

CARE HOMES FOR OLDER PEOPLE UK MARKET REPORT

THIRTY-FIRST EDITION

Care homes perform well amid challenge and disruption – but it's too soon to predict the long-term impact of Covid-19

The thirty-first edition of LaingBuisson's Care Homes for Older People UK market report is indispensable reading for anyone involved in this dynamic and changing market. This includes advisors, investors, commissioners and policymakers as well as service providers. Read together with Homecare and Supported Living UK market report and Retirement Housing UK market report, Care Homes for Older People completes the series to give anyone with an interest in the care and support of the over 65s a comprehensive market picture not found anywhere else.

Written by leading market commentator, William Laing, during the second half of 2020, the report includes fully updated data and market insights and charts the immediate impact that the Covid-19 pandemic had on care homes. The report also looks at how the experience of coronavirus may change the market in future.

The new report shows that the value of the UK market for care of older people in residential settings fell from £17.3 billion in March 2020 to £16.6 billion in September 2020. Through the first UK lockdown, occupancy fell by 8%, though LaingBuisson reports that no home closures were triggered by Covid-19. Clearly the pandemic has challenged the finances of care homes and it is too early to predict what may happen when government support schemes eventually stop.

Key demand drivers, such as an ageing population remain, and well-managed businesses and good development propositions continue to attract investment. The report also considers digitisation and the particular efficiencies that could be driven from improved connectivity between social care and health services.

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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What the report covers

- Market
- Policy and Regulation
- Payers
- Historic Market Growth
- Future Market Growth
- Demand and Supply
- Staffing
- Operational Metrics
- cost, fees and occupancy rates*
- Operational Models
- Investment Models
- Performance Measures
- Major Providers
- Market Structure
- Investors
- Market Potential

- Appendices
- Glossary
- Regulators
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- Financial Appendix

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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.

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. 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.

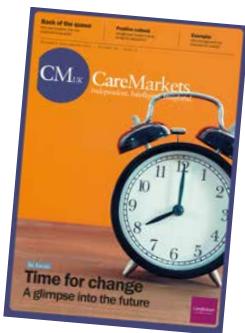
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Report



Homecare

Covering the market as it was in 2019, this report was completed in March 2020, just as the UK was going into the first Covid-19 lockdown. The report, therefore, provides a helpful summary of the 'state of play' just before it experienced the impact the pandemic, operationally and economically.

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.

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