

CARE HOMES FOR OLDER PEOPLE UK MARKET REPORT

THIRTY-THIRD EDITION

Social care charging reforms – what does this mean for care home modernisation?

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

The major challenge for the sector on the horizon is 'social care charging reform', in particular the implementation of Clause 18(3) of the Care Act 2014 and the Fair Cost of Care. The government's intention is to raise council-paid fees sufficiently to counterbalance loss of private pay premiums, and so maintain incentives for care home operators and investors. But there are concerns that the government will miscalculate. 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.

When combined with higher interest rates, there may be a negative impact on investor sentiment. Consequently, this could prove detrimental to care home modernisation, which has been driven by private sector investors over the last two decades.

The report also suggests a strategy for 'benefit loss tapering' in the care sector, which could make a real contribution to the social care workforce shortages which are having a knock-on impact on the NHS as well. Further details of this can be found in the report.

What the report covers

Market
Government policy 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
Major providers
Market structure
Investors
Market potential

Appendices

Glossary
Key legislation
Regulators
Trade bodies
Major provider profiles
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 fifth 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 £11.5 billion (2021/22) and estimates that around 670,000 people are in receipt of homecare or supported services in the UK.

The report also includes the findings of new research into 'tech' innovations that support the homecare and supported living sector, and social care generally.

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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
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- Online archive – over 20 years of news and features
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- Weekly news alerts – complete with live links to all stories and features
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Reports



Adult services

This 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 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 governmental decisions, public-facing adult specialist care providers will continue to operate in a challenging financial environment.

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Retirement housing

This report looks specifically at specialist, purpose-designed, self-contained accommodation for over 55-year-olds and covers the breadth of the UK's retirement housing market. The segments covered include age-exclusive 'downsizer' housing, retirement living and housing with care.

The retirement housing market has, anecdotally, experienced a strong rebound following the slump of the pandemic. It is highly attractive for investors looking for long-term yields.

Several segments of the market look set to expand as individuals and commissioners look to alternative models for those with less acute care needs.

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