

Key property trends in care home development

#SocialCare
@carterwoodltd

Amanda Nurse
Tom Hartley

15 May 2019



Good start, long way to go...



325,000

number of en-suites in UK
(at June 2018)



106,500

number of wetrooms in UK
(at June 2018)



327,996

number of en-suites in UK
(at January 2019)



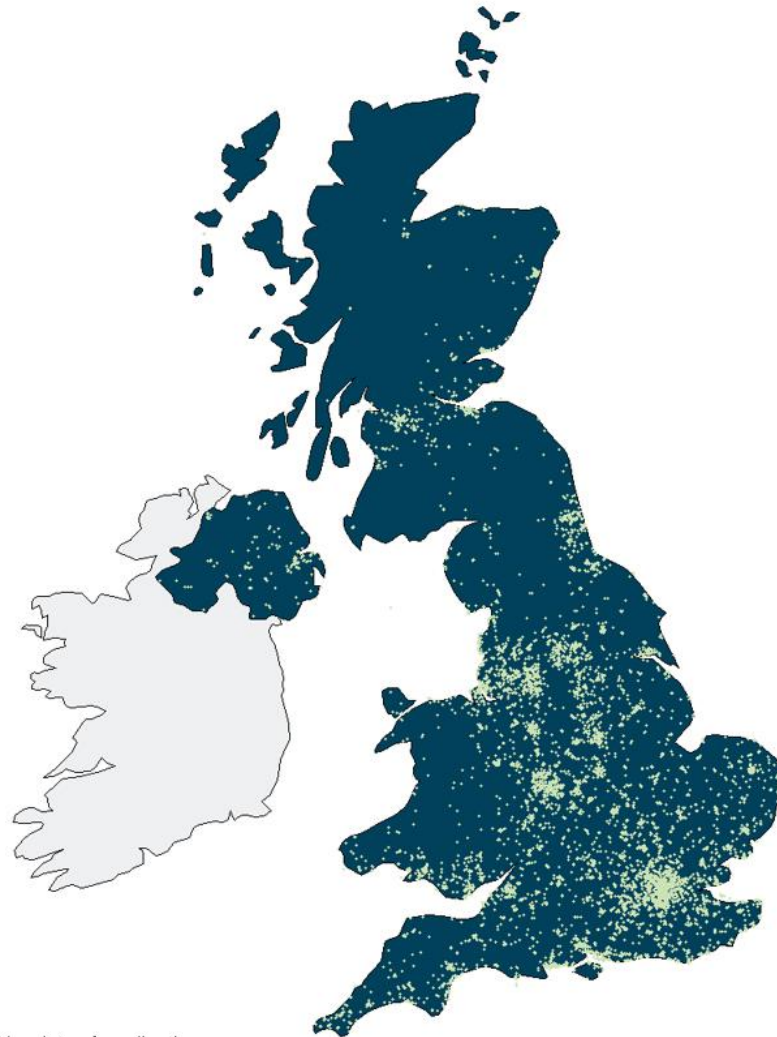
111,169

number of wetrooms in UK
(at January 2019)



Planning for the future

Date applied: March 2019.
Total applications researched: 16826



Total number of planning applications researched by date of application.
Sources: Carterwood, Glenigan, Planning Pipe, EGi

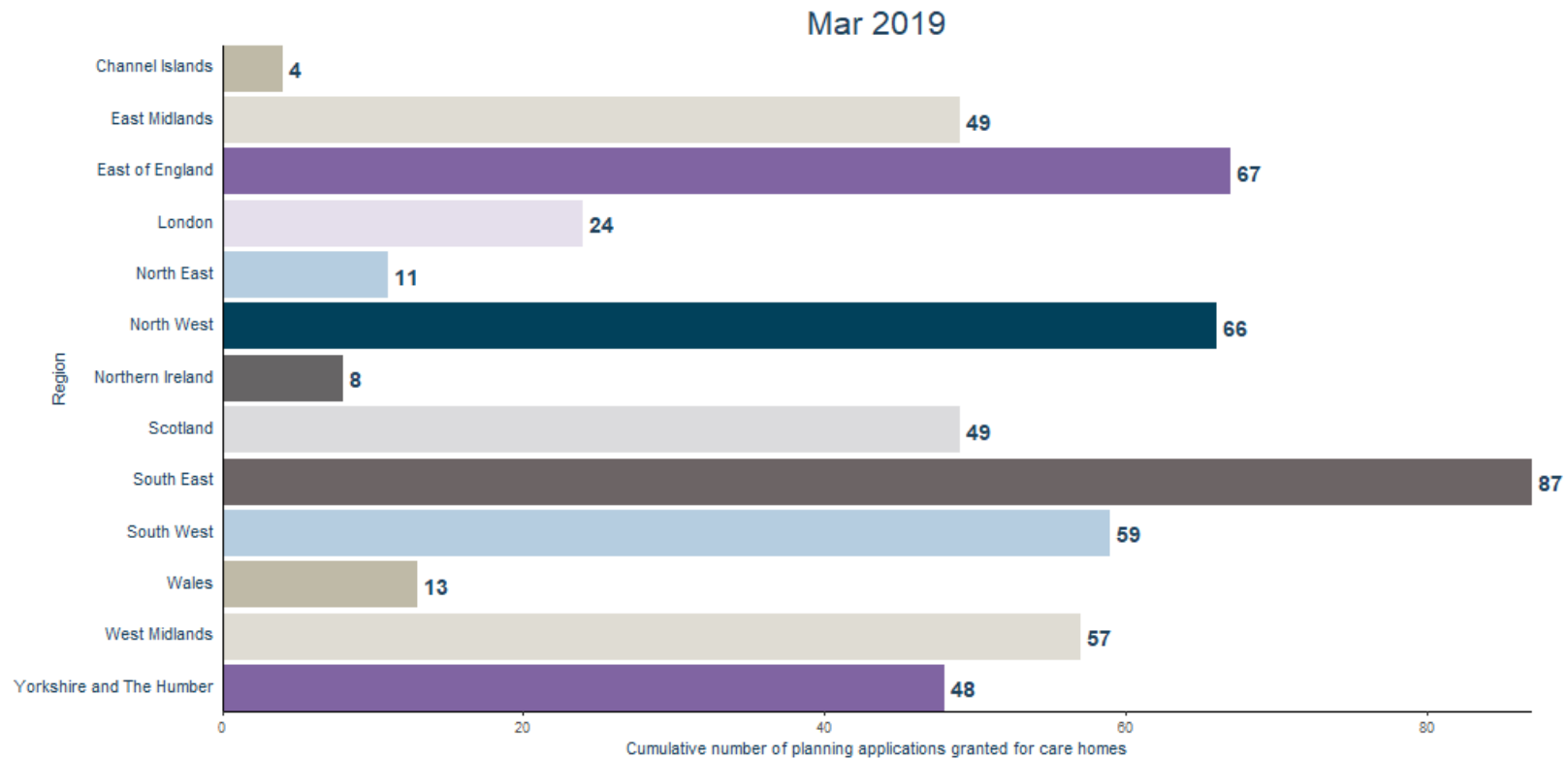
Over the last **12** months, we have spent over **2,000** hours researching **C2 elderly care home** planning applications submitted in the **UK** over the last **4** years.



improve decision making
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The Planning Race

Planning permission granted for new elderly care homes by region
April 2015 - March 2019

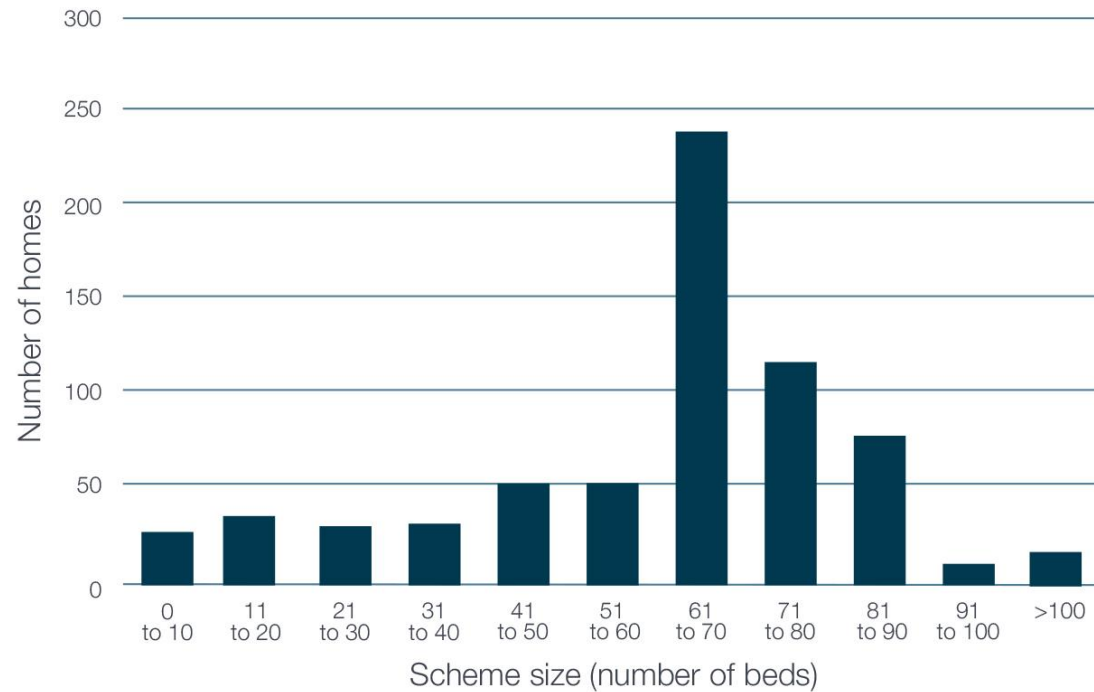


Sources: Carterwood, Glenigan, PlanningPipe, EGi

Scheme sizes - is big always beautiful?

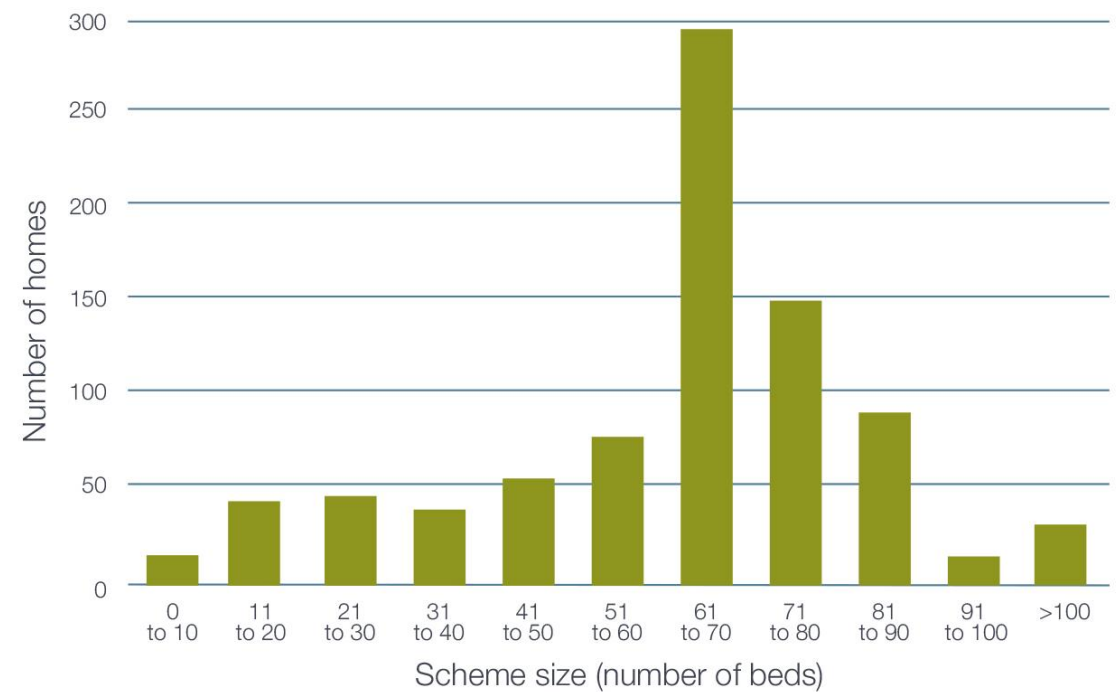
UK

Care home - distribution by scheme size
(new builds) April 2015 to March 2018



March 2018 - average scheme size of 59 beds

Care home - distribution by scheme size
(new builds) April 2015 to March 2019



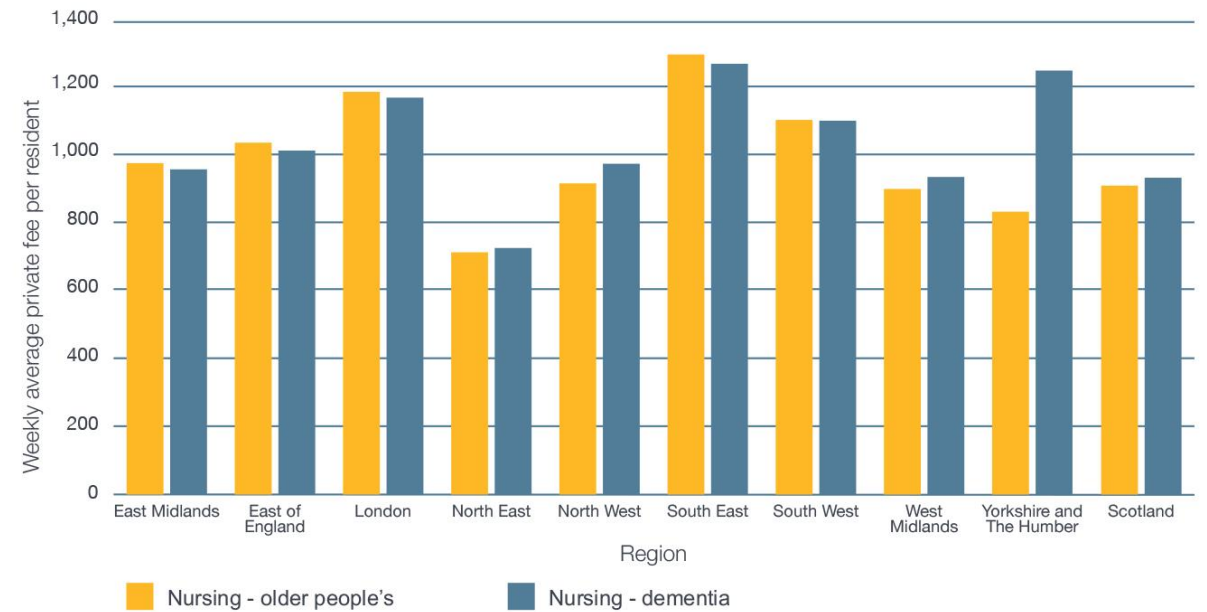
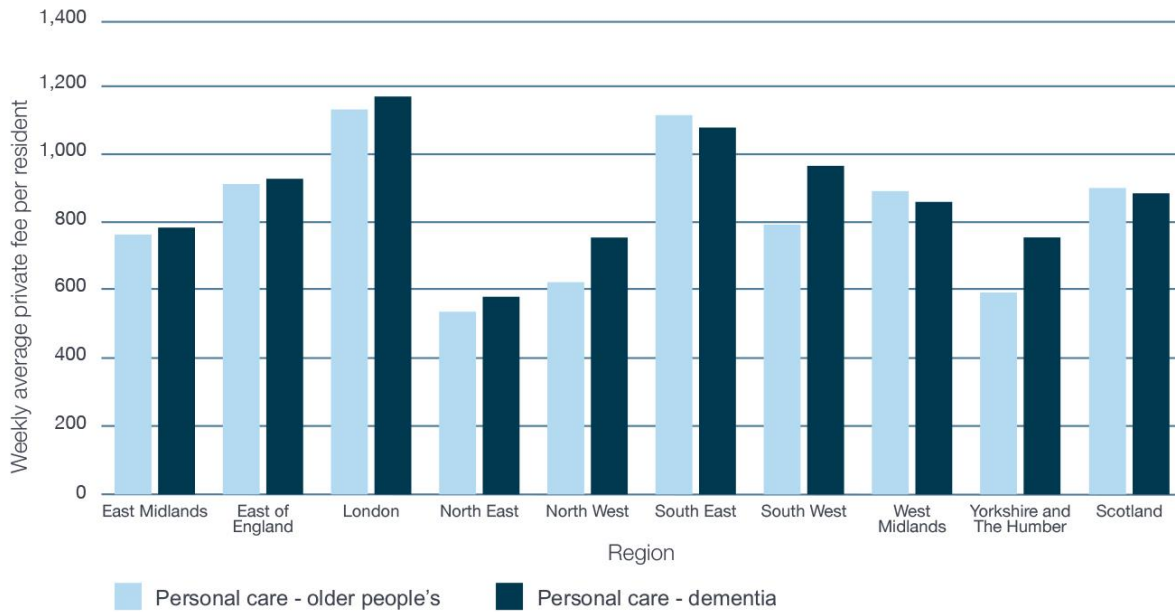
March 2019 - average scheme size of 60 beds

Sources: Carterwood Analytics, Glenigan, EGi, local authority planning departments.
Includes Isle of Man and Channel Islands

Where next?

Average fee rate (£) by region for elderly care homes in England and Scotland

1 Nov 2018 - 30 April 2019

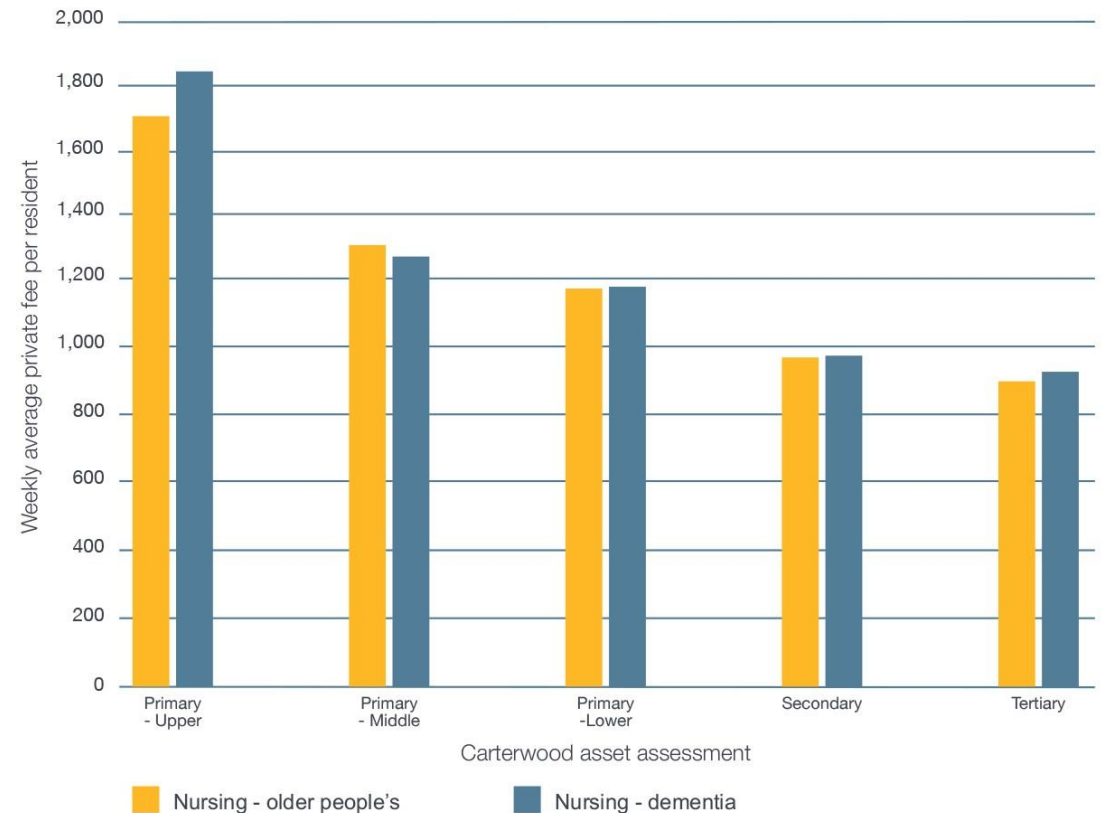
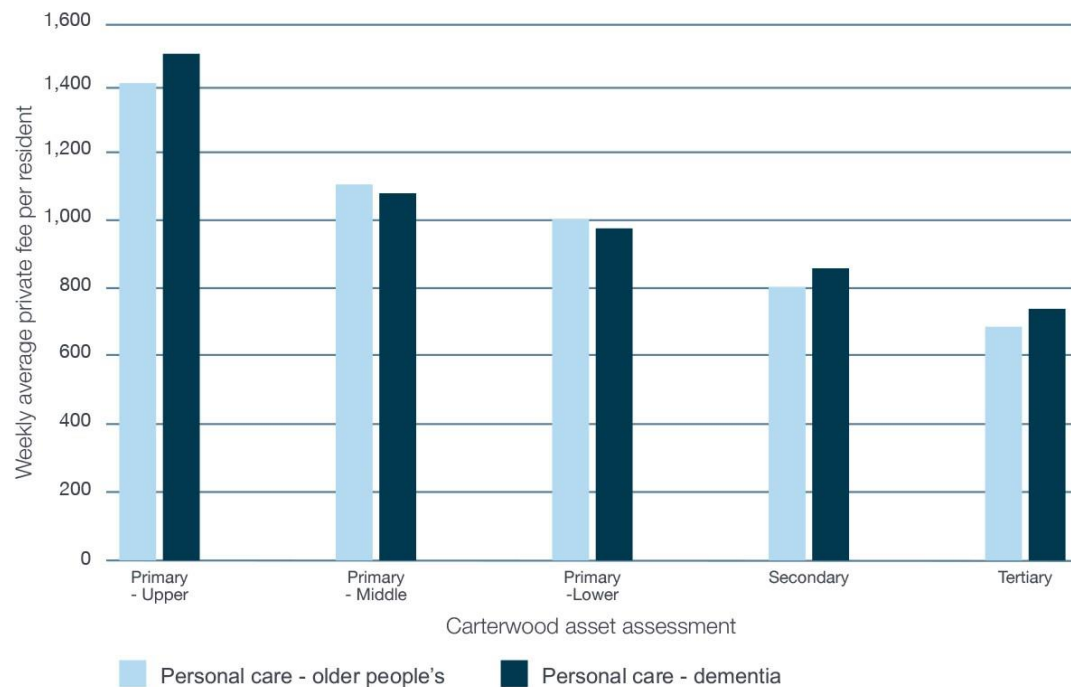


Sources: A-Z Care Homes Guide, Carterwood database, CQC

£2,000 is the new £1,000...?

Elderly care homes in England and Scotland 1 Nov 2018 - 30 April 2019

Average private fee by asset quality



Sources: A-Z Care Homes Guide, Carterwood database, CQC

Most active developers and operators

 <p>RUNWOOD HOMES SENIOR LIVING <i>Your care in our hands</i></p>	 <p>LNT Care Developments</p>	 <p>H HAMBERLEY</p>
 <p>FRONTIER</p>	 <p>COUNTRY COURT CARE <i>Our family caring for yours</i></p>	 <p>CARING HOMES</p>
 <p>CARE^{UK}</p>	 <p>BARCHESTER HEALTHCARE</p>	 <p>octopus healthcare</p>
 <p>PORTHAVEN CARE HOMES</p>	 <p>CCG care concern group</p>	 <p>Avery Care With A Difference</p>
 <p>castleoak Creating quality living space</p>	 <p>CINNAMON RETIREMENT LIVING</p>	 <p>Signature setting the standard for senior care</p>

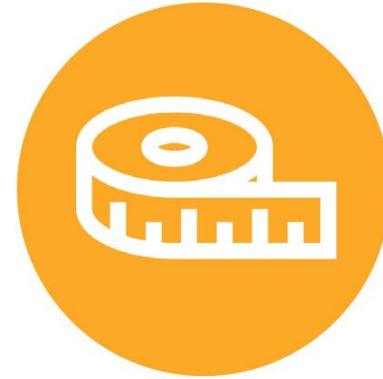
What's next... Blockbusters?



£5,000
weekly fee



London
is the new Surrey



Size
won't matter



Tech giants
disrupt



Amanda Nurse

Managing director

07595 119208

amanda.nurse@carterwood.co.uk



@amandanurse007



@Amanda Nurse



Tom Hartley

Director

07715 495062

tom.hartley@carterwood.co.uk



@tomcarterwood



@Tom Hartley

For further information email info@carterwood.co.uk
or call 08458 690777



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