



The **Regulation** and
Quality Improvement
Authority

Registered Nursing and Residential Homes and Beds Trend Report

2008 - 2018



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Introduction

The purpose of this report is to track the changes in both the nursing home and residential home regulated sectors over a ten year period (commencing 1 October 2008 and ending 30 September 2018) and to identify trends in this data. This information will also be analysed in relation to assumptions made about the sector during this time period.

It should be noted that when bed numbers are referenced, this represents the combined maximum number of users which the homes are registered to accommodate and not the number of beds occupied at that point in time.

Key Findings

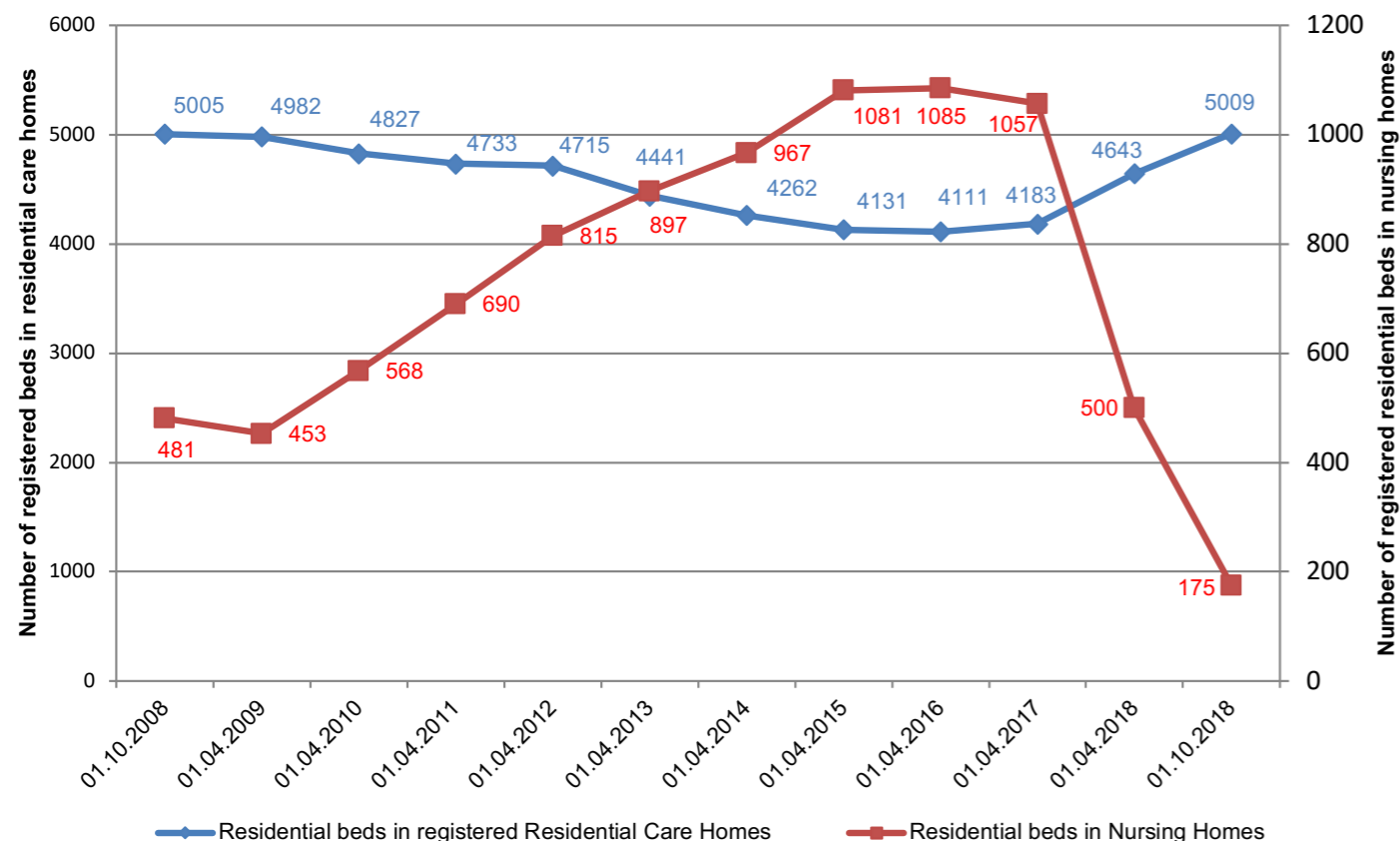
- As of 1 October 2018, there were 16,007 registered beds in all registered nursing and residential care homes across Northern Ireland. This represents a 4% increase in the total number of beds in the sector over a ten year period.
- The number of nursing beds increased by 10% between October 2008 and September 2018.
- The overall number of residential beds has decreased by 6% over the same period. The closure of stand-alone statutory residential homes has been partially offset by the registration of residential units in nursing homes.
- The total number of registered beds across both nursing and residential homes has increased by 663 beds (or approximately 4%).
- The number of statutory residential care homes has decreased from 62 down to 44.
- The 10% growth in the nursing sector is double the total population percentage growth for Northern Ireland between 2008 and 2017, but less than half the percentage growth for persons aged 65 years or older.
- Both the majority of new build premises and variations relating to internal improvements or extensions have been for nursing homes.
- The profile of the largest nursing home providers has changed, with the largest provider reducing its portfolio, the second largest folding, and new companies moving into the sector.
- The number of homes registered to provide dementia care has increased significantly, with 49% of care homes now registered for category DE (Dementia).

Frequently Asked Questions

Question 1 - Has the number of residential homes / beds been substantially reduced?

- Yes, but perhaps not to the extent which one would have expected.
- The figures show the number of registered residential care homes on our register decreased significantly, from 317 in October 2008 to 227 in September 2018. However, this decrease includes 61 de-registered adult placement settings and a number of mergers of registration.
- The number of stand-alone residential homes fell to 195 by 1 April 2017 but there has subsequently been an artificial increase due to separate registrations of residential units in nursing homes.
- When analysing the change in residential bed numbers, we must consider both the bed numbers within residential care homes and also the residential beds in nursing homes. The chart below provides a good visualisation of the decrease in residential home beds, the corresponding increase in residential beds in nursing homes, and these beds moving back to the residential side as providers opted for separate residential registrations.

Figure 1: Registered residential beds across residential and nursing homes 2008 – 2018

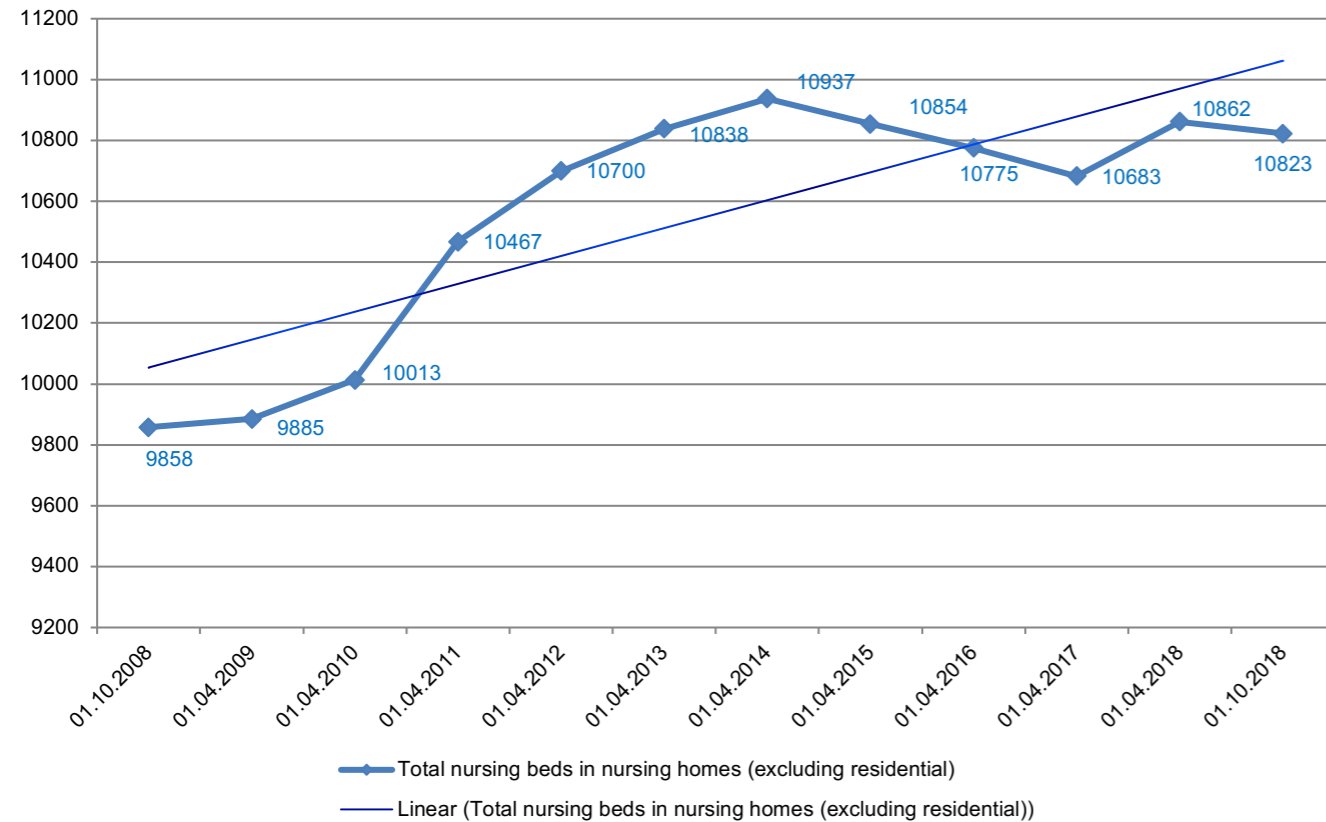


- Overall, the total number of registered residential beds across the sector has decreased by 302 over this 10 year period.
- The most noticeable decrease in residential care has been in the statutory sector, where the number of registered homes has decreased by 18 across all 5 Trusts and the number of beds by 627.
- A halt on further closures pending consultations was called by the Department in 2014; however, several of the remaining 44 homes are not thought to be operating at full capacity and/or are not accepting new admissions.
- The number of small residential homes, dropped from 41 in 2008 to just 11 in 2018.
- The conversion from residential care to supported living has accounted for 11 residential homes cancelling their registrations, although the overall reduction in residential beds as a result of this trend has been small.
- In addition to the above, a number of private residential care homes have also closed during this ten year period.
- These cancellations have not been offset by the registration of new residential care homes. When we exclude the residential units in nursing homes, there have been 16 new residential homes registered in 10 years (less than half the number of new nursing homes).

Question 2 - Has the number of nursing homes / beds increased?

- The total number of registered nursing homes has decreased from 252 in October 2008 to 248 in 2018, but this reduction can partly be explained by mergers of registrations (i.e. where formerly a nursing home had multiple registrations on one site but opted to merge under one central registration).
- In real terms the number of registered nursing homes has increased, with 34 new homes opening compared to 22 closures.
- Furthermore, a large proportion of nursing homes have submitted variations to increase their bed numbers (88 variations approved October 2008 – September 2018).
- The number of registered beds within nursing homes has gone from 10,339 in October 2008 to 10,998 in September 2018. However, this includes residential beds in nursing homes. When we exclude residential, the number of nursing beds has gone up from 9,858 to 10,823 (an increase of 965 beds, or approximately 10%).

Figure 2: Total number of registered nursing beds in nursing homes 2008 – 2018



- Although there have been more new homes registered than de-registered (when mergers are excluded), closures of individual nursing homes have nevertheless impacted upon local areas as well as the service users and relatives directly affected.
- Furthermore, the closure of multiple homes in a short time period will put pressure on the system.

Question 3 – Have certain trust areas been impacted more by closures?

- The overall number of nursing beds has increased during this period, while residential care homes/beds have decreased. However, there are geographical variations in the numbers (see appendices 1 and 2).
- The Northern Trust had the most nursing homes opened during the 10 year period (13) and is also the only trust to have seen an increase in their overall number of residential care beds (explained mostly by the fact that most of the new build nursing homes in this trust area also had residential units attached).
- There are also regional variations within trust areas. For example, of the five nursing homes closed in the Western Trust between 2014 and 2018, three were located in County Fermanagh (Enniskillen, Irvinestown and Belleek) and two in mid and west Tyrone (Newtownstewart and Omagh).

- Although new nursing homes have opened in Omagh, Limavady and Derry/Londonderry, there have been no new homes located in Fermanagh to replace those which have closed as of 30 September 2018). This tends to back up the evidence of a shortage in nursing homes in that county.
- The Western Trust has also seen a substantial decrease in their number of residential beds (falling by about 25%). This decrease can partly be explained by the transfer of service users from residential care to supported living, but there has also been the closure of several small homes and statutory homes located in Enniskillen, Omagh, Castlederg and Lisnaskea.
- Belfast is the only Trust to have seen a decrease in their number of nursing beds between 2008 and 2018, albeit only a nominal decrease of five.
- It is likely that the Belfast Trust has placed patients in homes located in the Northern and South Eastern areas, as these trusts cover towns and suburbs located within the Greater Belfast area.
- The South Eastern Trust in particular had a large increase in nursing beds due to the registration of several large homes and also extensions to existing homes.
- Three of the 7 newly registered homes in the South Eastern Trust area are located in Dunmurry, just to the south-west of Belfast.

Question 4 – Have the larger providers now obtained a larger share of the care home sector?

- The percentage of nursing homes/beds carried on by the 10 largest nursing homes providers has remained fairly static. However, the number of homes carried on by single providers has decreased.
- There have also been changes in the profile of the largest providers, with Four Seasons decreasing their number of homes/beds by about 10% and the second largest provider (Southern Cross) leaving the sector.
- Some existing providers have expanded their number of homes while other new providers have entered the sector (mostly notably the English based Priory Group and Runwood Homes, but also local based companies such as Larchwood Care Homes and Healthcare Ireland).

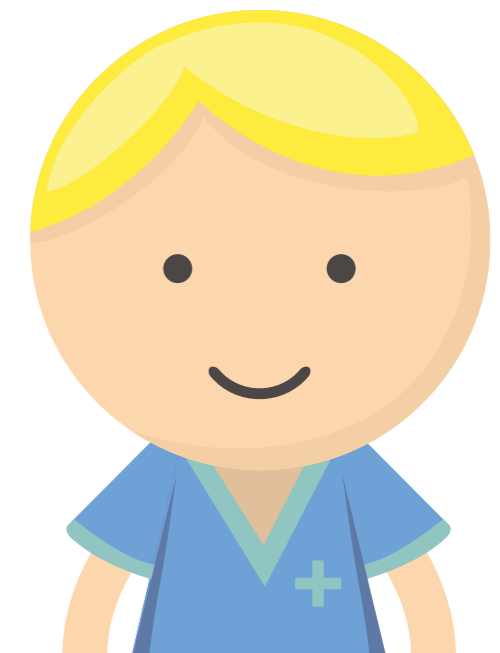


Figure 3: Registered nursing homes by provider 01 October 2008

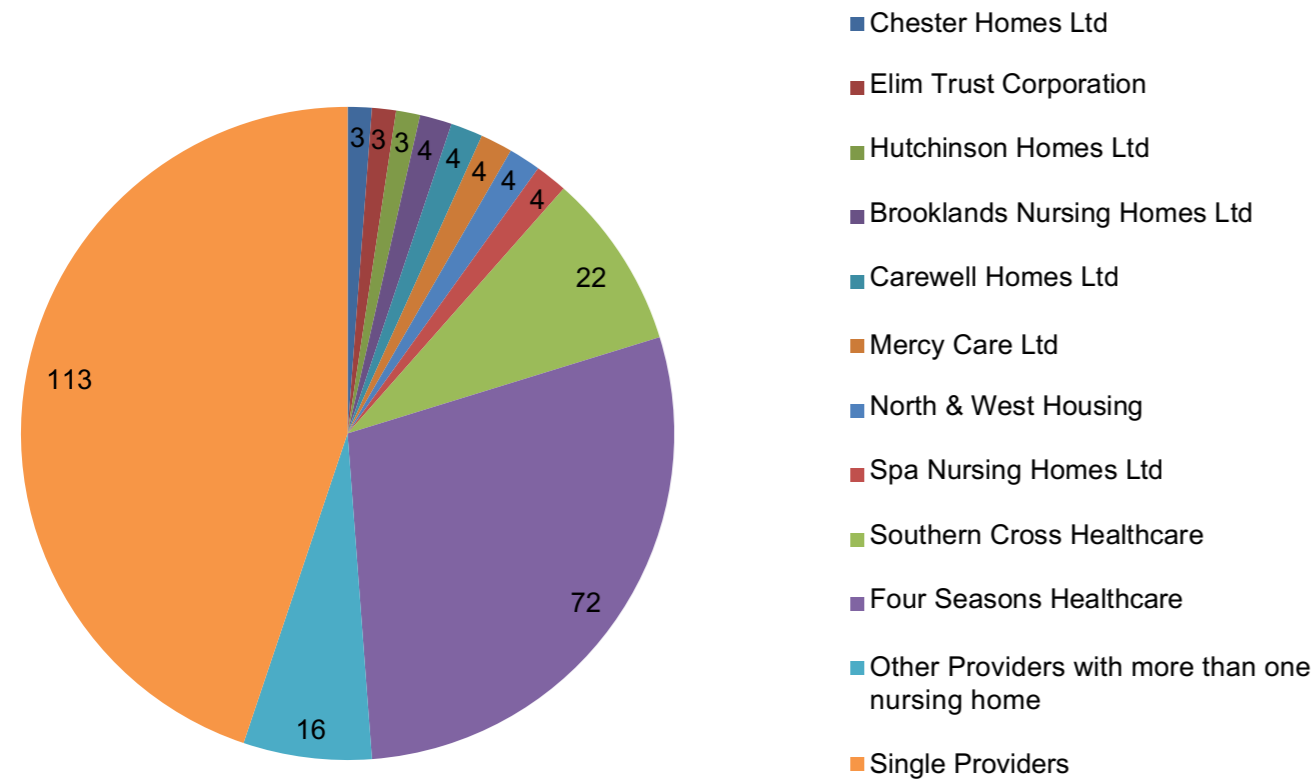
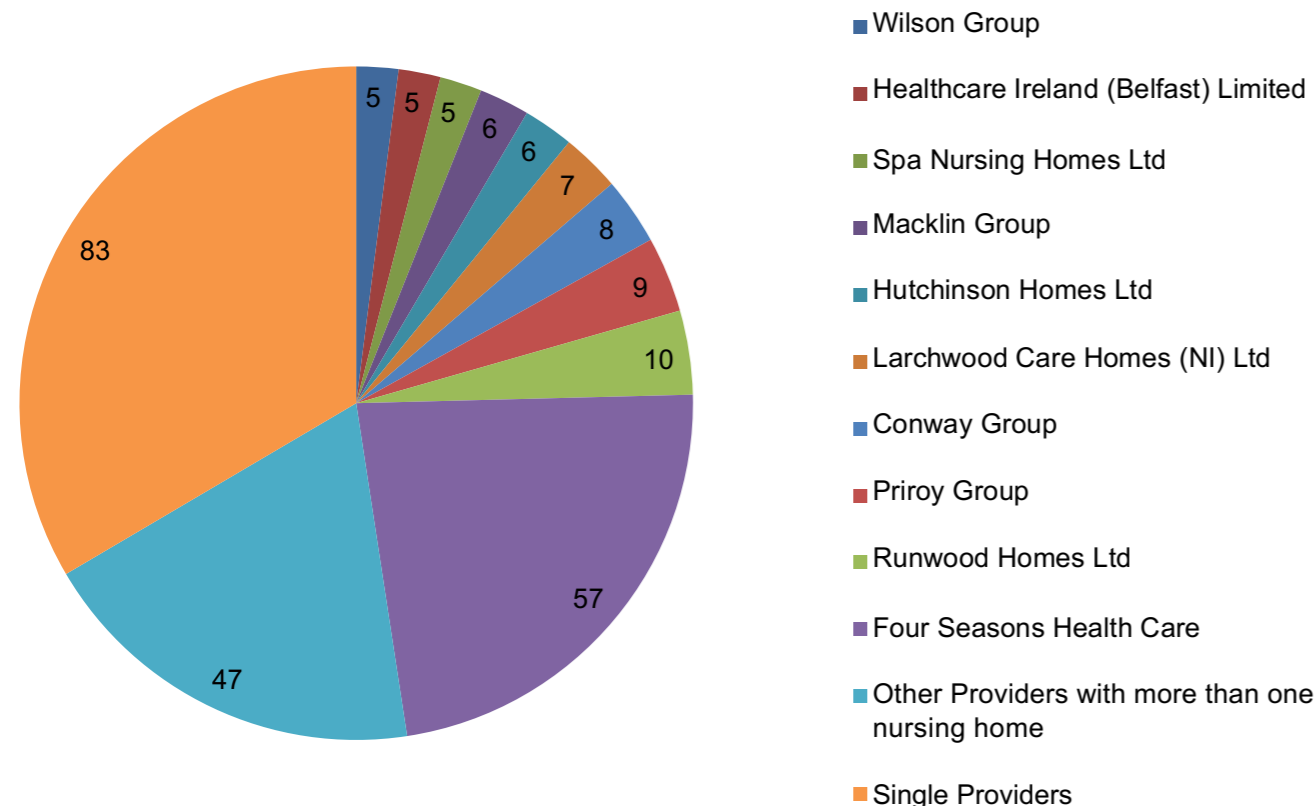


Figure 4: Registered nursing homes by provider 30 September 2018



- In the residential home sector, the main changes have been a decrease in the number of homes carried on by the HSC trusts and an artificial increase in the homes carried on by the larger nursing home providers, due to the outcome of the residential beds in nursing homes project.
- There has however been a decrease in the number of independent and voluntary providers carrying on small residential homes.

Question 5 – have the number of homes / beds registered for dementia patients increased?

- Anecdotal evidence combined with the analysis of new registrations and variations suggests a substantial increase in dementia care provision within registered care homes over the last 10 years.
- Twenty-four of the 34 newly registered nursing homes had the dementia category and a large proportion of variation applications made by nursing homes were either to add the dementia category or increase their number of dementia beds.
- This assumption is further backed up by a comparison between the 2008 and 2018 figures.
- In October 2008, 64 out of the 252 nursing homes were registered for category DE, and of these 22 were registered solely for dementia beds, with the remainder registered for DE along with other categories of care.
- The maximum number of dementia beds within nursing homes at this time was 1,752 (the majority of nursing homes registered for multiple categories of care will have a breakdown of their numbers per category as a condition of registration).
- Also in 2008, 17 out of the 256 residential care homes (excluding adult placement settings) were registered for the dementia category. Eleven of these homes were solely for dementia residents.
- The total number of dementia beds within residential homes was 408.
- The October 2018 figures show a substantial increase in both the number of nursing and residential homes registered for category DE and in the total number of registered dementia beds.
- 108 out of the 248 nursing homes were registered for category DE and the maximum number of dementia beds in the nursing home sector was 2,722 (i.e. an increase of 970 places since 2008).
- Paradoxically, the number of 'sole' dementia nursing homes has actually decreased from 22 to 16 over the same time period, indicating that providers have opted for multiple category registrations more frequently.
- The increase in residential dementia provision appears to be even greater, with 124 of the 227 residential care homes registered for category DE as at 30/09/2018 and a maximum of 2,016 dementia beds in residential homes.

However, the residential total may be inflated for two reasons:

- Firstly, 30 of the 124 homes are sub-categorised as residential within nursing homes meaning they are separately registered residential units on the same site as nursing homes, and these 30 registrations account for 608 residential dementia beds.
- Secondly, not all of the residential care homes registered for category DE alongside other categories of care have breakdowns of their number in each category. Where this is the case, the maximum number of dementia beds is taken to be the same as the maximum number of beds within the home. It is unlikely this is case for most of these homes; therefore the figure will be inflated.

- Nevertheless, the figures show that 232 of the 475 registered nursing and residential homes as at 30/09/2018 did have the DE dementia category. This accounts for 49% of all registered homes, up from only 16% in October 2008.
- In terms of registered beds, in October 2018 there was a potential maximum of 4,738 dementia beds across all registered nursing and residential homes in Northern Ireland and this accounts for 30% of all the registered care home beds. In October 2008, this percentage was 14%.

Figure 5: Proportion of nursing homes registered for dementia, 2008 compared to 2018

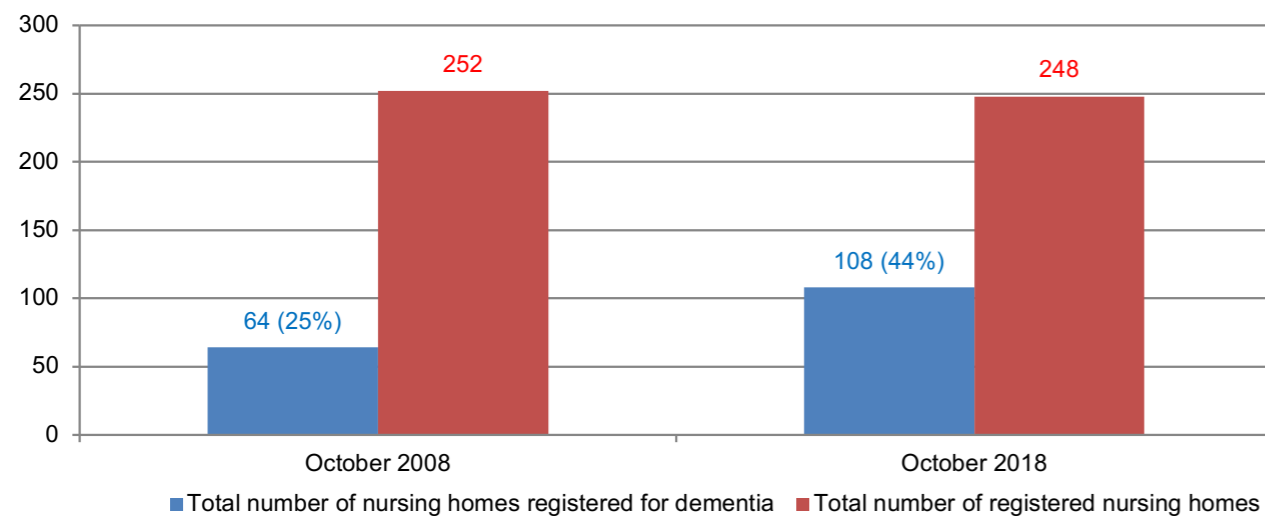
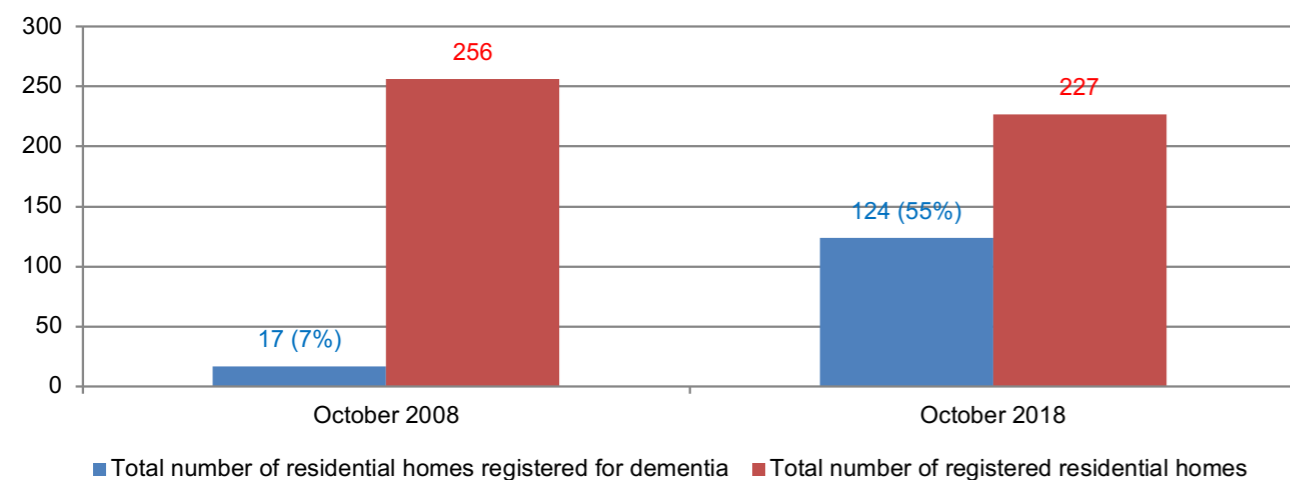


Figure 6: Proportion of residential homes registered for dementia, 2008 compared to 2018



Residential Care Homes – Trend data summary

The total numbers of registered residential care homes and residential beds have both reduced significantly over the last ten years (Figure 1). This has been impacted by a number of factors:

1. The deregistration of adult placement settings

- The total number of homes as registered with RQIA on 1 October 2008 was 317, however this included 61 adult placement settings which no longer required registration with RQIA due to the publication of the Adult Placement Agency Regulations in 2007.
- These 61 residential homes were de-registered through a rolling process from 1 October 2008 – 30 September 2009. Figure 1 shows that the impact was primarily in the Northern and Southern trusts. As these placements were all registered as small homes¹ and the majority had only one placement, the impact of their de-registrations had a negligible impact on the total bed numbers.

2. Mergers of registration

- During the third quarter of 2008-09, two providers completed mergers of multiple registered residential units on the same site, resulting in 16 deregistrations.
- In all, 25 residential home de-registrations which occurred during this 10 year period were either due to mergers of registration or residents being moved into new residential accommodation.

3. Closures

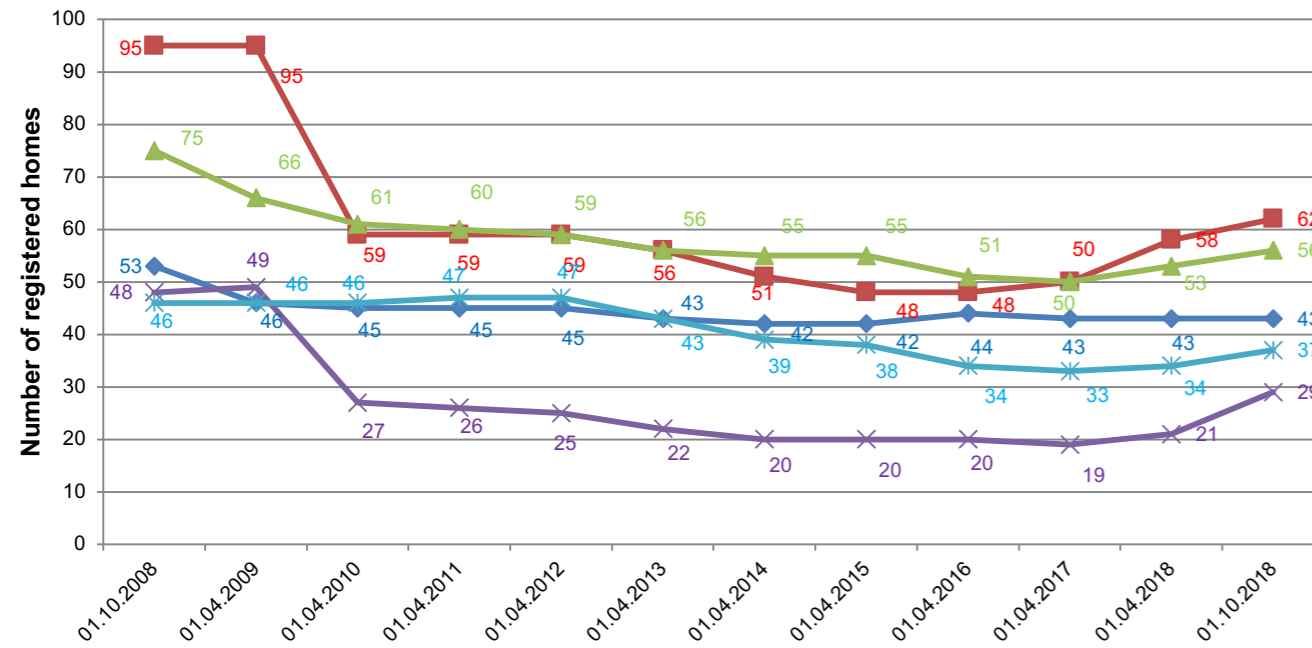
- There have also been a significant number of home closures excluding those accounted for above, resulting in the total number of residential homes being reduced falling to 194 in July 2016.

4. Increase due to residential beds in nursing homes project

- The figure has subsequently increased to 227 by 01.10.2018, this total reflects the 39 residential units within nursing homes which now require separate registrations. Figure 1 shows that the only Trust where numbers were not affected significantly was Belfast Trust.

¹ A small home is defined under the 2005 Registration Regulations as an establishment with three or less registered beds.

Figure 7: Number of registered residential care homes 2008 to 2018



There were 5,468 residential beds in October 2008, this decreased to 5,311 in January 2010 (due to the closure of three statutory homes in late 2009), before increasing again and peaking at 5,530 in April 2012, followed by a substantial drop after this date due to the number of home closures, particularly the closure of statutory residential homes during 2012 and 2013.

Tables 1 and 2 show that the number of registered residential homes decreased by 43 (18%) between 01 April 2010 and 31 March 2017, whereas the number of residential beds registered within residential care homes decreased by 644 (13%).

Table 1: Numbers of registered residential care homes April 2010 and April 2017

Date	BHSCT	NHSCCT	SEHSCT	SHSCT	WHSCT	Total
1 April 2010	45	59	61	27	46	238
1 April 2017	43	50	50	19	33	195
Net change	-2	-9	-11	-8	-13	-43

Table 2: Numbers of registered residential care beds April 2010 and April 2017

Date	BHSCT	NHSCCT	SEHSCT	SHSCT	WHSCT	Total
1 April 2010	1,289	1,025	1,267	481	765	4,827
1 April 2017	1,164	909	1,138	420	552	4,183
Net change	-125	-116	-129	-61	-213	-644

- The decrease in residential homes from 1 April 2012 – 1 October 2013 was partially offset by an increase in residential beds within nursing homes which occurred around the same time.
- What we have therefore seen is a substantial decrease in the number of ‘stand-alone’ residential homes but an increase in residential homes registered on the same site as nursing homes.
- This factor has offset some of the impact of the closure of homes and loss of residential beds – however, there was still a total decrease of 302 residential beds over this ten year period (i.e. approximately 6%).

New Registrations

- A total of 55 residential home registrations have been completed during this 10 year period – however, the bulk of this number are residential units within nursing homes which required separate registrations (39 in total).
- 16 new ‘stand-alone’ residential care homes were registered between 2008 and 2018, 8 of which were homes for learning disability patients.
- These 16 new homes range in size from one 3 bedded respite unit to a 57 bedded home (a nursing home re-registered as a residential care home). Six of these new homes have less than 10 beds.

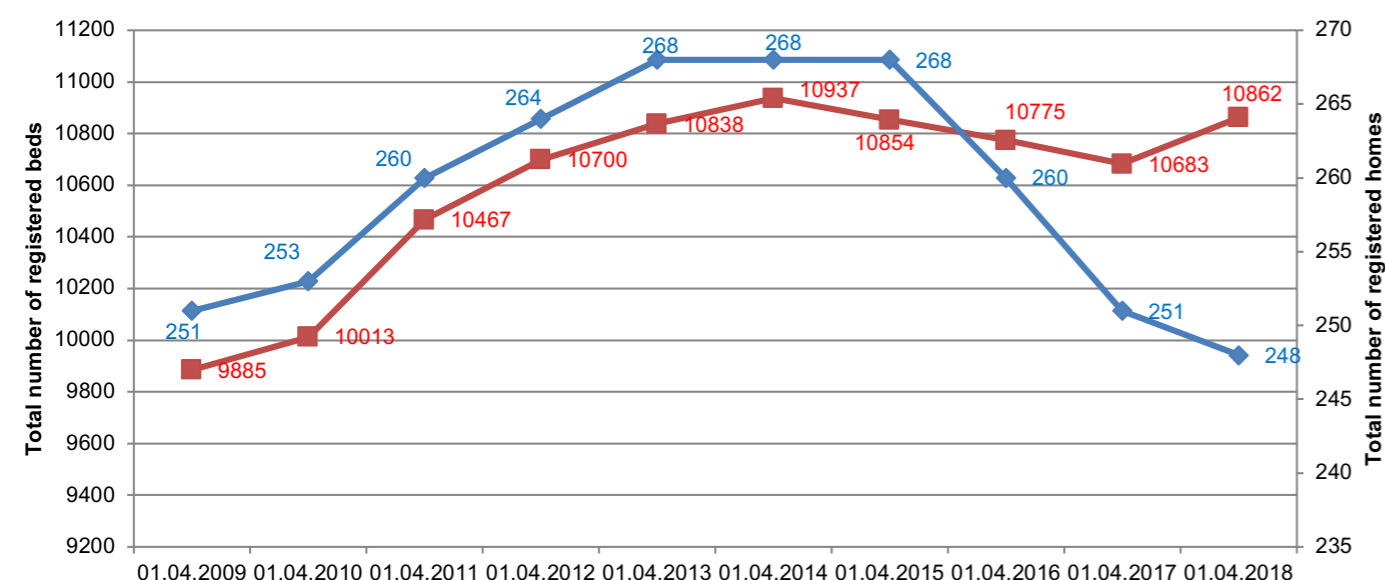
Cancellations

- Small residential homes:
- In terms of closures, the number of small residential care homes (excluding adult placement settings) has decreased from 41 in October 2008 to 11 in 2018. The most commonly stated reason for cancellation was that their service was no longer financially viable.
- Statutory homes:
- The number of statutory residential care homes decreased from 62 in 2008 to 44 in 2018. In addition to the closures, several of the remaining statutory residential homes are not operating at full capacity and/or not accepting new admissions. The maximum number of registered statutory residential beds dropped by over a third (from 1,715 to 1,088) over the same time.
- Conversion to supported living model:
- In total, 11 of the residential homes which de-registered from 2008 – 2018 converted to supported living services and therefore required re-registration under the domiciliary care regulations/standards.
- These 11 cancellations resulted in a total reduction of 145 residential beds. However, most of the existing service users accommodated within these services were reassessed and categorised as supported living tenants.

Nursing Homes – Trend data summary

The overall number of nursing homes has remained fairly constant across the Trusts over the last ten years, increasing from 251 in 2009 to a peak of 268 from 2013 to 2015 before falling to 248 in 2018 (Figure 2). The number of nursing homes in the Northern Trust area has increased from 62 in 2008 to 67 in 2018. Meanwhile, the numbers of homes in both the Belfast Trust and the Western Trust have both decreased (by 7 and 5 respectively). It should be noted that some nursing homes historically had multiple registrations for different suites/units, and therefore the total number of beds is a better indicator of service provision in this sector.

Figure 8: Registered nursing homes and beds 2009 to 2018



- There are 965 additional registered nursing beds in the sector in September 2018 than there were in October 2008 (i.e. an increase of approximately 10%). NB. This figure excludes residential beds within nursing homes.
- When residential beds are included, the increase in beds within nursing homes is reduced to 659 (approximately 6%) i.e. indicating a decrease of 306 residential beds within nursing homes between October 2008 – September 2018.
- There has been an increase in the number of registered beds in nursing homes across all trust areas with the exception of the Western Trust, where there has been decrease of 27 beds.
- The largest increases have been in the Northern Trust and South Eastern Trust areas (120 and 498 beds respectively).
- There was an increase in bed numbers for all of the Trusts (except Belfast) between 1 April 2010 and 1 April 2011. This was due to the registration of 7 new nursing homes and approval of 14 variations to increase bed numbers, all approved during this 12 month period.
- Again, the dip in overall numbers in four of the trusts between 1 April 2017 and 30 September 2018 is due to the residential in nursing homes project. The exception here is the Belfast Trust, where there have only been a small number of homes impacted by the work of this project.

New Registrations

- A total of 34 new nursing homes were registered between 1 October 2008 and 30 September 2018 with a total of 1,524 registered beds.
- The size of these homes ranges from a one-bedded nursing respite unit to an 84 bedded home, with an average size of 45 beds per home.
- Table 3 shows that the largest number of new nursing homes is located in the Northern Trust area.

Table 3: New nursing homes registered 2008 –2018 by HSC Trust

	Belfast	Northern	South Eastern	Southern	Western	Total
New nursing homes	4	13	6	6	5	34
Registered beds in new nursing homes	213	443	318	236	314	1,524

The 34 new homes are carried on by 17 different providers, with the Priory Group carrying on 8 and Runwood Homes 6 (see Appendix 3).

- The majority of these new homes (24) are registered for category DE (Dementia) and 21 are registered for both dementia care and category I (old persons not falling into any other category).

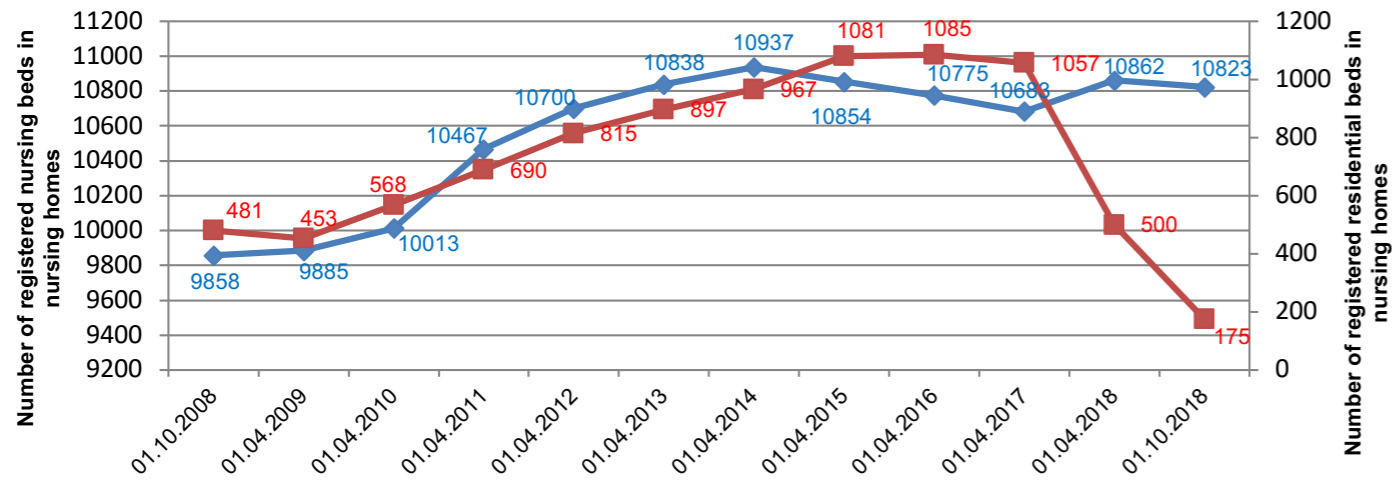
Cancellations

- As previously stated, several of the cancellations of registration processed in respect of nursing homes reflected mergers of registration which did not impact on the number of registered beds. However, a total of 22 nursing homes did close during this 10 year period.
- Nine of these closed homes were carried on by Four Seasons Healthcare (FSHC), five of which closed in December 2015 / January 2016. FSHC also sold three of their nursing homes to other providers in January / February 2016.
- One of FSHC's closed homes was subsequently re-registered as a residential care home under a new provider.
- One nursing home carried on by Runwood Homes was de-registered by RQIA through emergency enforcement action in August 2017.
- One closed home was subsequently replaced by a new build nursing home on the same site.

Residential beds in nursing homes

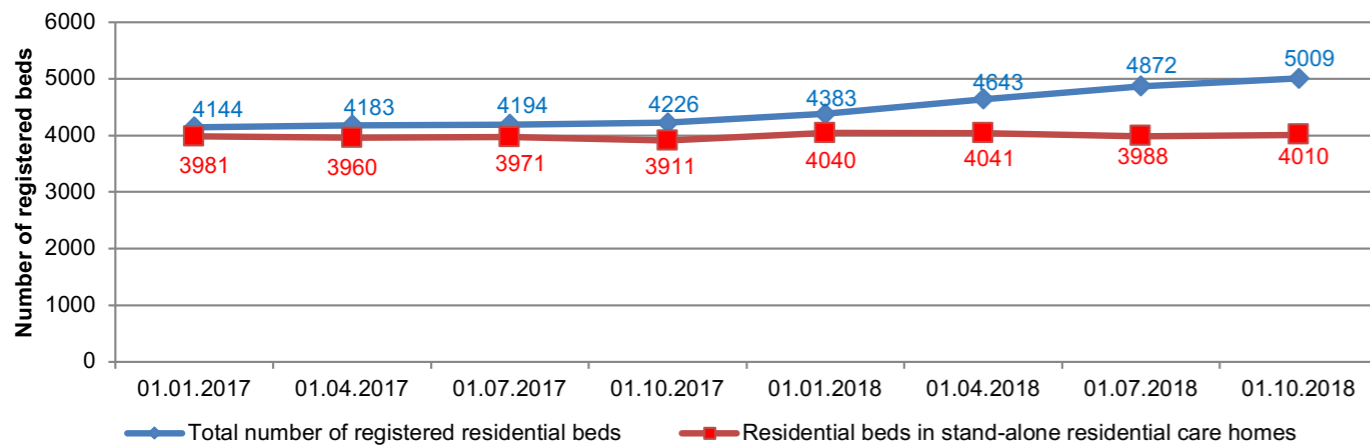
- The impact of the residential beds in nursing homes project is evidenced by the increase in registered residential homes and beds from April 2017 onwards (see Figure 1).
- Figure 3 below shows a significant increase in the number of residential beds registered within nursing homes between 1 April 2009 and 31 March 2015, followed by a steep decrease from 1 April 2017 onwards, mainly due to the requirement to register residential units within nursing homes separately.

Figure 9: Number of nursing beds and residential beds in nursing homes 2008 to 2018



- There were a small number of residential homes registered on the same site as nursing homes prior to April 2017, but the number significantly increased as a result of this project.
- Figure 4 shows the difference between the number of beds within stand-alone residential care homes and those separately registered but on the same site as nursing homes.

Figure 10: Residential homes beds by sub category 2017 - 2018



De-Registration of Adult Placement Settings

- In 2007, the Adult Placement Agencies Regulations were published by the Department of Health. This led to the registration of 4 adult placement agencies responsible for managing settings where care is provided.
- 61 adult placement settings previously registered as small residential care homes were de-registered as part of a rolling process from October 2008 to January 2010.
- These adult placement de-registrations coincided with a number of mergers of registration during the same period.
- There was a significant reduction in the overall number of registered residential care homes, from 317 in October 2008 to 238 in January 2010 (a reduction of 79, or 25%).
- However, the adult placement settings and other de-registered homes were small in size, so the decrease in residential bed numbers over the same time period was marginal (reduction of 193 beds, or a 4% decrease, see figure 5).

Figure 11: Registered residential homes and beds 2008 to 2010

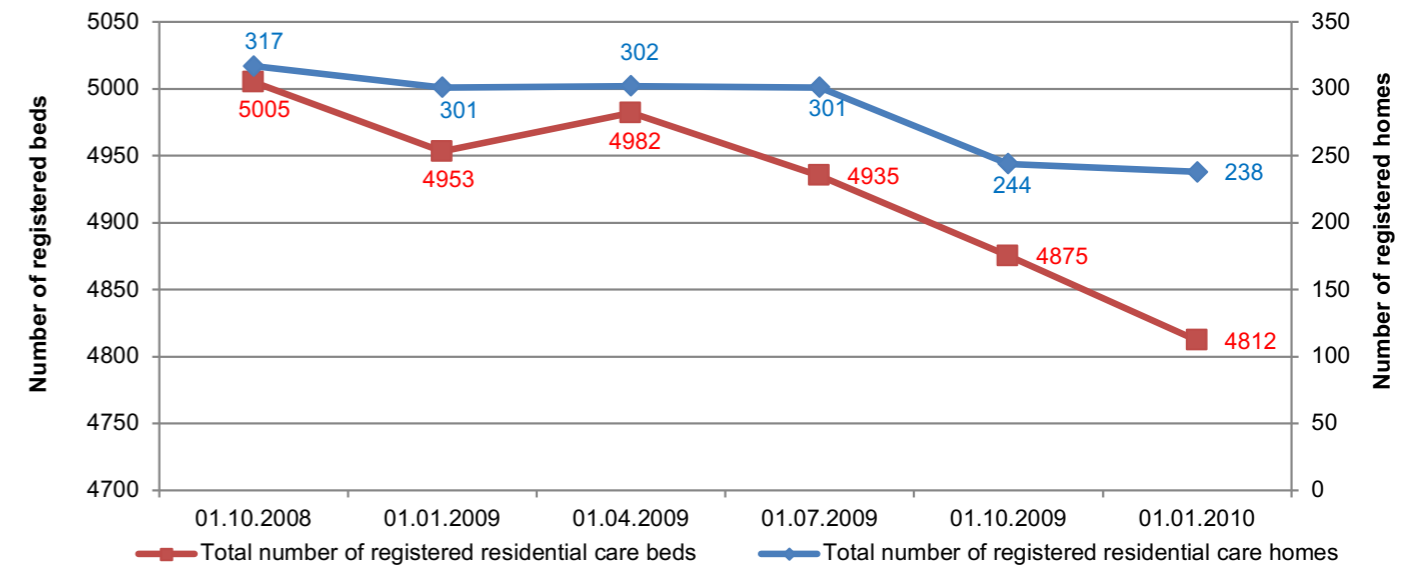
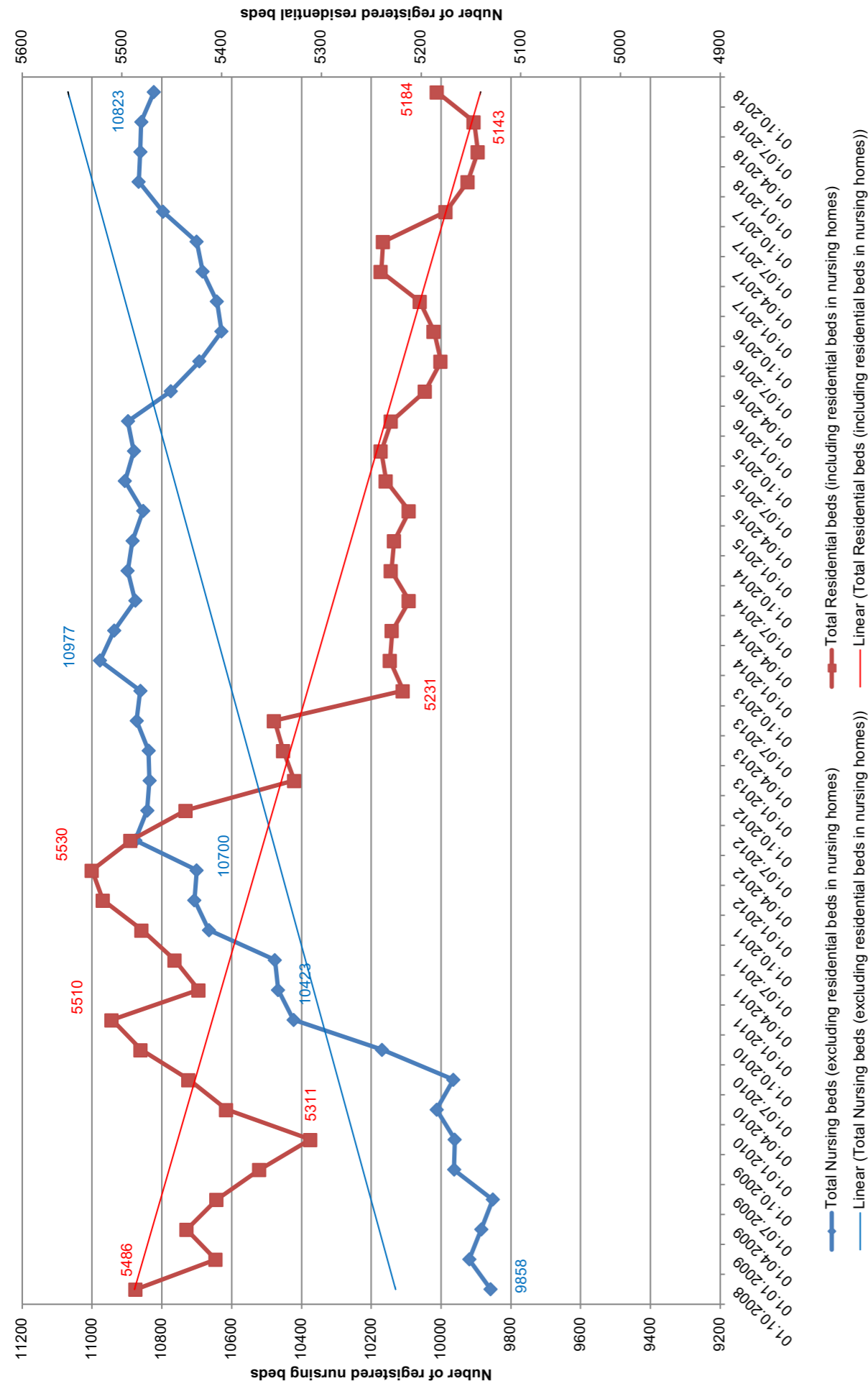


Figure 12: Total number of nursing and residential beds across all registered care homes 2008 - 2018



Summary by Trust area

- The net change in bed number over the 10 years can be further broken down by Trust area (see Appendices 1 and 2).
- Although there has been an overall decrease of 302 residential beds across Northern Ireland, the number of residential beds actually increased in the NHSCT area by 188.
- As the number of stand-alone residential homes in the Northern Trust decreased between October 2009 and April 2017, this increase must be accounted for by residential beds in nursing homes.
- The other four trust areas have seen their residential bed numbers decrease, the most notable being the Western Trust, where there has been the loss of 214 registered residential beds (or a reduction of 25%).
- In the nursing sector, the Belfast Trust area is unique in the fact that their overall number of nursing beds has decreased over the ten year period (although only by five).
- As per Appendix 3, there have only been four new nursing home registrations in the Belfast Trust area (the lowest of all five trusts) and one of these was a six bedded statutory unit.
- These new Belfast Trust homes/beds have been offset by closures and variation decreases.
- The Western Trust has seen a nominal increase of 50 nursing beds (or 3%) and the Southern Trust has increased by 192 beds (10%). Although the Northern Trust has seen the largest number of new homes registered and the largest increase in overall beds (i.e. when nursing and residential beds are combined), the South Eastern Trust has had the largest increase in nursing beds (486 beds or 25%).
- There has only been a small increase in the number of nursing homes in the South Eastern Trust area (52 to 54) however, the newly registered homes have been larger than the homes which have closed. Also, South Eastern Trust nursing homes have had a proportionally large number of variation increases when compared to the other trust areas.



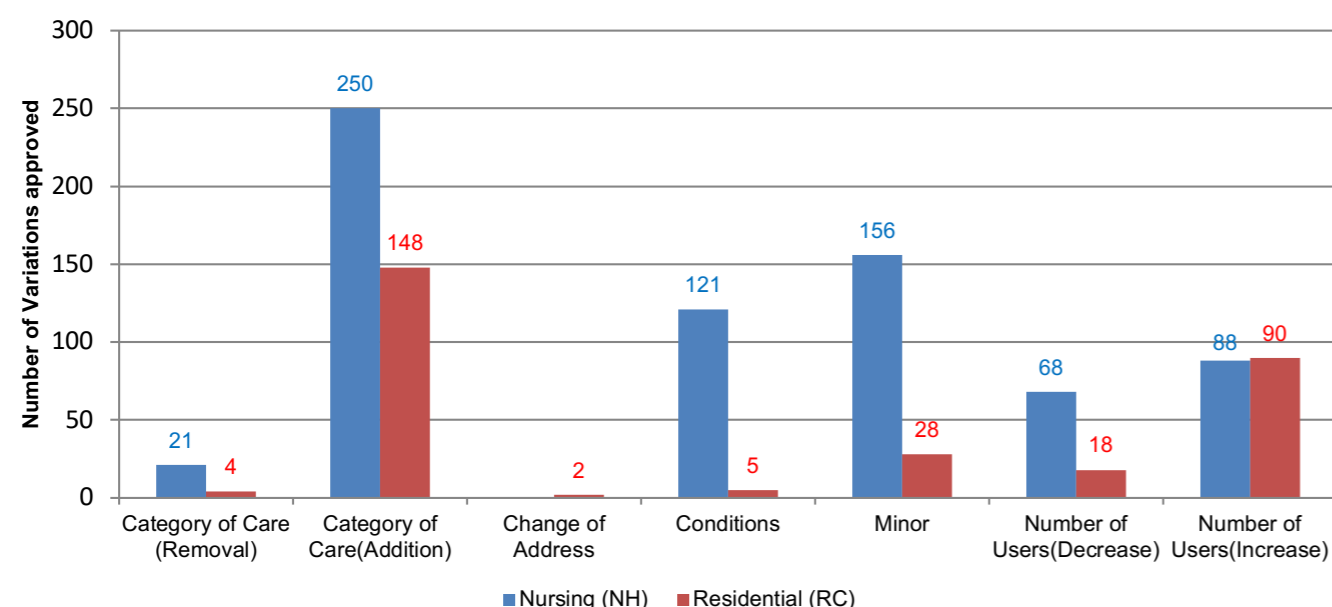
Comparison with NI population data

- Figures published by the Northern Ireland Statistical Research Agency (www.nisra.gov.uk) show the total population of Northern Ireland increased from 1,779,152 to 1,870,834 in 2017, representing a growth of approximately 4%.
- However, during this same ten year period, the population of persons aged 65 years or older has jumped from 247,500 to 302,975 (an increase of 22%).
- The percentage of persons 65 years or older as a proportion of the total population has increased from 14% to 16%.
- Over the same time period, the number of nursing beds has increased by 10% (see page 8).
- As established, there has been a reduction in residential beds. However, the overall number of beds in registered care homes has increased by 4%.
- Therefore, the percentage increase in nursing beds was less than half of the increase in the population aged 65 years or over.

Variations

- A total of 1,002 variations to registration were approved in respect of registered care homes between 2008 and 2018, of which 706 were for nursing homes (i.e. 71%) and 296 for residential care homes (29%).
- Almost 40% of the variations approved related to the addition of categories of care to a home's registration. Minor variations (usually relating to internal alterations to the building but not resulting in changes to their registration details) accounted for 18%, increases in the number of users/beds was another 18% and conditions of registration 13% (Figure 7).

Figure 13: Variations approved between 2008 and 2018 by service type



Residential beds in nursing homes

- Of the 121 variations categorised as 'conditions', most (75) were completed between April 2017 – September 2018 and related to the residential beds in nursing homes project, specifically where nursing homes opted to move to named residents only or to remove their residential categories.
- Likewise, the 36 reductions in bed numbers variations which were completed between April 2017 and September 2018 were predominantly nursing homes transferring their residential beds to separate registrations.

Minor variations

- The breakdown of minor variations shows that the large majority (84%) were submitted in respect of nursing homes, whereas minor variations received and approved for residential homes were relatively rare (only 28 approved in 10 years).
- A minor variation will generally occur when a home is making internal alterations to their building without impacting on the total number of bedrooms or categories of patients (for example, if they build a new nurse's station or sluice room).

Increases / decreases in bed numbers

- The figure for residential care homes going through an increase in numbers appears high (with 90 approved) – however, the majority of these increases were for small changes within the category numbers, whereas the bulk of substantial bed increases and/or extensions to premises occurred within nursing homes.
- Likewise, some of the reductions in bed number variations will actually have resulted from improvements to a home (for example, where double rooms are replaced with single rooms).

Variation trend analysis

- The above analysis of minor and increase variations, along with the figures relating to new registrations (which show the bulk of new build homes have been for nursing patients) indicates that there has been substantially more investment in building work within the nursing home sector than in the residential home sector.
- Two of the key variation types providing an insight into the trends within the sector are additions to care categories & increases in service user numbers.
- A large proportion of variations submitted for increases and/or additional care categories involved either adding the dementia category or increasing the number of dementia beds within the home.
- The high number of additions/increases for dementia places along with the bulk of new nursing homes being registered for category DE (24 out of 34 new registrations over 10 years) indicates a substantial increase in the dementia care provision within registered homes (see conclusion, question 5).

Changes of ownership – Largest Nursing and Residential Providers

- Accurate figures for changes of home ownership prior to 2014 are not available, but can still be used to provide overall trend figures with a focus on the largest independent providers.

Top ten largest nursing home providers

- In 2008, the ten largest providers of nursing homes together controlled 49% of the registered homes and 54% of the beds (see Appendix 4). However, Four Seasons and Southern Cross accounted for the bulk of these, with other providers accounting for only 3 or 4 registered homes.
- In 2018, the 'top ten' nursing home providers still controlled a comparable size of the market (48% of the homes and 52% of the beds, see Appendix 5). However, there have been significant changes in the profile of the top ten.
- Southern Cross (which was the second largest provider in 2008) is no longer in existence.
- Four Seasons remains the largest single provider but has reduced in size.
- The profile of the 'medium' sized providers has changed significantly with several companies expanding in size (including Hutchinson Homes, Spa Nursing and Brooklands Healthcare) while other new providers have come into the sector – Runwood Homes and the Priory Group, which are both English based companies, and Healthcare Ireland and Larchwood Care which are locally based.
- In addition to the above changes, we have seen a decrease in the number of nursing homes carried on by 'stand-alone' providers.
- For example, in October 2008, 113 out of the 252 registered nursing homes were either carried on by a sole person, a partnership or a single company which was not known to be part of a larger group or to carry on any other nursing homes in Northern Ireland. This constituted 45% of the total.
- In October 2018, this figure had fallen to 83 out of 248 registered homes (or 33%).
- It should be noted that statutory (or trust run) nursing homes are rare and tend to be small specialist units for learning disability or mental health patients. As of October 2018, there were four statutory nursing homes with a total of 25 registered beds.

Top ten largest residential home providers

- The 2008 figures (see Appendix 6) that the top four residential homes providers in terms of homes carried on were HSC trusts, with the Southern Trust being the sixth largest.
- The other large providers were either housing associations or voluntary organisations.
- The 'top ten' providers list for 2018 (Appendix 7) shows four of the five trusts are still on the list, but the number of homes carried on by these trusts has decreased.
- Runwood, Four Seasons and the Priory Group have all come into the top 10, largely due to the registration of residential units within nursing homes.

- Praxis has reduced their overall number of residential homes (partly due to mergers).
- North and West Housing (now Apex Housing) have converted all but one of their residential homes to supported living services.
- Also, the percentage of residential homes/beds controlled by the ten largest providers has decreased slightly over ten years.
- A large proportion (45%) of residential homes registered in 2018 are carried on by either a sole person, a partnership or a company which does not carry on any other residential homes in Northern Ireland. However, it should be noted that several of these entities are registered to carry on other service types, mostly nursing homes or supported living services.

Statutory residential care homes

- In October 2008, the Trust statutory sector accounted for 24% of residential care homes and 35% of the total registered residential beds.

Table 4: Statutory and Independent Residential Care Homes 2008 and 2018

	Statutory	Independent	Total	% Statutory
Registered statutory residential homes October 2008	62	194	256	24.2%
Registered statutory residential homes October 2018	44	183	227	19.4%

- The number of homes and beds within the statutory sector has decreased significantly over this ten year period, with only 19% of registered residential homes now carried on by the 5 HSC Trusts, accounting for 22% of the total residential beds.

Table 5: Statutory and Independent Residential Care Homes 2008 and 2018

	Statutory	Independent	Total	% Statutory
Registered statutory residential beds October 2008	1,715	3,207	4,922	34.8%
Registered statutory residential beds October 2018	1,088	3,921	5,009	21.7%

Focus on large independent providers

- Southern Cross– which was at the time the second largest care home provider in Northern Ireland – went into administration in 2011, resulting in 26 of their homes and 1,299 registered beds being re-registered under new providers.
- Several of these homes have gone through further changes of ownership in the years since, and two have closed.
- Runwood Homes only had one registered home in Northern Ireland as at 30 September 2008. Ten years later, they are registered to carry on 10 nursing homes, one residential care home and eight residential within nursing homes.
- In total, they are registered for 479 nursing beds and 329 residential beds, making them one of the largest care home providers in Northern Ireland.
- Of their 11 stand-alone homes, 7 were new builds while the other four were acquired from other providers (another home which was acquired in August 2016 was subsequently closed).
- The Priory Group had no registered care homes in Northern Ireland in October 2008. By 2018, they carried on nine nursing homes and six residential homes (two stand-alone and four residential in nursing homes). These services are registered under four subsidiary companies (all named Amore).
- In total they have 451 nursing and 120 residential beds. All of their homes are new builds with the exception of one which was acquired in June 2009.
- Four Seasons remain the largest overall care home provider in Northern Ireland; however, the group has shrunk in size due to several home closures and sales (as outlined above, see nursing homes cancellations, page 9).
- Four Seasons actually grew in size in 2011 when they acquired nine homes from Southern Cross Healthcare but subsequently reduced their portfolio through closures and sales of homes, and have further reduced their bed numbers through variation decreases.
- Their overall number of registered homes has decreased by six and their bed numbers by 310.
- As per the tables below, Four Seasons reached a peak of 86 registered homes and 3,884 registered beds in 2013; therefore, their total bed numbers decreased by 781 between October 2013 and October 2018 i.e. a reduction of 20%.
- The bulk of this decrease has been in their nursing homes, with the loss of 738 nursing beds in five years (21%), whereas their residential bed numbers have only decreased by 43 (or 12%).

Table 6: Four Seasons registered homes 2008, 2013, 2018

Date	Nursing Homes	Residential Care Homes	Total homes
30 September 2008	72	4	76
30 September 2013	80	6	86
30 September 2018	57	13	70

Table 7: Four Seasons registered beds 2008, 2013, 2018

Date	Total Nursing beds	Total Residential beds	Total beds
30 September 2008	3,162	251	3,413
30 September 2013	3,519	365	3,884
30 September 2018	2,781	322	3,103



Appendices

Appendix 1: Nursing Beds by HSC Trust area (excluding residential beds in nursing homes) 2008 – 2018

Year	Belfast	Northern	South Eastern	Southern	Western	Total
October 2008	2,092	2,511	1,941	1,870	1,444	9,858
October 2009	2,109	2,516	1,924	1,889	1,532	9,970
October 2010	2,192	2,581	1,950	1,909	1,537	10,169
October 2011	2,063	2,785	2,206	2,081	1,530	10,665
October 2012	2,000	2,937	2,346	2,082	1,509	10,874
October 2013	2,013	2,790	2,363	2,153	1,543	10,862
October 2014	2,019	2,773	2,391	2,176	1,520	10,879
October 2015	2,059	2,751	2,359	2,130	1,581	10,880
October 2016	1,978	2,699	2,362	2,087	1,503	10,629
October 2017	1,987	2,745	2,487	2,100	1,478	10,797
October 2018	2,087	2,753	2,427	2,062	1,494	10,823
Net Change (2008 – 2018)	-5	242	486	192	50	965

Appendix 2: Residential beds by Trust area (including residential beds in nursing homes) 2008 - 2018

Year	Belfast	Northern	South Eastern	Southern	Western	Total
October 2008	1,335	1,222	1,439	649	841	5,486
October 2009	1,315	1,178	1,386	621	855	5,355
October 2010	1,330	1,200	1,314	705	932	5,481
October 2011	1,293	1,203	1,363	689	932	5,480
October 2012	1,242	1,236	1,286	709	931	5,404
October 2013	1,182	1,344	1,291	630	771	5,218
October 2014	1,207	1,335	1,332	608	767	5,249
October 2015	1,214	1,328	1,375	623	700	5,240
October 2016	1,215	1,308	1,355	632	677	5,187
October 2017	1,220	1,438	1,329	563	625	5,175
October 2018	1,218	1,410	1,316	613	627	5,184
Net Change (2008 – 2018)	-117	188	-123	-36	-214	-302

Appendix 3: New nursing homes registered 2008 –2018 by provider

Provider Organisation	Number of new nursing homes registered Oct 2008 - Oct 2018	% of total new nursing homes	Total registered beds in new nursing homes*	% of total new nursing homes
Priory Group	8	23.5%	362	23.8%
Belfast HSC Trust	1	2.9%	6	0.4%
Conway Group	3	8.8%	114	7.5%
Cornfield Care Centre	1	2.9%	52	3.4%
East Eden Ltd	1	2.9%	81	5.3%
Four Seasons Health Care	1	2.9%	66	4.3%
Healthcare Ireland (Belfast) Limited	2	5.9%	90	5.9%
Knockagh Rise Ltd	1	2.9%	29	1.9%
Knockmoyle Lodge Ltd	1	2.9%	59	3.9%
M Care (NI) Ltd	1	2.9%	64	4.2%
Macklin Group	2	5.9%	104	6.8%
Maryland Healthcare Limited	1	2.9%	84	5.5%
Runwood Homes Ltd	6	17.6%	239	15.7%
Southern HSC Trust	1	2.9%	1	0.1%
St. James' Lodge Limited	1	2.9%	44	2.9%
Wood Green Management Company (NI) Limited	1	2.9%	32	2.1%
Zest Care Homes Limited	2	5.9%	97	6.4%
Grand Total	34		1,524	

*These figures represent the current maximum number of beds registered within these homes. This total may have changed since the time of their first registrations.

Appendix 4: Largest Nursing Home Providers October 2008

Provider	Number of registered homes	Number of registered beds
Chester Homes Ltd	3	152
Elim Trust Corporation	3	105
Hutchinson Homes Ltd	3	128
Brooklands Nursing Homes Ltd	4	209
Carewell Homes Ltd	4	181
Mercy Care Ltd	4	156
North & West Housing	4	132
Spa Nursing Homes Ltd	4	145
Southern Cross Healthcare	22	1,099
Four Seasons Healthcare	72	3,313
Total under 'Top 10' providers	123	5,620
% of Total Nursing Homes	48.8%	54.4%

Appendix 5: Largest Nursing Home Providers October 2018

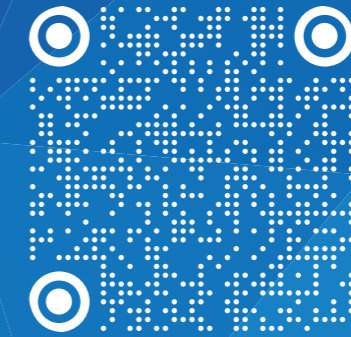
Provider	Number of registered homes	Number of registered beds
Wilson Group (including Chester Homes Ltd)	5	257
Healthcare Ireland (Belfast) Limited	5	275
Spa Nursing Homes Ltd	5	203
Macklin Group	6	335
Hutchinson Homes Ltd	6	256
Larchwood Care Homes (NI) Ltd	7	325
Conway Group (including Brooklands Healthcare Ltd)	8	361
Priory Group	9	451
Runwood Homes Ltd	10	479
Four Seasons Health Care	57	2,793
Total under 'Top 10' providers	118	5,735
% of Total Nursing Homes	47.6%	52.1%

Appendix 6: Largest Residential Care Home Providers October 2008

Provider	Number of registered homes	Number of registered beds
Downe Residential Project	5	38
Fold Housing Association	5	178
North & West Housing	5	73
Presbyterian Board of Social Witness	6	201
Southern HSC Trust	6	171
Praxis Care Group / Challenge	10	75
Western HSC Trust	12	289
Northern HSC Trust	14	420
Belfast HSC Trust	15	398
South Eastern HSC Trust	16	448
Total under 'Top 10' providers	94	2,291
% of Total Nursing Homes	36.7%	51.0%

Appendix 7: Largest Residential Care Home Providers October 2018

Provider	Number of registered homes	Number of registered beds
Praxis Care Group / Challenge	5	49
Priory Group	7	120
Presbyterian Council of Social Witness	7	240
Radius Housing Association	7	221
South Eastern HSC Trust	8	232
Northern HSC Trust	9	263
Runwood Homes Ltd	9	329
Western HSC Trust	10	208
Four Seasons Health Care (including Tamulst Care Limited)	13	310
Belfast HSC Trust	13	288
Total under 'Top 10' providers	88	2,260
% of Total Nursing Homes	38.8%	45.1%





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