

HOUSING WITH CARE UK MARKET REVIEW

SECOND EDITION

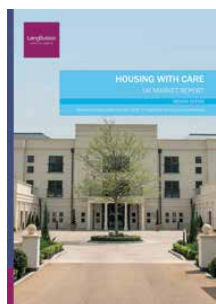
Will rising pensioner affluence deliver much promised growth to the UK housing with care market?

While the UK's Housing with Care market is currently small, it holds great potential for growth. Measures such as the Law Commission's clarifications around event fees and the government's statement on ground rent, have provided the confidence that providers, operators and investors need to increase their contribution to the market. Demographics provide natural impetus for the market to grow, and this could be supported further by leasehold reform and regulatory reform providing consumers with greater confidence in what the housing with care sector offers.

This report provides the information that housing associations, independent sector investors, developers and operators need to navigate this fast-growing market.

Valued at £2.6 billion, and amounting to more than 77,000 units in 2018, the Housing with Care UK market is at a point of inflexion. However, it is a market that is far from reaching its full potential, currently reaching just 2.4% of its addressable market.

With a predicted addressable market of 3.2 million people by 2030, there is the potential for the housing with care market to continue to enjoy strong growth. In the past ten years, this has seen the value of property alone in the sector triple.



Demographics will continue to be a key driver, especially as the over 75 age group is not only growing in size as a proportion of the population, but also only half of that age group is expected to be healthy and disability free into old age. At the same time, the property wealth of this demographic means it has more to invest in care and broader aspirations about how they want to live in their old age.

Furthermore, people are realising that earlier personal and informal care improves and lengthens healthy lives. Local authority commissioners are recognising that early care in housing with care settings reduces costs.

What the report covers

Market and demand drivers
Revenue, Operating and Investment
Models
Sector size, growth and performance
Sector players
Investors
Advisory organisations
Government policy and regulation
Market potential

Appendices
Provider profiles
Sector activity by month
Market position statements
Financial Appendix

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