

# CARE HOMES FOR OLDER PEOPLE UK MARKET REPORT

THIRTY-SECOND EDITION

## Covid recovery and social care reforms – where next for care homes?

The thirty-second edition of LaingBuisson's *Care Homes for Older People* market report is indispensable reading for advisors, investors, commissioners, policymakers and service providers involved in this dynamic and changing market. Read together with LaingBuisson's *Homecare and Supported Living* and *Retirement Housing* market reports, this research completes the series to give anyone with an interest in the care and support of the over 65-year-olds a comprehensive market picture not found anywhere else.

The report offers a backward view over the impact of the Covid pandemic. Loss of income from reduced occupancy continues to affect the sector, and occupancy is not expected to return to pre-pandemic levels until 2023. As a silver lining, NHSX is sufficiently convinced of the need for the digitisation of care homes following the pandemic that it seems likely to make NHS funding available.

Social care reform is the sector's next major challenge, in particular the implementation of Clause 18(3) of the Care Act 2014 and the Fair Cost of Care. These elements of the reforms are likely to reverse the trend to private pay driven by a growth in personal wealth – and which has been cross-subsidising publicly funded care home places. While popular politically, these reforms are likely to be highly disruptive to the care home market. Finding the balance between the state and the individual will be delicate.

These challenges and opportunities for UK care homes, alongside the potential for this important market, are fully discussed, alongside insight into the future potential for this dynamic market.

## 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

## What the report covers

Market  
Politics and regulation  
Payors  
Historic market growth  
Future market growth  
Demand and supply  
Staffing  
Operational metrics  
*cost, fees and occupancy rates*  
Operational models  
Investment models  
Performance measures  
Market structure  
Investors  
Market potential

Appendices  
*Glossary*  
*Regulators*  
*Trade bodies*  
*Financial appendix*

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Office for  
National Statistics

Chosen provider of independent sector healthcare market data to the UK government ONS

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.

The report shows the value of the UK market 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.

The report also includes the findings of new research which looks at how profitability is driven by location and the scale of the provider. It considers the increasing digitisation of homecare and supported living as 'tech enabled' providers join the list of market leaders.

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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 UKHCA
- Online archive - over 20 years of news and features
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## Reports



### Specialist Care

Covering all aspects of social care for younger adults this report estimates the UK market to be worth £13.6 billion: 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.

LaingBuisson research shows the market was resilient and performed well in the face of the pandemic. However, notwithstanding the government's autumn 2021 decisions, public-facing adult specialist care providers will continue to operate in a challenging financial environment.

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### Market Review

The thirty-third edition of LaingBuisson's flagship report is vital reading for independent providers, commissioners, advisors and investors active in the UK's independent healthcare and social care sectors.

Published in September 2021, and written during the summer, the Review reflects on how the pandemic has affected the independent healthcare and social care sectors during the past 18 months.

This update includes a new chapter on healthcare workforce and recruitment. This provides valuable insight into the key drivers of this market at a time when the sector is once again facing staffing challenges as the wider economy opens up.

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