

# HEMOCARE AND SUPPORTED LIVING MARKET REPORT

FIFTH EDITION

## How are social care budgets affecting demand for UK homecare and supported living?

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. Read together with Adult Specialist Care and Care Homes for Older People UK Market Reports, Homecare and Supported Living completes a series which illustrates the state of non-residential and residential care for adults over 18 and gives a comprehensive market picture not found anywhere else.

Written by leading market commentator, William Laing, during the winter of 2022/23, the report includes fully updated data and market insights that accurately portray how the market has developed in the past 18 months following the Covid-19 pandemic.

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. 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, and social care generally. With the Covid-19 pandemic accelerating digitalisation across the sector, this has provided opportunities for tech-enabled independent sector providers to diversify and expand into a more central, and more profitable, role in integrated care systems.

### Who is the report for

- C-suite professionals working in homecare and supported living providers
- Local Government and Clinical Commissioning Group commissioners
- Homecare agencies
- Directors of Adult Social Services
- Care advisors
- Banks and other financial institutions
- Investors and private equity
- Long-term care insurance providers
- Local and national government
- Care sector trade bodies
- Lawyers
- Policy advisors
- Think tanks
- Management consultants

### What the report covers

Market  
Politics and regulation  
Payors  
Major providers  
Investors  
Market Potential

Appendices  
Glossary  
Key Legislation  
Regulators  
Trade bodies  
Financial Appendix

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The thirty-fourth edition of LaingBuisson's UK Healthcare Market Review, sponsored by Avison Young, is vital reading for independent providers, commissioners, advisors and investors active in the UK's independent healthcare and social care sectors.

Published in February 2023, and written during the winter 2022, the Review reflects on how the independent healthcare and social care sectors have emerged from the Covid-19 crisis.

LaingBuisson's UK Healthcare Market Review gives a valuable overview of the operating landscape for health and social care service providers across all parts of the market.

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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 the Homecare Association
- 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
- Conference discounts – early bird rates for delegate passes

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## Reports



### Children's services

Focusing on the 2022/23 calendar year, LaingBuisson's latest report on the specialist childcare market offers expert analysis into the £20.6 billion sector.

New research shows that the number of looked after children has continued to grow over the last decade. The impact of background economic conditions and the associated pressure on family situations may suggest that there is likely to be continued volume growth ahead.

The report reflects upon the impact of Covid-19 on the market, which has demonstrated the defensibility of sectors backed by statutory public funding providing essential support to vulnerable people.

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### Digital health

Containing new and rebased data, the latest edition of this LaingBuisson's report offers insight into the current state of the UK healthcare sector's digital transformation, and the potential benefits of scaling and penetrating existing proven technologies across the whole NHS.

While digital health spending as a percentage of the overall healthcare budget has increased since 2020, we argue; is it enough to encourage a full-scale adoption of digital technology and construct a solid foundation for the NHS to build upon?

Vital reading to anyone with an interest in this emerging market.

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