



Elderly Care Homes in Europe & UK



In this report

- **Scope & Context of the Report**
- **Aggregated Country Statistics**
- **Regional Statistics per Country**
- **Overview of largest Groups in the Market per Country**

This report includes five European countries encompassing 39.087 elderly care homes

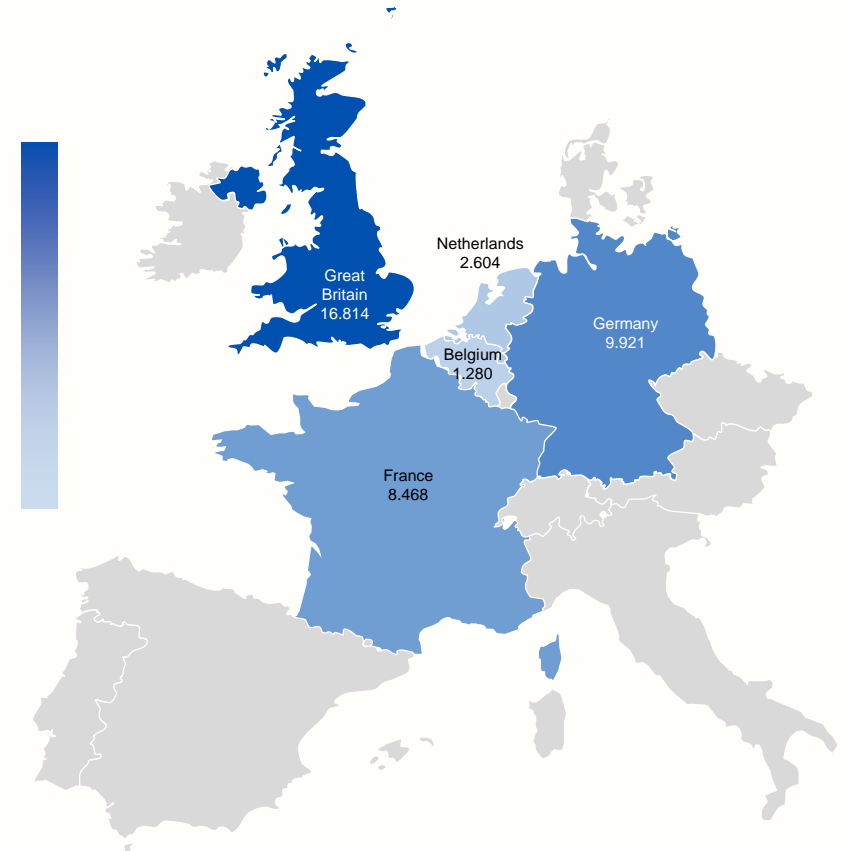
Context

The elderly care home market in Europe is a rapidly growing industry, as the continent's **population ages and the demand for long-term care increases**. According to data from Eurostat, the number of people aged 65 and over in Europe is projected to increase from 84 million in 2020 to 131 million by 2050.

The total **European care home market size was estimated at around \$84 billion** in 2020. The market varies significantly between countries, with some countries having a larger market and more developed infrastructure than others.

The scope of this report is tailored toward five European countries: **United Kingdom, France, Belgium, Germany and the Netherlands**. In total, there are **39.087 homes** across these five countries. The report discusses various features per home, including among other **number of rooms, price, address and group that operates the home**.

Geographical coverage



UNITED KINGDOM

The UK elderly care home market contains 16.814 homes totaling a market size of almost £17bn

Context

The elderly care home market in the United Kingdom (UK) has been growing in recent years, driven by an **aging population** and **increased demand for long-term care services**. This market considers **care homes, residential homes and nursing homes**.

There are **16.814 homes** active in the UK, totaling a **market size of almost £17bn**. Most of these homes are **privately** owned and operated. The government provides funding for elderly care through the **National Health Service (NHS)** and **local authorities**.

The quality of care in care homes varies and there have been concerns about the standard of care provided in some homes. The **Care Quality Commission (CQC)** is responsible for inspecting and regulating care homes in England and publishes reports on the quality of care provided.

The **COVID-19 pandemic** has had a significant impact on the elderly care home market in the UK. Many care homes have been hit hard by the virus, with outbreaks leading to high numbers of deaths and disruption to care. The pandemic has also highlighted the need for better infection control measures and increased funding for the care home sector.

Geographical coverage



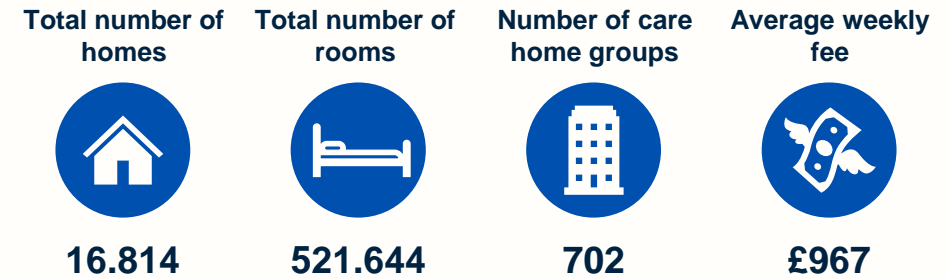
Statistics United Kingdom

There are 16.814 elderly care homes that account for 521.644 rooms

Number of homes per region



Aggregated country statistics*



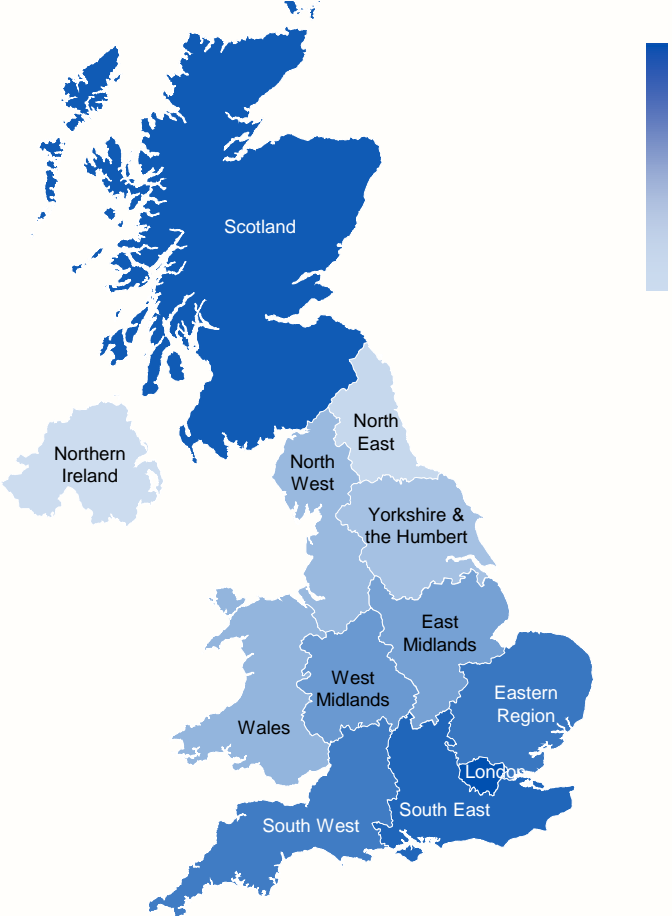
Per company insights included in the database

- Name
- Type of Owner
- # rooms
- Address
- Region
- Group / Independent
- Care provided
- Rating and # reviews

UK Regional Statistics

The largest homes are in Scotland, with one of the highest weekly fees per bed

Average Weekly Fee per Bed by Region



Average Care Home Capacity by Region



Note: The dataset contains data as of 06/12/22

UK Regional Statistics

The South-East of England represents the largest market share in the UK elderly care home market

Number of Inhabitants over 65 per Bed by Region



Total yearly Market Size* by Region



Note: The dataset contains data as of 06/12/22

*Market size = total capacity * avg price/year * avg occupancy rate

HC-One is the leading operator in the UK Elderly Care Home Market

There are 619 groups in the UK of which 100 operate more than 10 care homes

Market Definition and Segmentation

- Market : **United Kingdom**
- **Elderly Care Homes**
- Market Segmentation
 - **Independent**: only **1 home**
 - **Small**: between **2 – 10 homes**
 - **Medium**: between **11 – 50 homes**
 - **Large**: above **50 homes**

2022 Database*

Category	Number Groups	Total Number of Homes	Avg Nbr of Homes
Large	18	1.725	96
Medium	82	1.578	19
Small	519	1.991	4
Total Group	619	5.294	8,6
Independent	11.521	11.521	1
Total	12.140	16.815	1,4

Top 10 Groups	# of homes
HC-One	282
Barchester Healthcare Ltd	233
Care UK Nursing	156
Anchor	125
Bupa Care Homes	119
...	97
...	89
...	82
...	67
...	64

Descriptive statistics of the UK care home market dataset

The dataset offers information on 12 different parameters for 16.814 care homes

DESCRIPTION & COUNT OF ALL PARAMETERS		
Parameter	Description	Count
Region	Region that the elderly care home is active in. In the UK there are 12 regions in total, encompassing East of England, East- Midlands, London, North East England, North West England, Northern Ireland, Scotland, South East England, South West England, Wales, West Midlands and Yorkshire & The Humber.	16.814 (100%)
Type of Owner	This column displays by what type of owner the care home is owned. Possible ownership structures are: Private, National Health Service, Local Authority and Voluntary / Not for Profit.	16.814 (100%)
Name	The name of the elderly care home.	16.814 (100%)
Address	The address that the care home is located, displaying the street and number.	16.814 (100%)
City	City in which this address is located.	16.814 (100%)
Postal Code	Postal code of the city in which the elderly care home operates.	16.814 (100%)
Group	This column shows if the individual care home is part of a group that operates multiple care homes. If the cell is blank, the group is either unknown or the care home is independent.	5.377 (31,98%)
Capacity	In this column the capacity of each individual care home can be found. This value is expressed in the number of beds that the home has available.	16.758 (99,67%)
Care Provided	This column can be expanded so that for each possible care, the homes that provide that specific care can be selected.	16.814 (100%)
Rating	The rating that the home has received, as of a total of 100.	7.430 (44,19%)
Reviews	Number of reviews that have been given for the individual home.	8.930 (53,11%)
Weekly Fee	The starting weekly fee of the elderly care home.	3.366 (20,02%)

BELGIUM

The Belgian elderly care home market contains 1.280 homes totaling a market size of €2,2 billion

Context

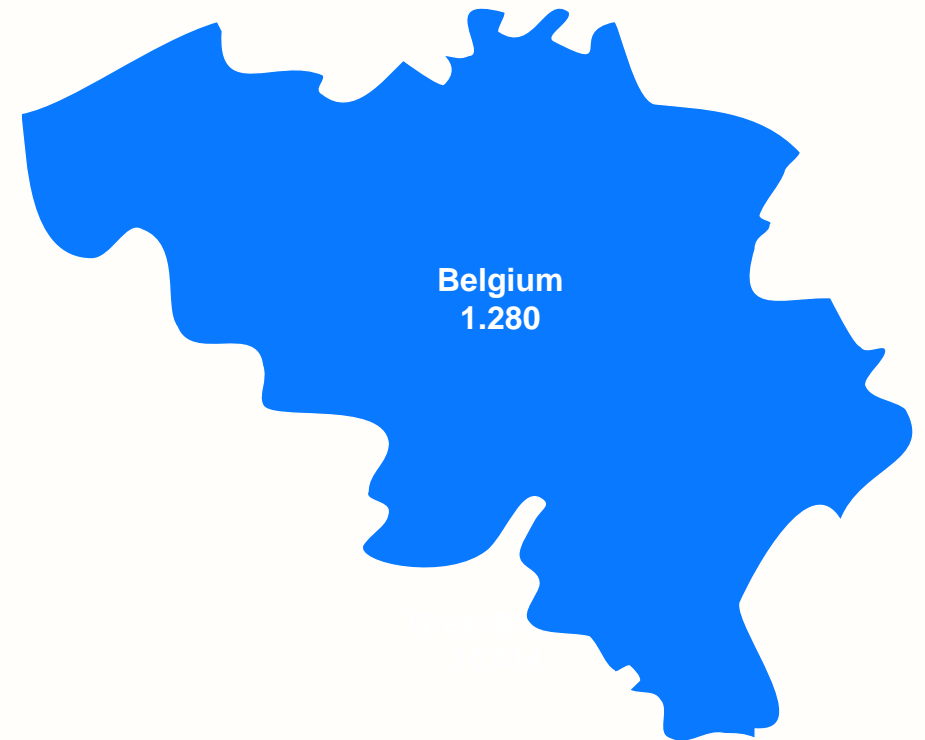
The elderly care home market in Belgium is a growing industry, as the country's **population ages and the demand for long-term care increases**. This market considers **care homes, residential homes and nursing homes**.

There are **1.280 care homes** in Belgium, totaling a **market size of €2,2bn**. The homes in this market are run by both **non-profit and for-profit** organizations, and are highly regulated by the government. The market is funded by a combination of government subsidies, social security, and private payments.

The **Belgian government** has also implemented several policies aimed at **increasing the number of care home places and improving the quality of care**. These include the "Wet Bijzondere Ziektekosten" (Special Health Care Costs Act) and the "Wet op de Medische Hulp in de Verpleging en Verzorging" (Law on Medical Assistance in Nursing and Care).

In recent years, there has been a shift towards **more personalized and home-like care for the elderly**, as well as a focus on integrating care homes into the community. This has led to the development of small-scale care homes, which offer a more intimate and individualized living environment for residents.

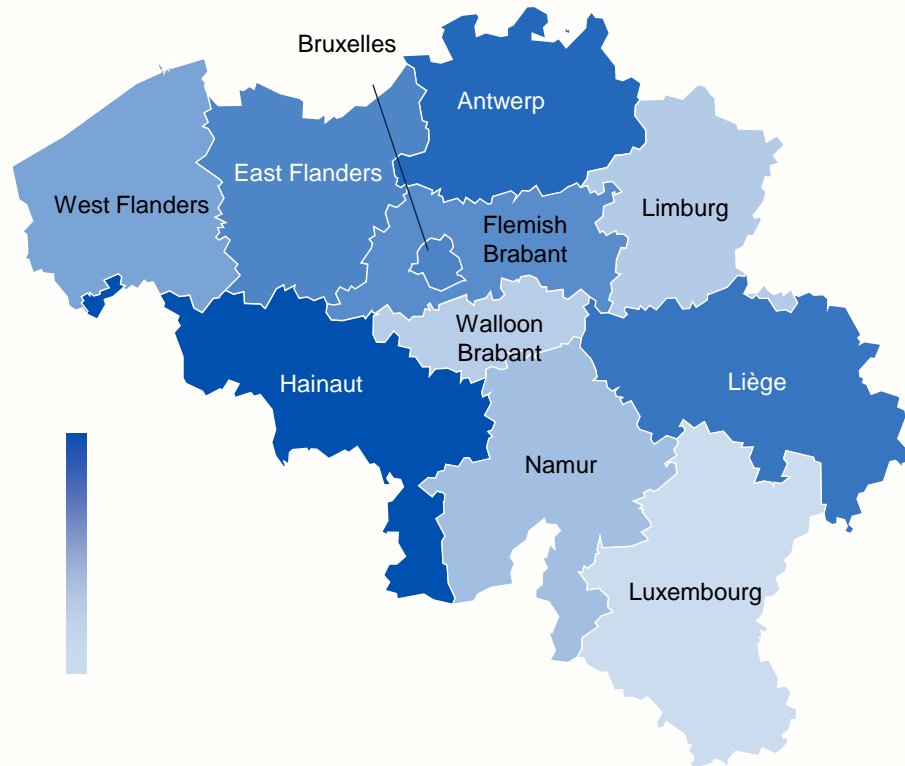
Geographical coverage



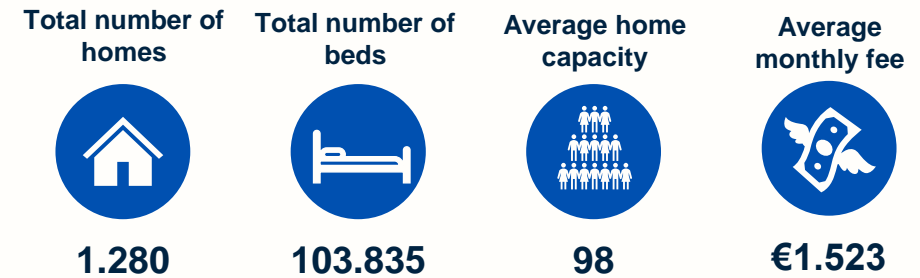
Statistics Belgium

There are 1.280 elderly care homes that account for 103.835 beds

Number of homes per region



Aggregated country statistics*



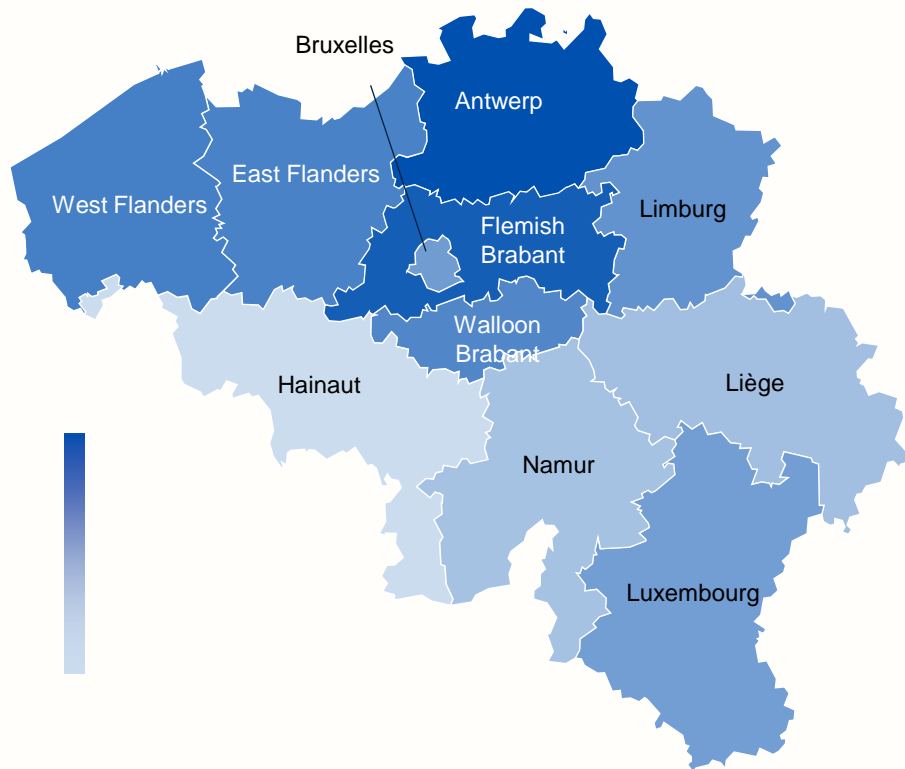
Per company data included in the database

- Name
- Address
- City
- Region
- Website
- Price
- Capacity
- Phone Number

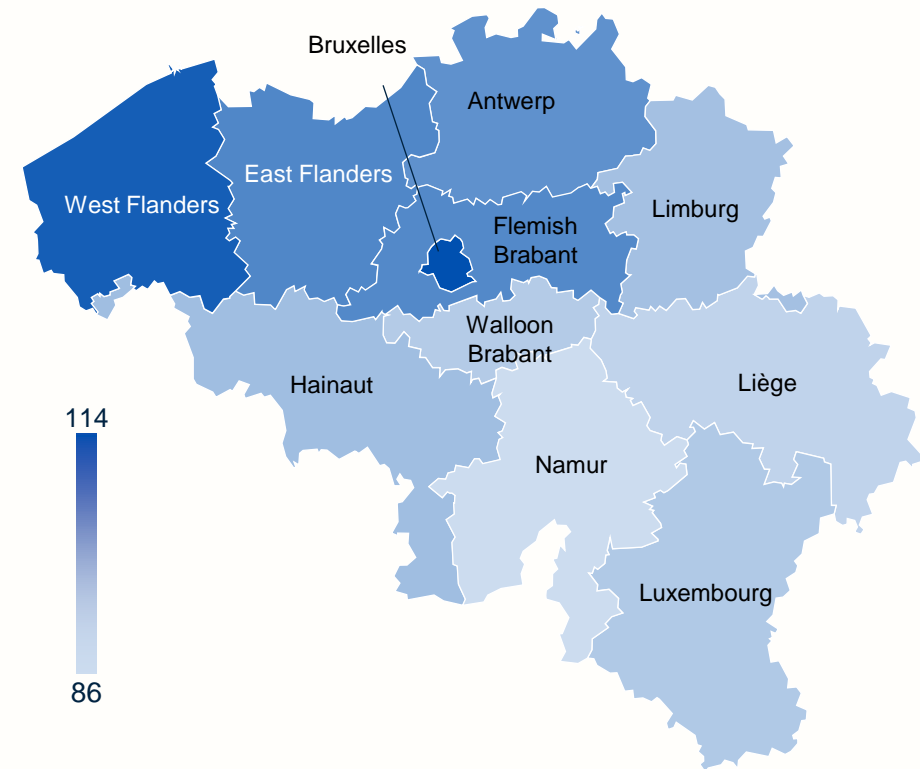
Belgium Regional Statistics

The largest homes are in Brussels and West Flanders, while high monthly fees are in Antwerp

Average Monthly Fee per Bed by Region



Average Care Home Capacity by Region

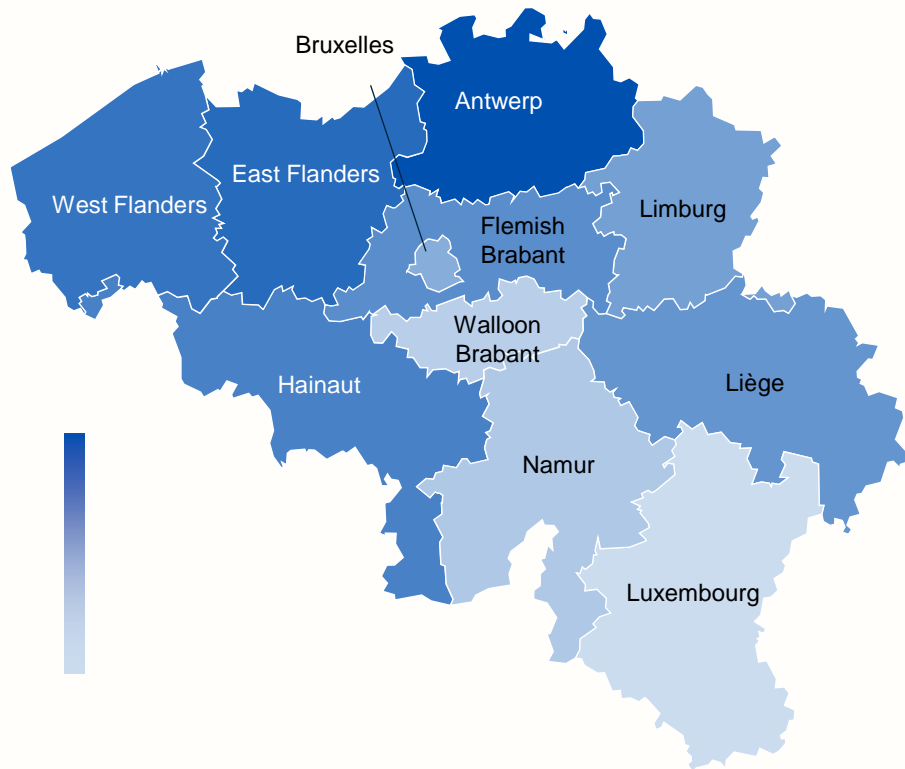


Note: The dataset contains data as of 15/12/22

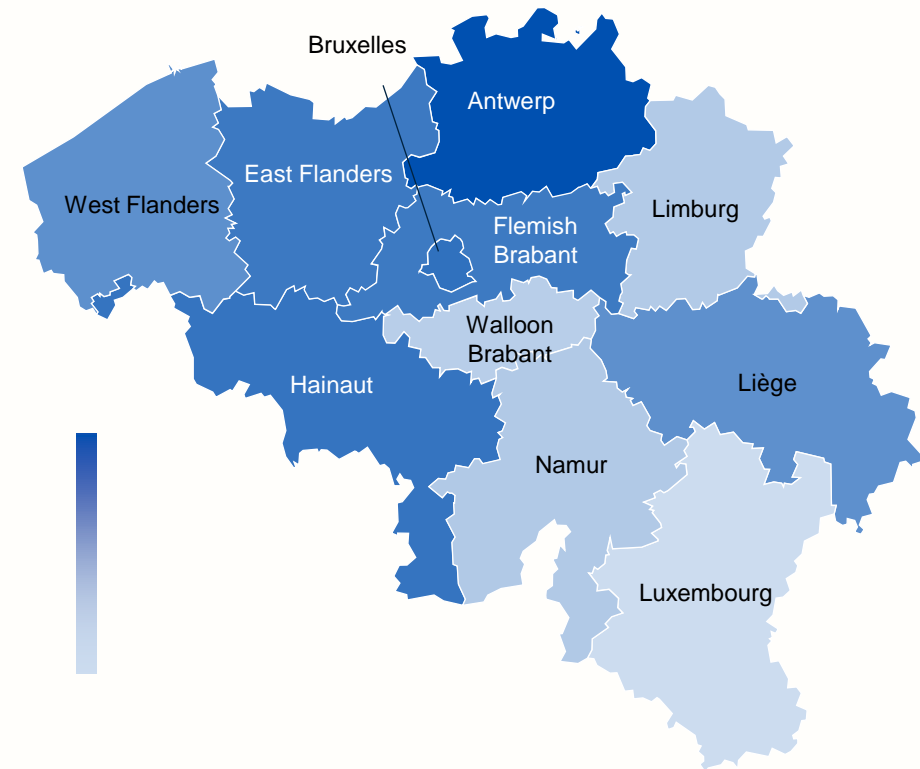
Belgium Regional Statistics

Antwerp represents the largest market share in the Belgian elderly care home market

Number of Inhabitants over 65 per Bed by Region



Total yearly Market Size* by Region



Note: The dataset contains data as of 15/12/22

*Market size = total capacity * avg price/year * avg occupancy rate

Korian is the leading operator in the Belgian Elderly Care Home Market

There are 81 groups in Belgium that operate 665 homes

Market Definition and Segmentation

- Market : **Belgium**
- **Elderly Care Homes**
- Market Segmentation
 - **Independent**: only **1** home
 - **Small**: between **2 – 10** homes
 - **Medium**: between **11 – 50** homes
 - **Large**: above **50** homes

Identified Groups in 2022 Dataset*

Category	Number Groups	Total Number of Homes	Avg Nbr of Homes
Large	3	242	80,7
Medium	8	177	22,1
Small	70	246	3,5
Total Group	81	665	8,2
Independent	615	615	1
Total	696	1280	2,2

Top 10 Groups	# of homes
Korian	109
Armonea	73
Orpea	60
Vulpia	40
Vivalto Home	32
...	26
...	20
...	18
...	15
...	14

Descriptive statistics of the Belgian care home market dataset

The dataset offers information on 10 different parameters for 1.280 care homes

DESCRIPTION & COUNT OF ALL PARAMETERS		
Parameter	Description	Count
Group	This column shows if the individual care home is part of a group that operates multiple care homes. If the cell is blank, the group is either unknown or the care home is independent.	837 (65,39%)
Name	The name of the elderly care home.	1.280 (100%)
Address	The address that the care home is located, displaying the street and number.	1.280 (100%)
Postal Code	Postal code of the city in which the elderly care home operates.	1.280 (100%)
City	City in which this address is located.	1.280 (100%)
Province	Province that the elderly care home is active in. In Belgium there are 10 provinces in total, encompassing Antwerp, Brabant, West Flanders, East Flanders, Hainaut, Liège, Limburg, Luxembourg, Namur and Brussels.	1.280 (100%)
Region	Region that the elderly care home is active in. In Belgium there are 3 regions in total, encompassing Brussels, Flanders and Wallonia.	1.280 (100%)
Website	The online website of the elderly care home.	515 (40,23%)
Capacity	In this column the capacity of each individual care home can be found. This value is expressed in the number of beds that the home has available.	1.059 (82,73%)
Monthly Fee	The monthly fee of the elderly care home expressed in euros.	1.258 (98,28%)

Netherlands

The Dutch elderly care home market totals 2.604 homes

Context

The elderly care home market in the Netherlands is a rapidly growing industry, as the country's **population ages and the demand for long-term care increases**. The elderly care home market considers **care homes, residential homes and nursing homes**.

There are **2.604 care homes** in the Netherlands. **Most of these homes are run by non-profit organizations**, with the rest being run by for-profit companies. The market is highly regulated, with the government setting standards for care and funding. In recent years, there has been a **shift towards more personalized and home-like care** for the elderly, as well as a focus on integrating care homes into the community.

The **Dutch government** has also implemented several policies aimed at **increasing the number of care home places and improving the quality of care**. These include the "Wet langdurige zorg" (Long-Term Care Act) and the "Zorgverzekeringswet" (Health Insurance Act).

Despite the growth in the industry, there are also **challenges** facing the elderly care home market in the Netherlands. After the **COVID-19 pandemic**, the market now faces a **shortage of qualified staff, high turnover rates, and financial constraints**.

Geographical coverage



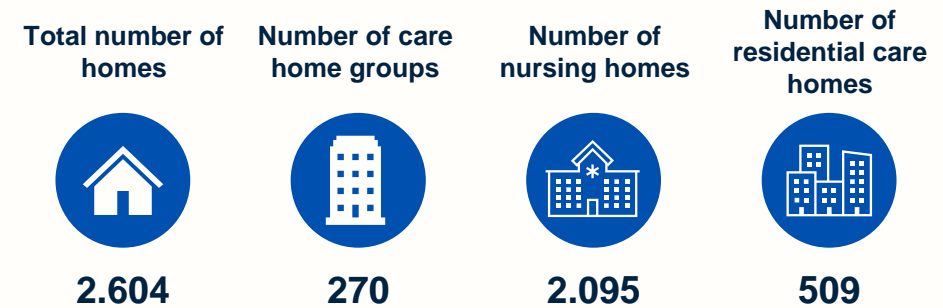
Statistics Netherlands

There are 2.604 elderly care homes and 270 groups active in the Netherlands

Number of homes per region



Aggregated country statistics*



Per company insights included in the database

- Name
- Address
- City
- Group
- Type
- Phone Number
- Website
- Rating & Reviews

Netherlands Regional Statistics

Nursing homes outweigh the number of residential care homes in the Netherlands

Ratio of Nursing Homes over Residential Care Homes by Region



Average Care Home Rating (out of 10) by Region



Netherlands Regional Statistics

The largest groups measured by number of homes operated are located in Friesland

Number of Inhabitants over 65 per Home by Region



Average Homes per Group by Region*



Note: The dataset contains data as of 05/12/22

Dagelijks Leven is the leading operator in the Dutch Elderly Care Home Market

There are 270 groups active in the Netherlands that operate 2.344 homes

Market Definition and Segmentation

- Market : **Netherlands**
- **Elderly Care Homes**
- Market Segmentation
 - **Independent**: only **1** home
 - **Small**: between **2 – 10** homes
 - **Medium**: between **11 – 50** homes
 - **Large**: above **50** homes

Identified Groups in 2022 Dataset*

Category	Number Groups	Total Number of Homes	Avg Nbr of Homes
Large	1	77	77
Medium	81	1.361	16,8
Small	188	906	4,8
Total Group	270	2.344	8,7
Independent	260	260	1
Total	530	2.604	4,9

Top 10 Groups	# of homes
Dagelijks Leven	77
Herbergier	44
SVRZ	40
De Zorggroep	35
BrabantZorg	34
...	29
...	28
...	27
...	26
...	25

Descriptive statistics of the Dutch care home market dataset

The dataset offers information on 10 different parameters for 2.604 care homes

DESCRIPTION & COUNT OF ALL PARAMETERS		
Parameter	Description	Count
Name	The name of the elderly care home.	2.604 (100%)
Group	This column shows if the individual care home is part of a group that operates multiple care homes. If the cell is blank, the group is either unknown or the care home is independent.	2.380 (91,40%)
Address	The address that the care home is located, displaying the street and number.	2.604 (100%)
Postal Code	Postal code of the city in which the elderly care home operates.	2.604 (100%)
City	City in which this address is located.	2.604 (100%)
Region	Region that the elderly care home is active in. In the Netherlands there are 12 provinces in total, encompassing Drenthe, Flevoland, Friesland, Gelderland, Groningen, Limburg, North Brabant, North Holland, Overijssel, South Holland, Utrecht and Zeeland.	2.604 (100%)
Type	The type of the elderly care home. In the Netherlands there are two types of elderly care homes: nurse homes and residential care homes.	2.604 (100%)
Website	The online website of the elderly care home.	2.597 (99,73%)
Rating	The rating that the home has received, as of a total of 10.	2.395 (91,97%)
Number of reviews	Number of reviews that have been given for the individual home.	2.395 (91,97%)

Germany

The German elderly care home market contains 9.921 homes that size of around €14bn

Context

The care home market in Germany is a rapidly growing industry, driven by an **aging population** and **increasing demand for long-term care services**. According to a report by the German Federal Statistical Office, the number of people over the age of 65 in Germany is projected to increase by more than 50% by 2060. This considers **care homes, residential homes and nursing homes**.

There are **9.921 care homes** in Germany, totaling a **market size of around €14bn**. This market is composed of both **publicly and privately operated facilities**. Privately operated care homes are owned and operated by private companies or individuals, and typically charge higher fees.

The quality of care in German care homes varies widely. The German government has implemented strict regulations and oversight to ensure that all care homes meet certain quality standards. The **Federal Care Act**, for example, sets standards for staffing levels, training, and facilities.

Despite the demand for care homes in Germany, the industry faces several **challenges**. One of the main challenges is the **shortage of qualified staff**, which has led to increased wages and high turnover rates. Additionally, the **cost of care home services has been rising**, making it difficult for some older adults to afford the care they need.

Geographical coverage



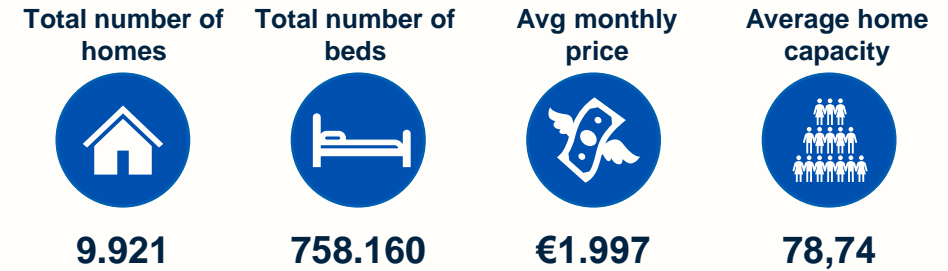
Statistics Germany

There are **9.921** elderly care homes that account for **758.160** beds in Germany

Number of homes per region



Aggregated country statistics



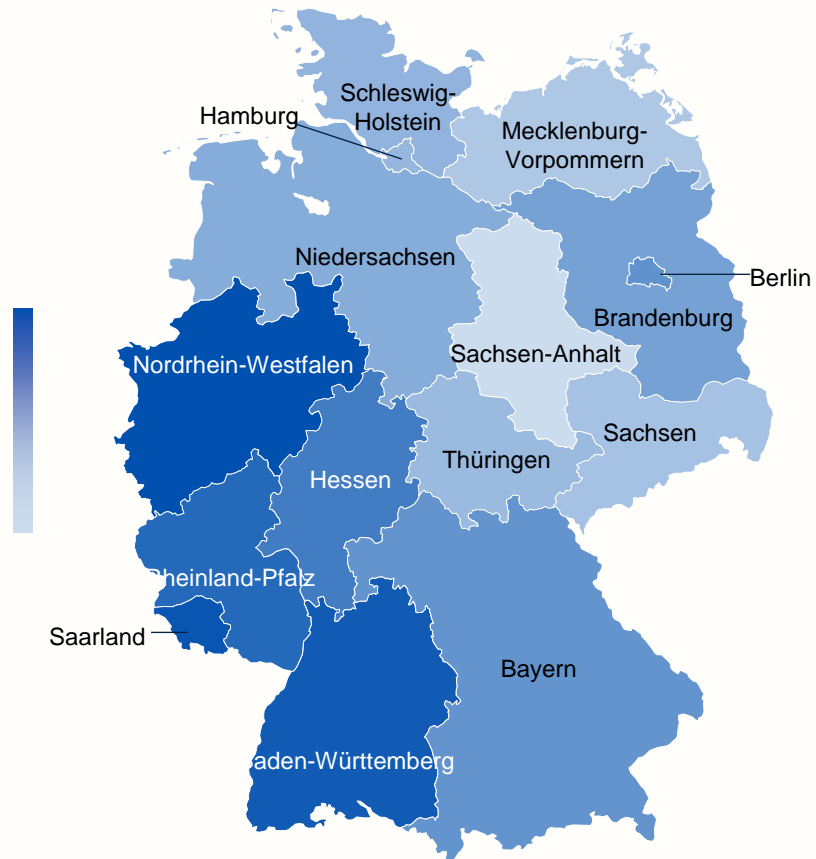
Per company insights included in the database

- Name
- Address
- Region
- Part of group
- Phone
- Mail address
- Website
- Lowest monthly fee

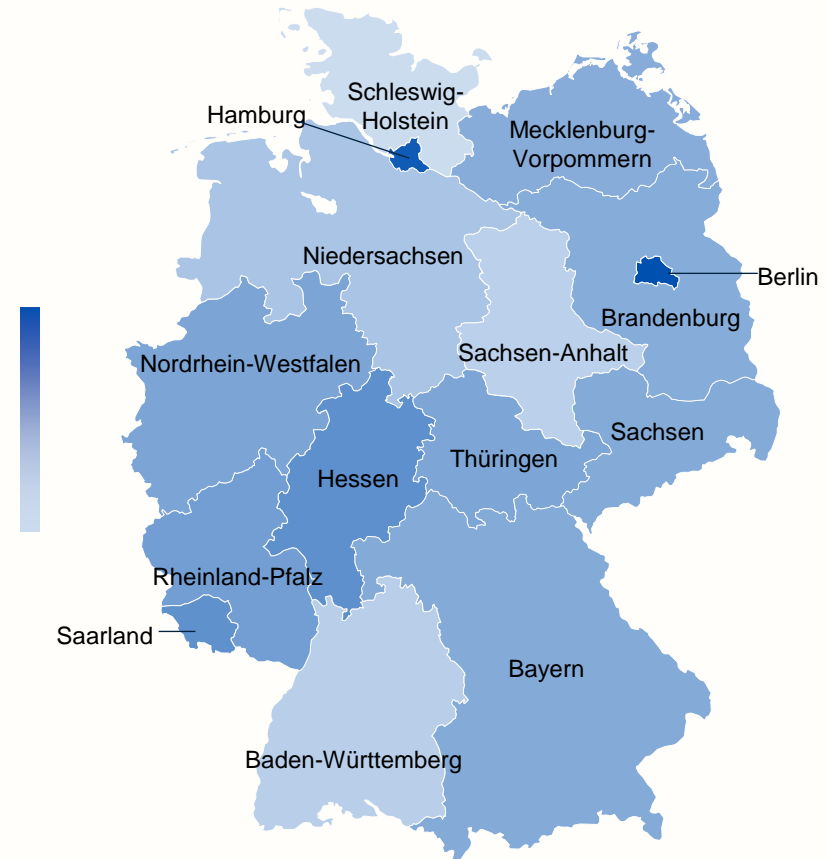
Germany Regional Statistics

The most expensive homes are in North-East Germany, the largest in the big cities

Average monthly price per region



Average care home capacity per region



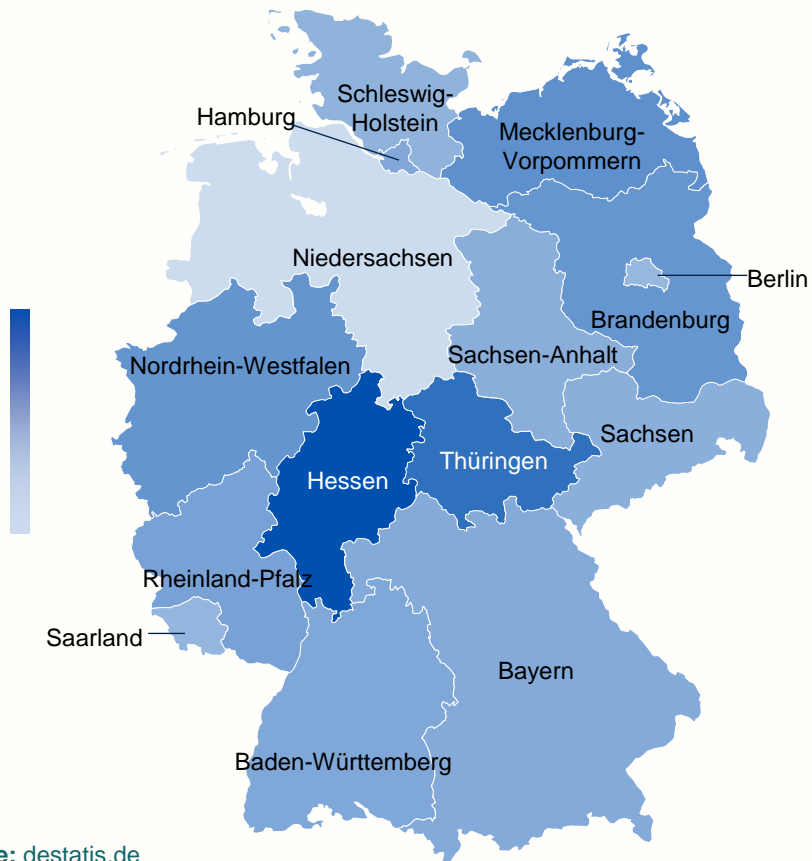
Source: Statbel

Note: The dataset contains data as of 05/01'22

Germany Regional Statistics

Hessen is the least saturated market, while Niedersachsen holds the largest size

65+ Inhabitants per Number of Beds by region



Yearly Market Size* by Region



Source: destatis.de

Note: The dataset contains data as of 05/01/22

*Market size = total capacity * avg price/year * avg occupancy rate

Korian is the leading operator in the German Elderly Care Home Market

There are 493 groups active in Germany that operate 4.257 homes

Market Definition and Segmentation

- Market : **Germany**
- **Elderly Care Homes**
- Market Segmentation
 - **Independent**: only **1 home**
 - **Small**: between **2 – 10 homes**
 - **Medium**: between **11 – 50 homes**
 - **Large**: above **50 homes**

2022 Database*

Category	Number Groups	Total Number of Homes	Avg Nbr of Homes
Large	7	753	108
Medium	85	1.601	19
Small	401	1.903	4,75
Total Group	493	4.257	8,63
Independent	5.745	5.745	1
Total	6238	9.992	1,6

Top 10 Groups	# of homes
Korian	217
Alloheim	160
Kursana	94
Pro Seniore	85
Evangelische Heimstiftung	74
	72
	51
	44
	40
	38

Descriptive statistics of the German care home market dataset

The dataset offers information on 9 different parameters for 9.921 care homes

DESCRIPTION & COUNT OF ALL PARAMETERS		
Parameter	Description	Count
Name	The name of the elderly care home.	9.921 (100%)
Group	This column shows if the individual care home is part of a group that operates multiple care homes. If the cell is blank, the group is either unknown or the care home is independent.	4.276 (43,10%)
Address	The address that the care home is located, displaying the street and number.	9.921 (100%)
Postal Code	Postal code of the city in which the elderly care home operates.	9.921 (100%)
City	City in which the care home's address is located.	9.921 (100%)
Region	Region that the elderly care home is active in. In Germany there are 1 regions in total, encompassing Baden-Württemberg, Bavaria, Berlin, Brandenburg, Hamburg, Hesse, Lower Saxony, Mecklenburg - Vorpommern, North Rhine-Westphalia, Rhineland-Palatinate, Saarland, Saxony, Saxony-Anhalt, Schleswig-Holstein and Thuringia.	9.921 (100%)
Capacity	In this column the capacity of each individual care home can be found. This value is expressed in the number of beds that the home has available.	9.584 (96,60%)
Website	The website of the care home, on which you can find more detailed information on each individual care home.	9.123 (91,96%)
Monthly Fee	The starting monthly fee of the elderly care home.	8.290 (83,56%)

France

The French care home market totals more than €19bn

Context

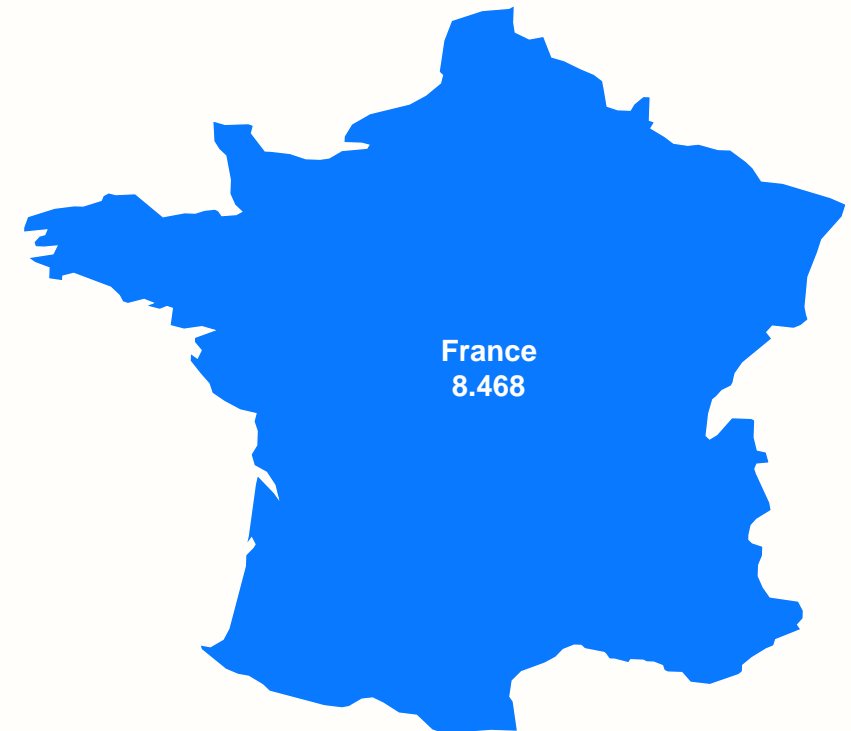
The elderly care home market in France, also known as the "maisons de retraite," has been growing in recent years due to an **aging population** and **increasing demand for long-term care services**. The current market in France offers beds for approximately 726.000 persons. This considers **care homes, residential homes and nursing homes**.

There are **8.468 care homes** in France, totaling a **market size of more than €19bn**. The market is divided into two main sectors: **public and private**. Public care homes are managed and financed by the government, private ones by private companies that have a broader range of services and amenities.

The **French government** has implemented several measures to **increase the availability and accessibility of care homes**, including the construction of new facilities and the modernization of existing ones. Additionally, the government provides financial assistance to those who are eligible to help cover the costs of care.

The private sector of care homes in France is also growing. The **private care homes provide more amenities, services and better infrastructure**. They are also known for providing specialized services such as memory care and rehabilitation, which can be beneficial for those with specific health needs.

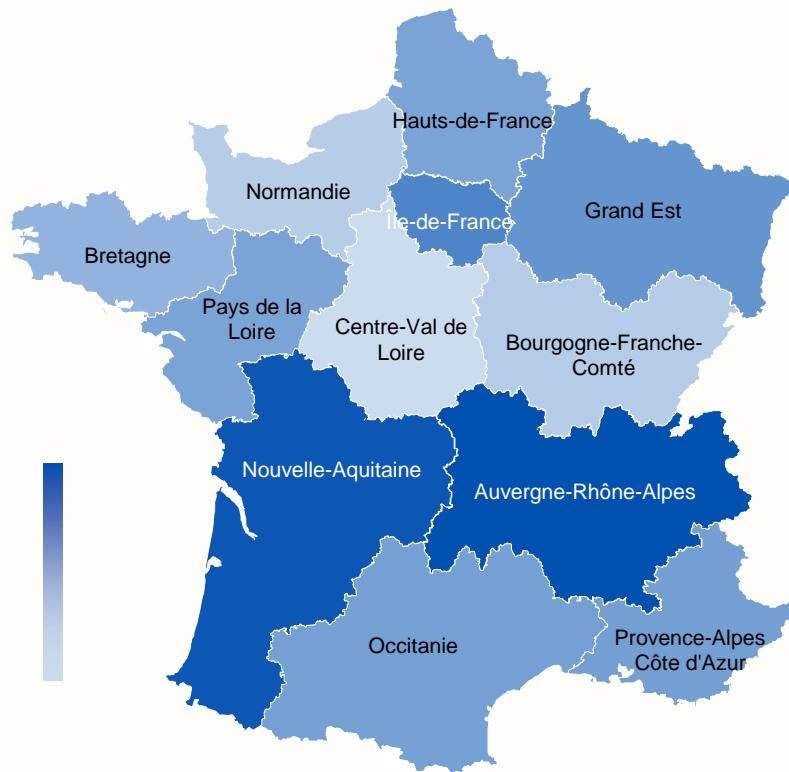
Geographical coverage



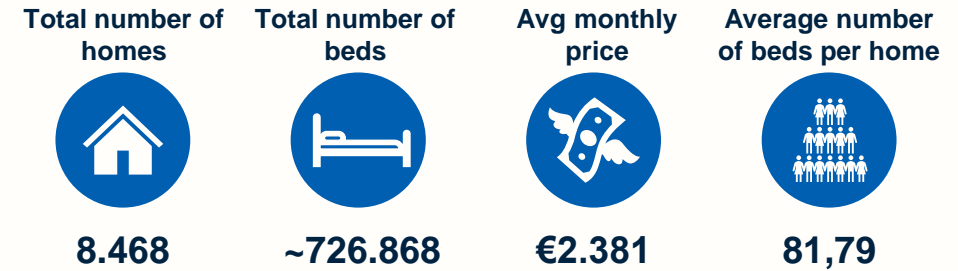
Statistics France

There are 8.887 care homes in France that account for around 726.000 beds

Number of homes per region



Aggregated country statistics



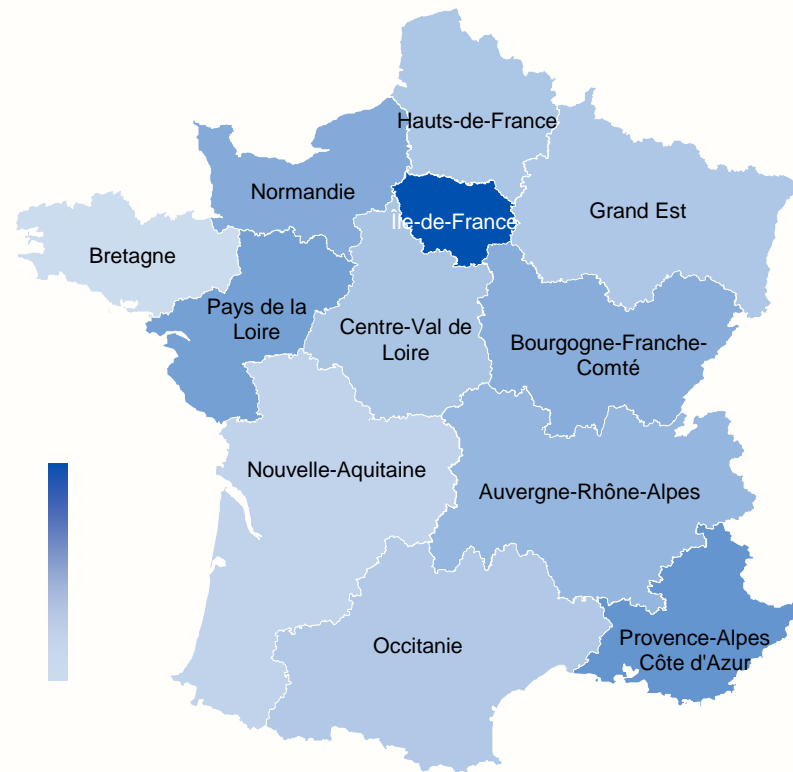
Per company insights included in the database

- Name
- Group
- Address
- Region
- Phone Number
- Website
- Lowest Monthly Fee
- Capacity (beds)

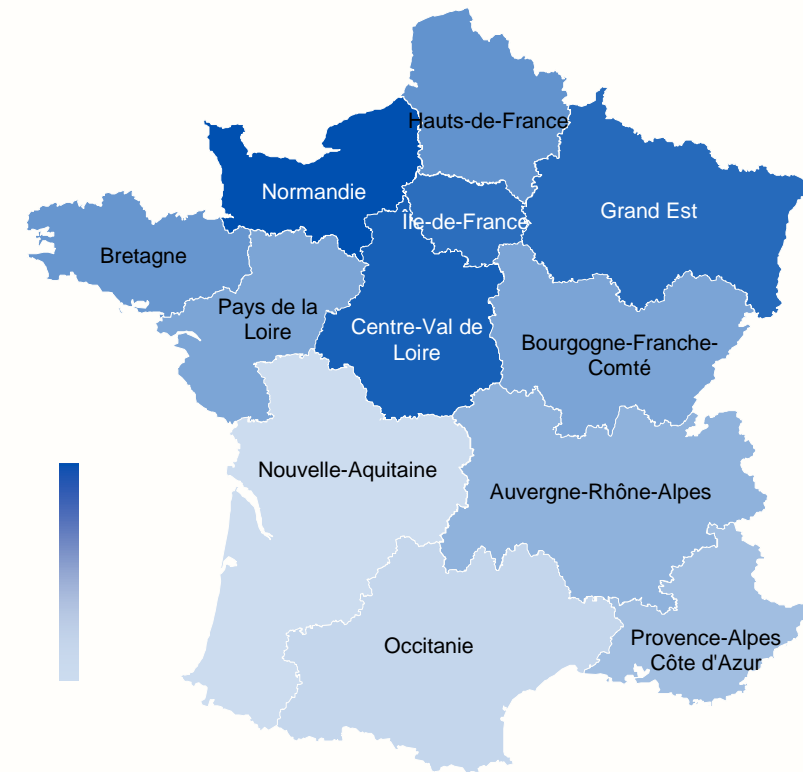
FR Regional Statistics

The largest homes are in the North of France, the most expensive ones close to Paris

Average Monthly Fee per Bed by Region



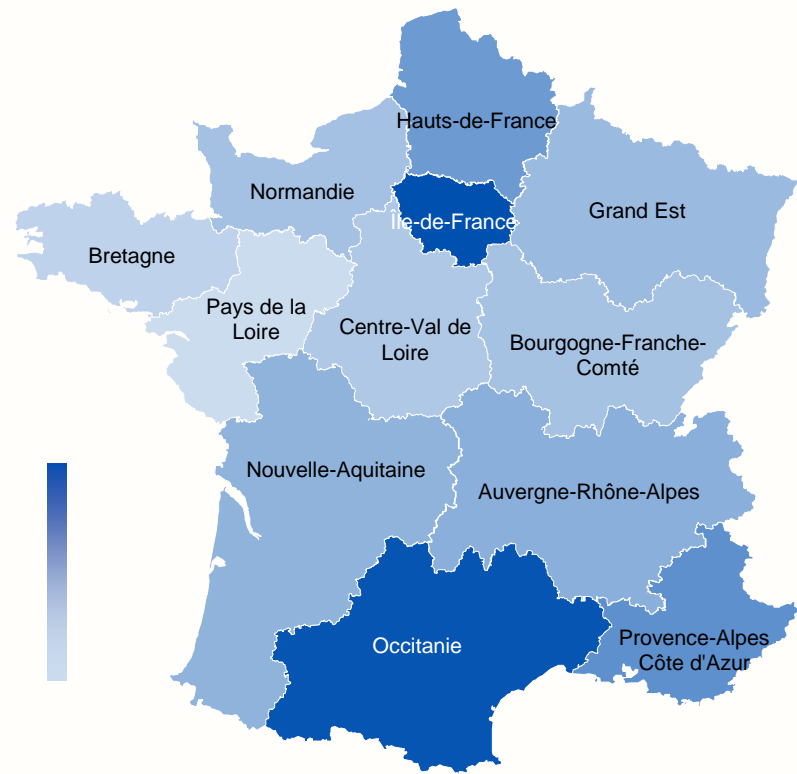
Average Home Capacity (# of beds) by Region



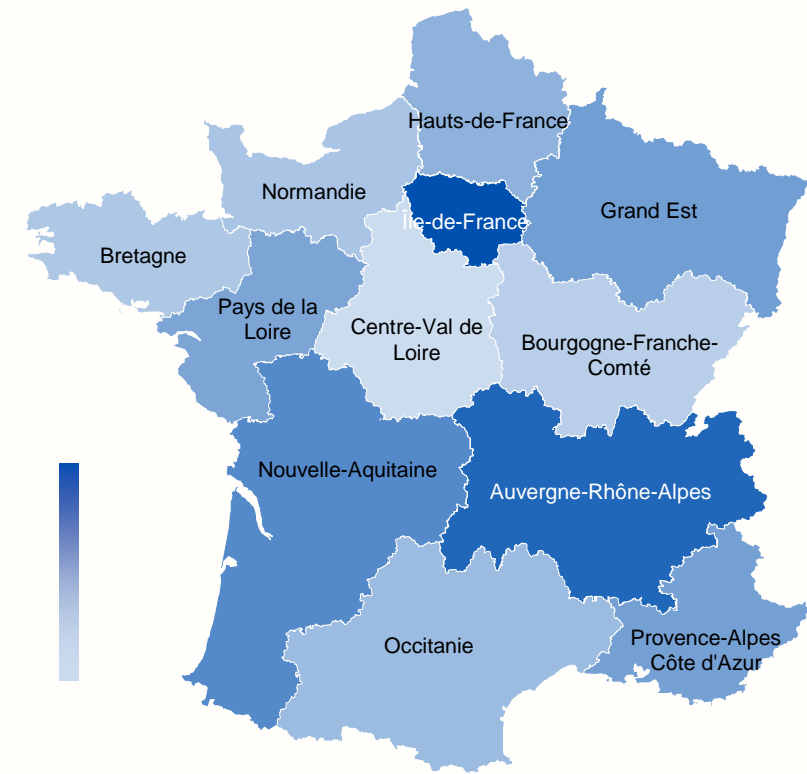
FR Regional Statistics

Ile-de-France offers a large and still attractive elderly care home market

Number of Inhabitants over 60 per Bed by Region



Total Yearly Market Size* by Region



Note: The database contains data as of 17/12/22

*Market size = total homes * avg capacity * avg price/year * avg occupancy rate (source: Statista)

Overview of elderly care home groups in France

There are 81 groups in France that operate 2.048 homes

Market Definition and Segmentation

- Market : **France**
- **Elderly Care Homes**
- Market Segmentation
 - **Independent**: only 1 home
 - **Small**: between 2 – 10 homes
 - **Medium**: between 11 – 50 homes
 - **Large**: above 50 homes

Identified Groups in 2022 Dataset*

Category	Number Groups	Total Number of Homes	Avg Nbr of Homes
Large	7	1.090	156
Medium	30	750	25
Small	44	208	4,7
Total Group	81	2.048	25,3
Independent	6.839	6.839	1
Total	6.920	8.887	1,28

Top 10 Groups	# of homes
Korian	270
Orpea	220
DomusVi	198
Colisée	162
MARPA	88
...	77
...	75
...	50
...	50
...	49

Descriptive statistics of the French care home market dataset

The dataset offers information on 9 different parameters for 8.468 care homes

DESCRIPTION & COUNT OF ALL PARAMETERS		
Parameter	Description	Count
Name	The name of the elderly care home.	8.468 (100%)
Group	This column shows if the individual care home is part of a group that operates multiple care homes. If the cell is blank, the group is either unknown or the care home is independent.	2.004 (23,67%)
Address	The address that the care home is located, displaying the street and number.	8.468 (100%)
Postal Code	Postal code of the city in which the elderly care home operates.	8.468 (100%)
City	City in which this address is located.	8.468 (100%)
Region	Region that the elderly care home is active in. In France there are 13 regions covered, which are Auvergne-Rhône-Alpes, Bourgogne, Bretagne, Centre-Val-de-Loire, Grand-Est, Hauts-de-France, Île-de-France, Normandie, Nouvelle-Aquitaine, Occitanie, Outre Mer, Pays de la Loire et Provence-Alpes-Côte d'Azur.	8.468 (100%)
Website	The online website of the elderly care home.	1.531 (18,08%)
Monthly Price	The starting monthly price that the care home charges to its residents.	872 (10,30%)
Capacity	In this column the capacity of each individual care home can be found. This value is expressed in the number of beds that the home has available.	6.258 (73,90%)