK market report is vital reading for anyone involved in adult social care for adults under 65, be they a provider, a commissioner, an investor, an advisor or a policy maker. Written and researched by leading market commentator, William Laing, this industry standard report provides unique insight into all areas of the market, including funding, operating models, future prospects and supply and demand.

The report covers all aspects of social care for younger adults and LaingBuisson estimates the UK market to be worth £13.6 billion (2020/21). This includes services for people with learning difficulties, mental health issues, substance misuse problems and acquired brain injury, and comprises both residential and non-residential settings.

The report shows the adult specialist care market was resilient and performed well in the face of the pandemic. The more important driver is public policy, including funding and regulation. Notwithstanding the government's autumn 2021 decisions, public-facing adult specialist care providers will continue to operate in a challenging financial environment.

Recruitment and retention of staff is a key issue, as it is in much of the economy. However, with little likelihood of being able to charge councils more for their services, providers are limited in their flexibility to raise salaries to compete in today's job market.

The pace of adoption of digital technologies is likely to increase. Driven first by the pandemic, the government's social care white paper, *People at the Heart of Social Care* and additional funding recognises the central importance of digital care in the future.

Policy measures, and particularly the availability of Housing Benefit, has driven growth and investment in supported housing.

### What the report covers

Market  
Politics and regulation  
Payors  
Major providers  
Investors  
Staffing  
Market Potential

Appendices  
Glossary  
Regulators  
Trade bodies and associations  
Major provider profiles  
Historical context  
Financial appendix

## Who is the report for

- Operators of residential care and nursing homes
- Homecare agencies and providers
- Nursing agency operators
- Local authority commissioners
- CCG commissioners
- Directors of adult social services
- Care advisors
- Banks and investors
- Management consultants
- Business advisors
- Long-term care insurance providers
- Central government
- Think tanks
- Policy writers

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The fourth edition of LaingBuisson's Homecare and Supported Living UK market report is indispensable reading for anyone involved in this fragmented and complex market. This includes advisors, investors, commissioners and policymakers as well as service providers. The new report shows the value of the UK market for homecare and supported living to be £10.3 billion (2019/20) and estimates that round 1 million people are in receipt of care. Through the Covid-19 pandemic, the sector showed itself to be resilient in the face of the

challenges it faced and the financial impact on most homecare providers was limited. This was down to the remarkable efforts of the people working in the sector, as much as the support of government grants.

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## Journals



### Social care

CareMarketsUK covers the social care market including residential care, nursing care, adult specialist care, children's services, childcare, housing with care, homecare, supported living and community care. Subscription includes:

- Unique content - ten issues a year bring you market data and content you will not find elsewhere
- Real insight - commentary from the sector's leading trade associations including Care England and the Homecare Association
- Online archive - over 20 years of news and features
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## Reports



### Healthcare staffing

LaingBuisson has published the fifth edition of its Healthcare Workforce & Recruitment UK market report. The report draws inspiration from and is informed by the author's interviews with over 100 NHS, adult social care, voluntary sector and independent acute sector CEOs and workforce and HR leaders.

Written during the Covid-19 pandemic, the report gives an all-round view of the state of the market, and while taking account of what has happened during the pandemic, considers the underlying market drivers and what is being done to address the resulting challenges.

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### Retirement housing

The first edition of LaingBuisson's Retirement Housing UK market report focuses on specialist, purpose designed, self-contained accommodation exclusively to be occupied by the over 55s.

Specifically, it covers age-exclusive 'downsizer' housing, retirement living and housing with care, giving a comprehensive overview of the full breadth of the UK's retirement housing market.

The report estimates an addressable market for retirement housing of 5.2 million older people in the UK who hold more than £250,000 in housing equity.

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