BDO | Nursing Homes Ireland

Private & Voluntary Nursing Home

Survey results 2019/2020

BDO

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1 Introduction and Forewords

1.1 Introduction & Highlights

BDO in Ireland (BDO) and Nursing Homes Ireland (NHI) are pleased to present our report on the Annual Private & Voluntary Nursing Home Survey 2020 ("survey").

The survey was undertaken in early 2020, when a detailed questionnaire was sent to every registered private and voluntary nursing home in the country. Responses were received from 126 nursing homes, which equates to a 28% response rate. The response rate has provided a sample which is considered to be an appropriate representation of the overall population being examined.

Where reference is made to a finding for the 2019/2020 survey, the period being referred to is the financial year ended 2019.

The primary purpose of the survey is to report comprehensively on the state of the private and voluntary nursing home sector in Ireland, to analyse key sector indicators and trends and to report on matters of concern to nursing home operators.

Some key findings of the 2019/2020 survey are outlined below. Comparisons with the 2014/2015 survey are outlined where appropriate (the annual survey was not conducted in the intervening years).

- **Supply of beds** - As of September 2020, there are **453** private and voluntary homes providing a total of 26,221 beds. There has been an **17.4%** increase in the supply of private and voluntary beds since 2014.

- **Population per private & voluntary bed -** Nationally, at the time of writing this report, there is **one private nursing home bed for every 27.5 persons aged 65 and over** in the Republic of Ireland.

- **Occupancy** - National average occupancy amongst survey respondents was **90.97%** during the year 2019. This represented an increase of 0.52% when compared to 2014. The survey responses were received pre Covid 19 and the occupancy levels reflect that. The Covid 19 pandemic has had a negative effect on occupancy for much of the remainder of 2020.

- **Weekly Nursing Home Support Scheme (Fair Deal) rates -** The average weekly rate nationally, as at October 2020, prevailing under the Fair Deal Scheme for accommodation in private and voluntary nursing homes, was **€1012.** The rates are negotiated by the National Treatment Purchase Fund (NTPF) on behalf of the Health Service Executive (HSE).

- **Staff costs -** Staff costs per registered bed accounted for **60% on average** of turnover in respondents' homes. The national average staff cost per registered bed was found to be **€33,514.** This represents a **c.24%** increase since 2014, previously **€27,130.**

- **Dependency levels** - Dependency levels in nursing homes continue to be **very high.** Since the introduction of the medical needs assessment, persons going into nursing homes are more dependent and require more complex care. The number of nursing home residents presenting with evidence of dementia continues to rise. The respondents to our survey reported that approximately half of residents have been clinically diagnosed with dementia.

Average Weekly Fair Deal rate as at October 2020 County	Private & Voluntary 2020 €
Co. Carlow	939
Co. Cavan	975
Co. Clare	910
Co. Cork	1,014
Co. Donegal	904
Co. Dublin	1,200
Co. Galway	916
Co. Kerry	916
Co. Kildare	1,074
Co. Kilkenny	963
Co. Laois	980
Co. Leitrim	940
Co. Limerick	922
Co. Longford	947
Co. Louth	1,024
Co. Mayo	921
Co. Meath	1,035
Co. Monaghan	980
Co. Offaly	925
Co. Roscommon	910
Co. Sligo	1,023
Co. Tipperary	919
Co. Waterford	978
Co. Westmeath	914
Co. Wexford	929
Co. Wicklow	1,076
National Average	1,012

1.2 Foreword by Tadhg Daly, Chief Executive Officer, Nursing Home Ireland

This report is published against a backdrop of sustained national focus on the nursing home sector.

It is imperative lessons are learned from Covid 19 and this report provides a comprehensive overview regarding the footprint of the sector nationally and within every county across Ireland.

It is a positive that we are living longer. This achievement manifests in an increased requirement for a range of care services, particularly nursing home care.

This research finds over half of people in our nursing homes are over 85 years of age and this cohort of the population will grow by a factor of four in the next 30 years. The care provided by nursing homes is highly specialised and will require bed capacity and an appropriate staffing skill-mix to provide such.

The research presents an inherent anomaly in the funding of nursing home care. Staffing costs have increased by 23.5% since 2014, with 60% of nursing home turnover accountable for staffing costs. Yet, over the same period, the increase in fees payable under the Nursing Home Support Scheme (Fair Deal) is 13.3%.

The inherent non-confidence within the sector in how the NTPF fulfils its role is appraised, with c.93% of the nursing home respondents stating it fails to recognise the reality of costs incurred to provide high-dependency, person-focussed, specialised care in the negotiation process.

BDO reports the NTPF has been providing Fair Deal rate increases of slightly in excess of 2% per annum, largely leading to the preservation of operating margins but excluding funding towards capital repayments. This leading to a trend of operators entering into sale and leaseback structures and redeeming their bank debt in the process.

This analysis follows Comptroller and Auditor General examination of Fair Deal, published August 2020 and undertaken over a two-year period, finding the body responsible for negotiation of fees on behalf of the State, the NTPF, does not have in place a model to provide evidential proof for how it sets fees.

The State has acknowledged nursing home fees are not commensurate with the reality of costs incurred for people requiring the specialised, round-the-clock care provided by nursing homes. Yet this crisis within our health services has not been addressed by successive Governments. Covid 19 focussed attention on the nursing home sector and presents impetus to address the discriminatory practice that exists in the funding of nursing home residents under Fair Deal.

This is played out against a backdrop of increased growth in requirement occurring for nursing home care. NHI commissioned research undertaken by the Centre for Health Policy and Management, Trinity College Dublin informs the reality that the considerable increase in our older population in the short - to medium-term will result in increasing numbers needing the specialised clinical, health and social care provided by nursing homes on a round-the-clock basis.

Population estimates from the CSO would suggest that the rise in demand will not be evenly disbursed across the country, yet BDO's analysis informs development of nursing homes in most counties outside of Dublin is sometimes seen as unviable and smaller nursing homes are closing due to financial unviability. Contrary to perception, there has been a considerable slowdown in the provision of new bed capacity within the sector, with only modest actual growth in bed numbers over the six-year period 2014 to 2020. Over 5,000 beds have been granted permission but not developed the report informs, with the financial viability of new builds a key barrier.

A health and social emergency of gross magnitude will present if reform of the funding of nursing home care is not addressed as a priority. The Covid 19 Nursing Homes Expert Panel state requirement for enhanced integration of nursing home care into our health services.

This report provides an evidential basis to assess the private and voluntary nursing home sector in Ireland and inherent challenges presenting with regard to staffing and funding.

The recent concentration on the sector must combine with a State-led focus on the necessity to place it on a sustainable footing for present and future generations that will require nursing home care.

Thank you to all our members who participated in informing this important research report and to BDO for compiling it.

1.3 Foreword by Brian McEnery, Partner & Head of Advisory, BDO

The private and voluntary nursing home sector is changing rapidly and at a pace which has not been observed since BDO commenced its sectoral analysis in 2003.

It is important, at the outset, to acknowledge the ground that has been made. In 2003 there were 14,946 beds in 408 nursing homes; but in 2020 there were 26,221 - an increase of slightly over 75% in the number of beds in that 17-year period. However, the increase in registered nursing homes has been only 11%, with the average size of nursing homes increasing from 37 beds to 58 beds.

Some important provisions of the Care and Welfare of Residents in Designated Centres for Older People Regulations, which were amended in 2016, are scheduled to come into effect in January 2022. These Regulations apply to the public, as well as the private and voluntary sectors, and are intended to ensure quality in the provision of accommodation to residents of nursing homes, through minimum size of bedrooms as well as measures to improve infection control through the reduction in numbers of residents being accommodated in shared and multiple occupancy bedrooms.

The need for the implementation of these regulations, particularly surrounding single occupancy bedrooms, looks particularly relevant as we reflect on the difficult experiences of Covid 19. Rigorous implementation of the regulations will likely impact supply and capital expenditure in the private and voluntary sector. Our survey indicates that 77% of accommodation in the private and voluntary sector is in the form of single bedrooms, while the HIQA standards for new centers requires at least 80% of supply to be single en-suite rooms. Therefore, it largely appears that the private and voluntary sector will meet the physical environment requirements set by HIQA. The challenge, however, will prove much greater for the public sector as the stock of long-term care facilities is older and has seen less investment than the private and voluntary sector in recent times. In a number of instances around the country, the HSE have been reducing the number of residents that are accommodated in public facilities, so the ratio of residents is more in compliance with the regulations. HIQA has indicated a desire to move towards continuous and responsive improvement, as opposed to periodically implementing sector wide standards and regulations that flow from those standards. The experience of Covid 19 has undoubtedly driven HIQA's desire for responsive improvement to ensure resident welfare.

Another key finding from our report is the large variation in Fair Deal rates across the country and, while certain costs are higher on the East Coast (particularly Dublin), the difference between the highest county average (Dublin at €1,200 per resident per week) and the lowest county average (Donegal at €904 per resident per week) is €296 per resident per week. In effect, the Donegal home receives one third less than its peers in Dublin. In a number of locations around Ireland, it is not economically viable to develop new nursing homes on the Fair Deal rates which are granted to new facilities. With building costs as they are, it is difficult to see a home with c. 50m2 per resident being feasible for a Fair Deal rate of €1,000 per resident per week or less. The need for investment in the nursing home stock, in regions with lower Fair Deal rates, is validated by the report finding that the North West of Ireland has the highest population of over 65's per nursing home bed (43.9 persons per bed) with Dublin, Kildare & Wicklow the lowest (24.2 persons per bed).

The cost of developing a nursing home bed has a range of between €150,000 and €200,000 and this level of investment significantly reduces the potential for traditional ownership structures to prevail into the future. For this very reason, large specialist operators with significant capital capabilities are growing their market share in comparison to the owner-operator and voluntary cohorts that really sustained the sector here in the past. BDO sees this trend continuing.

In addition, we expect that there will be a continuing reduction of nursing home beds in homes with less than 40 beds. Approximately 29% of beds are currently in smaller homes, but this is down from 35% in the 2014 survey and down from 64% in 2003. Overall, nursing homes are getting bigger, the investment required to develop them is larger and the smaller, older homes are falling out of the sector. This is why there has been a 75% increase in bed supply, with only an 11% increase in the number of nursing homes.

In summary, this BDO report validates the strides made in the sector over the past two decades; but sets out some challenges ahead that will require significant investment to resolve.

Finally, I would like to gratefully acknowledge the time nursing home operators have taken to complete the detailed questionnaire which we sent to them so this survey could be compiled.

2 Nursing Homes Ireland

2.1 Profile

Nursing Homes Ireland (NHI) is the representative organisation for the private and voluntary nursing homes sector. The sector, and the care our members provide, are central to healthcare delivery in Ireland. Private and voluntary nursing homes:

- Provide 26,221 beds;
- Account for more than 80% of all long-term care beds in the country; and
- Provide direct employment to more than 36,000 staff.

NHI members account for 90% of all private and voluntary nursing homes.

NHI actively supports members, enabling them to provide sustainable, high quality care to residents. The fulfilment of NHI's role in the sector in this regard is underpinned by its core values:

- **Empower:** We empower members with up-to-date information and guidance.
- **Influence:** We influence policy decisions, using up-to-date evidence and advocacy.
- **Lead:** We provide leadership for the sector.
- **Promote:** We promote a positive image of the sector and the important role nursing homes play in the provision of health care and social care.
- **Partner:** We partner with all our key stakeholders to support the delivery of care.

2.2 Our Vision for the Future

As a nation, Ireland still has the resources to develop the best possible services to meet the needs of a growing older population.

Our vision is for a strong, sustainable and agile private and voluntary nursing home sector, as a vital part of Ireland's health care system. To achieve this, NHI will continue to advocate on behalf of our members and the sector and will strengthen our range of professional services provided to members.

We in NHI have a significant contribution to make in developing those services, so that residential care for our older people is the best that it can be. Nursing homes fulfil Government objective of delivering high quality, person-centred care in the community. We have the expertise, the commitment and the willingness to work alongside the Government and all other key stakeholders in the sector to ensure long-term residential care is meeting the increasingly complex care requirements of persons moving to nursing homes.

Our expertise and our ideas are of key importance in informing the development of public policy on the care of older people. We are advancing and promoting this important debate, as key providers of a vital part of the health service and seeking the appropriate support framework to meet the challenges of growing and funding the best possible services for our older people.

NHI's vision is to lead and shape the environment in which care services provided by our Members achieve the highest quality of life for the residents in their care. It is one we are continuously advancing through meaningful partnership and consistent engagement with the Government, the HSE and the NTPF as purchasers, the Health Information and Quality Authority (HIQA) as the regulator, our members and all the stakeholders.

Having high quality care available to those who need it is an essential part of a well-functioning health service which delivers the care people need, in a way that is affordable, accessible, and, of the highest standard. Those who use our services should have the choice and flexibility in selecting the nursing home that most suits their needs.

2.3 Commitment of Members

NHI members are committed to:

- Maintaining and enhancing the quality of life of residents
- Preserving the autonomy of residents, guaranteeing free expression of opinion and freedom of choice
- Maintaining a safe physical environment and caring for the emotional wellbeing of residents
- Ensuring that the privacy and dignity of residents is respected
- Being an employer of choice and providing continuous professional development and training

Ensuring High Standards

At NHI, the resident is always at the heart of what we do. We support private and voluntary nursing homes to deliver the very highest standard of care. Nursing homes are specialised clinical, health and social care settings. The care is provided on a 24/7 basis within dedicated 'home from home' health settings.

We care about the delivery of better care. We support our members to create rich experiences of life for residents. Our members meet residents where they are on their journey and focus on enriching lives well-lived.

Care is better when we work together. We empower our private and voluntary nursing home members with the latest information and advocate for the sector so it can perform better. We bring our message of warmth, comfort and responsibility in a clear and strong voice to the wider community.

We are working to shape a new, more dynamic model of care. Caring is best when it is collective and collaborative. With our residents, members, communities and stakeholders, we are confidently moving forward together.

Meeting the True Cost of Care

NHI is advancing the critical requirement for an enhanced framework that recognises and supports the increasingly complex care requirements of nursing home residents. The private and voluntary nursing home sector must be provided with certainty and a funding framework that ensures it is in a position to plan and invest in meeting the increasing residential care needs of our ageing population.

Nursing home care fulfils an essential role in healthcare provision in Ireland and in ensuring we treat our older people with respect and dignity. It is fundamentally important for the State to ensure the funding of nursing home care realistically reflects the growth in requirement for this specialist care and the high dependency and high complexity care needs of persons requiring it.

There is requirement for an enhanced evidence-based cost-of-care funding model to ensure the specialised care needs of those requiring long-term residential care are addressed.

An enhanced model to support residents in long-term residential care must recognise the increased dependency and complex care needs of residents in such care.

Persons availing of nursing home care have high-dependency, high complexity, multiple comorbidity care needs. They present with severe physical and cognitive impairment, requiring 24/7 person-focussed clinical, health and social care.

Management & Governance

NHI represents the interests of its members and the nursing home sector through an effective, democratic governance structure. As the national representative organisation for the private and voluntary nursing home sector, NHI is organised through 10 regional committees, with governance provided by a 12 member Board of Directors.

The NHI governance structure affords all members membership of one of ten regional committees; each region elects a representative to the Board of Directors.

The 12 member Board, elected annually, consists of the 10 elected regional committee representatives, a national nursing committee representative and a non-executive independent chairman who is appointed by the Board.

The organisation is structured so that members are encouraged and assisted to play an active part in its deliberations and its decision-making processes.

The regions also elects a representative to the National Nursing Committee and a regional chair and regional secretary. Furthermore, each region elects, annually, a regional representative to named subcommittees as specified by the Board of Directors. Each of the 10 NHI regions directly elect, at their regional AGM, a representative to the following 3 Board subcommittees: Regulatory Affairs, Commercial and Financial Affairs and Public Affairs and Communications.

To encourage and facilitate greater involvement of members in the affairs of the organisation, NHI has established subcommittees of the Board of Directors to assist in managing the affairs of the organisation and to ensure that all relevant issues are appropriately addressed.

The current NHI board subcommittees are as follows:

- National nursing committee
- Finance, risk and audit committee
- Legal affairs committee
- Regulatory affairs committee
- Commercial and financial affairs committee
- Public affairs and communications committee

NHI Region	Areas Covered
Dublin/Kildare	Dublin (West & Southwest), Kildare
Dublin North	Dublin (North)
Dublin/Wicklow	Dublin (South & Southeast), Wicklow
Midlands	Laois, Longford, Offaly, Westmeath
Midwest	Limerick, Clare, Tipperary (North)
North East	Cavan, Louth, Meath, Monaghan
North West	Donegal, Leitrim, Sligo
South	Cork, Kerry
South East	Carlow, Kilkenny, Tipperary (South), Waterford, Wexford
West	Galway, Mayo, Roscommon

2.4 Irish Nursing Home Market Analysis Nationally

The private nursing home sector in Ireland is a sector which has evolved significantly in the last decade. Arising from an increasing older population, the demand for older person care facilities is growing.

The sector has seen the emergence of multi-site home operators who have driven significant investment. The sector has seen the entry of international real estate funds through sale and leaseback structures and international nursing home operating company groups. In most instances these parties have acquired existing nursing home groups. Approximately 40% of private nursing homes are operated or owned by one type of group or another.

Increasingly, nursing homes are modern operations with a greater range of facilities and have the ability to meet greater care requirements.

In Ireland, nursing home care is principally regulated by the following legislation:

- Health (Nursing Homes) Act 1990 (as amended)
- Nursing Homes (Care and Welfare) Regulations 1993
- The Health Act 2007 (as amended)
- Care and Welfare Regulations as amended – Health Act 2007
- Registration Regulations – Health Act
- Nursing Homes Support Scheme Act 2009
- National Standards for Residential Care Settings for Older People in Ireland 2016 (as amended)
- S.I. No. 415/2013, - Health Act 2007 (Care and Welfare of Residents in Designated Centres for Older People) Regulations 2013
- S.I. No. 61/2015, Health Act 2007 (Registration of Designated Centres for Older People) Regulations 2015.

2.5 Ireland's Ageing Demographic Profile

Ireland's demographic profile is characterised by the continually increasing numbers of people aged 65 and older. The country has experienced strong population growth in the past 28 years, during which time it has increased from approximately 3.52 million in 1991 to 4.97 million in 2020.

The population aged 65 and over is a key demographic when seeking to estimate the number of nursing home beds required in a country, due to the increasing medical dependency of people as they age. The CSO estimated, in 2016, that the 65+ population would increase to approximately 1.6m people and account for approximately 1 in 4 of the total population by 2051.

It was estimated that the population aged 65+ would grow by:

- 17% from 2016-2021
- 145% from 2016-2051

In 2016, the population aged 65 and over in Ireland was 637,567; or 13.4% of the total population and was estimated to increase to approximately 743,066 by 2021. The most recent population estimates from CSO, published in August 2020, suggest a total of 720,200 people living in Ireland are aged 65 and over (as at April 2020); representing a 13% increase during this period. This would suggest that prior estimates of 2016 are trending largely in line with current estimates.

Supply & Demand

There are currently 31,909 registered nursing home beds in Ireland; of which 5,688 are operated by the HSE, with the balance operated by the private and voluntary sector.

A key OECD indicator, although not definitive nor to be taken in isolation, is often used to estimate a country's requirement for nursing home bed spaces and suggests approximately 4% to 5% of the population aged 65 and over. The current bed supply equates to approximately 4.45% of the estimated population over 65 (31,909/720,200). This would suggest that Ireland has adequate supply in the short term to meet demand; albeit we understand that this supply is not evenly distributed across the country.

Whilst it is subjective and difficult to precisely assess the future requirement of nursing home beds for people over 65 years old, various research studies have been conducted in this area in an attempt to identify trends for future demand. One such example is the recent NHI Commissioned study conducted by Trinity College Dublin in 2019, which aimed to address the current and future requirements for nursing home care for people over 65 years of age in Ireland[1], showing projected demand in nursing home beds by 2031.

The research was primarily based on three scenarios namely population growth, healthy ageing population and healthy aging; and although the metrics and base scenarios used to predict future bed demand vary materially depending on the approach adopted, each scenario depicted an outcome of a significant increase in demand for nursing home beds in the future.

Notwithstanding same, it is expected, based upon the current supply demographic in addition to the projected over 65 population growth (to approximately 1m by 2031), that there will be a significant requirement for increased bed capacity into the future.

[1] Projecting-long-term-care-in-Ireland, TCD, NHI

If we were to apply the international indicator of 4-5% as an example, the demand for nursing home bed spaces could potentially reach nearly 45,000 by 2031.

Despite the number of nursing home projects in various stages of planning, Fair Deal rates are currently rendering new nursing home development unviable in most locations outside of Dublin due to the current cost of construction. It is difficult to see significant new development commencing in most areas where there will be a significant future need. There is also likely to be a reduction in existing nursing home capacity over the coming years as the 2016 standards (National Standards for Residential Care Settings for Older People in Ireland, 2016) are enforced by December 2021. It is expected that many existing homes, particularly smaller homes that are not purpose-built, will struggle to comply with these standards and therefore overall capacity will be affected.

3 Presentation of Survey Results

3.1 Survey Period

The survey assignment commenced in February 2020 and is culminating in this publication. A total of 126 nursing home operators returned completed surveys, 26 fewer responses than the previous survey. The information returned in the survey pertains to respondents 2019 financial year due to the time it takes nursing home complete and have their financial statements audited. The 2021 BDO/NHI Nursing Home Survey will reveal the financial impact of the Covid 19 pandemic on the sector.

3.2 Regional Analysis

Based on the survey results, in order to provide a meaningful regional analysis and to ensure comparability with the 2014 survey, the information captured in this survey is reported by reference to the below ten NHI regions; which corresponds approximately to the ten Health Board regions.

The regions of the country contained in each of the ten NHI Regions ("the Regions") are outlined below:

- **Dublin/Kildare:** Dublin (West & Southwest), Kildare.
- **Dublin North:** Dublin (North).
- **Dublin/Wicklow:** Dublin (South & Southeast), Wicklow.
- **Midlands:** Laois, Longford, Offaly, Westmeath.
- **Midwest:** Clare, Limerick, Tipperary (North East).
- **North East:** Cavan, Louth, Meath, Monaghan.
- **North West:** Donegal, Leitrim, Sligo.
- **South:** Cork, Kerry.
- **South East:** Carlow, Kilkenny, Tipperary (South), Waterford, Wexford.
- **West:** Galway, Mayo, Roscommon.

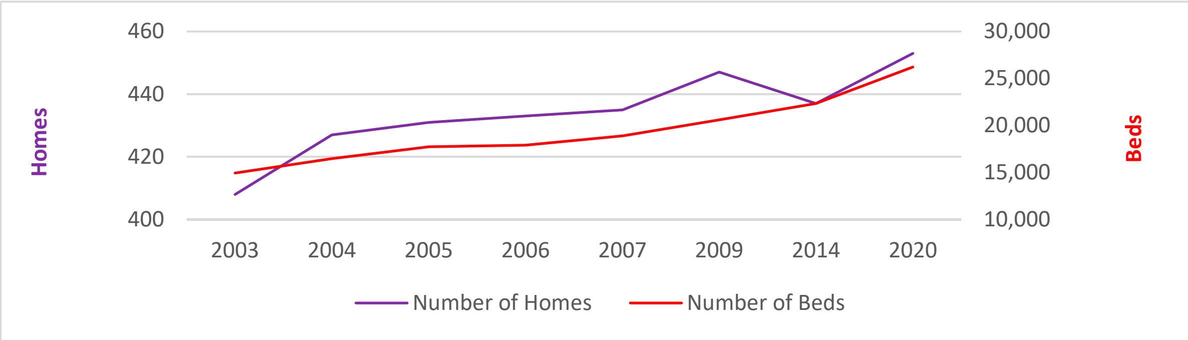
3.3 Analysis by Size of Nursing Home Facility

In addition to regional analysis, and where appropriate, information captured in the survey is analysed by reference to the bed capacity of nursing homes. The following are the four size categories which have been used for the purposes of the survey:

- Less than 25 beds
- 25 to 39 beds
- 40 to 59 beds
- 60 beds or more

4 Key Sector Indicators

The table below outlines the key sector indicators reported in each survey completed between 2003 and 2020. Between the years 2003 and 2006, the survey was commissioned by the Irish Nursing Homes Organisation (INHO). This organisation subsequently joined with three other nursing home representative organisations to form NHI.



	INHO Survey 2003	INHO Survey 2004	INHO Survey 2005	INHO Survey 2006	NHI Survey 2007	NHI Survey 2009/ 2010	NHI Survey 2014/ 2015	NHI Survey 2019/ 2020
Occupancy	89.00%	86.80%	86.10%	89.40%	91.20%	86.40%	90.58%	90.97%
Weekly rates*	€557	€578	€640	€694	€778	€850	€896	€1012**
Number of beds	14,946	16,461	17,722	17,909	18,883	20,590	22,342	26,221
Number of homes	408	427	431	433	435	447	437	453
Population ≥ 65 per private bed	29	27	25	24	25	23	24	28
Staff costs as a % of turnover	56%	56%	57%	60%	60%	62%	61%	60%
% of respondents planning to create additional beds within a year	42%	21%	24%	29%	22%	20%	42%	29%

*This is representative of the ***national average*** ‘Fair Deal’ rate across all room types and all regions. Large variances exist amongst the various HSE regions. These prices have been negotiated through the NTPF.

**This represents the weekly agreed FDR rate as on October 2020.

5 Private Nursing Home Beds - Current Supply & Growth Outlook

5.1 Register Nursing Home & Beds

As on September 2020, there were 453 private and voluntary nursing homes in the country providing a total of 26,221 beds. The distribution of these homes and beds by HSE Area is outlined below:

NHI Region	Number of Nursing Homes 2020	Number of Beds 2020	Average Number of Beds per Home 2020	Number of Nursing Homes 2014	Number of Beds 2014	Average Number of Beds per Home 2014
Dublin/Kildare	40	2,950	74	39	2,471	63
Dublin North	45	3,699	82	33	2,220	67
Dublin/Wicklow	48	2,942	61	51	2,599	51
Midlands	23	1,379	60	27	1,336	49
Midwest	46	2,357	51	46	2,219	48
North East	38	2,230	59	38	2,007	53
North West	22	1,040	47	20	942	47
South	65	3,554	55	67	3,270	49
South East	60	3,003	50	50	2,339	47
West	66	3,067	46	66	2,939	45
Grand Total	**453**	**26,221**	**58**	**437**	**22,342**	**51**

26,221

total beds

5.2 Supply Growth - 2014 to 2020

Since the completion of the 2014 survey there has been an increase in the number of nursing homes operating in Ireland. This period has seen a 4% growth in the number of homes, increasing from 437 in 2014 to 453 in September 2020, and a 17.4% increase in the number of private and voluntary beds. This reflects the trend whereby many newly developed homes have tended to be larger in size to take advantage of greater economies of scale.

As can be seen from the table below, Dublin North and the South East recorded the greatest relative increases in bed supply over this period.

NHI Region	Number of beds 2020	Number of beds 2014	% Change
Dublin/Kildare	2,950	2,471	19.4%
Dublin North	3,699	2,220	66.6%
Dublin/Wicklow	2,942	2,599	13.2%
Midlands	1,379	1,336	3.2%
Midwest	2,357	2,219	6.2%
North East	2,230	2,007	11.1%
North West	1,040	942	10.4%
South	3,554	3,270	8.7%
South East	3,003	2,339	28.4%
West	3,067	2,939	4.4%
Total	**26,221**	**22,342**	**17.4%**

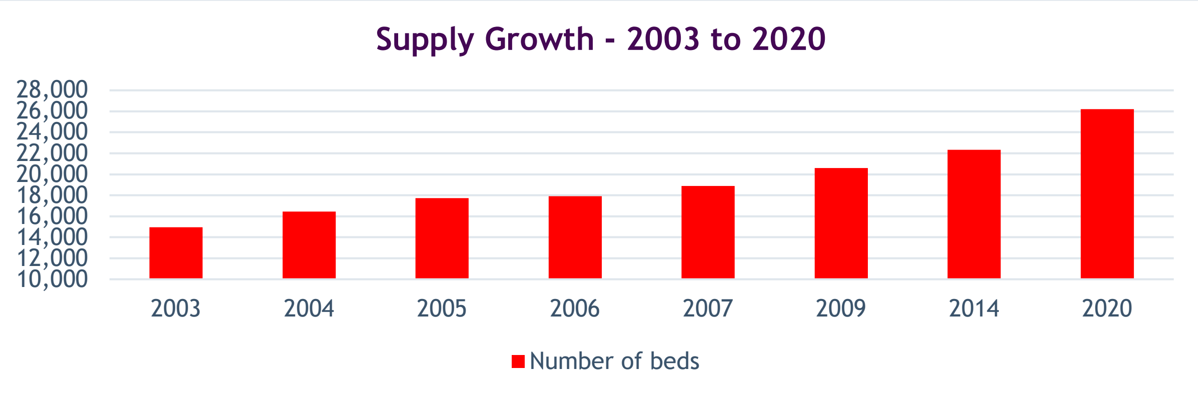
4%

growth in the number of homes

5.3 Supply Growth - 2003 to 2020

The pattern of growth in supply since the survey was first completed in 2003 is outlined below. In 2003 there were 14,946 private beds in the country, compared with 26,221 in 2020.

	2003	2004	2005	2006	2007	2009	2014	2020
Number of beds	14,946	16,461	17,722	17,909	18,883	20,590	22,342	26,221
% annual growth in supply	-	10.1%	7.7%	1.1%	5.4%	4.4%	1.6%	2.7%



The Compound Annual Growth Rate was **3.4%** between 2003 and 2020. In the seventeen-year period to 2020 there was an 11,275 increase in the supply of private beds (75% increase in supply). There was a net increase of 45 private nursing homes in the same period which represents an increase of just 11%. This trend indicates extensions creating additional capacity and increasing bed numbers in new homes in Ireland. In comparison to the 2014 survey, the average size of homes increased from 51 beds to 58 beds. The average size of a nursing home increased in all regions since the last survey. This continues a trend since the first Nursing Home survey in 2003, of larger, purpose-built homes replacing smaller older facilities. This trend allows for a greater economy of scale and efficiency particularly in labour costs.

A more detailed regional analysis illustrates that supply growth was greatest in the Midland area over the seventeen-year period. In the period, there was a 104% increase in bed numbers in the region. The South and South Eastern areas also increased significantly, with a supply growth of 98% and 95%, respectively.

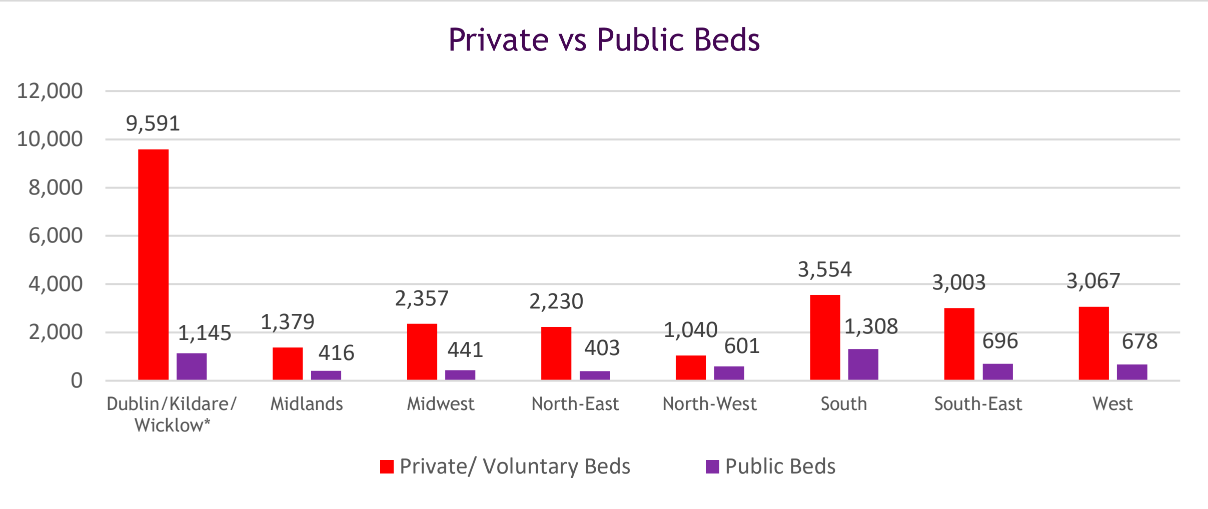
HSE Area	Private Homes 2003	Private Homes 2014	Private Homes 2020	% increase in homes 2003 - 2020	Private beds 2003	Private beds 2014	Private beds 2020	% increase in beds 2003 - 2020
Dublin/Kildare / Wicklow*	119	123	133	11.8%	5,114	7,290	9,591	87.5%
Midlands	20	27	23	15.0%	677	1,336	1,379	103.7%
Midwest	40	46	46	15.0%	1,525	2,219	2,357	54.6%
North East	34	38	38	11.8%	1,429	2,007	2,230	56.1%
North West	19	20	22	15.8%	885	942	1,040	17.5%
South	63	67	65	3.2%	1,796	3,270	3,554	97.9%
South East	51	50	60	17.6%	1,538	2,339	3,003	95.3%
West	62	66	66	6.5%	1,982	2,939	3,067	54.7%
Total	**408**	**437**	**453**	**11.0%**	**14,946**	**22,342**	**26,221**	**75.4%**

*In 2003 some information was only available for these three Areas on a combined basis.

5.4 Total Supply - Public and Private

The table below shows the projected number of persons aged 65 and over in 2020, per analysis from the 2016 census of population. These projections have been analysed over the number of nursing home beds available in both private and public homes. Information on the supply of public beds is based on the number of nursing home beds registered with HIQA as public facilities.

Region	Population ≥65	Private/ Voluntary Beds	Population ≥65 per private Bed	Public Beds	Total Number of Beds	Population ≥65 per Bed
Dublin/Kildare / Wicklow	231,827	9,591	24.2	1,145	10,736	21.6
Midlands	42,100	1,379	30.5	416	1,795	23.5
Midwest	65,787	2,357	27.9	441	2,798	23.5
North East	65,250	2,230	29.3	403	2,633	24.8
North West	45,623	1,040	43.9	601	1,641	27.8
South	109,900	3,554	30.9	1,308	4,862	22.6
South East	83,113	3,003	27.7	696	3,699	22.5
West	76,600	3,067	25.0	678	3,745	20.5
Total	**720,200**	**26,221**	**27.5**	**5,688**	**31,909**	**22.6**



Currently, there is one registered nursing home bed for every 22.6 persons aged 65 and over. The North West Region has the largest deficiency of beds with 27.8 persons aged 65 and over per bed, while the West Region is at the lower end with one bed per every 20.5 persons.

The South and Dublin/Kildare/Wicklow have the highest number of public beds available, 1,308 and 1,145, respectively. These beds in the South contribute to more than a quarter of the total beds available.

It is worth noting that amongst the over 65 population, there are approximately 79,000 persons aged 85 and over.

This demographic has the highest demand for nursing home care, with c. 22% of persons aged 85 and over in Ireland requiring assistance[2]. With increasing life expectancy, this demographic is expected to steadily increase, with the CSO forecasting this population will grow by a factor of four by the year 2051.

In recent times, smaller nursing homes around the country have made the decision to voluntarily close. This decision made by the nursing home operator may have been due to a number of different factors including concerns over financial viability, financial implications of achieving regulatory compliance, the absence of a successor in a family run home and more recently, the impact of Covid 19[3].

It can be difficult for homes outside of Dublin to be financially viable due to the lower Fair Deal rates received. New standards and regulatory compliances are also being enforced in homes to ensure residents have adequate floor/personal space in their bedroom. If these standards are not met, the nursing home operator must invest to ensure compliance. Evidence suggests that Covid 19 has seen these standards be more heavily enforced to prevent the spread of the virus.

In 2017, five registered providers advised HIQA that they had decided to close their nursing home. The five nursing homes, all small centres with less than 40 residents, were located in a variety of urban and rural locations across the country. In some cases, the registered provider advised that the financial model underpinning a small nursing home was difficult to sustain, particularly in the context where extensive investment may be required to ensure regulatory compliance into the future. The closure of nursing homes that offer a smaller, homely setting is concerning and if it continues could impact on the choice of setting available to older people and their families in the future.

The table shows the nursing home closure between 2017 & 2020.

Nursing Home Closure	2017	2018	2019	2020
Private	5	3	5	2
Voluntary	-	1	-	3
Total	**5**	**4**	**5**	**5**

[2] HIQA, Overview report on the regulation of designated centres for older persons 2018
[3] HIQA, Overview of HIQA regulation of social care and healthcare services 2017

5.5 Irish Nursing Home Developments

According to a CBRE report *'Shortage of Nursing Homes Expected to Become More Acute'* (July 2020), it is estimated that almost €150 million has been invested into the Irish Nursing Home market since 2018. With this funding, 935 new nursing home beds are operational, with 605 of these, or 65%, located in Dublin.

Subsequently, there were 12 homes under construction at the time to deliver 1,144 beds. It found that just under 5 of these were being constructed in Dublin yet supplying 55% of the number of beds. This corresponds with the market trend outlined in this annual survey, of larger homes being built to take advantage of greater economies of scale. The average capacity of these homes under construction in Dublin is 113 beds.

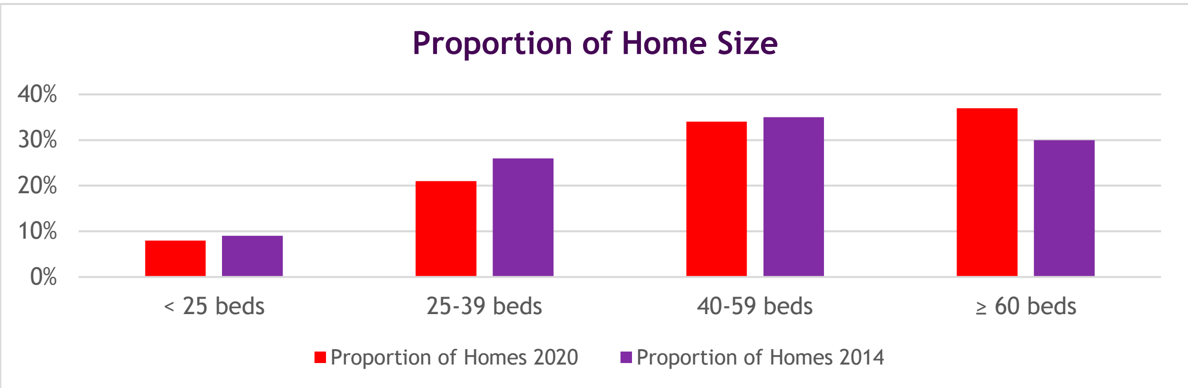
In the preceding 24 months, planning permission for the development of a further 3,560 new beds had been granted for both extensions and new builds. An additional 1,808 were still in the planning system. This means that within the planning system there are 5,368 undeveloped nursing home beds. Despite these applications being granted, developing homes in most counties outside of Dublin can be seen as unviable due to low Fair Deal rates. Thus, it is difficult to see significant new development commencing where homes are needed. For instance, Donegal has a high projected need for new supply, but the Fair Deal rate in that county is wholly insufficient to permit a new nursing home development there.

5.6 Size of Nursing Homes

As discussed in Sections 5.2 and 5.3, since 2014, the total number of beds in the private and voluntary sector has increased by 3,879 beds, while at the same time the total number of nursing homes in operation increased by 16. This is indicative of a trend that suggests expansions to existing nursing homes and the development of larger homes.

The distribution of nursing homes by size of **existing** facility is outlined below.

Size of nursing home	<25 beds	25-39 beds	40-59 beds	≥60 beds
Proportion of Homes 2020	8%	21%	34%	37%
Proportion of Homes 2014	9%	26%	35%	30%



Approximately 29% of survey respondents indicated that they intended to increase the bed capacity in their facilities in the coming year by an average of 20 beds. This indicated that the trend for the extension by existing experienced providers is set to continue.

6 Private Nursing Home Beds - Prospective Demand

The population aged 65 and over is a segment which is examined both nationally and internationally in the context of ageing and society. It is fair to say that with increasing life expectancy, this metric (the 65 and over population) looks somewhat out of date and less relevant in respect of residential care. However, the use of this metric in our survey is to ensure comparability with previous surveys and international metrics.

6.1 Population and Demand

Ireland's demographic profile is characterised by increasing numbers of persons aged 65 and over. This 'ageing' of the population has resulted in growing demand for care facilities for the older person. Based on the indicative population projections discussed below, this demand will grow further in the future.

The most recently completed census was undertaken by the CSO in 2016. At that time, the population aged 65 and over in Ireland was 637,567 or 13.4% of the total population. This represented an increase of 19% from the number of persons aged 65 and over since the completion of the previous census in 2011.

The distribution of the population aged 65 and over by NHI Region is outlined below.

In 2016, the CSO also projected that the current 65 and over population would reach 721,502, a c. 13% increase in this segment of the population in four years, which is largely in line with the most recently published CSO estimates in August 2020 of 720,200. We have extrapolated this to county level based on 2016 actuals and compared the percentage increase between the two periods. This population is further expected to increase by more than 39% between now and 2031, to a figure of just more than 1 million people. In order to estimate the impact of this in each Region, we have extrapolated the 2016 data for the estimated increase in the table below:

NHI Region	Population ≥65 Extrapolated 2031	Estimated Increase to 2031	Population ≥65 Estimated 2020*	Estimated Increase to 2020*	Population ≥65 2016
Dublin/Kildare / Wicklow	329,512	42.1%	231,827	12.8%	205,574
Midlands	62,979	49.6%	42,100	12.6%	37,393
Midwest	86,342	31.2%	65,787	14.9%	57,272
North East	93,099	42.7%	65,250	16.7%	55,906
North West	62,937	37.9%	45,623	11.2%	41,022
South	152,369	38.6%	109,900	11.1%	98,877
South East	117,832	41.8%	83,113	13.9%	72,965
West	101,579	32.6%	76,600	11.7%	68,558
Total	**1,006,649**	**39.8%**	**720,200**	**13.0%**	**637,567**

The CSO has also prepared longer term population projections to cover the period to 2051. The projections indicate that the over 65 population will increase to approximately 1.6 million people over the course of the next c. 30 years. In this period, the population aged 80 and over is set to reach c. 549,000, with over half of these being aged 85 and over. This will undoubtedly drive a large increased requirement to support care of the older person in the community, nursing homes and across the continuum of care.

6.2 Population Aged 65 and Over per Registered Bed

An indicator of potential demand for private nursing home beds, is the population aged 65 and over per registered bed. This international indicator is not intended as a benchmark against which to definitively gauge the requirement for beds. The statistic should not be taken in isolation and should be considered in the context of occupancy levels. However, it is potentially the most useful indicator available when estimating potential demand for nursing home beds.

The table below outlines the population aged 65 and over per private nursing home bed in each NHI Region in 2020:

NHI Region	Population ≥65	Private/ Voluntary Beds	Population ≥65 per private Bed
Dublin/Kildare/ Wicklow	231,827	9,591	24.2
Midlands	42,100	1,379	30.5
Midwest	65,787	2,357	27.9
North East	65,250	2,230	29.3
North West	45,623	1,040	43.9
South	109,900	3,554	30.9
South East	83,113	3,003	27.7
West	76,600	3,067	25.0
Total	**720,200**	**26,221**	**27.5**

As can be seen from the table above, there are 27.5 persons aged 65 and over per Private or Voluntary bed in Ireland, an increase of c.3 persons per bed since 2014. The Dublin/Kildare/Wicklow Region offers the most private beds per population (24.2 persons per bed); while the North West have the least supply with 43.9 persons per private bed.

A high population of over 65 years per registered bed is not necessarily a reflection of supply/demand. For instance, geographic factors such as whether the area is urban or rural may have an impact on the number of beds to the over 65 population. Additionally, other factors including the Fair Deal rate available may have an impact on supply. This is because the Fair Deal rate in several counties is inadequate to allow a return on capital associated with the development cost of a nursing home in those counties. Another factor worth considering is the availability of homecare packages and community care provision in a region, which might be a reason for lower bed demand etc.

7 Profile of Facilities

7.1 Bedroom Type

A breakdown of bedroom types in respondents' nursing homes is outlined below:

Room Type	Single en-suite	Single	Double en-suite	Double	Multiple*
2020 % of Total Beds	68%	9%	16%	6%	1%
2014 % of Total Beds	59%	11%	16%	7%	7%

*For the purposes of defining room types multiple refers to rooms accommodating three residents or more.

Single en-suite rooms were found to be the most common form of bedroom type available for residents in respondents' nursing homes. 68% of the total stock of private and voluntary beds was found to be comprised of this room type, increasing from 59% in 2014. A further 9% of the total stock was comprised of single rooms without en-suite facilities, which sees a decrease in the proportion of this bedroom type from 11% in 2014.

Accommodation in double rooms accounted for c. 22% of room types available, with more than two thirds with en-suites. Multiple occupancy rooms accounted for the remainder of room types available at 1%, down from 7% in 2014.

Provision of single rooms, without en-suite facilities and multiple rooms, is likely to continue to reduce considerably in the coming years due to the impact of HIQA's National Quality Standards for Residential Care Settings for Older People in Ireland ("the Standards") which came into force in July 2009. The experience of Covid 19 will expedite the requirement to reduce multiple occupancy accommodation and increase the necessity for bedrooms to be en-suite.

The 2009 HIQA Standards stipulated that new nursing home facilities, developed since July 2009, will be required to comply with the following requirements in relation to all new builds and extensions for bedroom type[4]:

- A minimum of 80% of residents to be accommodated in single en-suite rooms
- 12.5 square metres usable floor-space (excluding en-suite facilities)
- Shared rooms must be occupied by no more than 4 residents accommodated in each room.

HIQA standards permitted nursing homes, built prior to 2009, a six-year derogation to meet the specific Physical Environment Standards. However, in July 2016 the Government introduced legislation S.I. 293 of 2016 to extend that derogation period for a further 6 years to 2021.

In order to maintain registration, any home not complying with the Standard will be required to demonstrate that they have a 'written, costed plan with timescales' to bring the home into compliance with the Standards as outlined in HIQA Regulatory Notice RN 001/ 2013. Even in those circumstances, HIQA have indicated that they will place Conditions of Registration on nursing homes, where in particular, they believe the existing physical environment does not adequately provide for the privacy and dignity of residents.

[4] National Standards for Residential Care Settings for Older People in Ireland, 2016

This may further reduce the supply of public sector beds as many of these are contained in older facilities that are not compliant with the physical environment standards. Implementation of the HIQA Standards will undoubtedly impact the capital expenditure commitments of some older private and voluntary nursing homes throughout Ireland.

7.2 Purpose Built Facilities

Over half of respondents were found to operate from purpose-built nursing home facilities; in total 63% of respondents operated from such facilities. 28% were found to operate from redeveloped homes facilities converted from another use and the remaining 9% categorised themselves as 'Other'.

7.3 Years in Operation

The average period for which respondents were found to have operated their facility was 25 years. Facilities in the South East Region were found to be, on average, the most recently developed. The average length of time respondents was found to be operating in that region was 18 years.

Respondents in the Dublin/Kildare/Wicklow Region and the South Region had the longest established facilities. On average, they had been in operation for almost 28 years. Dublin/Wicklow Region contains the town of Bray which is sometimes referred to as the 'historic capital of nursing homes' and, as such, contains a large number of long-established facilities.

63%

operate purpose built nursing home facilities

8 Profile of Services Available

8.1 Specialised Dementia Facilities

According to the Department of Health's 'The Irish National Dementia Strategy', there is an estimate of over 65,000 people in the Republic of Ireland diagnosed with dementia. It is predicted that by 2036, there will be over 113,000 people living with dementia in the country[5]. It is reasonable to assume that based on the greater numbers of people living with the condition, demand for care in dedicated care units will increase.

Approximately 33% of respondents nationally were found to provide dedicated dementia care units within their nursing homes. Each of these units contained an average of 21 beds. Of those respondents that provided dedicated dementia care units, 88% operated from nursing homes with an overall level of accommodation of 40 beds or more.

The Dementia Services Information and Development Centre (DSIDC) survey carried out in December 2014, indicated that 34% of all people with dementia live in residential care. That survey also found that 1,000 persons with dementia were resident in dedicated Specialist Care Units (SCU). For the purpose of the DSIDC study, a SCU was defined as being *"a designated unit designed to cater exclusively for the complex needs of people with dementia"*. The higher number of reported units in the NHI Survey may be indicative of the existence of a number of 'specialist units', in the respondents to the NHI survey, that do not meet the definition provided by the DSIDC. This is likely to be because most Alzheimer Disease and dementia care units in nursing homes are units or wings within an overall larger nursing home facility and, therefore, are not exclusively dementia specific centres. However, the correlation of the findings of this survey (33% of respondents providing dementia care), and the DSIDC analysis of 34% of dementia sufferers living in residential care, shows that nursing home providers have responded to care needs with the addition of tailored care provision for persons with cognitive impairment.

Across all homes, it was reported that on average, 45% of residents have been diagnosed with dementia. In homes providing specialist dementia care units, this proportion is slightly higher at 50%. While the proportion is slightly lower in homes not providing specialist dementia care units, the percentage remains substantial at 44%. The following is a regional analysis of respondents that provided specialist dementia care in 2020:

NHI Region	% Providing Specialised Dementia Care
Dublin/Kildare	57%
Dublin North	33%
Dublin/Wicklow	50%
Midlands	0%
Midwest	47%
South East	0%
North East	75%
North West	20%
South	33%
West	11%
National	**33%**

[5] The Irish National Dementia Strategy- The Department of Health

It is important to note that in the Midlands & South East, 0% of the respondent stated they are providing dementia care; however, this result is based on only 6 & 5 respondents in the region respectively.

8.2 Other Specialist Facilities

2.4% of respondents provided a specialised brain injury care unit. A range of other specialist care units were provided by just over 5% of respondents.

8.3 Day Care Facilities

Nationally, just over **12%** of respondents provided day care facilities. Of those that indicated they provided such facilities, 69% operated from nursing homes containing 30 beds or more.

8.4 Home Care Service

The survey found that **4%** of homes were either currently providing home care services (whereby staff from the respondent's nursing home provided care services to persons in their own residences); and 13% of the respondents who did not provide the services, intended to do so in the next 12 months.

8.5 Contract Beds

Nationally, 40% of respondents were found to have beds contracted to the HSE. Where contracts with the HSE were in place, on average **5%** of the income of the nursing home came from contracted beds. Since the advent of the NHSS, the HSE has greatly reduced the number of contract beds funded, preferring instead for residents to apply to the NHSS and receive funding through this.

8.6 Other Services Provided

The survey sought to examine the range of services provided by respondents to residents in their nursing homes. The following is the overview of the most commonly available services and their provision levels nationally:

Services	% of Respondents Nationally Providing this Service
Providing Social Programmes	100%
Daily Delivery of Newspapers	97%
Providing Chiropody Service	98%
Providing Dry Cleaning Service	74%
Providing Ophthalmic/Dental Service	89%
Transport	97%
Providing Hairdressing Service	97%

8.7 Physiotherapy & Occupational Therapy

The survey found that almost 66% of respondents retained/employed a physiotherapist and/or occupational therapist in their homes, with 8% working full time in the home and the remaining 58% retaining a therapist on a part time/required/sessional basis.

Approximately 58% of respondents indicated that the services of a physiotherapist and/or occupational therapist was made available by the HSE to residents in their nursing homes. Ideally, this would be a much higher number. Residents retain the entitlement to this service; however, the provision of this service is not made available from the HSE with sufficient cover or frequency, as is appears there are long waiting lists.

66%

*retain a **physiotherapist** and/or **occupational therapist** in their homes*

9 Profile of Residents

9.1 Funding Profile of Residents

At present, nursing home care for long-term residents is funded in one of the four following ways:

- **Nursing Home Support ('Fair Deal') Scheme** - Residents receive support towards their care under the Fair Deal. Fair Deal is a co-payment scheme.
- **Subvention** – Residents who were accommodated in private nursing homes, prior to the commencement of the Fair Deal Scheme, have been allowed to continue with their subvention arrangements if they wish; rather than transfer to the Fair Deal Scheme.
- **Contract** – This category refers to residents that are publicly funded by the HSE. Contract arrangements are in place between the HSE, private and voluntary nursing homes for the care of these residents (This category is being phased out due to the Fair Deal Scheme).
- **Private** – Residents who fund their care privately.

The survey found the following to be the distribution of residents by funding classification in respondents' homes:

Classification	Contract	Fair Deal	Private	Subvention/Other
% Residents 2020	1%	82%	16%	1%
% Residents 2014	6%	79%	12%	3%
% Residents 2009	17%	25%	20%	38%

The above clearly shows a majority trend of residents now being funded through the Fair Deal scheme. As HSE Contract and Subvention beds are phased out, it is likely that this proportion will increase further. It is worth pointing out that the 2009/2010 survey was conducted shortly after the introduction of the Fair Deal scheme (Oct 2009); and consequently, this is why the population of residents on the Fair Deal scheme was as low as it was in 2009.

9.2 Age Profile of Residents

An age profile of residents accommodated in respondents' nursing homes is set out below. 85% of all residents were found to be aged over 76.

Comparable findings from the 2014/2015 survey are also shown below. This ageing profile of nursing home residents is leading to increased dependency when admitted to homes as the requirement for nursing home care increases significantly in the over 85 cohort.

Age Profile	≤65	66-75	76-85	86-90	91-95	96-100	>100
% Residents 2020	4%	11%	31%	28%	18%	7%	1%
% Residents 2014	3%	10%	30%	29%	20%	7%	1%

9.3 Dependency Levels

Over 55% of all residents accommodated in respondents' homes were in the high or max categories. The percentages noted for each category of care are outlined below:

Category	Low	Medium	High	Max
% Residents	16%	29%	29%	26%

The dependency levels indicate that older persons are cared for in their own homes, as long as possible, and only being admitted to nursing homes when they can no longer safely take care of themselves and are assessed as requiring nursing home care.

The application process for the NHSS (Fair Deal) has led to an increasing dependency profile of residents admitted to nursing homes as more independent older persons are, where funding is available, provided with home care and other supports to allow them to remain in their own homes.

The most utilised method of assessing resident dependency was the Barthel methodology, with 97% of respondents utilising this dependency assessment index.

9.4 Long-stay Residents

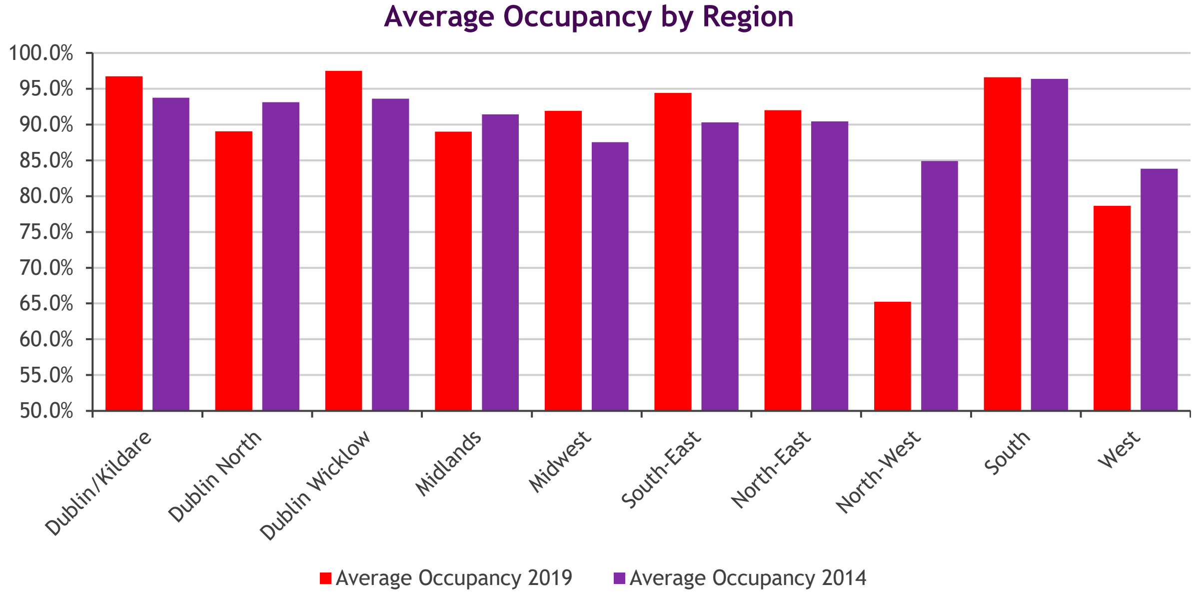
Long-stay residents accounted for 87% of all residents in respondents' nursing homes. The average length of stay per resident was reported to be 1.25 years, down from 2.9 years in 2014. This reduced length of stay suggests a shift towards people remaining in their own home with support of community care services until their dependency level dictates a need for full-time residential care.

10 Occupancy Levels

10.1 Occupancy by Location

The average occupancy in 2019 amongst nursing homes nationally was 91%. This represents an increase of 1% since the completion of the 2014/2015 National Nursing Home survey.

The graph below illustrates the annual average percentage occupancy levels reported by survey respondents in each area for 2019:



The Dublin/Wicklow Region recorded the highest average occupancy in 2019 with an occupancy percentage of c. 97%. Correspondingly, the North West Region recorded the lowest average at c. 65.3%. In the North West Region, only two respondents provided occupancy statistics of which a single nursing home reported 33% occupancy. However, occupancy levels in the North West Region have been historically lower despite the apparent need for increased supply. This is clearly anomalous and may point to different social care patterns in that region.

Only half the regions recorded an increase in average occupancy. The Midwest Region experienced the largest increase in occupancy rising from 87.5% in 2014 to 91.9% in 2019.

Overall, occupancy in the respondents nursing homes for the year 2019 have increased nationally. However, decreases observed in some regions can be due to several reasons whereby a nursing home would have undergone refurbishments, extension etc.

It is useful to contextualise outcomes in the 2014 survey arising from delays that then existed in accessing the Fair Deal Scheme, which is now reduced to four weeks.

10.2 Occupancy by Size

Average occupancy levels, based on nursing home size categorisation, fell in homes sized between 0-39 beds. However, occupancy rose in all other categories of homes. The table below illustrates the averages for each year and the percentage changes noted for each category:

Home Size	<25	25-39	40-59	>60
Average occupancy 2019	90.5%	84.7%	90.6%	94.2%
Average occupancy 2014	93.0%	84.7%	89.5%	93.5%
Change	(2.5%)	(0.0%)	1.1%	0.7%

11 Weekly Fair Deal Rates

11.1 Overview - The Fair Deal

The commencement of the Nursing Home Support Scheme (also known as “the Scheme” or “The Fair Deal”), on 27th October 2009, was a landmark development for older persons seeking nursing home care, their families and for the private nursing home sector in Ireland.

The Nursing Homes Support Scheme is a scheme of financial support for people who need long-term nursing home care. Under the Scheme, the resident will contribute towards the cost of nursing home care and the state will pay the balance. This applies whether the nursing home is public, private or voluntary.

The National Treatment Purchase Fund (NTPF) has been designated by the Minister for Health to negotiate prices with nursing homes for the provision of care under The Fair Deal. In July 2009, the NTPF offered each registered nursing home in the country the opportunity to participate as a care provider under the Scheme.

Since the introduction of the Fair Deal scheme, the NTPF has negotiated rates with all but one nursing home in Ireland. The NTPF is agreeable to negotiating short (i.e. one year or less) agreements, or longer agreements. Fair Deal rate negotiation is an important part of the business of long-term care.

The NHSS is by far the largest commissioner and funder of long-term care in Ireland. The NTPF are tasked with the negotiation of rates for long term care on behalf of the HSE. In recent times, the NTPF have been providing Fair Deal rate increases of slightly in excess of 2% per annum to nursing home providers and this is largely leading to the preservation of operating margins in the sector. However, operating margins do not include funding towards capital repayments and, so, for many nursing homes that have high levels of debt, their requirement to service this cost is not included in the rate increases which are secured from the NTPF.

Consequently, many nursing home operators are opting for an elimination of their borrowing on their nursing homes, by changing their long-term interest in the nursing home from being that of a freehold to leasehold interest. Many operators are entering into sale and leaseback structures and redeeming their bank debt in the process. In future years, this survey will focus more closely on ownership structures. Returning to the NTPF pricing methodology, the majority of operators surveyed believe the methodology of negotiating and pricing care is not fair or resident focused. There is widespread belief that the pricing methodology is imprecise, lacking science and also lacking consistency.

A methodology that considers the actual costs of providing nursing home care, which is resident specific as opposed to being based upon a facility, would be preferable and has been called for by both the DSIDC and the Oireachtas Health Committee:

DSIDC, An Irish National Survey of Dementia in Long-Term Residential Care: *“In particular, payments made through the NTPF need to be commensurate with level of care, staff training and skill mix and type of non-pharmacological interventions expected to be delivered.”*

Oireachtas Health Committee, Report on End of Life & Palliative Care in Ireland (July 2014): *“In reviewing the current Fair Deal Scheme an evidence-based cost of care model could be used in assessing the real cost of residential nursing home care in Ireland.”*

11.2 Weekly Fair Deal Rates - Private & Voluntary and Public Facilities

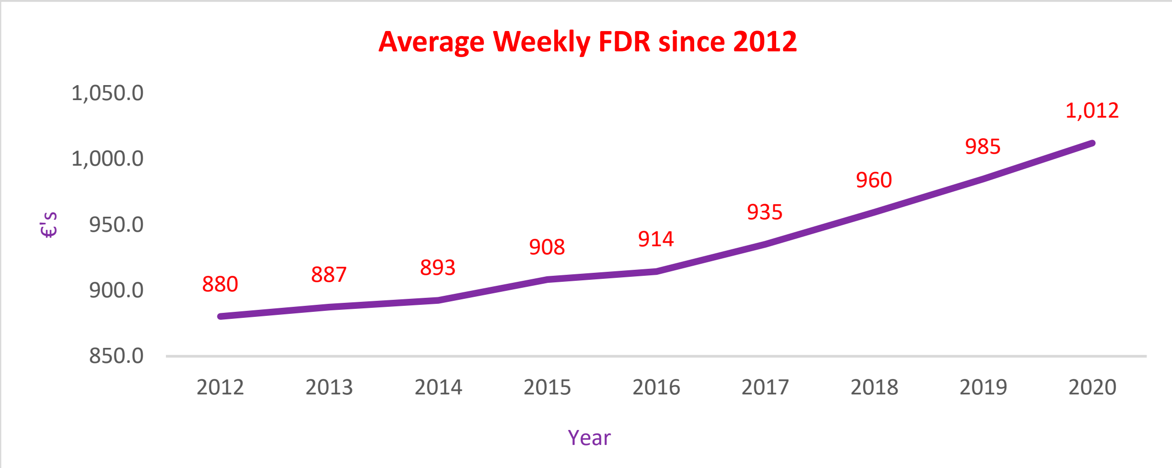
The average Fair Deal rates prevailing for accommodation in private & voluntary nursing homes and the average rate prevailing for public nursing home facilities by county as at October 2020 are outlined below[6]:

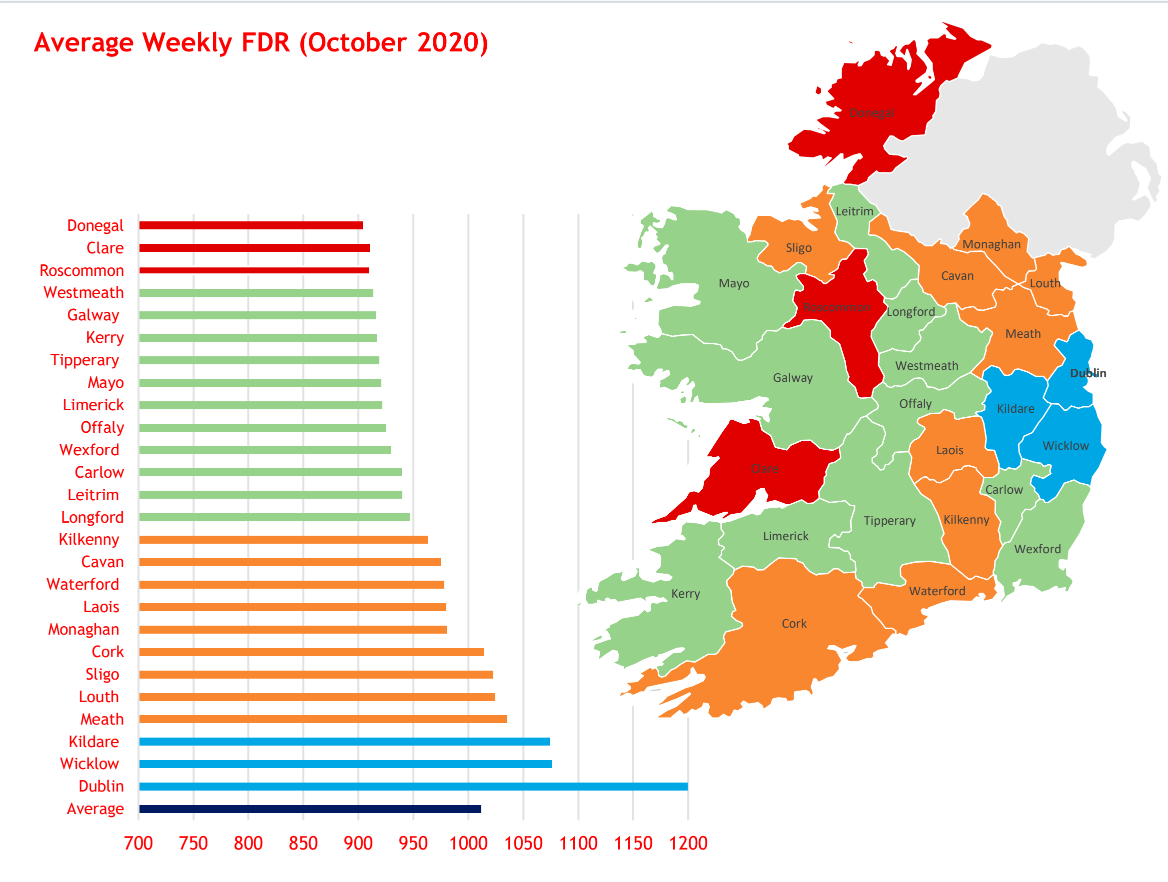
County	Private & Voluntary 2020 €	Private % change	Private & Voluntary 2014 €	Public 2020 €
Co. Carlow	939	13.7%	826	1,495
Co. Cavan	975	14.7%	850	1,734
Co. Clare	910	12.3%	811	1,540
Co. Cork	1,014	10.3%	919	1,501
Co. Donegal	904	20.8%	748	1,603
Co. Dublin	1,200	9.1%	1,100	1,703
Co. Galway	916	16.3%	787	1,618
Co. Kerry	916	12.3%	816	1,465
Co. Kildare	1,074	10.0%	976	1,734
Co. Kilkenny	963	11.8%	861	1,738
Co. Laois	980	9.1%	898	2,251
Co. Leitrim	940	20.8%	778	1,562
Co. Limerick	922	16.4%	792	1,643
Co. Longford	947	12.4%	842	1,992
Co. Louth	1,024	12.5%	910	1,775
Co. Mayo	921	14.9%	801	1,544
Co. Meath	1,035	12.2%	923	1,808
Co. Monaghan	980	14.1%	859	1,771
Co. Offaly	925	20.4%	768	1,770
Co. Roscommon	910	19.5%	762	1,577
Co. Sligo	1,023	19.7%	854	1,614
Co. Tipperary	919	16.3%	790	1,531
Co. Waterford	978	11.6%	876	1,127
Co. Westmeath	914	16.5%	784	1,860
Co. Wexford	929	17.0%	794	1,577
Co. Wicklow	1,076	8.6%	991	1,710
National Average	**1,012**	**13.0%**	**896**	**1,622**

[6] www.hse.ie

The average weekly Fair Deal rate has risen in all counties since 2014. Leitrim & Donegal have experienced the highest relative increase at 20.8%. The highest county average can be found in Dublin where the rate rose by 9.1% to €1,200 per week. As can be seen above, without exception, the published weekly rates for publicly provided accommodation under Fair Deal continue to exceed weekly rates for privately provided accommodation in every county in Ireland.

It is worth noting that the overall increase since 2014, a six-year time horizon, is only 13.3% representing a c.2% annual increase. Some of this small annual increase was awarded because of Fair Deal contracts which were linked to fixed interval increases.





11.3 Private & Voluntary Facilities - Weekly Fair Deal Rates by NHI Region

Outlined below are the current weekly Fair Deal rates prevailing for private & voluntary operators in each NHI Region as at October 2020.

NHI Region	No. of Nursing Homes	Average Weekly rate €
Dublin/Kildare	40	1,129
Dublin North	45	1,194
Dublin/Wicklow	48	1,156
Midlands	23	932
Midwest	46	918
South East	60	942
North East	38	1,015
North West	22	943
South	65	988
West	66	916
Country Average	453	1,012

€1,012

*Avg. Fair Deal rate**

**Country average*

11.4 Services Included under the Fair Deal Scheme

It is important to note that the weekly fee rate under the Scheme covers the following only:

- Bed and board
- Nursing and personal care
- Bedding
- Laundry service
- Basic aids and appliances

The following services are specifically **excluded** under the Fair Deal Scheme:

- Daily delivery of newspapers
- Social programmes
- All therapies
- Incontinence wear*
- Chiropody
- Dry cleaning
- Ophthalmic and dental services
- Transport (including care assistant costs)
- Specialised wheelchairs & equipment
- Hairdressing and other similar services

*For Fair Deal residents these are provided by the HSE

Additional Service Charge (ASC) covers services which are provided outside the terms of the Fair Deal scheme and are agreed in the contract of care.

11.5 NTPF Negotiations

The Fair Deal scheme has come under considerable financial pressure since its launch. There is a capped budget with which to provide funding for older persons who require nursing home care; and at times, this does not appear to be sufficient to cover the large number of older persons requiring care.

As a result, the NTPF have been reluctant to agree increases in Fair Deal rates to the level which are sought, even if such increase requests can be justified on the basis of experienced cost pressures arising since their most recent negotiation. In addition, there appears to be an attempt to balance any increases given to homes on low rates against smaller increases to homes on higher rates, in different parts of the country. This can be very challenging for homes, even in counties with high average Fair Deal rates if the nursing home has high levels of debt owing on their facility.

During the period of the 12 months to the survey date, 87.5% of respondents secured a marginal increase in their most recent NPTF negotiations, while 12.5% of respondents retained their existing rate. There were no operators who suffered Fair Deal rate reductions. The survey also found that c. 93% of respondents did not believe the NTPF recognised the reality of costs being incurred to provide high-dependency, person-focussed and specialised care during in the negotiation process.

Unfortunately, this figure has revealed that there is an overwhelming lack of confidence by operators in the NTPF in carrying out its statutory responsibilities with rigour, transparency, and fairness under Fair Deal and in the scheme itself.

11.6 Convalescent & Respite rates

Survey respondents were asked to set out the weekly rates charged for convalescent and respite care. This type of care is not covered under the Fair Deal Scheme. The following are the average rates reported nationally and regionally for such care:

NHI Region	Average Convalescent Rate	Average Respite Rate
Dublin/Kildare	€1,302	€1,302
Dublin North	€1,325	€1,117
Dublin/Wicklow	€1,550	€1,601
Midlands	€928	€928
Midwest	€920	€916
South East	€1,005	€854
North East	€1,005	€1,005
North West	€910	€910
South	€1,007	€1,022
West	€910	€890
Country Average	€1,052	€1,020

€1,052

Avg. convalescent rate

€1,020

Avg. respite rate

12 Financial Performance

12.1 Turnover per Registered Bed by Location

The average turnover per registered bed reported by respondents in respect of their most recent financial year is outlined below. Results were found to vary widely by location; however, there is a clear upward trend which is reflective of both increases in occupancy and marginal rate increase, including the ASC for services provided outside the Fair Deal.

NHI Region	Average Turnover Per Bed 2020	Average Turnover Per Bed 2014	% change
Dublin/Kildare	€61,427	€56,197	9.3%
Dublin North	€55,570	€51,285	8.4%
Dublin/Wicklow	€72,993	€56,727	28.7%
Midlands	€39,948	€42,867	-6.8%
Midwest	€56,709	€35,079	61.7%
South East	€48,987	€33,929	44.4%
North East	€54,327	€46,537	16.7%
North West	€45,119	€34,203	31.9%
South	€54,378	€44,069	23.4%
West	€47,300	€36,035	31.3%
Country Average	**€54,089**	**€44,451**	**21.7%**

Respondents in the Dublin/Wicklow Region recorded an average turnover per bed of €72,993. This was the highest average amongst all Regions. Correspondingly, respondents in the Midlands Region reported the lowest average at €39,948. This, however, was due to one nursing home reporting significantly lower average turnover per bed, when we exclude this home, the Region reported €45,158 average turnover per bed, an increase of 5.3% between the periods. The Midwest Region had the highest increase in rates since 2014 of 61.7%.

Turnover in 2020 increased per registered bed due to two reasons, namely:

a) Average fee rates increased between 2014 and 2020; and
b) Occupancy levels also increased over the five-year period.

Therefore, when the increased turnover is analysed by registered bed, the national average increase has improved by 21.7% in that time horizon.

12.2 Turnover by Size

Average annual turnover per bed categorised by size of nursing home is set out below. Interestingly, respondents operating in the '25 bed or less' size category, reported higher turnover per registered bed than in the 25-39 category, compared to previously this was noted in 25-39 and 40-59 category. However, it is clear that homes in excess of 60 beds generate significantly more revenue on a per bed basis.

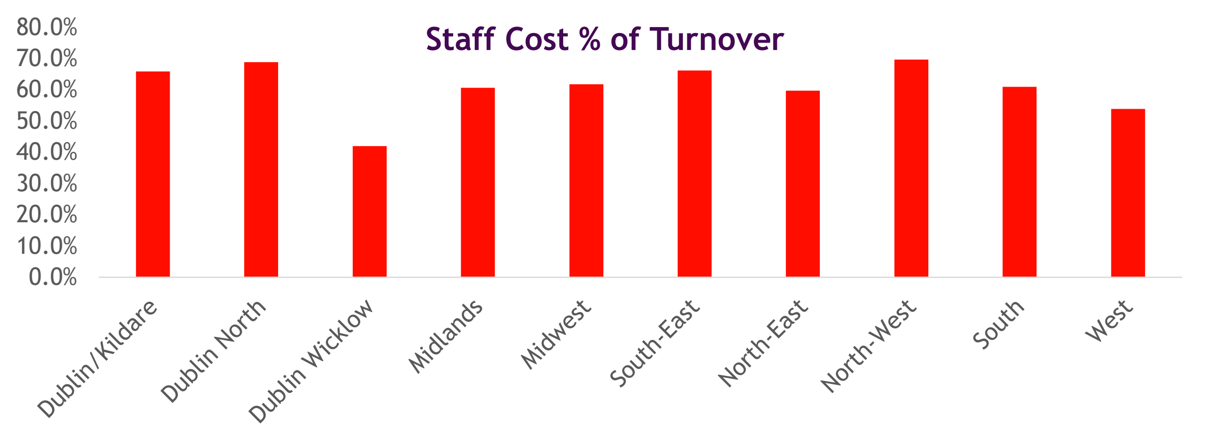
Home Size	<25	25-39	40-59	≥60
Average Turnover per Bed 2014	€41,583	€42,823	€40,813	€48,594
Average Turnover per Bed 2020	€51,408	€47,165	€53,574	€57,891

13 Staffing Matters

Staff costs are the single largest category of cost incurred in the provision of nursing home care.

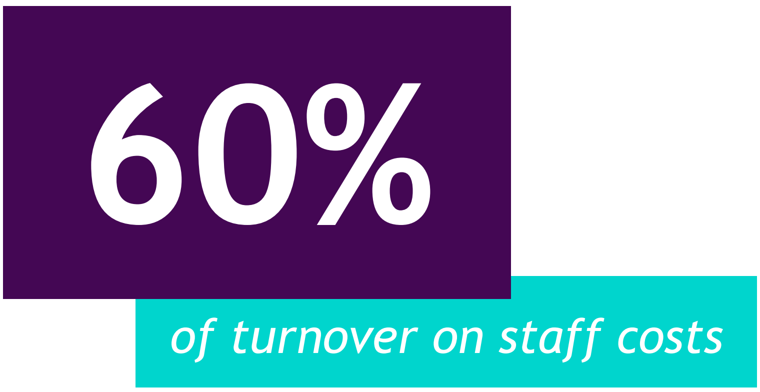
13.1 Staff Costs as a Percentage of Turnover

Nationally in 2019, staff costs accounted for 60% of turnover on average in respondents' homes, which is marginally reduced from the figure reported in 2014 of 61.5%. Regionally, staff costs accounted for the following percentages of turnover:



It is worthy of note that the North West Region is reporting the highest staff cost/turnover ratio; with the figure being at the lower end of the average weekly Fair Deal rate compared to other Regions.

Dublin/Wicklow Region reported the lowest percentage of 42% as a result of one nursing home reporting 13% staff cost as percent of turnover driving the average down. However, excluding this home would indicate a 52% staff cost as a percent of turnover in the Region, which is still the lowest of the areas reported upon.



13.2 Staff Costs per Registered Bed

The national average staff cost per registered bed in respondents' homes increased by 23.5% between 2014 and 2019, with the national average for 2019 being €33,514 per bed.

The North West Region experienced the largest increase in staff costs since 2014, with staff costs in this region increasing 310.7%; however, this was based on a response from one nursing home respondent in the region with 69.71% staff cost as percent of turnover with a occupancy of 33% during the year. Similarly, in the Dublin/Wicklow Region, the average staff cost has been low as a result of one nursing home respondent showing significantly low staff cost per bed; excluding which, the average in Dublin Wicklow Region was €37,523, an increase of 3% compared to 2014. The lowest staff cost per bed was reported in Midlands area at €24,749 in 2019. It is worth noting that homes in their first year of operation will have a lower cost per registered bed as occupancy builds up. This is due to the lower numbers of staff required; compared to homes with high occupancy and may impact on the average costs reported in a particular area. Average staff costs per registered bed for each of the NHI Regions are set out in the table below:

Area	Staff Cost per Bed 2020	Staff Cost per Bed 2014	% Change
Dublin/Kildare	€40,026	€30,908	29.5%
Dublin North	€38,300	€34,668	10.5%
Dublin/Wicklow	€30,485	€36,164	-15.7%
Midlands	€24,749	€26,149	-5.4%
Midwest	€34,546	€21,144	63.4%
South East	€32,550	€20,557	58.3%
North East	€37,900	€28,653	32.3%
North West	€84,485	€20,571	310.7%
South	€31,841	€26,860	18.5%
West	€25,410	€20,976	21.1%
Average	**€33,514**	**€27,130**	**23.5%**

The table below summarises the nursing cost based on the size of the nursing home. It is clear that lower staff cost as percent of turnover is achieved at nursing homes in excess of 40 beds.

Home Size	<25	25-39	40-59	≥60
Average of Staff Cost Per Bed	€30,082	€34,546	€36,599	€33,933
Staff Cost as % Turnover	61.3%	66.2%	58.9%	59.8%
Average Staff Cost 2019	€610,707	€915,023	€1,366,257	€1,718,922

13.3 Individual Salary Levels & Hourly Rates

Director of Nursing & Clinical Nurse Manager

In 2019, the average gross salaries reported by survey respondents for Directors of Nursing and Clinical Nurse Managers (CNM) were €64,977 and €48,078 respectively.

The survey found that where a Director of Nursing was employed in a respondent's home, 45% of persons occupying the position were involved in the direct care of residents. The remaining 55% held a management role only.

Approximately 60% of respondents employed a CNM in addition to a Director of Nursing. Of the respondents who do employ a CNM, the CNM is involved in the direct care of residents, with on average 32 hours per week of direct care being provided by CNM's.

Care Staff

The average hourly rates (excluding PRSI and levies) for Registered General Nurses (RGN) and Health Care Assistants (HCA) in 2019 were €20.4 and €11.5 respectively. A schedule of hourly rates by NHI Region is outlined below:

NHI Region	RGN Hourly Rate 2020	HCA Hourly Rate 2020	RGN Hourly Rate 2014	HCA Hourly Rate 2014
Dublin/Kildare	€21.2	€11.6	€18.9	€10.9
Dublin North	n/a	n/a	€19.5	€11.1
Dublin/Wicklow	€24.3	€13.0	€19.5	€11.7
Midlands	€18.0	€11.0	€18.4	€10.3
Midwest	€19.7	€11.2	€18.5	€10.2
South East	€21.4	€11.4	€19.0	€10.2
North East	€19.5	€10.8	€18.5	€10.2
North West	€19.0	€11.5	€16.5	€9.9
South	€20.3	€12.2	€19.5	€11.4
West	€18.5	€10.5	€16.9	€9.9
Average	**€20.4**	**€11.5**	**€18.6**	**€10.7**

Anecdotally, we have been informed that there is significant pressure on operators to increase staff pay rates. Almost 74% of respondents increased staff pay rates in 2019 and 65% of respondents indicated that they expected to increase rates in 2020. On average, overall pay rates for nurses increased by an average of 3%; with HCA rates increasing by an average 4% in 2019. Of the respondents who expected to pay an increase in 2020, the average expected increase for nurses was 2.7%; with the average increase for care assistants expected to be 3%.

Support Staff - Hourly Rates

A schedule of hourly rates by HSE area for the various support roles in respondents' homes is outlined below. All are shown exclusive of PRSI and levies.

Position	Hourly Rate 2019	Hourly Rate 2014
Domestic Assistant	€11	€10
Cook	€15	€14
Kitchen Assistant	€11	€10
Administrator	€17	€15
Receptionist	€13	€10
Maintenance Staff	€16	€14

13.4 Other Staff Related Findings

Outlined below are some other key staff related Survey findings:

- **Staff turnover:** respondents reported a 16% staff turnover in 2019.
    - The most common reason cited for nursing staff leaving was to take up employment with another private nursing home, followed by leaving for another sector.
    - In the case of care assistants, the most common reason for leaving was retirement, followed by leaving for the HSE.
- **Nationality of nursing staff**: the survey found that on average 36% of nurses employed in respondents' homes were from outside the European Union (EU) (increase from 28% in 2009). A further 21% were from the EU (excluding Ireland), with the balance of 43% of nurses being Irish.

13.5 Direct Care Hours

Direct care refers to care provided to nursing home residents by nursing and care assistants including activities staff hours.

The HIQA Standards stipulate that, at all times, there are sufficient numbers of staff with the necessary experience and competencies to meet the needs of residents and which reflect the size, layout, and purpose of the service. Standard 7.2.1[7]

1) The registered provider shall, in so far as is reasonably practical, arrange to meet the needs of each resident when these have been assessed in accordance with paragraph (2).
2) 15. (1) The registered provider shall ensure that the number and skill mix of staff is appropriate having regard to the needs of the residents, assessed in accordance with Regulation 5, and the size and layout of the designated centre concerned. 15. (1) The registered provider shall ensure that the number and skill mix of staff is appropriate having regard to the needs of the residents, assessed in accordance with Regulation 5, and the size and layout of the designated centre concerned. (2) The person in charge shall ensure that the staff of a designated centre includes, at all times, at least one registered nurse.

Despite previous expressions of desire/need for a national assessment tool to be agreed and implemented, such an assessment tool has not yet been established. A staffing matrix which is dependency-based and properly funded would be a welcome addition to the long-term care sector.

In the absence of a regulatory framework, international best practice is frequently used by nursing home operators for guidance on direct care staffing and is consistent with the findings of higher dependency levels in Irish Nursing Homes.

Survey respondents were found, on average, to provide 3.77 care hours per day to each resident accommodated in their respective nursing homes. This represents a 0.10 hour increase per resident per day on the levels noted in the 2014/2015 survey.

[7] The Health Act 2007 (Care & Welfare of Residents in Designated Centres for Older People) Regulations 2013.

14 Food Costs

14.1 Analysis by Size

When analysed by size of nursing home, the following were the findings in relation to average food cost per registered bed in 2019:

Home Size	<25	25-39	40-59	≥60
Food Cost Per Bed 2019	€2,318	€2,600	€2,190	€2,254
Food Cost as % of Turnover	5.4%	5.3%	4.0%	4.1%

As can be seen above, homes with 40 or more beds appear to be capable of achieving greater economies of scale through bulk purchasing of food and provisions.

15 Other Expenditure

15.1 Repairs & Maintenance Costs

Repairs & Maintenance has proved a significant cost in recent years. On average, the respondents reported that almost 3% of turnover was spent on repairs within their homes in 2019. The below table analyses the Repairs & Maintenance costs per bed in relation to home size:

Home Size	<25	25-39	40-59	≥60
Average of R&M Per Bed	€1,280	€973	€1,393	€1,175
R&M as % Turnover	2.9%	2.0%	2.7%	2.3%
Average Repairs & Maintenance 2019	€27,817	€31,704	€67,194	€71,917

15.2 Staff Training Costs

Staff training costs are now responsible for a considerable proportion of expenditure. On average, the respondents reported that almost 0.3% of turnover (slightly in excess of €10,000) was spent on training staff in their homes in 2019. The below table analyses the staff training costs per bed as a percentage of turnover. The respondent with the highest training cost spent was in the northern area with spending of c.€15k in staff training. Important to note is that the North West Region is based on 1 respondent with unusually high average training costs and, therefore, is not indicative of costs in the wider region.

NHI Region	Average Training Cost	Average Training cost as a % of Turnover
Dublin/Kildare	€12,177	0.35%
Dublin North	€12,310	0.19%
Dublin/Wicklow	€12,290	0.26%
Midlands	€4,475	0.30%
Midwest	€5,425	0.33%
South East	€4,782	0.19%
North East	€13,637	0.41%
North West	€35,376	1.44%
South	€13,764	0.36%
Western	€6,970	0.51%
Average	**€10,361**	**0.36%**

The below shows staff training cost per bed based on the size of the home:

Home Size	<25	25-39	40-59	≥60
Training Cost per bed	€172	€214	€203	€189
Training as % Turnover	0.3%	0.5%	0.3%	0.4%
Average Training Cost	€3,586	€7,122	€9,340	€11,056

16 Summary Schedule by Size

Home Size	<25	25-39	40-59	≥60
Average Turnover per Bed	€51,408	€47,165	€53,574	€57,891
Average Staff Cost per Bed	€30,082	€34,546	€36,599	€33,933
Staff Costs as % of Turnover	61.3%	66.2%	58.9%	59.8%
Food Cost per Bed	€2,318	€2,600	€2,190	€2,254
Food Cost as % Turnover	5.4%	5.3%	4.0%	4.1%
R&M per Bed	€1,280	€973	€1,393	€1,175
R&M as % of Turnover	2.9%	2.0%	2.7%	2.3%
Training Cost per Bed	€172	€214	€203	€189
Training as % of Turnover	0.3%	0.5%	0.3%	0.4%

The above table illustrates the differences in financial performance by nursing homes categorised by home size. As can be seen from the table above, despite having the highest turnover per registered bed, homes with 60 beds had a lower staff cost/turnover ratio as a result of economies of scale. Analysis of food costs and training costs illustrate the economies of scale achieved by homes with 40 beds or more. These homes have the lowest cost per bed in both absolute and percentage terms.

€10,000+

*average spent on staff training**

**2019*

17 Area Summaries

The populations summaries for 2020 are based on April 2020 CSO estimates released on a regional basis, which we have extrapolated to county level based on actual 2016 census data.

17.1 Dublin/Kildare/Wicklow

The Dublin/Kildare/Wicklow Region is comprised of County Dublin, the City, the County of Kildare, and the County of Wicklow.

The number of private beds in the Region is set out in the table below:

Regions	Population	Population ≥ 65	Private Beds
Dublin	1,417,800	183,300	7,100
Kildare	236,924	26,318	1,513
Wicklow	151,655	22,208	978

The table below summarises the key survey findings in respect of the Dublin/Kildare/Wicklow Region:

Area Statistics	2020
Number of homes	133
Number of private beds	9,591
Population ≥ 65 per private bed	24.2
Survey Results	**2020**
Average occupancy	94.4%
Average weekly Fair Deal rate	€1,160
Average turnover per bed	€63,330
Average annual staff cost per registered bed	€36,270

17.2 Midlands Region

The Midlands Region covers the counties of Laois, Longford, Offaly and Westmeath.

The number of private beds in the Region is set out in the table below:

Midlands Regions	Population	Population ≥ 65	Private Beds
Laois	88,058	10,817	235
Longford	42,495	6,557	223
Offaly	81,055	11,924	387
Westmeath	92,293	12,801	534

The table below summarises the key survey findings in respect of the Midlands Region:

Area Statistics	2020
Number of homes	23
Number of private beds	1,379
Population ≥ 65 per private bed	30.5
Survey results	**2020**
Average occupancy	89.0%
Average weekly Fair Deal rate	€932
Average turnover per bed	€39,948
Average annual staff cost per registered bed	€24,749

17.3 Midwest Region

The Midwest Region covers the counties of Limerick, Clare and Tipperary North.

The number of private beds in the region is set out in the table below:

Midwest Regions	Population	Population ≥ 65	Private Beds
Limerick	201,007	31,495	1,159
Clare	122,540	20,280	747
Tipperary North	82,276	14,013	451

The table below summarises the key survey findings in respect of the Midwest Region:

Area Statistics	2020
Number of homes	61
Number of private beds	2,357
Population ≥ 65 per private bed	27.9
Survey results	**2020**
Average occupancy	91.9%
Average weekly Fair Deal rate	€918
Average turnover per bed	€56,709
Average annual staff cost per registered bed	€34,546

17.4 North East Region

The North East Region covers the counties of Cavan, Louth, Monaghan and Meath.

The number of private beds in the Region is set out in the table below:

North East Regions	Population	Population ≥ 65	Private Beds
Cavan	78,778	11,638	397
Monaghan	63,482	9,539	348
Louth	137,237	19,221	626
Meath	207,684	24,853	859

The table below summarises the key survey findings in respect of the North East Region:

Area Statistics	2020
Number of homes	38
Number of private beds	2,230
Population ≥ 65 per private bed	28.9
Survey results	**2020**
Average occupancy	92.0%
Average weekly Fair Deal rate	€1,015
Average turnover per bed	€54,327
Average annual staff cost per registered bed	€37,900

17.5 North West Region

The North West Region covers the counties of Donegal, Leitrim and Sligo.

The number of private beds in the Region is set out in the table below:

North West Regions	Population	Population ≥ 65	Private Beds
Donegal	164,629	27,792	604
Sligo	67,773	11,816	306
Leitrim	33,138	6,016	130

The table below summarises the key survey findings in respect of the North West Region:

Area Statistics	2020
Number of homes	22
Number of private beds	1,040
Population ≥ 65 per private bed	43.9
Survey results	**2020**
Average occupancy	65.3%
Average weekly Fair Deal rate	€943
Average turnover per bed	€45,119
Average annual staff cost per registered bed	€84,485*

*Average turnover is based on one respondent and such doesn't represent the whole regional average costs.

17.6 South Region

The South Region covers the counties of Cork and Kerry.

The number of private beds in the Region is set out in the table below:

South Region	Population	Population ≥ 65	Private Beds
Cork	563,405	82,075	2,790
Kerry	153,295	27,825	764

The table below summarises the key survey findings in respect of the South Region:

Area Statistics	2020
Number of homes	65
Number of private beds	3,554
Population ≥ 65 per private bed	31.1
Survey results	**2020**
Average occupancy	96.6%
Average weekly Fair Deal rate	€988
Average turnover per bed	€54,378
Average annual staff cost per registered bed	€31,841

17.7 South East Region

The South East Region covers the counties of Carlow, Kilkenny, Waterford, Wexford and Tipperary South.

The number of private beds in the Region is set out in the table below:

South East Region	Population	Population ≥ 65	Private Beds
Carlow	59,298	8,366	304
Kilkenny	103,355	15,980	630
Waterford	121,003	19,753	595
Wexford	155,943	25,000	905
Tipperary South	82,276	14,013	452

The table below summarises the key survey findings in respect of the South East Region:

Area Statistics	2020
Number of homes	71
Number of private beds	3,003
Population ≥ 65 per private bed	27.7
Survey results	**2020**
Average occupancy	94.4%
Average weekly Fair Deal rate	€942
Average turnover per bed	€48,987
Average annual staff cost per registered bed	€32,550

17.8 West Region

The West Region covers the counties of Galway, Mayo and Roscommon.

The number of private beds in the Region is set out in the table below:

West Region	Population	Population ≥ 65	Private Beds
Galway	267,564	39,001	1,627
Mayo	135,314	25,596	887
Roscommon	66,922	12,003	553

The table below summarises the key survey findings in respect of the West Region:

Area Statistics	2020
Number of homes	66
Number of private beds	3,067
Population ≥ 65 per private bed	25.0
Survey results	**2020**
Average occupancy	78.7%
Average weekly Fair Deal rate	€916
Average turnover per bed	€47,300
Average annual staff cost per registered bed	€25,410

18 Appendix: Nursing Home Directory[8]

Home Name	Address 1	Address 2	County
Abbey Haven Care Centre	Carrick Road	Boyle	Co Roscommon
Abbeybreaffy Nursing Home	Dublin Rd (N5)	Castlebar	Co Mayo
Abbeylands Nursing Home & Alzheimers Unit	Carhoo	Kildorrery	Co Cork
Abbot Close Nursing Home	St Marys Terrace	Askeaton	Co Limerick
Aclare House Nursing Home	4/5 Tivoli Terrace South	Dun Laoghaire	Co Dublin
Acorn Lodge Nursing Home	Ballykelly	Cashel	Co Tipperary
Ailesbury Nursing Home	58 Park Ave	Sandymount	Dublin 4
Aisling House Nursing Home	Seabank Road	Arklow	Co Wicklow
Altadore Retirement & Nursing Home	Upper Glenageary Road	Glenageary	Co Dublin
Amberley Nursing Home	Acres	Fermoy	Co Cork
An Teaghlach Uilinn Retirement and Convalescent Centre	Kilrainey	Moycullen	Co Galway
Annabeg Nursing Home	Meadowcourt	Ballybrack	Co Dublin
Aperee Living Tralee	Skahanagh	Tralee	Co Kerry
Araglen House	Loumanagh	Boherbue, Mallow	Co Cork
Aras Chois Fharraige	Pairc	Spiddal	Co Galway
Aras Gaoth Dobhair	Meenaniller	Derrybeg, Letterkenny	Co Donegal
Aras Mhic Suibhne Nursing Home	Mullinasole	Laghey	Co Donegal
Aras Mhuire- Medical Missionaries of Mary	Beechgrove	Drogheda	Co Louth
Aras Mhuire Nursing Home	Greenville	Listowel	Co Kerry
Aras Ui Dhomhnaill	Loughnakey	Milford	Co Donegal
Arbour Care - Carlingford Nursing Home	Old Dundalk Road	Carlingford	Co Louth
Arbour Care - Raheny House Nursing Home	Raheny House	476 Howth Road, Raheny	Dublin 5
Arbour Care Dunboyne Nursing Home	Summerhill Road	Dunboyne	Co Meath
Arbour Care Greystones Nursing Home	Church Road	Greystones	Co Wicklow
Arbour Care Sacred Hearts Nursing Home	Roslea Road	Clones	Co Monaghan
Arbour Care - Mullinahinch House Private Nursing Home	Mullinahinch	Monaghan	Co Monaghan
Arbour Care - Teach Altra Nursing Home	Scarteen	Newmarket	Co Cork
Archview Lodge Nursing Home	Drumany	Letterkenny	Co Donegal
Ard Na Ri Nursing Home	Holy Cross	Bruff	Co Limerick
Ardeen Nursing Home	Abbey Road	Thurles	Co Tipperary

[8] Per NHI Directory (September 2020)

Asgard Lodge Nursing Home	Monument Lane, Kilbride	Arklow	Co Wicklow
Ashbury Nursing Home	1a Kill Lane	Kill O'the Grange, Blackrock	Co Dublin
Ashford House Nursing Home	6 Tivoli Terrace East	Dun Laoghaire	Co Dublin
Ashlawn House Nursing Home	Limerick Road	Nenagh	Co Tipperary
Assisi House	Navan Road		Dublin 7
Athlunkard House	at Saint Nicholas	Westbury	Co Clare Via Limerick
Atlanta Nursing Home	Sidmonton Road	Bray	Co Wicklow
Ave Maria Nursing Home	Tooreen	Ballyhaunis	Co Mayo
Bailey's Nursing Home (Ougham House)	Mountain Road	Tubbercurry	Co Sligo
Ballard Lodge Nursing Home	Borris Road	Portlaoise	Co Laois
Ballinamore House Nursing Home	Kiltimagh		Co Mayo
Ballincurrig Care Centre	Ballincurrig	Leamlara	Co Cork
Ballinderry Nursing Home	Kilconnell	Ballinasloe	Co Galway
Beaumount Lodge Residential Home	Kilmore Road	Kilmore, Artane	Dublin 5
Beech Lawn House Nursing Home (Sisters of Our Lady of Charity)	High Park	Grace Park Rd, Drumcondra	Dublin 9
Beech Lodge Care Facility & Residential Village	Kilmallock Road	Bruree	Co Limerick
Beech Park Nursing & Convalescent Centre	Dunmurry East	Kildare Town	Co Kildare
Beechfield Manor Nursing Home	Shanganagh Road	Shankill	Co Dublin
Beechtree Nursing Home	Murragh House	Oldtown	Co Dublin
Beechwood House Nursing Home	Newcastle West		Co Limerick
Beechwood Nursing Home	Rathvindon	Leighlinbridge	Co Carlow
Belmont House Nursing Home	Galloping Green	Stillorgan	Co Dublin
Bethany House	Main Street	Tyrrelspass	Co Westmeath
Bishopscourt Residential Care Ltd	Liskillea	Waterfall	Co Cork
Blackrock Abbey Nursing Home	Blackrock		Co Louth
Blackrocks Nursing Home	The Green,Foxford		Co Mayo
Blair's Hill Nursing Home	Blair's Hill	Sunday's Well	Co Cork
Blake Manor Nursing Home	Cloughballymore House	Ballinderreen	Co Galway
Blarney Nursing and Retirement Home	Killowen	Blarney	Co Cork
Borris Lodge Nursing Home	Borris		Co Carlow
Boyne Valley Nursing Home	Dowth	Drogheda	Co Louth
Brabazon Trust	2 Gilford Road	Sandymount Avenue	Dublin 4
Bramleigh Lodge Nursing Home	Cashel Road	Cahir	Co Tipperary
Brampton Care Home	Main Street	Oranmore	Co Galway
Bridhaven Nursing Home	Spa Glen	Mallow	Co Cork
Brindley Healthcare - Ashley Lodge Nursing Home	Tully East	Kildare Town	Co Kildare

Brindley Healthcare - Beach Hill Manor Private Nursing Home	Lisfannon, Fahan	Buncrana	Co Donegal
Brindley Healthcare - Brentwood Manor Private Nursing Home	Letterkenny Road	Convoy	Co Donegal
Brindley Healthcare - Brindley Manor Private Nursing Home	Letterkenny Road	Convoy	Co Donegal
Brindley Healthcare - Brookvale Manor Private Nursing Home	Hazelhill	Ballyhaunis	Co Mayo
Brindley Healthcare - Kilminchy Lodge Nursing Home	Kilminchy	Portlaoise	Co Laois
Brindley Healthcare - Maynooth Lodge Nursing Home	Rathcoffey Road,Crinstown	Maynooth	Co Kildare
Brindley Healthcare - Millbrae Lodge Nursing Home	Newport		Co Tipperary
Brindley Healthcare - Mill Lane Manor Private Nursing Home	Sallins Road	Naas	Co Kildare
Brindley Healthcare - Oughterard Manor	Camp Street	Oughterard	Co Galway
Brookfield Care Centre	Leamlara	Carrigtwohill	Co Cork
Brookhaven Nursing Home	Donoughmore	Ballyragget	Co Kilkenny
Brooklodge Nursing Home	Ballyglunin	Tuam	Co Galway
Brymore House Nursing Home	Thormanby Road	Howth	Co Dublin
Brymore Howth Hill Lodge	Thormanby Road	Howth	Co Dublin
Bushfield Care Centre	Bushfield	Oranmore	Co Galway
Bushmount Nursing Home	Bushmount	Clonakilty	Co Cork
Bushy Park Nursing Home Ltd	Borrisokane		Co Tipperary
Cahercalla Community Hospital Ltd	Cahercalla Road	Ennis	Co Clare
Cahereen Care Centre	Condrum	Macroom	Co Cork
Cairn Hill Nursing Home	Herbert Road	Bray	Co Wicklow
Caiseal Geal Teach Altranais Nursing Home	School Road, Castlegar	Galway City	Co Galway
Carebright Community Centre	Ardykeohane	Bruff	Co Limerick
CareChoice Ballynoe Nursing Home	White's Cross		Co Cork
Carechoice Beaumont Residential Care Home	Woodvale Road	Beaumont, Ballintemple	Co. Cork
Carechoice Clonakilty Nursing Home	Clogheen	Clonakilty	Co Cork
CareChoice Dungarvan Nursing Home	The Burgery	Dungarvan	Co Waterford
Carechoice Finglas	Tolka Valley	Finglas Road	Dublin 11
Carechoice Macroom Nursing Home	Gurteenroe	Macroom	Co Cork
Carechoice Malahide Nursing Home	Mayne River Street, Northern Cross	Malahide Road	Dublin 17
Carechoice Montenotte Nursing Home	Middle Glanmire Road	Montenotte	Co Cork
Carechoice Newtown Park Nursing Home	Newtownpark Avenue	Blackrock	Co Dublin
Carechoice Swords	Bridge Street	Swords	Co Dublin

Carechoice The Marlay Nursing Home	Kellystown Rd.	Rathfarnham	Dublin 16
Carechoice Trim	Knightsbridge Village	Longwood Road, Trim	Co Meath
Carna Nursing Home (Teach Altranais Charna)	Carna		Co Galway
Carrigoran House	Newmarket-on-Fergus		Co Clare
Carthage Nursing Home	Mucklagh	Tullamore	Co Offaly
Carysfort Nursing Home	7 Arkendale Road	Glenageary	Co Dublin
Castlebridge Manor Nursing Home	Ballyboggan Lower	Castlebridge	Co Wexford
Grace Healthcare - Castleross Nursing & Convalescent Centre	Castleross	Carrickmacross	Co Monaghan
Castleturvin House Nursing Home	Castleturvin	Athenry	Co Galway
Catherine McAuley House	Beaumont Convalescent Home	Beaumont	Dublin 9
Catherine McAuley Nursing Home	Old Dominic Street		Co Limerick
Cedar House Nursing Home (Society of the Sacred Heart)	35 Mount Anville Park	Mount Anville Road	Dublin 14
Central Park Nursing Home	Clonberne Village	Clonberne,Ballinasloe	Co Galway
Cherryfield Lodge Nursing Home	Milltown Park		Dublin 6
Cherrygrove Nursing Home	Priesthaggard	Campile, New Ross	Co Wexford
Claremount Nursing Home	Claremount	Claremorris	Co Mayo
Clarenbridge Nursing Home	Ballygarriff	Craughwell	Co Galway
Cloverlodge Nursing Home Kildare	Clonmullion	Athy	Co Kildare
Cobh Community Hospital	Cobh		Co Cork
Corbally House Nursing Home	Mill Road	Corbally	Co Limerick
Corpus Christi Nursing Home	Brigown	Mitchelstown	Co Cork
Corrandulla Residential Nursing Home	Corrandulla		Co Galway
Costellos Nursing Home & Care Centre	Ballyleague	Lanesboro	Co Roscommon
Cottage Nursing Home	No 70 Irishtown	Clonmel	Co Tipperary
Craddock House	Craddockstown Road		Co Kildare
Cratloe Nursing Home	Gallows Hill	Cratloe	Co Clare
Cuan Chaitriona Nursing Home	The Lawn	Castlebar	Co Mayo
Curam Care Home Navan Road	Cabra	Navan	Dublin 7
Curragh Lawn Nursing Home	Kinneagh	The Curragh	Co Kildare
Dargle Valley Nursing Home	Cookstown	Enniskerry	Co Wicklow
Darraglynn House Nursing Home	Carrigaline Road	Douglas	Co Cork
Dealgan House Nursing Home	Toberona	Dundalk	Co Louth
Deerpark Nursing Home	Lattin		Co Tipperary
Conna Nursing Home	Conna	Mallow	Co Cork
Coral Haven Residential Nursing Home	Headford Road		Co Galway
Cramers Court Nursing Home	Belgooly	Kinsale	Co Cork
Deerpark House Nursing Home	Seafield	Bantry	Co Cork

Millrace Nursing Home	Bridge Street	Ballinasloe	Co Galway
Ocean View Retirement and Nursing Home	Knockglassmore	Camp, Tralee	Co Kerry
Strathmore Lodge Nursing Home	Friary Walk,	Callan	Co Kilkenny
Douglas Nursing Home	Moneygourney	Douglas	Co Cork
Drakelands House Nursing Home	Drakelands		Co Kilkenny
Droimnin Nursing Home	Brockley Park	Stradbally	Co Laois
Dromcollogher and District Respite Care Centre	Dromcollogher		Co Limerick
Drumbear Lodge Nursing Home	Cootehill Road		Co Monaghan
Drumderrig Nursing Home	Abbeytown	Boyle	Co Roscommon
Ealga Lodge	Main Street	Shinrone, Birr	Co Offaly
Eliza Lodge Nursing Home	Five Roads	Banagher	Co Offaly
Elm Green Nursing Home	Elmgreen, Dunsink Lane	Castleknock	Dublin 15
Elm Hall Nursing Home	Loughlinstown Road	Celbridge	Co Kildare
Elmgrove House Nursing Home		Birr	Co Offaly
Ennis Road Care Facility	Meelick		Co Clare Via Limerick
Esker Lodge Nursing Home	Esker Place	Cathedral Road	Co Cavan
Esker Ri Nursing Home	Kilnabin	Clara	Co Offaly
Eyrefield Manor Nursing Home	Church Lane	Greystones	Co Wicklow
Fairfield Nursing Home	Quarry Road	Drimoleague	Co Cork
Fairlawns Private Nursing Home	Cavan Road	Bailieboro	Co Cavan
Fairy Hill Nursing Home	Kennel Hill	Mallow	Co Cork
Fennor Hill Care Facility	Toughers Road	Urlingford	Co Kilkenny
Fearna Manor Nursing Home	Tarmon Road	Castlerea	Co Roscommon
Ferbane Nursing Home	Ferbane		Co Offaly
Fingal House Nursing Home	Spiddal Hill	Seatown West, Swords	Co Dublin
Firstcare Beneavin House Ltd	Beneavin Road	Glasnevin	Dublin 11
Firstcare - Beneavin Lodge Nursing Home Ltd	Beneavin Road	Glasnevin	Dublin 11
Firstcare Beneavin Manor Nursing Home Ltd	Beneavin Road	Glasnevin	Dublin 11
Firstcare Blainroe Lodge Nursing Home Ltd	Coast Road	Blainroe	Co Wicklow
Firstcare Earlsbrook House Nursing Home Ltd	41 Meath Road	Bray	Co Wicklow
Firstcare - Mountpleasant Lodge Ltd	Kilcock to Clane Road	Kilcock	Co Kildare
Flannerys Nursing Home	Chapel Road	Abbeyknockmoy, Tuam	Co Galway
Anam Cara	St Canice's Road	Glasnevin	Dublin 11
Cherryfield Housing with Care	2D Cherryfield Lawns	Hartstown, Clonsilla	Dublin 15
Friars Lodge Nursing Home	Convent Road	Ballinrobe	Co Mayo
Gahan House	Gahan House	High Street, Graiguenamanagh	Co Kilkenny
Garbally View Rest Home	76 Brackernagh	Ballinasloe	Co Galway

Gascoigne House Care Centre	37-39 Cowper Road	Rathmines	Dublin 6
Glebe House	Kilternan Care Centre	Kilternan	Dublin 18
Glenashling Nursing Home	Oldtown	Celbridge	Co Kildare
Glenaulin Nursing Home Ltd	Lucan Road	Chapelizod	Dublin 20
Glendonagh Residential Home	Dungourney	Midleton	Co Cork
Glengara Park Nursing Home	Lower Glenageary Road	Dun Laoghaire	Co Dublin
Glyntown Care Centre	Glyntown	Glanmire	Co Cork
Good Counsel Nursing Home	Kilmallock Road	Kilmallock Road	Co Limerick
Gowran Abbey Nursing Home & Retirement Village	Abbey Court	Gowran	Co Kilkenny
Grange Con Nursing Home	Carraigrohane		Co Cork
Greenhill Nursing Home	Waterford Road (formerly Pill Road)	Carrick-on-Suir	Co Tipperary
Greenpark Nursing Home	Tullinadaly Road	Tuam	Co Galway
Griffeen Valley Nursing Home	Esker	Lucan	Co Dublin
Hamilton Park Care Facility	Balrothery	Balbriggan	Co Dublin
Harbour Lights Nursing Home	Townasligo	Bruckless	Co Donegal
Grace Healthcare - College View Nursing Home	Clones Road		Co Cavan
Grace Healthcare - Nephin Nursing Home	132/134 Navan Road	Cabra	Dublin 7
Grace Healthcare - St Gladys Nursing Home	53 Lr Kimmage Road	Harolds Cross	Dublin 6
Grace Healthcare - Terenure Nursing Home	122 / 124 Terenure, Road West		Dublin 6W
Grace Healthcare- Oakwood Lodge Nursing Home	Toberburr Road	St Margarets	Co Dublin
Haven Bay Care Centre	Ballinacubby	Kinsale	Co Cork
Havenwood Nursing Care Facility & Retirement Village	Bishopscourt	Ballygunner	Co Waterford
Hazel Hall Nursing Home	Prosperous Road	Clane	Co Kildare
Heather Lee Nursing Home	Lawlor's Cross	Killarney	Co Kerry
Heatherfield Nursing Home	Raynestown	Dunshaughlin	Co Meath
Highfield Healthcare - Alzheimer Care Centre	Swords Road	Whitehall	Dublin 9
Highfield Healthcare - Elmhurst Nursing Home	Hampstead Ave	Glasnevin	Dublin 9
Hillcrest House Nursing Home	Long Lane	Letterkenny	Co Donegal
Hillcrest House Nursing Home The Lodge	Long Lane	Letterkenny	Co Donegal
Hillside Nursing Home	Aughrim	Ballinalsoe	Co Galway
Hillview Convalescence & Nursing Home	Tullow Road		Co Carlow
Hillview Private Nursing & Retirement Residence	Rathfeigh	Tara	Co Meath
Hollymount Private Nursing Home	Kilrush	Hollymount	Co Mayo
Holy Family Nursing Home Limited	Magheramore, Killimor	Ballinasloe	Co Galway

Holy Family Residence- Little Sisters of the Poor	Roebuck Road		Dublin 14
Holy Ghost Residential Home	Cork Road		Co Waterford
Kenmare Nursing Home 'Tir na nOg'	Killaha East	Kenmare	Co Kerry
Kerlogue Nursing Home	Killaha East	Kerlogue	Co Wexford
Kilbrew Nursing Home	Kilbrew Demesne	Ashbourne	Co Meath
Kilcara House Nursing Home	Kilcara,Duagh	Abbeyfeale	Co Kerry
Killeline Nursing Home Ltd	Cork Road	Newcastle West	Co Limerick
Killure Bridge Nursing Home	Airport Road		Co Waterford
Kilrush District Hospital Ltd	Cooraclare Road	Kilrush	Co Clare
Kiltipper Woods Care Centre	Kiltipper Road	Tallaght	Dublin 24
Kiltormer Nursing Home	Kiltormer	Ballinasloe	Co Galway
Kinvara House Nursing Home	3/4 The Esplanade	Strand Road, Bray	Co Wicklow
Knockeen Nursing Home	Barntown		Co Wexford
Knockrobin Hill Care Home	Port Road	Wicklow	Co Wicklow
Kylemore House Nursing Home	Sidmonton Road	Bray	Co Wicklow
Lake House Nursing Home	Port-na-Blagh		Co Donegal
Larchfield Park Nursing Home	Monread Road	Naas	Co Kildare
Larissa Lodge Nursing Home	Carnamuggagh	Letterkenny	Co Donegal
Laurel Lodge Nursing Home	Templemichael Glebe	Longford	Co Longford
Lawson House	Glenbrien	Enniscorthy	Co Wexford
Lexington House	Monastery Road	Clondalkin	Dublin 22
Lisheen Nursing Home	Stoney Lane	Rathcoole	Co Dublin
Little Flower Nursing Home	Labane		Co Galway
Lough Erril Nursing Home	Mohill		Co Leitrim
Loughshinny Residential Home	Blacklands, Ballykea	Skerries	Co Dublin
Lourdesville Nursing Home	Athy Road	Kildare Town	Co Kildare
Lystoll Lodge Nursing Home	Skehenerin	Listowel	Co Kerry
Maria Goretti Nursing Home	Proonts	Kilmallock	Co Limerick
Marian House Nursing Home, Glasnevin	Holy Faith Convent	Glasnevin	Dublin 11
Marian House Respite Home	Ballindine	Claremorris	Co Mayo
Maryborough Nursing Home	Maryborough Hill	Douglas	Co Cork
Maryfield Nursing Home Chapelizod		Chapelizod	Dublin 20
Maryfield Nursing Home, Galway	Farnablake East	Athenry	Co Galway
Marymount Care Centre		Lucan	Co Dublin
Marymount Universtity Hopsital & Hospice	Curraheen Road	Curraheen	Co Cork
Maypark House Nursing Home	Maypark Lane		Co Waterford
Middletown House Nursing Home	Courtown Harbour	Gorey	Co Wexford
Milford Care Centre	Plassey Park Road	Castletroy	Co Limerick
Millbrook Manor Nursing Home	Slade Road	Coolmines, Saggart	Co Dublin
Millbury Nursing Home	Commons Road	Navan	Co Meath
Mooncoin Residential Care Centre	Pollrone	Mooncoin	Co Kilkenny

Moorehall Lodge Ardee	Hale Street	Ardee	Co Louth
Moorehall Lodge Drogheda	Dublin Road	Drogheda	Co Louth
Mount Carmel Nursing Home	Parkmore Convent, Abbey Street	Roscrea	Co Tipperary
Mount Carmel Supported Care Home	Prologue	Callan	Co Kilkenny
Mount Cara Nursing Home	Redemption Road	Blackpool	Co Cork
Mount Hybla Private Nursing Home	Farmleigh	Castleknock	Dublin 15
Mount Sackville Nursing Home	Mount Sackville Convent, Chapelizod		Dublin 20
Mount Tabor Care Centre	Sandymount Green	Sandymount	Dublin 4
Mountbellew Private Nursing Home	Mountbellew		Co Galway
Mowlam Healthcare - Archersrath Nursing Home	Archersrath		Co Kilkenny
Mowlam Healthcare - Ballincollig Community Nursing Unit		Murphy Barracks Road, Ballincollig	Co Cork
Mowlam Healthcare - Caherass Nursing Home	Croom		Co Limerick
Mowlam Healthcare - Castle Gardens Nursing Home	Drumgoold	Enniscorthy	Co Wexford
Mowlam Healthcare - Clearbrook Nursing Home	Heathfield	Finglas West	Dublin 11
Mowlam HealthCare - Ennis Nursing Home	Showground Road	Drumbiggle, Ennis	Co Clare
Mowlam Healthcare - Kilcolgan Nursing Home	Kilcolgan		Co Galway
Mowlam Healthcare - Kilcoole Lodge Nursing Home	Ballydonarea	Kilcoole	Co Wicklow
Mowlam HealthCare - Killarney Nursing Home	Oakwood Retirement Village	Rock Road, Killarney	Co Kerry
Mowlam Healthcare - Kilmainhamwood Nursing Home	Kilmainhamwood	Kells.	Co Meath
Mowlam Healthcare - Kilrush Nursing Home	Kilimer Road	Kilrush	Co Clare
Mowlam Healthcare - Lakes Nursing Home	Hill Road	Killaloe	Co Clare
Mowlam Healthcare - Maplecourt Nursing Home Ltd	Dublin Road	Castlepollard, Mullingar	Co Westmeath
Mowlam Healthcare - Moate Nursing Home	Dublin Road	Moate	Co Westmeath
Mowlam Healthcare - Mount Carmel Community Hospital	Braemor Park	Churchtown	Dublin 14
Mowlam Healthcare - Moycullen Nursing Home	Ballinahalla	Moycullen	Co Galway
Mowlam Healthcare - Rush Nursing Home	Kenure, Skerries Road	Rush	Co Dublin
Mowlam Healthcare - Sancta Maria Nursing Home	Parke	Kinnegad	Co Meath
Mowlam Healthcare - Sligo Nursing Home	Ballytivnan		Co Sligo

Mowlam Healthcare - St Colmcille's Nursing Home	Oldcastle Road	Townparks, Kells	Co Meath
Mowlam Healthcare - St Martha's Nursing Home	Love lane	Charleville	Co Cork
Mowlam Healthcare - Swords Nursing Home	Mt. Ambrose	Swords	Co Dublin
The Orchard Respite Centre	Temple Road	Blackrock	Co Dublin
Mowlam Healthcare - The Park Nursing Home	Castletroy		Co Limerick
Mowlam Healthcare - Waterford Nursing Home	Ballinakill Downes	Dunmore Road	Co Waterford
Mowlam Healthcare- Adare & District Nursing Home	Adare Road	Croagh	Co Limerick
Moyglare Nursing Home	Moyglare Road	Maynooth	Co Kildare
Moyne Private Nursing Home	The Moyne	Enniscorthy	Co Wexford
Mystical Rose Nursing Home	Knockdoemore	Claregalway	Co Galway
Nazareth Group, Ballymote Community Nursing Unit	Ballymote		Co Sligo
Nazareth House Nursing Home, Donegal	Fahan via Lifford		Co Donegal
Nazareth House Nursing Home, Malahide	Malahide Road	Marino	Dublin 3
Nazareth House Nursing Home, Mallow	Drommahane	Mallow	Co Cork
Nazareth Nursing Home, Sligo	Church Hill		Co Sligo
New Lodge Nursing Home	Stocking Lane	Rathfarnham	Dublin 16
New Ross Community Hospital	Hospital Road	New Ross	Co Wexford
Newbrook Nursing Home	Ballymahon Road	Mullingar	Co Westmeath
Newpark Care Centre	Newpark	The Ward	Co Dublin
Nightingale Nursing Home	Lowville, Ahascragh	Ballinasloe	Co Galway
Northwood Residential Home	Old Ballymun Road	Ballymun	Dublin 9
Norwood Grange Nursing Home	Ballinora	Waterfall	Co Cork
Oakdale Nursing Home	Tullamore Road	Portarlington	Co Laois
Oakfield Retirement & Nursing Home	Courtown	Gorey	Co Wexford
Oaklodge Nursing Home	Churchtown South	Midleton	Co Cork
Oakview Nursing Home	The Commons, Belturbet		Co Cavan
Oakwood Nursing Home	Circular Road	Ballaghaderreen	Co Roscommon
Oakwood Nursing Home	Hawthorn Drive		Co Roscommon
Oghill Nursing Home	Oghill	Monasterevin	Co Kildare
Orwell Private Nursing Home	112 Orwell Road	Rathgar	Dublin 6
Orwell Queen of Peace Nursing Home	Garville Avenue	Rathgar	Dublin 6
Our Lady of Fatima Nursing Home	Oakpark	Tralee	Co Kerry
Our Lady of Lourdes Care Facility	Kilcummin Village	Killarney	Co Kerry
Our Lady's Manor Nursing Home, Dalkey	Bulloch Castle	Dalkey	Co Dublin

Our Lady's Manor Nursing Home, Edgeworthstown	Dublin Road	Edgeworthstown	Co Longford
Aperee Living Churchtown	Churchtown	Mallow	Co Cork
Padre Pio Nursing Home, Clondalkin	50-51a Cappaghmore	Clondalkin	Dublin 22
Padre Pio Nursing Home, Tipperary	Graiguenoe	Holycross, Thurles	Co Tipperary
Padre Pio Nursing, Convalescent and Retirement Home, Rochestown	Sunnyside	Upper Rochestown	Co Cork
Padre Pio Rest Home	Carrigeen	Cappoquin	Co Waterford
Parke House Nursing Home	Kilcock		Co Kildare
Passage Healthcare - Lucan Lodge Nursing Home	Ardeevin Drive	Lucan	Co Dublin
Passage Healthcare - Sally Park Nursing Home	Sally Park Close	Firhouse	Dublin 24
Patterson's Nursing Home	Lismackin	Roscrea	Co Tipperary
Pilgrims Rest Nursing Home	Barley Hill	Westport	Co Mayo
Portiuncula Nursing Home	Multyfarnham		Co Westmeath
Portumna Retirement Village	Brendan's Road	Portumna	Co Galway
Powdermill Nursing Home	GunPowdermills	Ballincollig	Co Cork
Queen of Peace Centre	Churchfield	Knock	Co Mayo
Rathkeevan Nursing Home	Cahir Road, Rathkeevan	Clonmel	Co Tipperary
Retreat Nursing Home	Loughandonning, Bonnavalley	Athlone	Co Westmeath
Riverbrook Nursing & Respite Care	Stradbally	Castleconnell	Co Limerick
Riverdale House Nursing Home	Blackwater	Ardnacrusha	Co Clare
Riverdale Nursing Home	Ballon		Co Carlow
Riverside Nursing Home	Milltown	Abbeydorney	Co Kerry
Rivervale Nursing Home	Rathnaleen	Nenagh	Co Tipperary
Rochestown Nursing Home	Monastery Road	Rochestown	Co Cork
Rockshire Care Centre	Rockshire Road	Ferrybank	Co Waterford
Ros Aoibhinn Nursing Home	Bunclody		Co Wexford
Roselodge Nursing Home	Killucan		Co Westmeath
Rosemount House Nursing Home	Garrabeg Road	Church Street, Gort	Co Galway
Rosenalee Care Centre Ltd		Ballincollig	Co Cork
Roseville House Nursing Home	Killonan	Ballysimon	Co Limerick
Roseville Nursing Home	49 Meath Road	Bray	Co Wicklow
Rushmore Nursing Home	Knocknacarra		Co Galway
Ryevale Nursing Home	Ryevale Mill	Leixlip	Co Kildare
Sacre Coeur Nursing Home	Station Road	Tipperary Town	Co Tipperary
Sacred Heart Nursing Home	Crosspatrick	Johnstown	Co Kilkenny
Sacred Heart Residence, Little Sister's of the Poor	Sybil Hill Road	Raheny	Dublin 5
Sallyville House		Newton Road	Co Wexford
Santa Sabina House	Dominican Sisters	Navan Road,	Dublin 7

Shalom Nursing Home	Presentation Convent, Kilcock		Co Kildare
Shannagh Bay Nursing Home	2/3 Fitzwilliam Terrace	Strand Road, Bray	Co Wicklow
Shannon Lodge Nursing Home	Rooskey		Co Roscommon
Sheelin Nursing Home	Riverbank, Tonagh	Mount Nugent	Co Cavan
Shrewsbury House Nursing Home Ltd	164 Clonliffe Road	Drumcondra	Dublin 3
Signa Care Bunclody	Bunclody		Co Wexford
SignaCare Killerig		Killerig	Co Carlow
SignaCare New Ross	Newtown Commons	New Ross	Co Wexford
SignaCare Waterford		Rocklands, Ferrybank	Co Waterford
Silver Grove Nursing Home Ltd	Main Street	Clonee	Co Meath
Silverstream Healthcare - Clontarf Private Nursing Home	5-7 Clontarf Road	Clontarf	Dublin 3
Silverstream Healthcare - Dunlavin Nursing Home	Dunlavin		Co Wicklow
Silverstream Healthcare - Leeson Park Nursing Home	10 Leeson Park	Ranelagh	Dublin 6
Silverstream Healthcare - Nenagh Manor Nursing Home	Yewstown	Nenagh	Co Tipperary
Silverstream Healthcare - Ratoath Manor Nursing Home	Rathoath		Co Meath
Silverstream Healthcare - St. Pappins Nursing Home	Ballymun Road	Ballymun	Dublin 9
Silverstream Healthcare - The Croft Nursing Home	Main Street	Inchicore	Dublin 8
Simpson's Hospital	Ballinteer Road	Dundrum	Dublin 16
Skibbereen Residential Care Centre	Baltimore Road	Skibereen	Co Cork
Sonas Nursing Home Ashborough	Lyre Road	Milltown	Co Kerry
Sonas Nursing Home Innis Ree	Ballyleague	Lanesboro	Co Roscommon
Sonas Nursing Home Carrick-On-Suir	Carrick On Suir		Co Tipperary
Sonas Nursing Home Glendale	Shillelagh Road	Tullow	Co Carlow
Sonas Nursing Home Knock	Ballyhaunis Road	Knock	Co Mayo
Sonas Mnursing Home Moyridge	Ridgepool Road	Ballina	Co Mayo
Sonas Nursing Home Riverview	Morrison Terrace	Ballina	Co Mayo
Sonas Nursing Home Ti Aire	Tallagh Road	Belmullet	Co Mayo
Snoas Nursing Home Melview	Prior Park	Clonmel	Co Tipperary
Sonas Nursing Hone Ard na Greine	Enniscrone		Co Sligo
Sonas Nursing Home Cloghanboy	Ballymahon Rd.	Cloghanboy, Athlone	Co Westmeath
Sonas Nursing Home Cloverhill	Lisagallan	Cloverhill	Co Roscommon
St Annes Nursing Home	Sonnagh	Charlestown	Co Mayo
St Annes Nursing Home Ballybay	Clones Road	Ballybay	Co Monaghan
St Anthony's Nursing Home	Kilduff Castle	Pallasgreen	Co Limerick
St Attractas Residence	Hagfield	Charlestown	Co Mayo
St Brendan's High Support Unit	Mulranny	Westport	Co Mayo

St Camillus Nursing Centre	Killucan		Co Westmeath
St Carthages House	Lismore		Co Waterford
St Catherine's Nursing Home, Newcastle	Bothar Bui	Newcastle West	Co Limerick
St Columban's Nursing Home	Magheramore		Co Wicklow
St Columban's Retirement Home (Columban Missionaries)	Dalgan Park	Navan	Co Meath
St David's Retirement Home	Gentian Hill	Salthill	Co Galway
St Dominic Savio Nursing Home	Liscannor		Co Clare
St Eithnes Care Centre	Corbally	Tulsk, Castlerea	Co Roscommon
St Elizabeth's Nursing Home	Kells Road	Athboy	Co Meath
St Eunan's Private Nursing Home	Ramelton Road	Letterkenny	Co Donegal
St Francis Nursing Home	Kilkerrin	Ballinasloe	Co Galway
St Francis Nursing Home (Mount Oliver)	Mount Oliver	Dundalk	Co Louth
St Gabriel's Nursing Home	Glenayle Road	Raheny	Dublin 5
St Gobnait's Nursing Home Ltd	Ballyagran	Kilmallock	Co Limerick
St John's House	202 Merrion Road		Dublin 4
St Joseph's Centre	Crinken Lane	Shankill	Co Dublin
St Josephs Hospital	Lee Road	Mount Desert	Co Cork
St Joseph's Nursing Home, Cavan	Lurgan Glebe	Virginia	Co Cavan
St Joseph's Nursing Home, Ferrybank	Little Sisters of the Poor, Abbey Road	Ferrybank	Co Waterford
St Joseph's Nursing Home, Kenmare	Killowen	Kenmare	Co Kerry
St Joseph's Nursing Home, Killorglin	Killorglin		Co Kerry
St Josephs Supported Care Home	Kilmoganny		Co Kilkenny
St Kieran's Nursing Home	The Pike, Rathcabbin	Roscrea	Co Tipperary
St Louis Nursing Home	Clonmore	Tralee	Co Kerry
St Luke's Home	Castle Road	Mahon	Co Cork
St Martha's Nursing Home	Cappauniac	Cahir	Co Tipperary
St Marys Residential Care Centre	Shantalla Road		Co Galway
St Michaels Nursing Home	100 Acres East	Caherconlish	Co Limerick
St Patricks Missionary Society	Kiltegan		Co Wicklow
St Patrick's Nursing Home	Dublin Road	Baldoyle	Dublin 13
St Paul's Nursing Home	Dooradoyle		Co Limerick
St Phelim's Nursing Home	Dromahair		Co Leitrim
St Teresa's Nursing Home	Friar Street (formerly John Street)	Cashel	Co Tipperary
St Theresa's Nursing Home, Kilrush	Leadmore East	Kilrush	Co Clare
St Theresa's Nursing Home, Thurles	Dublin Road	Thurles	Co Tipperary
St Ursula's Nursing Home	Golf Link Road	Bettystown	Co Meath
Stella Maris Nursing Home, Galway	Cummer	Tuam	Co Galway
Stella Maris Nursing Home, Westmeath	Baylough	Athlone	Co Westmeath
Strawhall Nursing Home	Strawhall	Fermoy	Co Cork

Summerville Healthcare	Strandhill		Co Sligo
Sunhill Nursing Home	Blackhall Road	Termonfeckin	Co Louth
Talbot Lodge Nursing Home	Kinsealy Lane	Malahide	Co Dublin
Tara Care Centre	5/6 Putland Road	Bray	Co Wicklow
Grace Healthcare - Tara Winthrop Private Clinic Ltd	Nevinstown Lane	Pinnock Hill, Swords	Co Dublin
Tearmainn Bhride Nursing and Retirement Home	Brideswell	Athlone	Co Roscommon
The Fern Dean Nursing Home	Deansgrange Road	Blackrock	Co Dublin
The Four Ferns	Brighton Road	Foxrock	Co Dublin
Thomond Lodge Nursing Home	Ballymahon		Co Longford
Thorpes Nursing Home	Clarina		Co Limerick
Tinny Park Residential Care Centre	Derdimus	Callan Road	Co Kilkenny
TLC Carton	Tonlegee Road	Raheny	Dublin 5
TLC Cara Care Centre	Northwood Park	Santry	Dublin 9
TLC Citywest	Fortunestown Lane, Cooldowncommons	Citywest	Co Dublin
TLC Maynooth	Straffan Road	Maynooth	Co Kildare
TLC Santry	Northwood Park	Santry	Dublin 9
Trinity Care - Anovocare Nursing Home	Stockhole Lane, Cloghran	Swords	Co Dublin
Trinity Care - Castlemanor Nursing Home	Billis	Drumalee	Co Cavan
Trinity Care - Foxrock Nursing Home	Westminister Road	Foxrock	Dublin 18
Trinity Care - Gormanston Wood Nursing Home	Gormanston		Co Meath
Trinity Care - Rathborne Nursing Home	Ashtown		Dublin 15
Trinity Care - Suncroft Lodge Nursing Home	The Curragh		Co Kildare
Trinity Healthcare - St. Peter's Nursing Home	Sea Road	Castlebellingham	Co Louth
Trinity Healthcare - St. Doolagh's Park Care & Rehabilitation Centre	St. Doolagh's Park	Malahide Road, Balgriffin	Dublin 17
Valentia Hospital	Knightstown	Valentia Island	Co Kerry
Valentia House Nursing Home	Camolin,	Enniscorthy	Co Wexford
Villa Marie Nursing Home	Templemore Road	Roscrea	Co Tipperary
Waterman's Lodge Care Centre	Cullinagh	Ballina, Killaloe	Co Tipperary
Willowbrook Lodge Nursing Home	Mocklers Hill	Fethard	Co Tipperary
Willowbrook Nursing Home	Borohard	Naas Rd, Newbridge	Co Kildare
Willow Brooke Care Centre	College Road	Castleisland	Co Kerry
Windmill House Nursing Home	Churchtown	Mallow	Co Cork
Woodlands House Nursing Home	Trim Road	Navan	Co Meath
Woodlands Nursing Home	Bishopswood	Dundrum	Co Tipperary
Wygram Nursing Home	Davitt Road	Wexford Town	Co Wexford
Youghal & District Nursing Home	Gortroe	Youghal	Co Cork

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