

# RETIREMENT HOUSING UK MARKET REPORT

FIRST EDITION

## Strong potential for growth in retirement housing as interest in addressable market increases

The first edition of LaingBuisson's *Retirement Housing UK* market report focuses on specialist, purpose designed, self-contained accommodation exclusively to be occupied by the over 55s. Specifically, it covers age-exclusive 'downsizer' housing, retirement living and housing with care, giving a comprehensive overview of the full breadth of the UK's retirement housing market. Read together with our forthcoming Care Homes for Older People UK market report - thirty-first edition, this research offers a complete overview of the accommodation and care options open to older people in the UK.

The report estimates an addressable market for retirement housing of 5.2 million older people in the UK who hold more than £250,000 in housing equity. With current uptake of private sale (non-social) properties only 4.9%, it is a market ripe for growth, though to achieve this growth, it needs to shake off the negative stigma associated with it. The report looks at how the sector is diversifying to shed this stigma.

Interest in retirement housing is increasing among investors. This has been encouraged by more reliable models for long-term investment being established, for example, through deferred management fees. Barriers to entry to this sector remain high owing to the time, capital and specialism required. However, as other sectors look challenged in the wake of Covid-19, retirement housing may look increasingly attractive.



The report analyses whether the opportunity for the sector lies in diversity of choice. To grow, not only does it need to break away from its reliance on the more affluent areas of the country, but also offer people a range of schemes to suit different lifestyles. It also looks at the potential impact of Covid-19 and of the effect Brexit may have, especially on the availability of care and support staff.

### Who is the report for

- Operators of retirement housing schemes
- Property developers
- Providers of age-exclusive 'downsizer' housing
- Retirement living providers
- Housing with care providers
- Housing associations
- Staffing agency operators
- 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 size
- Market growth
- Demand drivers
- Business models
- Staff supply
- Politics and regulation
- Payors
- Major providers
- Investors
- Market potential

### Appendices

- Glossary
- Regulators
- Trade bodies
- Major providers profiles
- Financial appendix

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The forthcoming edition of LaingBuisson's flagship report *Care Homes for Older People* is for anyone involved in this large and dynamic sector. In a changing market, it provides commissioners, providers, investors and advisors with indispensable information on which to base business decisions.

A key factor in this market is its clear divergence onto two tracks. In 2020 private payers account for 51% of the market by value and 43% by volume. This side of the market has also underpinned the overall market's inflation-beating growth, private pay growing by 6.3% (CAGR in cash terms) over the years between 2015 and 2020,

compared to 2.9% for the market as a whole.

**COMING SOON - LaingBuisson's *Care Homes for Older People* vital reading not only for those independent providers but also commissioners, advisors and investors in the sector**

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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 UKHCA
- 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

## Reports



### Adult Specialist Care

This report provides unique and in-depth insight into all areas of the market, including funding, operating models, future prospects and supply and demand.

The report covers all aspects of social care for adults under the age of 65, which LaingBuisson estimates to be worth £12.5 billion across the whole of the UK. 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.

In an economy that is heading for uncertain times, adult specialist care, and supported living in particular, offers safe, long term, index linked returns.

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