

ADULT SPECIALIST CARE UK MARKET REPORT

SIXTH EDITION

Supported living has emerged as the primary choice for adult specialist care

The sixth edition of LaingBuisson's Adult Specialist Care UK market report is vital reading for anyone involved in social care for adults under 65. Written and researched by leading market commentator, William Laing, this industry standard report provides unique insight into all areas of the market, including funding, operating models, future prospects and supply and demand.

LaingBuisson estimates the UK market to be worth £14.5 billion (2021/22), with the top four care groups contributing only 7.2% of the total revenue in this unconsolidated market. 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.

The report reveals a rising preference for supported living over care homes. Clients, families, and councils increasingly choose supported living due to its greater independence and personalised care. This has resulted in almost 95% of adult specialist care services being provided by independent sector organisations. These organisations operate in a market funded primarily by local authorities. Supported living meets the preferences of service users and their families while offering cost advantages to cash-strapped councils by shifting property costs to central government-funded Housing Benefit.

Workforce availability remains a significant challenge. Initially, the pandemic brought in temporary staff from other sectors, but as the economy reopened, this trend reversed. To fill the gaps, social care employers have turned to hiring overseas workers with the help of relaxed immigration controls. However, workforce shortage remains a major obstacle in meeting the rising demand for care.

As anticipated, the health and social care sector has undergone extensive digitalisation due to the pandemic. This shift is expected to improve the efficiency of commissioning and provision of social care while enhancing safety and quality.

What the report covers

- Market
- Politics and regulation
- Payors
- Major providers
- Investors
- Staffing
- Market Potential

Appendices

- Glossary
- Key legislation
- Regulators
- Trade bodies
- History of privatisation
- Major provider profiles
- Financial Appendix

Who is the report for

- Operators of residential care/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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Reports



Care homes

LaingBuisson's flagship report explores the major challenge of the care home sector - 'social care charging reform'. With the government's intention to raise council-paid fees sufficiently to counterbalance loss of private pay premiums, and so maintain incentives for care home operators and investors, this report addresses concerns that the government will miscalculate. While popular politically, these reforms are likely to be highly disruptive to the care home market.

This report also suggests a strategy for 'benefit loss tapering' in the care sector, which could make a real contribution to the social care workforce shortages.

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Homecare

This report is indispensable reading for anyone involved in this fragmented and complex market. Written 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 report values 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.

The report also includes the findings of new research into 'tech' innovations that support the homecare and supported living sector, and social care generally.

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Retirement housing

This report looks specifically at specialist, purpose-designed, self-contained accommodation for over 55-year-olds and covers the breadth of the UK's retirement housing market. The segments covered include age-exclusive 'downsizer' housing, retirement living and housing with care.

The retirement housing market has, anecdotally, experienced a strong rebound following the slump of the pandemic. It is highly attractive for investors looking for long-term yields.

Several segments of the market look set to expand as individuals and commissioners look to alternative models for those with less acute care needs.

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