“Those operating in the industry are continually looking for new solutions with the main objective of being able to care for patients effectively in their own home. Domiciliary care providers who manage to offer personalised, affordable and clinically-led care solutions will be best positioned to gain opportunities from the ever-ageing population in the UK.”

– Lewis Cone, Senior B2B Analyst

This report looks at the following areas:

- Despite numerous consultations and government pledges, adult social care still faces significant challenges
- Rising number of people requesting care but fewer people are receiving it, whilst number of carers and home care agencies decline

The UK market for domiciliary care rose in value between 2014/15 and 2018/19 by a cumulative 5% - from £81.6 billion to £85.9 billion.

While the market is believed to have remained at a fairly consistent value over the last five years, the commercial sector is expected to represent just over a fifth of total market value. This also comprises the direct private sector supply and voluntary informal sectors, which meet the needs of the vast majority of low intensity contacts.

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.
Domiciliary Care - UK - October 2019

Overview

What you need to know
Covered in this Report

Executive Summary

The market
Market value continues to rise but at an insufficient level for demand
Figure 1: UK market for domiciliary care, 2014/15-2018/19, (£ million)
Slower growth in informal care curtails overall market
Figure 2: Segmentation of the UK domiciliary care market, by type of purchaser, 2014/15-2018/19, (£ million)
Market value to rise by 6% to 2023/24
Figure 3: Forecast UK domiciliary care market value, 2019/20-2023/24, (£ million at 2019 prices)

Companies and brands
Despite tight margins, several providers expand service provision

The consumer
Help with daily tasks and use of technology most commonly sought service features
Figure 4: Domiciliary care features, April 2019, (% of respondents)

What we think

Issues and Insights

Despite numerous consultations and government pledges, adult social care still faces significant challenges
The facts
The implications
Rising number of people requesting care but fewer people are receiving it, whilst number of carers and home care agencies decline
The facts
The implications

The Market - What You Need to Know

Market value continues to rise but at an insufficient level for demand
Slower growth in informal care curtails overall market
Market value to rise by 6% to 2023/24

Market Size

Market value continues to rise but at an insufficient level for demand
Figure 5: UK market for domiciliary care, 2014/15-2018/19, (£ million)
Figure 6: UK commercial market for domiciliary care, 2013/14-2017/18, (£ million)

Market Segmentation

Slower growth in informal care curtails overall market
Figure 7: Segmentation of the UK domiciliary care market, by type of purchaser, 2014/15-2018/19, (£ million)
Local authority expenditure
Figure 8: Segmentation of local authority expenditure on domiciliary care for older people (65+) in the UK, by type, 2013/14-2017/18, (£ million)
Figure 9: Segmentation of local authority expenditure on domiciliary care for adults aged 18-64 in the UK, by client type, 2013/14-2017/18, (£ million)
Figure 10: Segmentation of UK local authority expenditure on domiciliary care, all adults, by client type, 2013/14 and 2017/18, (%)

Regional LA expenditure
Figure 11: Local authority expenditure, all adults, by region, 2013/14-2017/18, (£ million)
Figure 12: Local authority expenditure, older people (65+), by region, 2013/14-2017/18, (£ million)
Figure 13: Local authority expenditure, adults (18-64), by region, 2013/14-2017/18, (£ million)

NHS expenditure
Figure 14: Segmentation of NHS expenditure on social care community services, by country, 2014/15-2018/19, (£ million)

Private expenditure
Figure 15: Segmentation of private expenditure on domiciliary care in the UK, by type, 2014/15-2018/19, (£ million)

Informal care
Figure 16: Informal carers by relationship to person receiving care in England, 2013/14-2017/2018, (% of informal carers)
Figure 17: The UK market for informal domiciliary care, 2014/15 - 2018/19, (£ billion and hours)

Market Forecast
Market value to rise by 6% to 2023/24
Figure 18: Forecast UK domiciliary care market value, 2019/20-2023/24, (£ million at 2019 prices)

Informal care to remain dominant domiciliary care provider, but its growth continues to diminish
Figure 19: Forecast UK domiciliary care market segmentation value, by type, 2019/20-2023/24, (£ million at 2019 prices)

Market Trends
Old age support ratio continues to decline, with dependency on the rise
Figure 20: UK population projections, by age group, 2019-44, (000 people)

Minimum price for home care rises yet again, but majority are still not paying this rate
Figure 21: Estimated minimum price for home care, April 2019-March 2020, (£)

Turnover and vacancy rates remain high despite slight improvement in average wages
Figure 22: Annual workforce turnover rates in the independent and voluntary domiciliary care sector, England, 2015-17, by employee position, (%)
Figure 23: Average annual pay in the independent and voluntary domiciliary care sector, England, 2015-17, by employee position, (£)

Home care accounts for majority of delays in transfer of care from NHS hospitals, with further issues arising once people return home

Market Drivers
A decline in the number of state pensioners is creating the need for operating model changes

APPG launched to tackle crisis whilst green paper is delayed

Implications of Brexit

Legislation
Community Care Act
Care Standards Act
Regulation and Inspection of Social Care (Wales) Act
The Carers (Scotland) Act
The Care Act 2014 and Better Care Fund
Pensions Act
Other legislation

Companies and Brands – What You Need to Know

Despite tight margins, several providers expand service provision...

... whilst others look to unique offerings to create business opportunities

Industry Structure

Industry development
M&As and other industry movements
Market share
Figure 24: Independent sector domiciliary care providers’ market share, 2019, (% of total independent sector market)

Changes in the structure of the industry
Figure 25: Analysis of changes in the structure of the 'other human health activities' industry, 2014-2018, (number of local units and businesses)
Figure 26: Analysis of changes in the structure of the 'social work activities without accommodation for the elderly and disabled' industry, 2014-2018, (number of local units and businesses)

Structure by employment
Figure 27: Analysis of the employment structure of the 'other human health activities' industry, 2017 and 2018, (number of local units and local unit employment size)
Figure 28: Analysis of the employment structure of the 'social work activities without accommodation for the elderly and disabled' industry, 2017 and 2018, (number of local units and local unit employment size)

Structure by turnover
Figure 29: Analysis of the financial structure of the 'other human health activities' industry, 2017 and 2018, (£ 000 and % of total turnover)
Figure 30: Analysis of the financial structure of the 'social work activities without accommodation for the elderly and disabled' industry, 2017 and 2018, (£ 000 and % of total turnover)

Competitive Strategies

Despite tight margins, several providers expand service provision...

... whilst others look to unique offerings as a means of creating business opportunities

Company Profiles

Allied Healthcare (now part of Aurelius Group)
Recent company activity

Interserve Healthcare (formerly Advantage Healthcare)
Recent company activity
Financial information
Figure 31: Financial analysis of Interserve Healthcare, 2013-2017, (£000)

Lifeways Community Care
Recent company activity
Financial information
Figure 32: Financial analysis of Lifeways Community Care, 2013-2017, (£000)

Mears Group
Recent company activity
Financial information
Figure 33: Financial analysis of Mears Group, 2014-2018, (£ Million)
**The Consumer – What You Need to Know**

- Government and personal savings expected to fund long-term care
- 41% would prefer a family member or friend to provide them with care in their home
- Help with daily tasks and use of technology most commonly sought service features
- Rising fees affecting care affordability raises largest concern

**Care Status**

- 14% of people have, or have had, a carer help them in their home
- Over a tenth of people have a family member who requires care in their own home

**Care Payment**

- Government and personal savings expected to fund long-term care

**Home Care Provider**

- 41% would prefer a family member or friend to provide them with care in their home

**Care Service Features**

- Help with daily tasks and use of technology most commonly sought service features

**The Consumer – Future Care Concerns**

- Rising fees affecting care affordability raises largest concern

**Appendix – Data Sources, Abbreviations and Supporting Information**

**Abbreviations**

**Methodology**

**Further Sources and Contacts**

- Trade associations
- Trade magazines

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**Domiciliary Care - UK - October 2019**

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- Mihomercare
- Recent company activity
- Financial information
  - Figure 34: Financial analysis of Mihomercare, 2014-2018, (£000)
- Sevacare
- Recent company activity
- Financial information
  - Figure 35: Financial analysis of Sevacare, 2014-2018, (£ million)

**Figure 34: Financial analysis of Mihomercare, 2014-2018, (£000)**

**Figure 35: Financial analysis of Sevacare, 2014-2018, (£ million)**
Trade events