Market Analysis of Care Homes for Older People across England and Wales

Fiona Richardson
Assistant Director, IPC

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Institute of Public Care

- We work for better outcomes through well run evidence-based public care
- Part of Oxford Brookes University
- We offer applied research and evaluation, consultancy, skills development and informatics
- National and local government, NHS, public care providers, and sector support organisations
A duty towards care markets

- The Care Act (2014) places new duties on local authorities to promote the efficient and effective operation of the market for adult care and support as a whole.
  - Sustainable
  - diverse
  - quality

- Local authorities in Wales to publish market stability reports reviewing the sufficiency of care and support in their area.
London care home levels'

Lack of money prompts council contracts

Care home numbers falling rapidly, but new homes offering more places

by Rachel Carter

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Challenges
The number of care homes and beds in England has fallen 2012 - 2017

-3,769 -0.8%

-1,409 -7.9%

http://ipc.brookes.ac.uk
But the number of beds for older people has increased.
There are regional variations

% change in the number of care homes April 2012 to April 2017

EM: 4.0%
SE: 2.0%
WM: 1.5%
East: 1.0%
NW: 0.5%
London: -2.5%
SW: -4.0%
Y&H: -4.5%
NE: -6.0%

http://ipc.brookes.ac.uk
A steady reduction in the number of residential and nursing homes across Wales

-11 residential
-19 nursing
Homes are getting bigger

2012: 26
2017: 28
8%

New homes 2016/17: 37

http://ipc.brookes.ac.uk
Type of home

Residential homes 2017
(Mean beds per Home CQC, CSSIW)

- 28, 27

RM vacancies
13%, 7%
(Turnover SfC June 2017)

13.6%

Nursing homes 2017

- 52, 45

24.8%

33%

http://ipc.brookes.ac.uk
New nurse registrants from the EU

Total number of EU nurse registrants in the UK, January 2016–April 2017
Conclusions

- Significant regional variation
- Business risk
- Difficulties for new entrants
- Concerns about workforce planning
More Information

- The care home market in Wales: mapping the sector
  http://ipc.brookes.ac.uk/publications/publication_840.html

- Market shaping in adult social care
  http://ipc.brookes.ac.uk/publications/Market_shaping_adult_social_care.html

- Six steps to managing demand in adult social care
  http://ipc.brookes.ac.uk/publications/six_steps_to_managing_demand_exec_summary.html

- Market position statement guidance and database

- Just another paperclip? Rethinking the market for complex public services
Thank you

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- Contact Fiona Richardson with any questions frichardson@brookes.ac.uk