

Adult Social Care - UK - 2021

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

This report looks at the following areas:

- The impact of COVID-19 on adult social care and how providers and care users will react to market conditions.
- How the adult social care market will adapt to the post-COVID-19 environment.
- The value of individual segments in the market in 2021.

Adult social care remains one of the largest areas of expenditure for local authorities across England, accounting for an average of 40% of a local authority's overall budget.

Occupancy in care homes fell from around 90% at the start of the pandemic to around 80% in February 2021. CQC found that large home care and specialist providers have been financially less affected by COVID-19.

Between 2018 and 2038, the total cost of care is projected to rise by 90% for adults aged 18-64 and 106% for over-65s.

MBD estimates the value of adult social care in the UK to grow by 9% between 2021/22 and 2025/26, with total spend in the market forecast to be worth £50.4 billion (excluding the value of informal care).



"With the demand on services only expected to increase, councils need to embrace more innovative solutions to mitigate the financial risk this issue presents. However, the continued delay in the publication of the Green Paper is a sign of the ongoing lack of consensus and thinking that should be being applied to the social care crisis in the UK."

- Lewis Cone, Senior B2B Analyst

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

OVERVIEW

- Key issues covered in this Report
- COVID-19: market context
- Economic and other assumptions
- Products covered in this Report

EXECUTIVE SUMMARY

- **Impact of COVID-19 on adult social care**
Figure 1: Short-, medium-, and long-term impact of COVID-19 on adult social care, 2020-25
- **The market**
- **Market spend to rise but will remain below the required level**
Figure 2: UK adult social care forecast, by type of care, 2021/22-2025/26 (£m)
- **Steep rise in informal care over the pandemic boosts growth**
Figure 3: Segmentation of the UK domiciliary care market, by type of purchaser, 2016/17 and 2020/21 (£m)
Figure 4: Segmentation of the UK residential care market, by type of purchaser, 2017 and 2021 (£m)
- **Old age support ratio expected to decline despite increases to state pension age**
Figure 5: Old age support ratio, 2021-46 (ratio)

ISSUES AND INSIGHTS

- Attempts to improve workforce number could be complicated by plans to make COVID vaccines compulsory for workers
- Current pay rates undervaluing social care’s contribution to society
- Uncertainty remains over how to pay for rising levels of social care

THE MARKET – KEY TAKEAWAYS

- Market spend to rise but will remain below the required level
- Steep rise in informal care over the pandemic boosts growth

DOMICILIARY CARE

- Market size

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world’s leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- Market value rises significantly as sector battles against the impact of the pandemic**

Figure 6: UK market for domiciliary care, 2016/17-2020/21 (£m)

Figure 7: UK commercial market for domiciliary care, 2016/17-2020/21 (£m)

- Market segmentation**
- Steep rise in informal care during the pandemic and strong growth in private spend boost growth**

Figure 8: Segmentation of the UK domiciliary care market, by type of purchaser, 2016/17-2020/21 (£m)

- Local authority expenditure**

Figure 9: Segmentation of local authority expenditure on domiciliary care for older people (65+) in the UK, by type, 2015/16-2019/20 (£m)

Figure 10: Segmentation of local authority expenditure on domiciliary care for adults aged 18-64 in the UK, by client type, 2015/16-2019/20 (£m)

Figure 11: Segmentation of UK local authority expenditure on domiciliary care, all adults, by client type, 2015/16 and 2019/20 (%)

- Regional LA expenditure**

Figure 12: Local authority expenditure, all adults, by region, 2015/16-2019/20 (£m)

Figure 13: Local authority expenditure, older people (65+), by region, 2015/16-2019/20 (£m)

Figure 14: Local authority expenditure, adults (18-64), by region, 2015/16-2019/20 (£m)

- NHS expenditure**

Figure 15: Segmentation of NHS expenditure on social care community services, by country, 2016/17-2020/21 (£m)

- Private expenditure**

Figure 16: Segmentation of private expenditure on domiciliary care in the UK, by type, 2016/17-2020/21 (£m)

- Informal care**

Figure 17: Informal carers, by relationship to person receiving care in England, 2015/16-2019/20 (% of informal carers)

Figure 18: The UK market for informal domiciliary care, 2016/17-2020/21 (£bn and hours)

RESIDENTIAL CARE

- Market size**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- Market expenditure rises by 4% in 2020/21, but long-term operator viability remains uncertain**

Figure 19: UK residential care market, by value, 2016/17-2020/21 (£m)
- Rate of care home closures slows once again**

Figure 20: UK residential care market, by number of registered care homes, 2017-21 (units)
- Number of places declines marginally in 2021**

Figure 21: UK residential care market, by number of registered places, 2017-21 (000)
- Average number of places and revenue per home reach all-time highs**

Figure 22: Average number of places, revenue per care home and revenue per place, UK, 2017-21 (average number of places, revenue in £000)
- Market segmentation**
- Accommodation type**

Figure 23: Segmentation of the UK residential care market, by type of accommodation, 2017-21 (number of homes, sheltered housing in 000 units)
- Care purchaser**

Figure 24: Segmentation of the UK residential care market, by type of purchaser, 2017-21 (£m)
- Provider type**

Figure 25: Segmentation of the UK residential care market, by type of provider, 2017-21 (£m)
- Local authority expenditure**

Figure 26: Segmentation of local authority-commissioned residential and nursing care expenditure, by provider and client type, 2017-21 (£m)

Figure 27: Segmentation of local authority-commissioned residential and nursing care expenditure, by provider and service type, 2017-21 (£m)
- Older people (65+) expenditure**

Figure 28: Segmentation of local authority expenditure on residential care services for older people (65+), by service type, 2017-21 (£m)
- Adults aged 18-64 expenditure**

Figure 29: Segmentation of local authority expenditure on residential care services for adults aged 18-64, by service type, 2017-21 (£m)
- NHS care expenditure**

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 30: Segmentation of NHS expenditure on residential and nursing care, by provider type, 2017-21 (£m)

- Private care purchasers**

Figure 31: Private expenditure on residential and nursing care, 2017-21 (£m and % market share)

- Sheltered housing**

Figure 32: The development of sheltered housing in the UK, 2017-21 (000 units and % change)

- Extra-care housing**

ADULT SOCIAL CARE MARKET FORECAST

- Short, medium and long-term impact of COVID-19 on the industry**

Figure 33: Short-, medium-, and long-term impact of COVID-19 on adult social care, 2020-25

- Market drivers and assumptions**

Figure 34: Key drivers affecting Mintel's market forecast, 2015-24 (in % annual change, % rate, and £m)

- Learnings from the last recession**

Figure 35: Industry performance following the last recession, 2009/10-2014/15 (£m)

- Market spend to rise but will remain below the required level**

Figure 36: Forecast UK adult social care market value, 2021/22-2025/26 (£m at 2021 prices)

- Innovation required to meet demand for care**

- New Health and Care Bill introduced to Parliament...**

- ...although councils argue that more NHS and government involvement in social care provision will only lead to greater inefficiency**

MARKET TRENDS

- Old age support ratio expected to decline despite increases to state pension age...**

Figure 37: UK population projections, by age, 2021-46 (000 people)

- ...although this is driving the need for more 'housing with care'**

- Minimum price for home care rises to record high**

Figure 38: Estimated minimum price for home care, April 2021-March 2022 (£)

- Number of jobs rises with a more positive perception of working in the industry, but issues remain**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- Care home occupancy rates slowly recovering following the onset of the pandemic
- Care quality standards rise prior to pandemic
- More care providers embrace technology following adoption during pandemic

MARKET DRIVERS

- Government pressed to announce plans for social care reform...
- ...as 3,000 formal care and support requests are turned down each week by local councils
- Post-Brexit immigration rules could impact social care workforce

COMPANIES AND BRANDS – KEY TAKEAWAYS

- Digital tech uptake has accelerated following the onset of the pandemic
- ARCO launches advisory council to shape future of housing with care
- Joint ventures and partnerships drive retirement living developments

INDUSTRY STRUCTURE

- Industry development
- Domiciliary care
- Residential care
- ARCO launches advisory council to shape future of housing with care
- Indemnity scheme introduced for designated care homes
- Health and social care software integration improving outcomes
- M&As and other industry movements
- Domiciliary care
- Residential care
- Market share
- Domiciliary care

Figure 39: Independent sector domiciliary care providers' market share, 2021 (% of total independent sector market)

- Residential care
- Changes in the structure of the industry

Figure 40: Analysis of changes in the structure of the 'other human health activities' industry, 2016-20 (number of local units and businesses)

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 41: Analysis of changes in the structure of the ‘social work activities without accommodation for the elderly and disabled’ industry, 2016-20 (number of local units and businesses)

Figure 42: Analysis of the changes in the structure of the ‘residential nursing care activities’ industry, 2016-20 (number of local units and businesses)

Figure 43: Analysis of the changes in the structure of the ‘residential care activities for the elderly and disabled’ industry, 2016-20 (number of local units and businesses)

Figure 44: Analysis of the changes in the structure of the hospital activities – medical nursing home activities industry, 2016-20 (number of outlets and businesses)

• **Structure by employment**

Figure 45: Analysis of the employment structure of the ‘other human health activities’ industry, 2019 and 2020 (number of local units and local unit employment size)

Figure 46: Analysis of the employment structure of the ‘social work activities without accommodation for the elderly and disabled’ industry, 2019 and 2020 (number of local units and local unit employment size)

Figure 47: Analysis of the employment structure of the residential nursing care activities industry, 2019 and 2020 (number of outlets and outlet employment size)

Figure 48: Analysis of the employment structure of the residential care activities for the elderly and disabled industry, 2019 and 2020 (number of outlets and outlet employment size)

Figure 49: Analysis of the employment structure of the hospital activities – medical nursing home activities industry, 2019 and 2020 (number of outlets and outlet employment size)

• **Structure by turnover**

Figure 50: Analysis of the financial structure of the ‘other human health activities’ industry, 2019 and 2020 (£000 and % of total turnover)

Figure 51: Analysis of the financial structure of the ‘social work activities without accommodation for the elderly and disabled’ industry, 2019 and 2020 (£000 and % of total turnover)

Figure 52: Analysis of the financial structure of the residential nursing care activities industry, 2019 and 2020 (£000 and % of total turnover)

What's included

- Executive Summary

- Full Report PDF

- Infographic Overview

- Powerpoint Presentation

- Interactive Databook

- Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world’s leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 53: Analysis of the financial structure of the residential care activities for the elderly and disabled industry, 2019 and 2020 (£000 and % of total turnover)

Figure 54: Analysis of the financial structure of the hospital activities – medical nursing home activities industry, 2019 and 2020 (£000 and % of total turnover)

COMPETITIVE STRATEGIES

- **Joint ventures and partnerships drive retirement living developments**
- **Richmond Villages opens Dutch-inspired dementia care village**
- **Bluebird Care launches referral app to improve recruitment**
- **Platform launched to connect care users with local carers**

COMPANY PROFILES

- **Domiciliary care**
- **City & County Healthcare Group**
Figure 55: Financial analysis of City & County Healthcare Group, 2016-20 (£m)
Figure 56: Financial analysis of Advantage Healthcare Ltd (formerly Interserve Healthcare), 2015-19 (£000)
Figure 57: Financial analysis of MiHomecare, 2016-20 (£000)
- **Lifeways Community Care**
Figure 58: Financial analysis of Lifeways Community Care, 2015-19 (£000)
- **Sevacare**
Figure 59: Financial analysis of Sevacare, 2015-19 (£m)
- **Residential care**
- **Abbeyfield (formerly known as The Abbeyfield Society)**
Figure 60: Financial analysis of Abbeyfield, 2016-20 (£m)
- **Barchester Healthcare**
Figure 61: Financial analysis of Barchester Healthcare, 2015-19 (£000)
- **Hallmark Care Homes**
Figure 62: Financial analysis of Hallmark Care Home Group, 2016-20 (£m)
- **HC-One**
Figure 63: Financial analysis of HC-One, 2016-20 (£m)
- **Housing 21**
Figure 64: Financial analysis of Housing 21, 2016-20 (£m)
- **Sanctuary Care**
Figure 65: Financial analysis of Sanctuary Care, 2016-20 (£m)

What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

APPENDIX – DATA SOURCES, ABBREVIATIONS AND SUPPORTING INFORMATION

- Abbreviations
- Methodology

FURTHER SOURCES AND CONTACTS

- Trade associations
- Age UK
- Care England
- Carers UK
- National Care Association
- National Care Forum
- United Kingdom Homecare Association (UKHCA)
- Trade magazines
- Care Home Professional
- Care Management Matters
- Care Talk
- Caring Times
- Caring UK
- Community Care
- Tomorrow's Care
- Trade events
- Care England 2022
- Care Roadshow London 2021
- Community Care Live 2021
- Dementia, Care & Nursing Home Expo 2021
- Health + Care 2022
- Home Care Expo 2021
- Primary Care and Public Health 2022

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100



About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.