

ADULT SPECIALIST CARE UK MARKET REPORT

FOURTH EDITION

A robust adult specialist care sector with much to offer investors

The fourth edition of LaingBuisson's *Adult Specialist Care UK* market report is essential reading for anyone involved in this vital part of the UK's social care sector, be they a provider, a commissioner, an investor, an advisor or a policy maker.

Written and researched by leading industry expert and commentator, William Laing, this industry standard 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.

Written during the first months of the Coronavirus pandemic, the report assesses the adult specialist care market to have 'passed the reliability test in the face of Covid-19'. Unlike many providers of care for older people, adult specialist care providers have not faced the existential threat of clients dying or of reduced admissions.



The greater risk to the sector from the pandemic may be in the medium to long term – with care for adults under the age of 65 being principally paid for by the state, it will become just one of many essential services looking for funding from a depleted public purse.

LaingBuisson expects the market will remain of interest to investors. In an economy that is heading for uncertain times, adult specialist care, and supported living in particular, offers safe, long term, index-linked returns. While not entirely without risks, the level of public funding and also public willingness to see the lifetime costs of users of these services covered offers a level of certainty that few other investments can offer.

What the report covers

Market
Politics and regulation
Payors
Major providers
Investors
Market Potential

Appendices
Glossary
Regulators
Trade bodies
Major providers
History
Financial appendix

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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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healthcare market data to the UK Government ONS

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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- 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

Reports



Mental Health

The fourth edition of LaingBuisson's *Mental Health Hospitals* UK market report is essential reading for providers, investors, advisors, financiers, commissioners and anyone with an interest in this dynamic market.

The UK market for independent mental health hospitals as a whole grew by 4.1% in calendar 2018, and with the NHS funding 90% of places, the 5+% yearly growth foreseen by the NHS funding settlement suggest the market value may be as much as £2.3 billion by 2023.

This report considers how the independent sector may be affected by NHS England's plans to eliminate out of area placements by 2020/21.

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Market intelligence



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