

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

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## Institute of Public Care

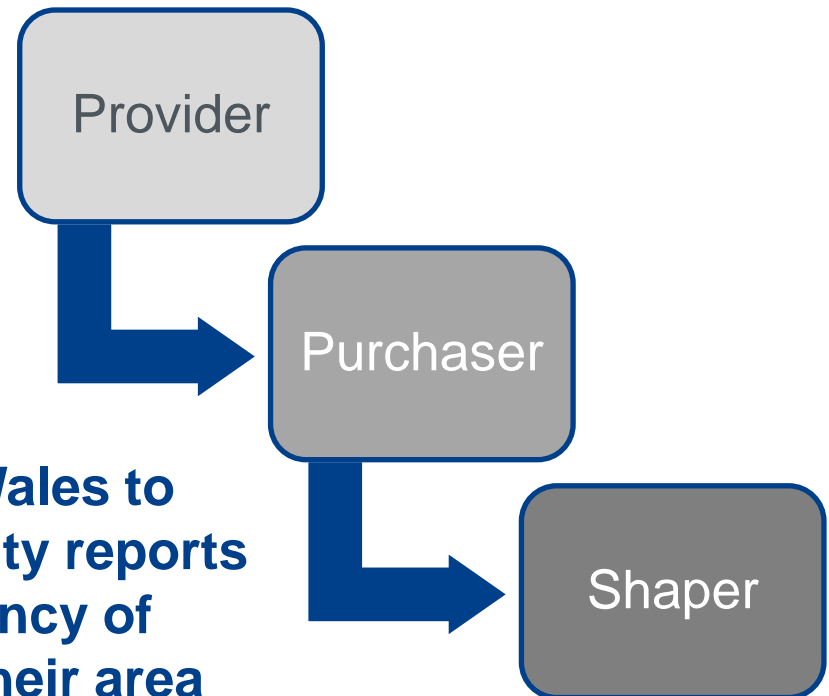
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- **We work for better outcomes through well run evidence-based public care**
- **Part of Oxford Brookes University**
- **We offer applied research and evaluation, consultancy, skills development and informatics**
- **National and local government, 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



**'Lack of money' prompts council contracts**

20 March 2017 | UK

**London care home levels'**

5 December 2016 | London

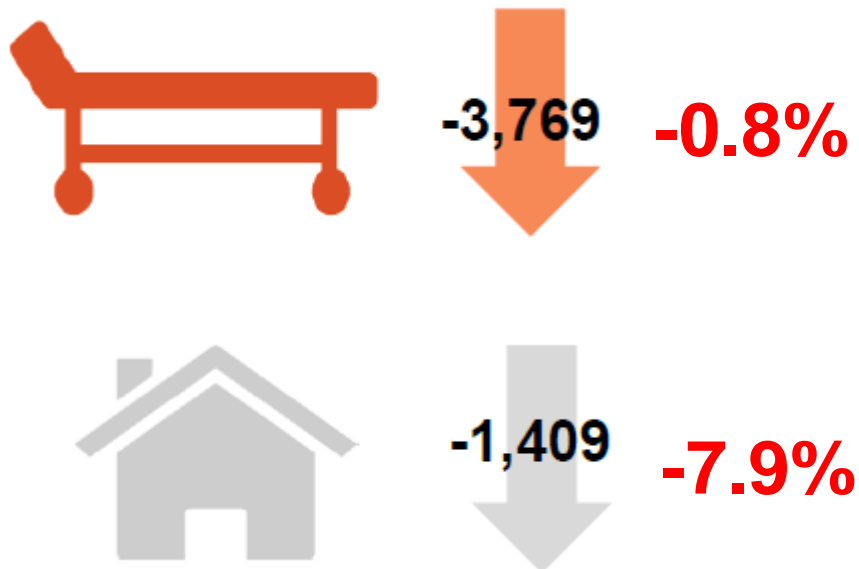
**Care home numbers fall 'rapidly' but new homes offering more places**

New care homes tend to be targeted at self-funders, affecting council-funded sector, warns Institute for Public Care

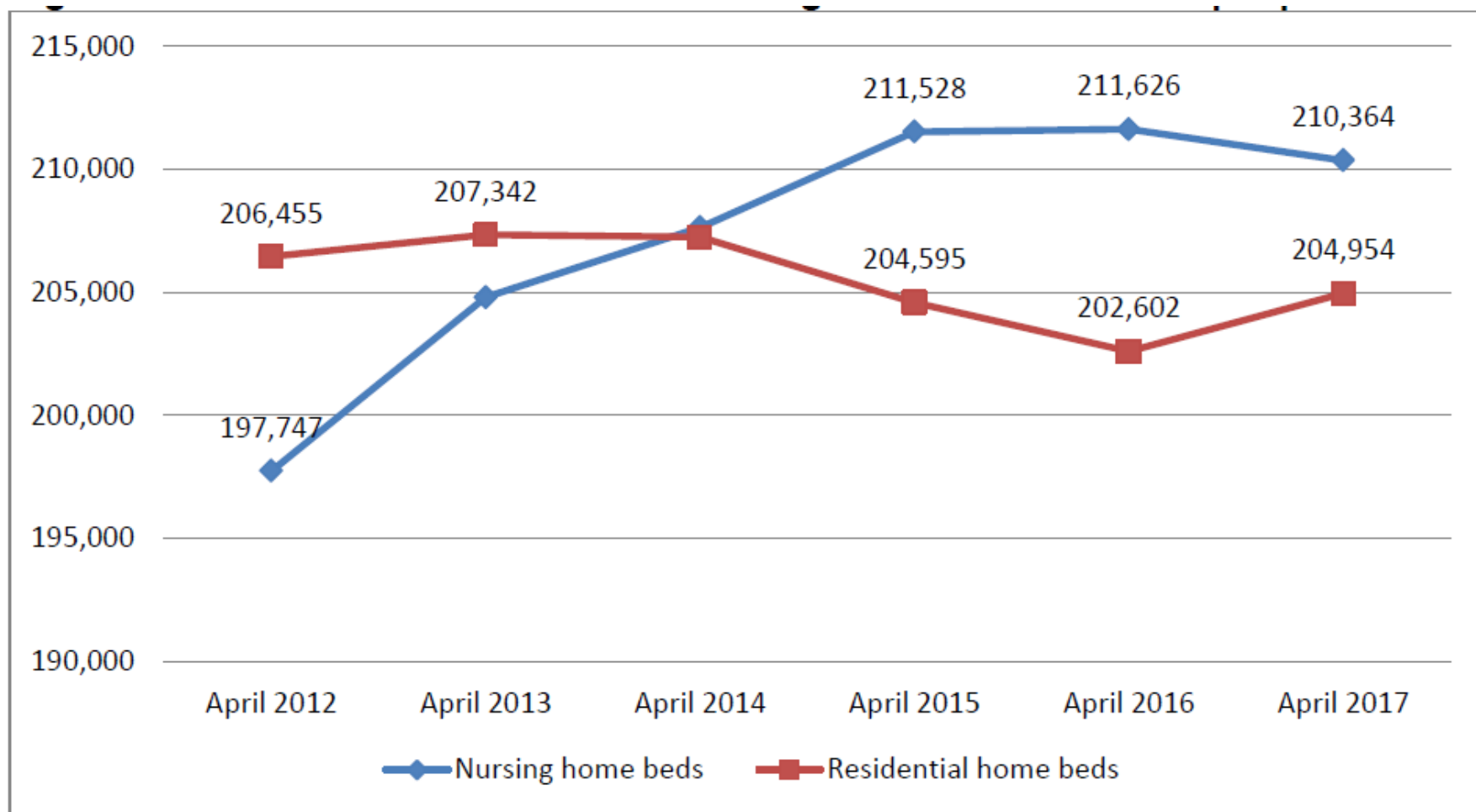
by Rachel Carter on September 1, 2017 in Adults, Residential care

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

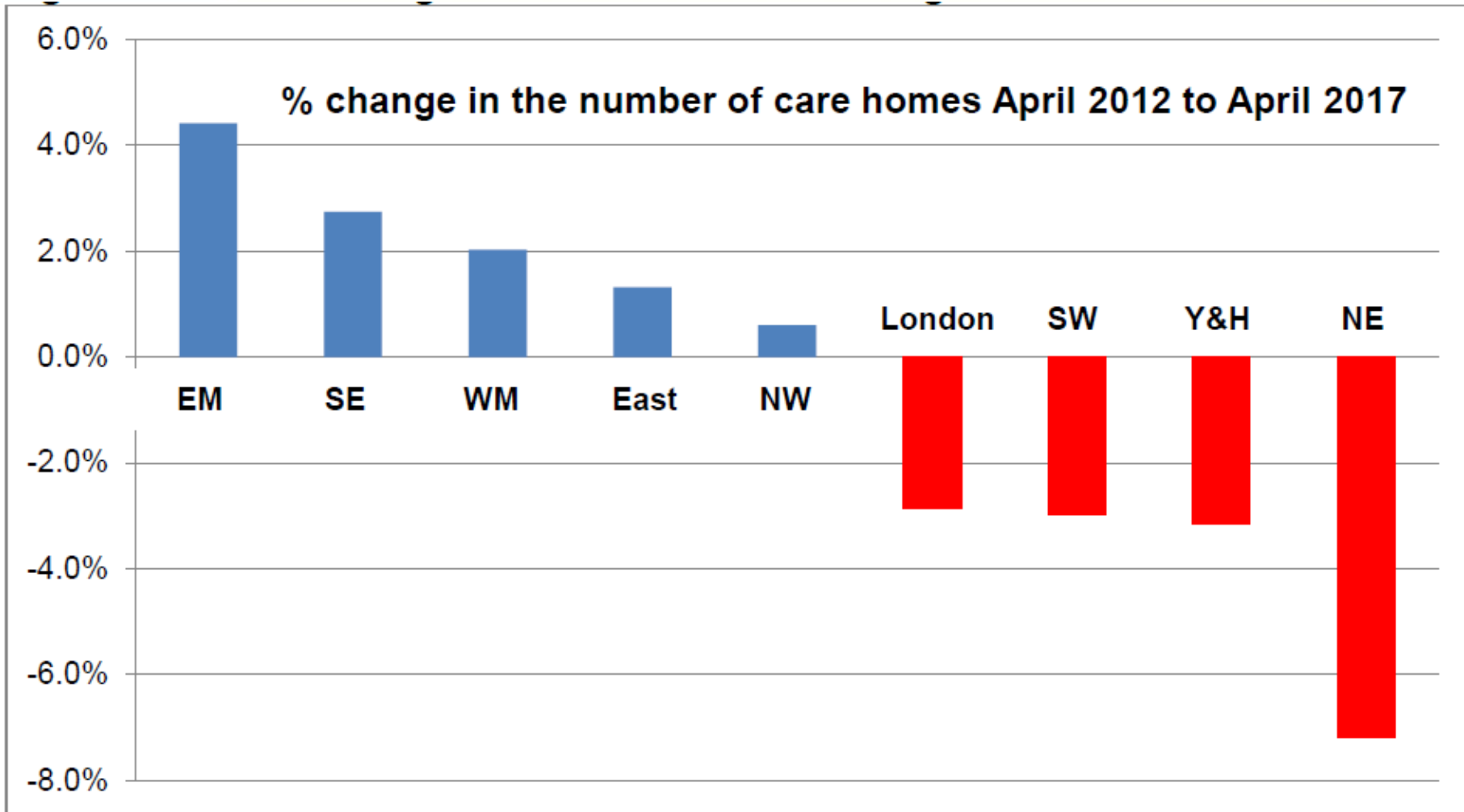
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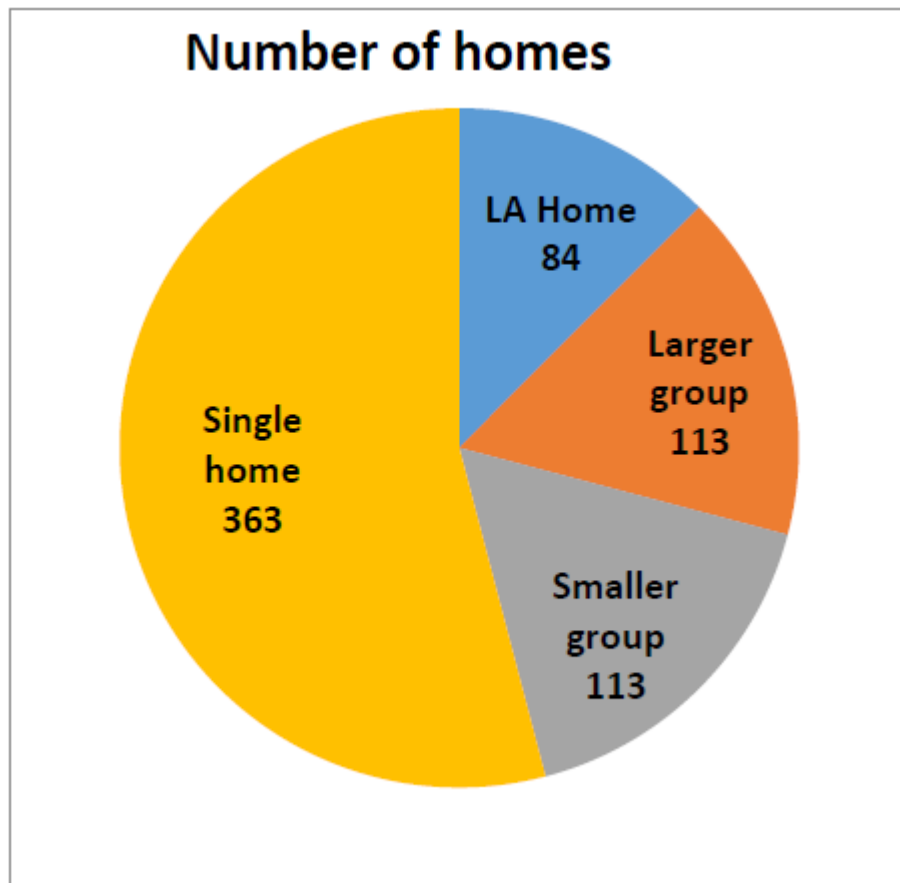
## But the number of beds for older people has increased



## There are regional variations



# A steady reduction in the number of residential and nursing homes across Wales

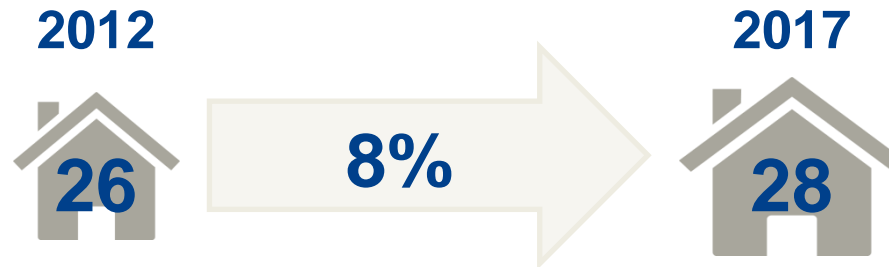


**-11 residential**  
**-19 nursing**



## Homes are getting bigger

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**New homes  
2016/17**



# Type of home

(Mean beds per  
Home CQC, CSSIW)

**Residential  
homes 2017**



**28, 27**

**Nursing homes  
2017**



**52, 45**

**RM vacancies  
13%, 7%**

(Turnover  
SfC June 2017)



**13.6%**



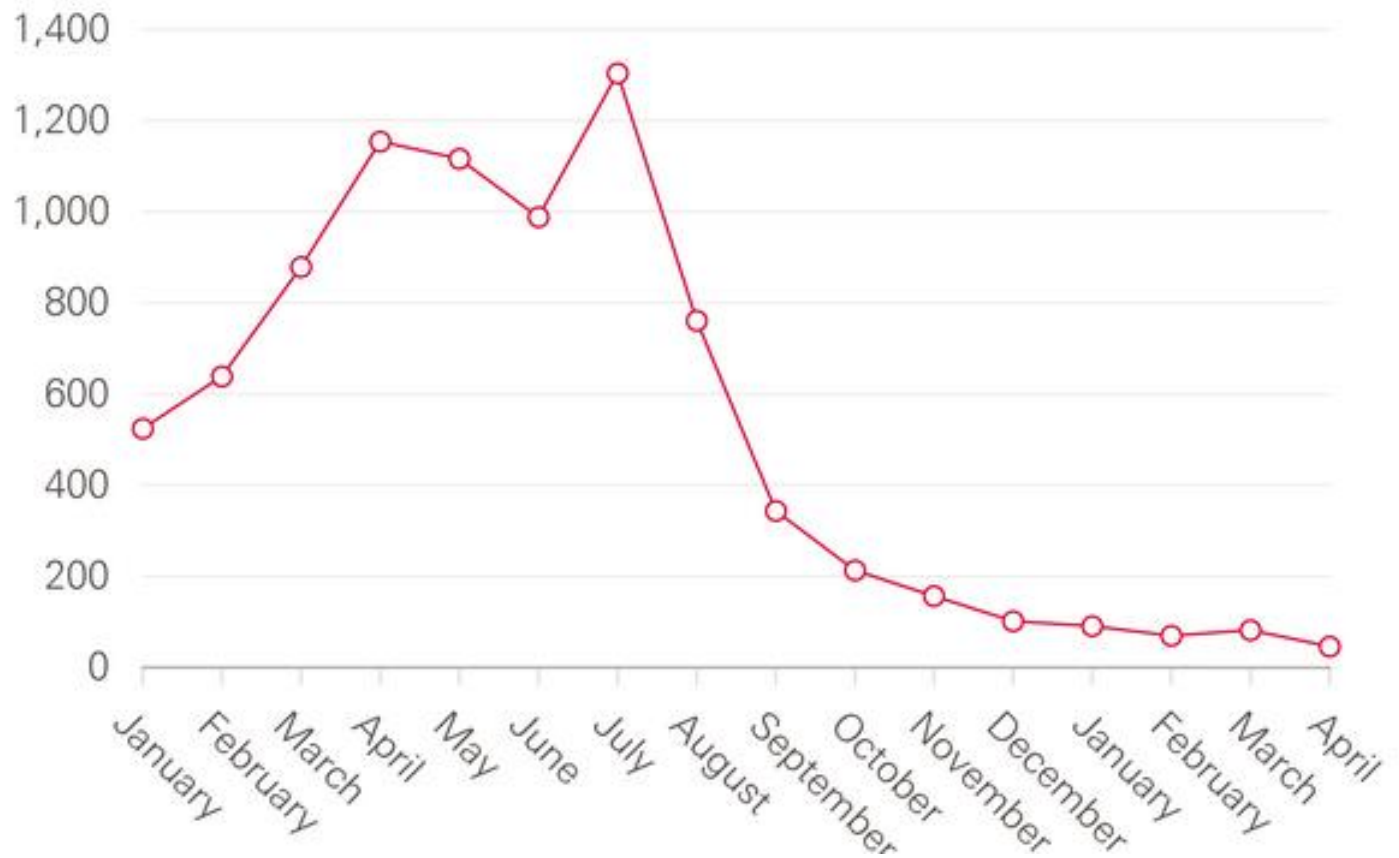
**24.8%**



**33%**

## New nurse registrants from the EU

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



## Conclusions

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

## More Information

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- **The care home market in Wales: mapping the sector**  
[http://ipc.brookes.ac.uk/publications/publication\\_840.html](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](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](http://ipc.brookes.ac.uk/publications/six_steps_to_managing_demand_exec_summary.html)
- **Market position statement guidance and database**  
[http://ipc.brookes.ac.uk/publications/Market\\_Position\\_Statement\\_Guidance.html](http://ipc.brookes.ac.uk/publications/Market_Position_Statement_Guidance.html) and <https://ipc.brookes.ac.uk/MPSdatabase>
- **Just another paperclip? Rethinking the market for complex public services**  
<https://www.anzsog.edu.au/resource-library/news-media/just-another-paperclip-procuring-complex-public-services>



## Thank you

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- All reports and guidance available at <http://ipc.brookes.ac.uk>
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