

PRESS INFORMATION

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INFORMATION ON LOCAL CARE PROVIDER EXPOSURE IS AVAILABLE

Following concerns raised this week by the Public Accounts Committee report, *Oversight of user choice and provider competition in care markets*, highlighting the possibility of regional over-exposure to the largest independent providers of these services, healthcare intelligence provider **Laing & Buisson** has released data giving the most up-to-date picture of market share.

To be published in the forthcoming *Care of Elderly People UK Market Survey 2011/12**, new data identifies the frequency of situations in which individual providers of nursing homes for older and physically disabled people operate more than 25% of the capacity in any particular council boundary. A figure of 25% is the usual benchmark used across the economy to identify where monopoly supplier power may exist.

According to report author, and Laing & Buisson chief executive William Laing, the information focuses on nursing care only, as opposed to the more standard residential care, because this is the segment of the elderly care market where supplier concentration is at its highest. Mr Laing adds that nursing care is also arguably a self-contained market down to the fact that the levels of need seen in clients mean that they could not be looked after in residential care homes.

This new analysis shows that Bupa Care Homes has a market share of 25% or over in 21 of the UK's 209 councils with social care responsibilities (CASSRs). Four Seasons, the UK's largest independent provider of elderly residential care following this summer's collapse of Southern Cross Healthcare, appears next with a 25% share of nursing home capacity in 15 CASSRs. New provider HC-One appears next with 25% share with just ten CASSRs.

There are eight CASSRs, all geographically small councils, in which an individual provider controls more than 50% of capacity within the council's boundaries.

Commenting on these new figures, Mr Laing said: 'Whether or not abuse of supplier power occurs, or may occur, within these local markets is an unanswered question, but the issue pales into insignificance compared with the concentration of purchasing power in the hands of local authorities which, despite their declining placements, still pay for 51% of all care home residents nationally and pay for in excess of three-quarters of care home residents in many less affluent council areas.'

Frequency of supplier market share of 25% and over in local nursing home markets for older and physically disabled people, UK November 2011

	Number of Councils with Adult Social Services Responsibilities (CASSRs) where provider's share of capacity is in the given range			Number of CASSRs in UK
	25-34%	35-49%	50% +	
	Barchester Healthcare Ltd	5	3	
Bondcare Group	1	-	-	209
Bupa Care Homes	11	8	2	209
Care UK	1	5	1	209

Caring Homes Group	-	-	1	209
European Care Group	-	1	-	209
Excelcare Holdings Ltd	2	-	-	209
Four Seasons Health Care Ltd	10	4	1	209
Hallmark Care Homes	-	-	1	209
HC-One Ltd	4	5	1	209
Life Style Care plc	2	1	1	209
Methodist Homes	-	1	-	209
Minster Care Group	1	-	-	209
Sunrise Senior Living	-	1	-	209

Source: Laing & Buisson

- END OF RELEASE -

**Care of Elderly People UK Market Survey 2011/12 will be available shortly. Priced at £795 for hard copy and £1,155 (inc. VAT) for hard copy and PDF. To purchase contact Laing & Buisson, 20 Angel Gate, City Road, London, EC1V 2PT. Tel: 020 7833 9123. Fax: 020 7833 9129. www.laingbuisson.co.uk*

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NOTES TO EDITORS:

Founded by William Laing in 1986, Laing & Buisson is the UK's leading provider of information and market intelligence on the independent health, community care and childcare sectors.

Laing & Buisson offers a uniquely focused range of expert services to providers, purchasers and investors in the health and community care markets. Information about the range of products and services provided is summarised below.

Market Reports & Annual Directories: Laing & Buisson publishes a series of special market reports and directories on the health and community care sectors. The research and conclusions within the reports are frequently cited in parliamentary questions and answers, official documents and company prospectuses, and are regularly drawn upon by the national media.

Events: In addition to one-off conferences on subjects selected for their special interest or topicality, Laing & Buisson's annual programme features a series of conferences on specific areas including long term care for the older people, learning disabilities and mental health, acute healthcare, insurance and children's nurseries. The Independent Healthcare Forum consists of two major conferences: the acute healthcare conference and the mental health conference and a workshop for private patient units. The Independent Specialist Care Awards and the Independent Healthcare Awards take place in March and September, highlighting the range of achievements and recognising best practice within the sectors.

Newsletters: Laing & Buisson publishes two authoritative monthly newsletters - *Community Care Market News*, which covers the long-term care sector and *Healthcare Market News*, which covers the acute healthcare sector.

CareSearch and Health & Care Data: CareSearch is Laing & Buisson's flagship data product, a 'one stop shop' with extremely flexible search facilities for those needing detailed, reliable and up-to-date information on care homes, care home groups, independent healthcare establishments, care commissioners, PCTs and inspection and registration agencies for the whole of the UK. Further to this, details of group operators, their holdings and financial information from statutory accounts offer subscribers an invaluable resource. Alternatively, individual data sets are available to supply as csv files by email. In addition to the data included on CareSearch being available to purchase separately, home care agencies and groups can also be supplied.

Consultancy and Market Intelligence: Market intelligence and consultancy work, focusing on non-clinical aspects of health and social care markets, is tailor-made for companies with an active interest in the sector. Examples of recent work include a report on the future of the independent healthcare sector for the Healthcare Commission, the seminal work conducted by Laing & Buisson on *A Fair Price for Care* for the Joseph Rowntree Foundation and *Improving Lives - Improving Life*, a report on the key strategic issues facing the long term care sector. Laing & Buisson also frequently assists investors in market due diligence work in the health and care sectors.