

HEMOCARE AND SUPPORTED LIVING UK MARKET REPORT

THIRD EDITION

Homecare and supported living: a sustainable market for non- residential care?

The third edition of LaingBuisson's much respected report on the UK homecare and supported living market, written by the company's founder, health economist William Laing, is essential reading for anyone involved in this fragmented and growing market. This includes investors, advisors and providers as well as commissioners of these services for which independent providers predominate.

Covering the market as it was in 2019, the report was completed in March 2020, just as the UK was going into lockdown because of Coronavirus. The report, therefore, provides a helpful summary of the 'state of play' just before it experienced the impact of Covid-19 both operationally and economically and is a valuable tool for understanding the underlying dynamics of the sector.

New in this year's report is data on the number of people being looked after by each registered homecare service, as recorded by the CQC on the day of inspection. Market concentration, defined as the market share held by the four largest providers, stood at just over 9% in this market worth £9.5 billion in 2018/19.



Key challenges for the market continue to include staff retention and turnover. The report asks what impact the Coronavirus will have on a workforce which is largely paid only just above the National Living Wage but who will be putting themselves in harm's way throughout the crisis. Will measures to deal with staffing issues be accelerated or stymied as a result of the economic impact of the Coronavirus?

This influential report provides an indispensable update on the current state of this market which supports some 1 million people across the UK at a time when the role of the people working in it has never been so important.

What the report covers

Market
Politics and regulation
Payors
Major providers
Investors
Staffing
Market Potential

Appendices
Glossary
Key Legislation
Regulators
Trade bodies
Financial Appendix

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**Office for
National Statistics**

Chosen provider of independent sector healthcare market data to the UK Government ONS

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

ORDER NOW

The latest edition of *Care Homes for Older People* is vital reading for anyone involved in this large and dynamic sector. In a changing market, this provides commissioners, providers, investors and advisors with indispensable information on which to base business decisions.

A key factor in this £16.5 billion market (March 2019) is its clear divergence onto two tracks. Private payers account for 51% of the market by value and 45% by volume. This side of the market has also underpinned the overall market's inflation-beating growth, private pay growing by 6.1% (CAGR in cash terms) over the years between 2009 and

2019, compared to 3% for the market as a whole.

This makes 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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Journal



Social Care

Care Markets covers the social care market including residential care, nursing care, adult specialist care, children's services, childcare, housing with care, home care, 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
- Supplements - including roundtables, costs surveys, policy supplements and infographics
- Weekly news alerts - complete with live links to all stories and features
- Conference discounts - early bird rates for delegate passes

Market intelligence



CareMonitor gives real-time information on the CQC's Fundamental Standards of Quality and Safety in all registered Care Homes across England. Use CareMonitor to analyse care home performance in real-time, for marketing, planning and strategy.

Accurate information – Data is linked in real-time to the CQC and other public databases as well as LaingBuisson's database so it is always the most up to date and accurate

Flexible searches – Make granular data searches using over 20 fields (including owner, sector, council, size of home, client type, etc) with further analysis facilitated by Excel

Exportable results – Customised searches can be downloaded directly from CareMonitor for you in your own reports and presentations

Healthcare data delivered online and in real-time with a sophisticated search facility and data downloadable for your use

CareSearch provides real-time operational, contact and financial information on care home groups across the United Kingdom.

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Care Homes	19,250
Care Home Groups	1,200
Nursing Care Places	271,100
Residential Care Places	269,250

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