

# CARE HOMES FOR OLDER PEOPLE UK MARKET REPORT

THIRTY-FOURTH EDITION

## Care home fees up nearly 20% in two years

Understand what this means at both national and local levels

The thirty-fourth edition of LaingBuisson's Care Homes for Older People UK market report is indispensable reading for advisors, operators, investors, commissioners, and policymakers involved in this dynamic and changing market. The report provides a robust credibility check on key questions for those interested in investing in the sector or who are looking to understand the impact of change at both a national and local level.

Care Homes for Older People provides a data-driven view of the shifting landscape for care home operators and those looking to invest in the market and paints a picture of a sector where care home fees are rising rapidly, in both the public-pay and private-pay markets. These fee uplifts are taking place at a time when the risks from the implementation of social care charging reforms appears to be receding and where funding reforms appears off the table for both the Conservative and Labour Party ahead of a general election.

LaingBuisson has found that the overall market value for the sector has rebounded to more than £23 billion by December 2023, after having dipped to £17.4 billion in March 2021.

Our deep market insights come with heat maps of fee rates across different care modalities, and for both private and public pay, to give a clear picture of change across England. This is overlaid with wider assessments of local profitability, supply and demand factors, capacity changes and occupancy levels, as well as comprehensive data across all the factors influencing business decisions.

For convenience and accessibility, the underlying data can be purchased in an Excel workbook alongside the market report. This allows businesses to port our unique data straight into their own analysis, whether to understand local commissioning, support strategic planning or decision-making on asset selection.

### Who does the report deliver value to?


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



### What the Report covers

- Overall market value
- key market sub-segments
- Historic market growth
- Future market growth
- Demand and supply
- Operational metrics
- cost and occupancy rates
- Fees across care modalities and payors
- at national and local levels
- Staffing
- Operational models
- Government policy and regulation
- Payors
- Investment models
- Performance measures
- Major providers
- Market structure
- Investors
- Market potential
- Appendices
- Glossary
- Regulators
- Trade bodies
- Major provider profiles
- Financial appendix

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The latest edition of LaingBuisson's sector-leading UK Healthcare Market Review offers a comprehensive outlook across key independent healthcare and social care markets and reveals the opportunities and challenges facing each sub-sector.

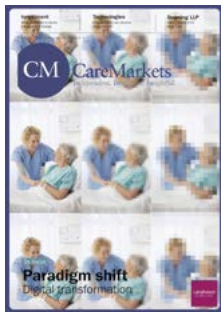
The study is an invaluable source of information for anyone looking to stay abreast of developments across the sector, providing data-led perspectives that will support

strategic planning and investment decisions in 2024 and beyond.

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## Journal



### Social care

**CareMarkets** 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

**Supplements** including roundtables, costs surveys, policy supplements and infographics

**Weekly news alerts** complete with live links to all stories and features

**Conference discounts** early bird rates for delegate passes




## Reports



### Adult specialist care

The latest LaingBuisson study into specialist services for adults covers all aspects of care provision with LaingBuisson estimating the UK market to be worth £14.5 billion (2021/22), with the top four care groups contributing only 7.2% of the total revenue in this unconsolidated market.

The report reveals a rising preference for supported living over care homes. Clients, families, and councils increasingly choose supported living over care homes due to its greater independence and personalised care. This has resulted in almost 95% of adult specialist care services being provided by independent sector organisations.




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### Homecare

This report shows the value of the UK market for homecare and supported living to be £11.5 billion (2021/22) and estimates that around 670,000 people are in receipt of homecare or supported services in the UK.

These services, together, represent a strong intermediate step on the 'ladder of care', and are becoming more prominent as pressures on councils' social care budgets see some care receivers shift from care home care to community-based homecare or supported living. The report also includes the findings of new research into 'tech' innovations that support the homecare and supported living sector.

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