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# ADULT SPECIALIST CARE UK MARKET REPORT

SIXTH EDITION

## Supported living has emerged as the primary choice for adult specialist care

The sixth edition of LaingBuisson's Adult Specialist Care UK market report is vital reading for anyone involved in social care for adults under 65. 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.

LaingBuisson estimates 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. 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 reveals a rising preference for supported living over care homes. Clients, families, and councils increasingly choose supported living 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. These organisations operate in a market funded primarily by local authorities. Supported living meets the preferences of service users and their families while offering cost advantages to cash-strapped councils by shifting property costs to central government-funded Housing Benefit.

Workforce availability remains a significant challenge. Initially, the pandemic brought in temporary staff from other sectors, but as the economy reopened, this trend reversed. To fill the gaps, social care employers have turned to hiring overseas workers with the help of relaxed immigration controls. However, workforce shortage remains a major obstacle in meeting the rising demand for care.

As anticipated, the health and social care sector has undergone extensive digitalisation due to the pandemic. This shift is expected to improve the efficiency of commissioning and provision of social care while enhancing safety and quality.

### Who is the report for

- Operators of residential care/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  
Major providers  
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Market Potential

Appendices  
Glossary  
Key legislation  
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# HEMOCARE AND SUPPORTED LIVING MARKET REPORT

FIFTH EDITION

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