BDO | Nursing Homes Ireland

Private & Voluntary Nursing Home

Survey results 2020/2021

Smart business advisors

Contents

1 Introduction and Forewords

1.1 Introduction & Highlights

Nursing Homes Ireland (NHI) and BDO in Ireland (BDO) are pleased to present our report on the Annual Private & Voluntary Nursing Home Survey 2020/2021 (“survey”).

The survey was undertaken in late 2021 when a detailed questionnaire was sent to every registered private & voluntary nursing home in the country. Responses were received from 124 nursing homes which equates to a 27% 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 2020/2021 survey, the period being referred to is the financial year ended 2020 or the closest accounting period thereto where the responding home’s financial year end is not 31st December.

The primary purpose of the survey is to report comprehensively on the state of the private & 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 2020/2021 survey are outlined below. Comparisons with the 2019/2020 survey are outlined where appropriate.

Supply of beds – There are presently, as of May 2022, **453** private & voluntary homes providing a total of **26,561 beds**. There has been a **1.3%** increase in the supply of private and voluntary beds since our last survey report in 2020.

- **Population per private bed -** Nationally there is presently **one private & voluntary nursing home bed for every 28.9 persons aged 65 and over** in the Republic of Ireland.
- **Occupancy -** National average occupancy amongst survey respondents was 89.77% during the year 2020. Whilst overall occupancy levels would have been anticipated to increase particularly with the closure of a number of public beds, the overall occupancy for nursing homes in the country in fact reduced by a net 1.2% per the responses received compared to the 2020 survey. However, we must acknowledge with this, that occupancy has been impacted by the Covid-19 pandemic. Additionally, we observe some new build ramp-up which will temporarily yield low occupancy rates until stabilised. However, this would also have been apparent in prior surveys.
- **Weekly Nursing Home Support Scheme (Fair Deal) rates** – The average weekly rate nationally as of May 2022 prevailing under the Fair Deal scheme for accommodation in private and voluntary nursing homes was **€1,057** per resident**.** 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 **60.9% on average** of turnover in respondents’ homes.
- **Dependency levels -** Dependency levels in nursing homes continue to be **very high. 55% of residents in survey respondents’ homes were classified under high and max dependency levels.** 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 May 2022 County	Private & Voluntary 2022 €'s
Co. Carlow	981
Co. Cavan	1,019
Co. Clare	963
Co. Cork	1,055
Co. Donegal	955
Co. Dublin	1,235
Co. Galway	967
Co. Kerry	964
Co. Kildare	1,108
Co. Kilkenny	1,007
Co. Laois	1,027
Co. Leitrim	983
Co. Limerick	973
Co. Longford	979
Co. Louth	1,056
Co. Mayo	975
Co. Meath	1,074
Co. Monaghan	1,026
Co. Offaly	988
Co. Roscommon	970
Co. Sligo	1,063
Co. Tipperary	966
Co. Waterford	1,016
Co. Westmeath	962
Co. Wexford	980
Co. Wicklow	1,113
National Average (of all private & voluntary homes)	**1,057**

1.2 Foreword by Tadhg Daly, Chief Executive Officer, NHI

Nursing Homes Ireland is delighted to have partnered once again with BDO for this important and insightful analysis into the nursing home sector in Ireland.

This detailed survey makes available data that provides important understanding regarding the business environment that private & voluntary nursing homes are operating in. Thank you to the 124 nursing homes that participated in the extensive cost and staffing analysis to inform this important research report.

This year's survey picks up on a headline and worrying trend that is prevalent within the private & voluntary nursing home sector. Pointing to a reduction in the number of nursing homes with fewer than 40 beds, it highlights smaller nursing homes are facing closure or the requirement to increase capacity in order to meet rising costs and achieve economies of scale.

This follows on from the independent regulator HIQA recently stating concerns regarding the levels of closures of smaller nursing homes, asserting a particular model of care within the nursing home sector is being lost.

The survey details increased reliance upon the State support scheme Fair Deal, with 86% of nursing home residents now availing of it. A body of evidence independent of NHI highlights the scheme is not commensurate with the reality of nursing home resident care costs. Despite the Department's review of the scheme published in 2015, recommending the pricing mechanism recognises care costs entailed for residents with higher level or more complex care needs, no action has been undertaken by the State to address an issue that should be fundamental to how the scheme operates.

The utter lack of confidence in how the scheme operates is reflected within the survey. It reports the overwhelming majority of providers – 96% - believe the methodology for negotiating and pricing care is not fair, or resident focussed. It informs of widespread belief amongst providers that the pricing mechanism is imprecise, lacking science and consistency. This is consistent with Comptroller and Auditor General findings, published 2020, that the NTPF could not provide it with a model to explain how the various criteria are weighed and combined to determine a fee for resident care.

Within the current unprecedented cost environment, the failings of Fair Deal become compounded. The closure of smaller nursing homes is a manifestation of the squeeze being placed upon all nursing homes, with the fee payable ignorant of the reality of regulatory and resident care costs.

The number of persons classified as maximum dependency has considerably increased since our 2019/2020 survey, with the commensurate person-intensive cost environment reflected again with staffing costs entailing 61% of turnover. NHI and BDO's collective call is for a staffing matrix which is dependency based to provide a tool to provide transparency for every nursing home regarding staffing requirements. Despite this being a long-standing recommendation emanating from the State, such a tool has never been realised on a national basis. Rollout of such can detail the intensive staffing and care needs of nursing home residents.

A further trend to emerge from the survey is the increased requirement for nursing home providers to enter into a sale and leaseback arrangement. The failure of the Fair Deal scheme to recognise the reality of resident care costs, including the current inflationary environment and capital investment in nursing home care, has led to many entering into such arrangements, to enable them to redeem their bank debt. The leasehold interest ownership structure is now the second most prevalent within the sector. It is reflective of the pricing mechanism that is in effect.

A reduction in occupancy, with Covid-19 a prevalent factor in this regard is noted within the survey.

The details emanating from this research report point to ultimate contraction in the supply of nursing home beds. The survey records a marginal increase in the number of private & voluntary nursing home beds. This is occurring at a time when it is estimated that 45,000 beds (public & private) will be required by 2031 to meet the demands for long-term, 24/7 residential care amongst an older population that is increasing in size year-on-year.

The survey points to the State mechanism to support nursing home care continuing to betray the reality of care costs for nursing home residents and those entrusted with providing them with care. This survey informs the State regarding the very changed landscape emerging for nursing home care under the deficient support mechanism it continues to operate.

Thank you to BDO and colleagues for bringing this important and insightful analysis into the private & voluntary nursing home sector together.

Tadhg Daly
Chief Executive Officer
Nursing Homes Ireland

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

Firstly, I would like to show immense gratitude toward all of the homes that have contributed to this important sector survey for another consecutive year.

We are delighted to have teamed up with NHI again for this year's survey and thank them for all they are doing to support members across the country on an ongoing basis, particularly given difficulties which have arisen as a result of the Covid-19 pandemic since March 2020.

This year's survey has revealed a number of challenges the sector has gone through in the past two years most notably in the wake of the Covid-19 pandemic. The pandemic created a hugely difficult and traumatic time for older age cohorts in particular. Recently published CSO data with a review period between March 2020 and February 2022 identified that Covid-19 was identified as the underlying cause of death in 5,384 cases in Ireland. Further, the data outlined that 91% of those who died of Covid-19 were in the 65+ age category, with Covid-19 associated nursing home deaths totalling 1,564 (29% of total).

Since January 2022, the amendments made to the "The Care and Welfare of Residents in Designated Centres for Older People Regulations 2016" have come into effect. The amendments particularly relate to the requirements on the bedroom facilities provided to the resident. Our survey sample now indicates that 82% of accommodation in the private & voluntary homes are in the form of single bedrooms, an increase of 5% since 2020. This may be due to operator efforts to come into compliance with the revised standards, and equally new builds / extensions would have to adhere to particular guidelines surrounding single bed occupancy.

In addition to the above, we have unfortunately observed the closure of a number of smaller homes, particularly those with less than 40 beds. We note that since the 2020 survey, the private & voluntary nursing home beds (as at May 2022) have increased to 26,561, representing an increase of 340 beds however the total number of private & voluntary homes remains the same at 453. The overall net increase in beds is due largely to the closure of smaller homes and opening of new larger homes or extensions to existing facilities.

Private & voluntary beds now account for 84% of all long-term care beds in the country, an increase of 4% since our 2020 survey. This is partially due to the increase in private & voluntary bed numbers, however another contributing factor is the closure of a number of public bed spaces, from 5,688 at the time of the last survey, to 5,182 in May 2022. Therefore on balance, the overall nursing home bed numbers have concerningly decreased since the time of the last survey from 31,909 to 31,743 as at May 2022.

In 2022 the CSO conducted the latest census, and the preliminary results indicate that the population in the country has increased to c.5.1m and the current population of aged over 65 is estimated to have risen to 768k representing 15% of the total population. Based on CSO projections estimates, and long-term care indicators, we estimate that there could be a need for c.45,000 beds (public & private) to meet the nursing home bed requirements by 2031.

Occupancy levels, according to the responses received held strong at c.89.8% in the review period despite the impact of Covid-19 however as indicated above there were 506 less public beds available to residents and so nothwitstanding the pandemic we would have expected occupancy levels to be higher than the last survey. We equally acknowledge that the onset of the pandemic did not occur until March 2020 and so an entire year's impact on occupancy may not be evident within survey results.

Average Fair Deal rates across the country have increased by c.4.4% between October 2020 to May 2022, and regional rate disparity continues whereby we note that the average weekly Fair Deal rate per resident in Dublin (highest weekly rate) is c. €180 above Cork which is the second most populated county in the country. When we compare this to the lowest weekly rate in county Donegal the difference is €280 per resident per week which equates to €14,560 per resident per annum. This differential is significant for home operators with the current rising cost environment and our survey finds that 96% of operators did not believe the Fair Deal rate covered the current true cost of delivering care in the operators' home. However, we do acknowledge instances whereby counties with lower Fair Deal rates have received a higher proportionate increase in rates in comparison to counties with higher weekly average rates – we hope that this signals recognition by the State to address prevailing issues with the scheme and share in NHI's desire to see swift and effective reform of the scheme.

Brian McEnery
BDO Ireland – Partner & Head of Advisory

2 Nursing Homes Ireland (NHI)

2.1 Profile

NHI is the representative organisation for the private & voluntary nursing homes sector. This sector, and the care our members provide, are central to healthcare delivery in Ireland. Private & voluntary nursing homes:

- Provide 26,561 beds (As at May 2022).
- Account for more than 84% of all long-term care beds in the country; and,
- Provide direct employment to more than 40,000 staff.

NHI Members account for 90% of all private & 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.
Partner	We partner with all our key stakeholders to support the delivery of care.
Promote	We promote a positive image of the sector and the important role nursing homes play in the provision of health and social 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 & 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 the 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 resourcing 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 & 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 & 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 & 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 resourcing 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 & 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 chairperson 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 elect 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 & voluntary 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 homes. Further increasing from the time of our last survey, approximately 48% of private nursing homes are now operated or owned by one type of group or another, both Irish and International.

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:

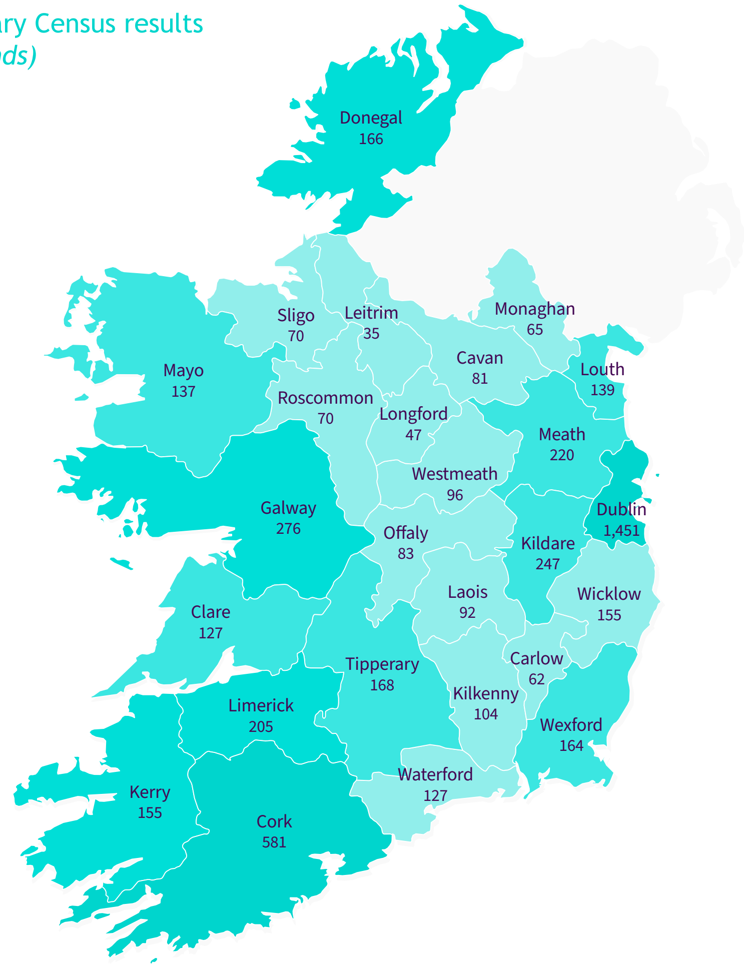
- Health (Nursing Homes) Act 1990 (as amended)
- Nursing Homes (Care and Welfare) Regulations 1993
- The Health Act 2007 (as amended)
- Care and Welfare Regulations as amended – Health Act 2007
- Registration Regulations – Health Act
- Nursing Homes Support Scheme Act 2009
- National Standards for Residential 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.
- S.I. No. 293/2016 - Health Act 2007 (Care and Welfare of Residents in Designated Centres for Older People) (Amendment) Regulations 2016

2.5 Ireland's Ageing Demographic Profile

The 2022 census preliminary results from the CSO indicate that the population in the country has risen to 5.1m. This indicates that since the 2016 census the population has grown by 7.6% (CAGR of 1.23%) in a span of 6 years.

The graphic below shows the 2022 preliminary population results by county. The population breakdown indicates that much of the population in the country is concentrated in counties Dublin (1.45m), Cork (581k) and Galway (276k).

2022 CSO Preliminary Census results
(Figures in thousands)



The 2022 preliminary results indicate that the overall population in the country is broadly in line with previous CSO projection estimates whereby it was estimated by 2021 the overall population in the country would be c.5m.

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.

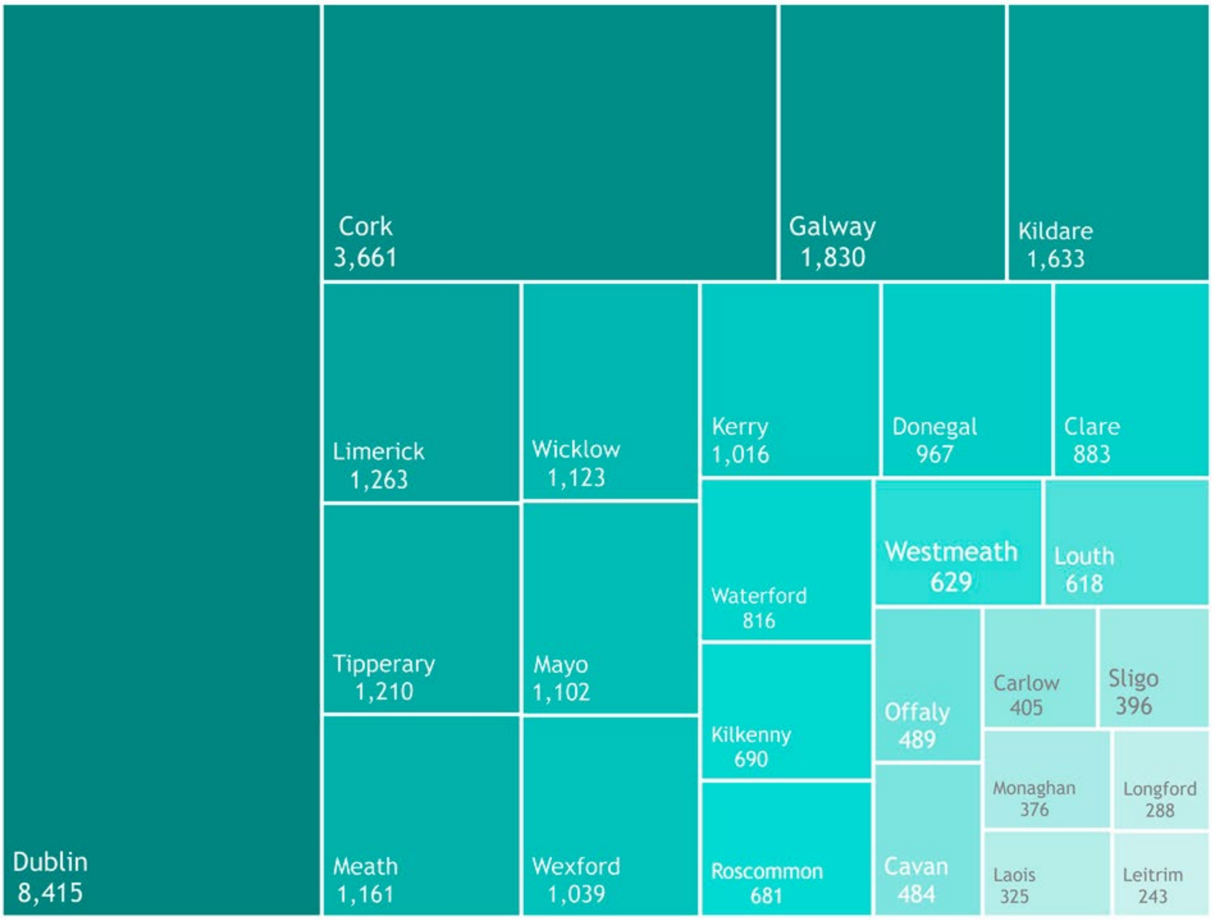
The 2022 CSO ageing demographics indicate that currently 768k (15%) of the population is aged 65+ and persons aged 85+ accounted for 89k (1.7%) of the total population. This indicates an increase of the above 65+ aged population by c. 20.6% (3.2% CAGR) since 2016, a significant increase in the ageing population in the country in a 6-year span.

With the existing trends in the ageing demographics in the country it is a likely scenario that by the end of next decade the number of persons aged 65+ would have increased to more than 1 million persons in the country as per CSO estimates.

2.6 Supply & Demand

In the country there are currently 31,743 nursing home beds of which 5,182 beds are operated by the HSE with the balance operated by private & voluntary nursing homes. The graphic below shows the concentration of the total beds in the country by county.

Bed numbers



44% of the supply is largely concentrated in Dublin, Cork and Galway which is broadly trending with the population density in the country. A key OECD indicator, although not definitive nor to be taken in isolation, is often used to estimate a country's requirements for nursing home bed capacity and suggest approximately 4% to 5% of the population aged 65+ require such specialised care.

On this basis, the current bed supply in the country would imply a 4.13% (31,743/768,700) supply to the estimated over 65 population, which is within the OECD range of bed requirements, however in comparison to our last survey we note that the supply has decreased from 4.45% which indicates the contraction in bed supply in comparison to the estimated ageing population. It is also important to note that supply and ageing demographics are not evenly spread, where it is noted that some regions have higher/lower supply compared to other regions. On balance it appears that bed supply is sufficient in the immediate term however given a tightening of supply in comparison with the estimated over 65 population, it is anticipated that demand for bed supply will increase further.

Whilst it is subjective and difficult to precisely assess the future requirements of nursing home beds for people aged over 65 years old, on the basis of CSO projected population we estimated that by 2031 the population of the country would increase to c.1m and when applying the median range of OECD benchmark of 4.5% would indicate a bed supply requirement of c.45K beds. This supports the view that there will be a significant under supply of beds in the country over the next decade and significant bed development is required to meet the bed supply for the ageing population in the country.

Within our last survey release in 2021 we indicated a total public and private & voluntary nursing home bed supply of 31,909 and currently as of May 2022 the supply stands at 31,743 which seems to suggest a reduction in the bed capacity in the country. However, we note this reduction in bed numbers are from the reductions in public beds which have decreased from 5,688 to 5,182 (May 2022 HIQA bed register). Private & voluntary bed numbers have increased from 26,221 to 26,561 and, whilst we would have expected private bed growth to have been higher, Covid-19 related restrictions contributed towards the temporary slowdown of construction activity in the period under review. Additionally, although private & voluntary bed numbers have increased, we observe that the number of homes remains the same from the time of our last survey. On further review we note that the number of homes with less than 40 beds has decreased from 29% in 2020, to 27.2% of the total in 2022. Smaller homes, particularly in regional areas are struggling to meet existing regulatory demands and rising costs under the constraints of the prevailing Fair Deal scheme.

Nothwitstanding this, it is clear that there is significant deficiency in the supply of beds in the long term to meet the ageing population. We estimate, based on the current CSO population estimates and over 65 demand indicators, that potentially c.45,000 bed spaces (public & private) would need to be available to meet the demand of the ageing population in the country by 2031.

A report issued by the ESRI in 2017 outlined that, based on the 2016 CSO population estimates it was understood that the over 65 population could range anywhere between 962k – 989k by 2030, potentially giving rise to a demand for long term care resident places of between 40,700 and 52,400[1] based upon various scenarios.

Additionally, a 2022 release by the ESRI indicates that the population of over 65 in the country could increase to 1.1 million persons by 2035 and that the number of persons aged 85 years and older is projected to increase to 165k persons in the same time frame[2].

This further adds to our growing concern in regards to bed supply and the ageing population in the country to meet the required demand.

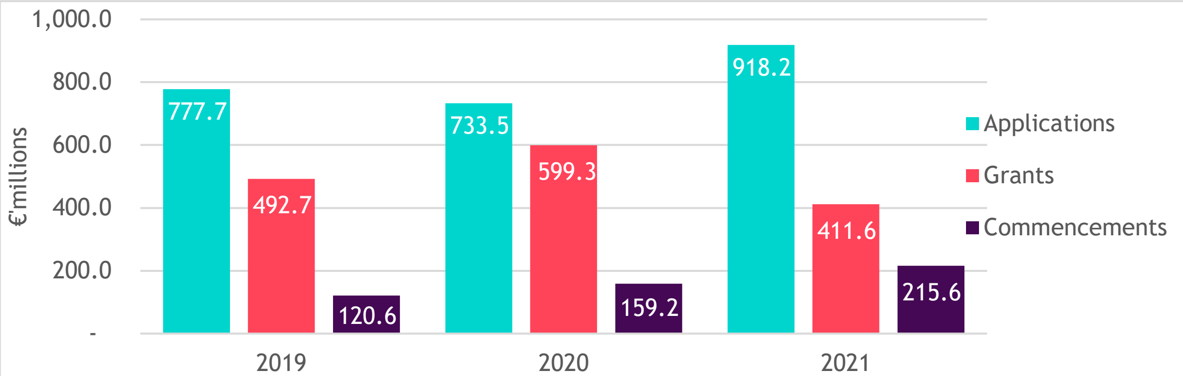
2.7 Nursing Home Development Activity

Building Information Ireland (BuildingInfo) one of the leading providers of researched construction project activity across the country has contributed to this year's survey in providing insights into the level of the construction activity in the nursing home sector.

Analysis by BuildingInfo found that 2021 has again been a relatively stable year for construction in the nursing home sector. The pipeline continues to be strong. However, turnaround times on projects remains long. Planning applications were up 25% nationally compared with 2020. This was the case in all regions except Connacht and Ulster which recorded a decrease of 40%. Granted permissions were down 31% nationally compared with 2020 and this decrease was seen in all regions with the exception of Leinster.

[1] Projections of demand for healthcare in Ireland 2015-2030: First report from the hippocrates model, ESRI, 2017
[2] Projections of Workforce requirements for public acute hospitals in Ireland 2019 -2035, ESRI, July 2022

Nursing Home Construction Activity (€'millions)



Commencements in the sector were up 35% in 2021 compared to 2020. Dublin recorded a spike in activity which was up 307% in 2021 over 2020 figures. As a small sector with a relatively low number of high value projects, fluctuations are the norm. Overall, factoring in all metrics, it is a steady sector. The main draw on construction in this sector is the turnaround times from application to commencement which are particularly slow, currently at 100 weeks. The industry standard turnaround time is 67 weeks. A summary of applications and commencements between regions can be found in the tables below:

Applications	Dublin	Leinster	Munster	Connacht and Ulster	Total
2020	€184m	€350m	€108m	€91m	€733m
2021	€200m	€466m	€197m	€55m	€918m
Variance % (2020 & 2021)	9%	33%	82%	-40%	25%
Commencements	**Dublin**	**Leinster**	**Munster**	**Connacht and Ulster**	**Total**
2020	€14m	€79m	€57m	€9m	€159m
2021	€56m	€65m	€69m	€25m	€216m
Variance % (2020 & 2021)	307%	-18%	21%	172%	35%

The outlook is neutral for medical construction in 2022, as was the case in 2021. The pipeline of works looks steady, but turnaround times are significantly lower than the industry average[3]. BuildingInfo forecast a small increase of 4% in construction activity in this sector for 2022 when compared with 2021.

NHI and BDO are also aware of struggles faced by nursing home owners, and prospective home owners in terms of nursing home development arising out of the significant increases to construction costs in recent times. This is further adding to issues surrounding the provision of nursing home beds in relation to estimates concerning rising demand.

[3] Industry benchmark includes residential, commercial & retail, industrial, medical, agriculture, social and education

3 Presentation of Survey Results

3.1 Survey Period

Following on from our 2019/2020 survey, we undertook the 2020/2021 survey in late 2021. We received a total of 124 responses from private & voluntary nursing homes across the country. We would like to take this opportunity to thank every respondent for their effort in completing this year's survey during a difficult period posed by Covid-19.

We now present the result of the survey in this report. The data provided in the survey is for the financial period 2020 of the respondents. This is because it takes several months for nursing homes to complete and have their financial statements for 2020 audited.

3.2 Regional Analysis

Based on the survey results, in order to provide a meaningful regional analysis and to ensure comparability with the 2020 survey, the information captured in this survey is reported by reference to the below ten NHI 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.

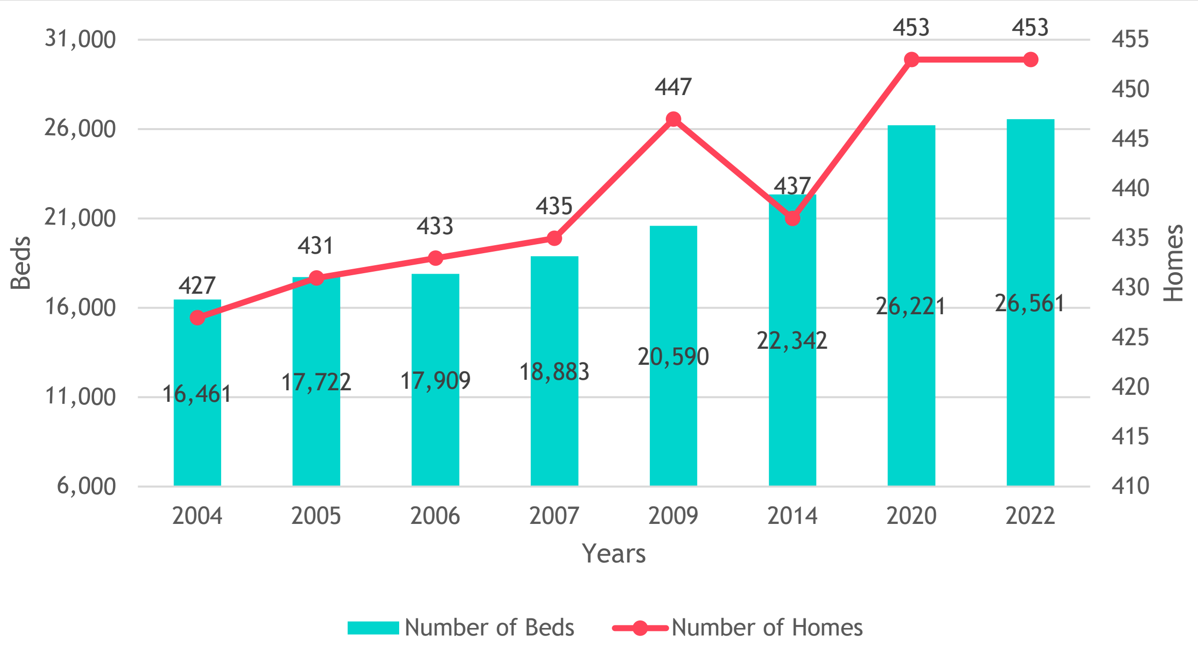
3.3 Analysis by Size of Nursing Home Facility

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 graphic below shows the increase/decrease in number of beds and number of private & voluntary nursing homes in the country from 2004 to 2022. As of May 2022, there were 453 homes and 26,561 beds being offered by private & voluntary homes in the country.



Between the years 2004 and 2006 the survey was commissioned by the Irish Nursing Homes Organisation. This organisation subsequently joined with three other nursing home representative organisations to form NHI.

	INHO Survey 2004	INHO Survey 2005	INHO Survey 2006	NHI Survey 2007	NHI Survey 2009/ 2010	NHI Survey 2014/ 2015	NHI Survey 2019/ 2020	NHI Survey 2020/ 2021
Occupancy (%)	86.80%	86.10%	89.40%	91.20%	86.40%	90.58%	90.97%	89.77%
Weekly rates* (€)	€578	€640	€694	€778	€850	€896	€1,012	€1,057**
Number of beds	16,461	17,722	17,909	18,883	20,590	22,342	26,221	26,561
Number of homes	427	431	433	435	447	437	453	453
Population ≥ 65 per private & voluntary bed	27	25	24	25	23	24	27.5	28.9
Staff costs as a % of turnover	56.0%	57.0%	60.0%	60.0%	62.0%	61.0%	60.0%	60.9%
% Of respondents planning to create additional beds within a year	21.0%	24.0%	29.0%	22.0%	20.0%	42.0%	29.0%	22.4%

*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 of May 2022 for private & voluntary nursing homes.

4.1 Covid-19 impact on Nursing homes

The impact of Covid-19 on the nursing homes was several fold and this trend continues. The immediate reaction of the homes in the wake of the pandemic proved vital for homes to be able to continue to provide care for the older person. The tremendous efforts of all healthcare workers in the country were fundamental to protecting the older person. Homes went through a period of stress from quick response, changes in operating procedures, training, limited capacity, infection control and much more.

Later we discuss the occupancy reported by the homes across the country by region in 2020 whereby we note that on an overall basis occupancy was down only 1.2% on average. However, when interpreting this seemingly small decrease from the prior period, we firstly need to consider the fact that we would have ordinarily expected occupancy growth in the period where demand is increasing and we witnessed some bed closures, and secondly the period under which occupancy was reported encompasses the impact of Covid-19 only in 2020 whereby the first confirmed case in a nursing home in Ireland was reported on 13 March 2020[4]. While overall occupancy remained high in 2020, we particularly note densely populated areas reporting lower occupancy due to Covid-19 restrictions, outbreaks etc. It is equally fair however to point out that more densely populated areas are typically areas where higher build and ramp up activity occurs which may have further contributed to occupancy variances in the period.

4.2 Measures Adopted

Throughout the pandemic Homes undertook several measures in order to protect residents and staff including;

- Intensified infection prevention and control
- Enhanced staff training and education
- Serial testing programmes
- Holding rooms for isolation bays
- Admissions delays and / or restrictions
- Vaccination schemes

4.3 Government Schemes

Nursing homes suffered increased costs as a result of Covid-19, including those costs associated with infection prevention and control and staffing issues. Nursing facilities were expected to always have the appropriate amount of PPE available for staff and residents. Additional staff were rostered to ensure that the facilities were clean in order to help prevent the virus from spreading. Government intervention was required to assist nursing home facilities in dealing with these additional costs.

Several Government schemes were introduced throughout the pandemic to support nursing homes, with certain schemes being extended past their intended cut off dates, the latest being the Outbreak Assistance Scheme which has been extended to 30 September 2022.

[4] The Impact of COVID-19 on Nursing Homes, HIQA 2020

5 Private Nursing Home Beds - Current Supply & Growth Outlook

5.1 Register Nursing Home & Beds

As of May 2022, there were 453 private and voluntary nursing homes in the country providing a total of 26,561 beds. The distribution of these homes and beds by HSE Area is outlined below:

NHI Region	No. of Nursing Homes 2022	No. of Beds 2022	Average No. of Beds per Home 2022	No. of Nursing Homes 2020	No. of Beds 2020	Average No. of Beds per Home 2020
Dublin/Kildare	39	2,803	72	40	2,950	74
Dublin North	48	3,993	83	45	3,699	82
Dublin Wicklow	50	3,276	66	48	2,942	61
Midlands	21	1,356	65	23	1,379	60
Midwest	46	2,334	51	46	2,357	51
North-East	37	2,250	61	38	2,230	59
North-West	22	1,055	48	22	1,040	47
South	66	3,572	54	65	3,554	55
South-East	61	2,972	49	60	3,003	50
West	63	2,950	47	66	3,067	46
Grand Total	**453**	**26,561**	**59**	**453**	**26,221**	**58**

26,561

total beds

5.2 Supply Growth - 2020 to 2022

The net number of private & voluntary nursing homes operating in Ireland remains unchanged since the 2020 survey was completed. The number of private & voluntary beds has increased from 26,221 in 2020 to 26,561 in 2022 (1.3% increase over this period). As can be seen from the table below, the Dublin, Kildare and Wicklow region recorded the greatest relative increases in bed supply over this period.

HSE Area	Private Homes 2020	Private Homes 2022	% Change in Homes	Private beds 2020	Private beds 2022	% Change in beds
Dublin/Kildare/ Wicklow	133	137	3.0%	9,591	10,072	5.0%
Midlands	23	21	-8.7%	1,379	1,356	-1.7%
Midwest	46	46	0.0%	2,357	2,334	-1.0%
North-East	38	37	-2.6%	2,230	2,250	0.9%
North-West	22	22	0.0%	1,040	1,055	1.4%
South	65	66	1.5%	3,554	3,572	0.5%
South-East	60	61	1.7%	3,003	2,972	-1.0%
West	66	63	-4.5%	3,067	2,950	-3.8%
Total	**453**	**453**	**0.0%**	**26,221**	**26,561**	**1.3%**

Comparing the bed supply pattern above, it is evident that certain regional areas have seen a reduction in the number of beds, especially the western region where the bed numbers have reduced by 117 beds. In Dublin, Kildare & Wicklow region we note that the total bed supply in the region has been the highest having increased by 481 beds from 2020 figures with the majority of the increase in Dublin on a net basis.

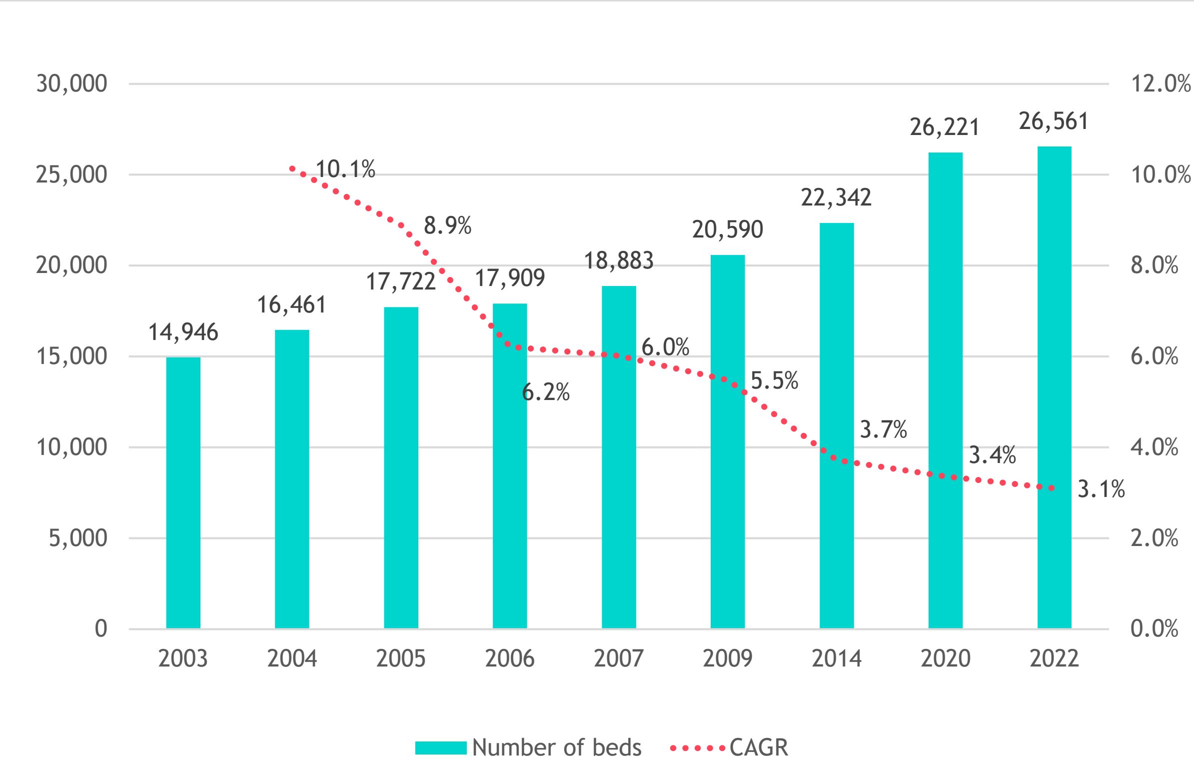
0%

growth in the number of homes

5.3 Supply Growth - 2003 to 2022

The pattern of growth in supply of private & voluntary beds since 2003 is outlined below. In 2003 there were 14,946 private & voluntary beds in the country, compared with 26,561 in 2022. Compared to our previous 2020 6 year annualised growth rate, in 2022 the increase in beds has slowed down to c.1.3% net increase in private & voluntary beds. This has been partly driven by the impact of Covid-19 in delaying construction activity across the country but also due to some homes facing closure. These homes have been unable to survive in the increasing cost environment, especially smaller homes, and in addition have been unable to meet the regulatory standard requirements.

Supply Growth (2003 to 2022)



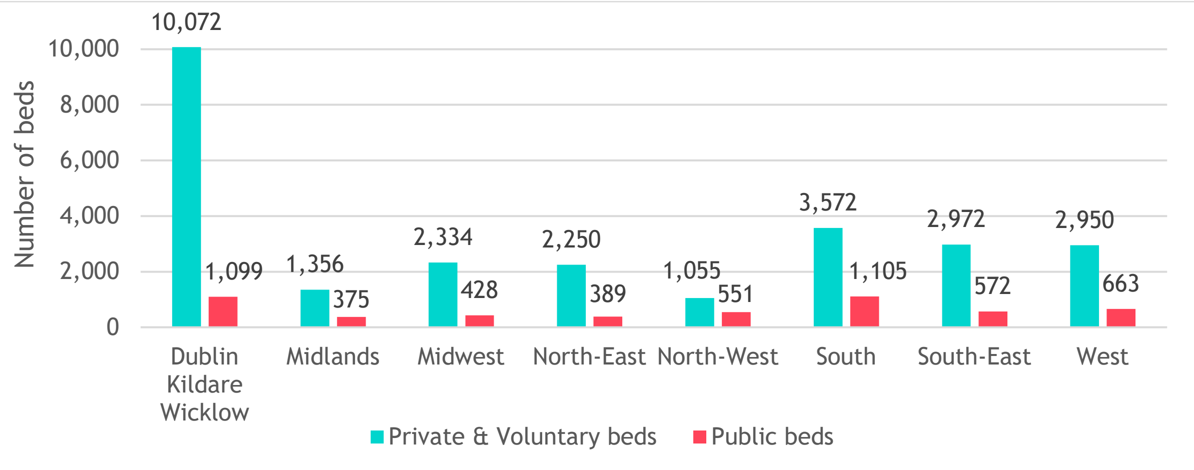
The Compound Annual Growth Rate (CAGR) was 3.1% between 2003 and 2022. In the nineteen-year period to 2022 there was a 11,615 increase in the supply of private & voluntary beds (77% increase in supply). Interesting to note when comparing the CAGR (red dotted line) with 2003 as the base year, we see much of the increase in bed supply leading up to the 2009 "Great Recession", followed by which the new bed supply in the country year on year has decreased rapidly and as of today private & voluntary beds are at the lowest year on year growth on a CAGR basis. The number of private nursing homes increased by a net total of 45 during this period. This trend indicates extensions creating additional capacity and increasing bed numbers in new homes in Ireland. The average size of nursing homes increased between 2020 and 2022 from 58 to 59 beds. This continues a trend since the first Nursing Home Survey in 2003, of larger, purpose-built homes replacing smaller older facilities.

5.4 Total Supply - Public and Private

The table below shows the estimated number of persons aged 65 and over in 2022 based on preliminary CSO 2022 results. These estimates have been analysed over the number of nursing home beds available in both private & public homes as of May 2022. 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	247,209	10,072	24.5	1,099	11,171	22.1
Midlands	44,500	1,356	32.8	375	1,731	25.7
Midwest	71,180	2,334	30.5	428	2,762	25.8
North-East	71,739	2,250	31.9	389	2,639	27.2
North-West	46,151	1,055	43.7	551	1,606	28.7
South	118,000	3,572	33.0	1,105	4,677	25.2
South-East	88,320	2,972	29.7	572	3,544	24.9
West	81,600	2,950	27.7	663	3,613	22.6
Total	**768,700**	**26,561**	**28.9**	**5,182**	**31,743**	**24.2**

Nursing Home Beds (Private & Public)



Currently, there is one registered nursing home bed for every 24.2 persons aged 65 and over. The North-West Region has the lowest number of beds with one bed for every 28.7 persons aged 65 and over, while the Dublin/ Kildare/ Wicklow region is at the higher end with one bed per every 22.1 persons.

The South and Dublin/Kildare/Wicklow Regions have the highest number of public beds available of 1,105 and 1,099, respectively. These beds contribute more than a quarter of the total beds available from HSE.

Interestingly, compared to our 2020 survey, available beds have dropped to one for every 24.2 persons. In 2020, there was one bed for every 22.6 persons aged 65 and over - this decrease in available beds per person over 65 is largely due to the increase in the over 65 population and the decrease in total available beds since our last survey. However, in this comparatively small horizon, it is important to note the investment by the private & voluntary sector to cater for the growing needs. Private & voluntary beds have increased by 340 since the 2020 survey report, whereas the public beds have reduced by 506 beds.

In 2021, HIQA reported that 62 public and private centres reduced capacity, resulting in a decrease of 474 beds. There was also reduction of 200 beds from voluntary closure of 5 homes and another 4 homes closed under Section 51 of the health Act 2007 in the public and private nursing home sector.

The table shows the private & voluntary nursing home closure between 2017 and 2021:

Nursing Home Closure	2017	2018	2019	2020	2021
Private	5	3	5	2	5
Voluntary	-	1	-	3	1
Total	**5**	**4**	**5**	**5**	**6**

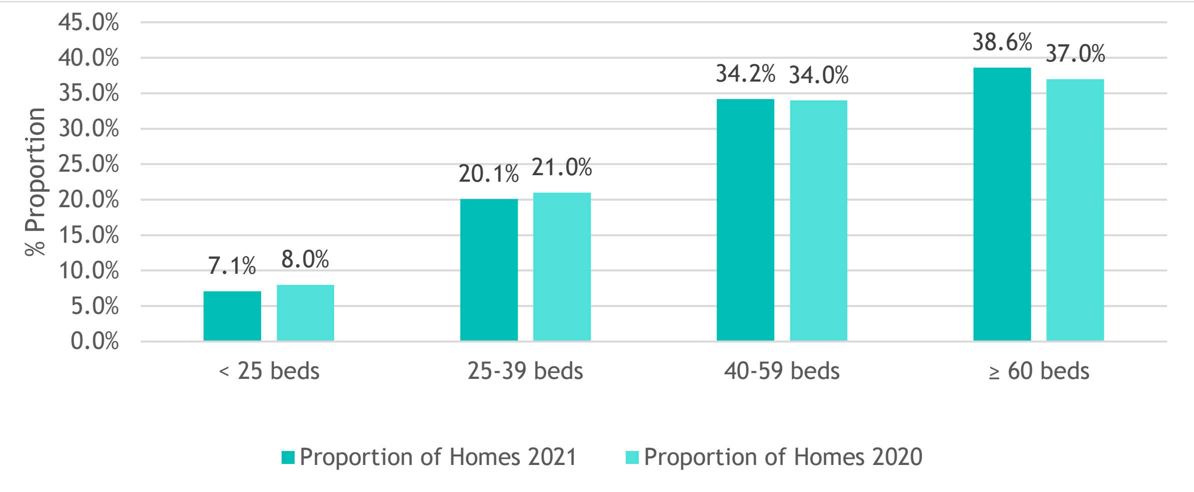
5.5 Size of Nursing Homes

As discussed in section 5.1, the total number of beds in the private and voluntary sector has increased from 26,221 in 2020 to 26,561 in 2022 (1.3% increase). During the same period, the total number of nursing homes in operation stayed the same at 453. This is indicative of a trend that suggests expansions to existing nursing homes and the development of larger homes.

As can be seen from the table below, which outlines the distribution of nursing home by size, currently only 7.1% of homes in the country have less than 25 beds with the majority, 73%, having 40 beds and above. In comparison to 2020, this indicates a 2% increase in the number of homes falling in the above 40 beds category and this trend is very much likely to continue with smaller homes facing closure or alternatively increasing capacity to meet the rising cost and therefore ability to achieve economies of scale.

Size of nursing home	< 25 beds	25-39 beds	40-59 beds	≥ 60 beds
Proportion of Homes 2021	7.1%	20.1%	34.2%	38.6%
Proportion of Homes 2020	8.0%	21.0%	34.0%	37.0%

Proportion of Home Size



In the coming year approximately 22.4% of survey respondents indicated that they plan to increase the bed capacity in their facilities by an average of 22 beds. Indicating that this trend for the extension by existing experienced providers is set to continue.

6 Private Nursing Home Beds - Prospective Demand

6.1 Population and Demand

Ireland's ageing 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 preliminary 2022 CSO ageing demographic estimates we note a significant increase in demand for nursing home beds across all counties.

The most recently completed census was undertaken by the CSO in 2022. The preliminary result shows the population in the country has increased to c.5.1m people and the over 65 aged population has increased to 768k or 15% of total population. This represented an estimated increase of 20.6% from the number of persons aged 65 and over since the completion of the previous census in 2016.

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

We have extrapolated this to county level based on CSO estimates. Between now and 2036, the population aged 65 and over is going to continue to rise to a figure close to 1.07 million, in line with the previous survey. This is a significant rise of c.39.2%.

NHI Region	Population ≥ 65 Extrapolated 2036*	Estimated Increase to 2036	Population ≥ 65 Estimated 2022	Estimated Increase 2022	Population ≥ 65 2016
Dublin/Kildare/ Wicklow	352,964	42.8%	247,209	20.3%	205,574
Midlands	67,996	52.8%	44,500	19.0%	37,393
Midwest	93,375	31.2%	71,180	24.3%	57,272
North-East	106,470	48.4%	71,739	28.3%	55,906
North-West	61,390	33.0%	46,151	12.5%	41,022
South	161,501	36.9%	118,000	19.3%	98,877
South-East	120,239	36.1%	88,320	21.0%	72,965
West	106,426	30.4%	81,600	19.0%	68,558
Total	**1,070,360**	**39.2%**	**768,700**	**20.6%**	**637,567**

*CSO long term projections estimates

6.2 Population Aged 65 and Over per Registered Bed

An indicator of potential demand for private & voluntary 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 2022:

NHI Region	Population ≥65	Private/ Voluntary Beds	Population ≥65 per private Bed
Dublin/Kildare/ Wicklow	247,209	10,072	24.5
Midlands	44,500	1,356	32.8
Midwest	71,180	2,334	30.5
North-East	71,739	2,250	31.9
North-West	46,151	1,055	43.7
South	118,000	3,572	33.0
South-East	88,320	2,972	29.7
West	81,600	2,950	27.7
Total	768,700	26,561	28.9

As can be seen in the table above, we estimate that there are now 28.9 persons aged 65 and over per private & voluntary bed in Ireland which has increased since our 2020 estimates. This indicates a higher increase in ageing demographic in comparison to the nursing home beds being made available. The Dublin/ Kildare/ Wicklow regions offer the most private & voluntary beds per population (24.5 persons per bed), in line with our previous survey estimate. However, regions such as Midwest, Midlands, South, South-East and West have seen a decrease in beds available in comparison to previous estimates.

A high population of over 65 years of age 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 such as 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.

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*
2021 % of Total Beds	66.3%	16.2%	9.9%	5.5%	2.0%
2020 % of Total Beds	68.0%	9.0%	16.0%	6.0%	1.0%

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

Single en-suite rooms were again found to be the most common form of bedroom type available for residents in respondents' nursing homes representing 66.3% of the total stock. A further 16.2% was comprised of single rooms without en-suite. In total, 82.5% of rooms surveyed comprised of single en-suite or single rooms in comparison with 78% at the time of the last survey.

Accommodation in double rooms accounted for c.16% of room types available, with nearly two thirds with en-suites. This figure has decreased by a further 6% since 2020. Multiple occupancy rooms accounted for the remainder of room types, available at 2% of overall bedroom supply.

The 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 experiences of Covid-19 may further add to pressures to reduce these room types over coming periods.

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

The S.I. No. 293/2016 - Health Act 2007[5] (Care and Welfare of Residents in Designated Centres for Older People) (Amendment) Regulations 2016 states the following in relation to the floor space of a bedroom in a designated centre that was in operation before 1st July 2009;

- "On and from 1 January 2022, a bedroom in a designated centre which was carrying on the business of a designated centre on or before 1 July 2009 or a part of a designated centre where such business was carried on before that date shall have an area of not less than 7.4 m^2 of floor space, which area shall include the space occupied by a bed, a chair and personal storage space, for each resident of that bedroom and no bedroom shall have more than 4 residents other than a high-dependency room which shall not have more than 6 residents."
- "The area of floor space for a resident of a bedroom in a designated centre shall not be reduced from the area of floor space provided for the resident on the day the Health Act 2007 (Care and Welfare of Residents in Designated Centres for Older People) (Amendment) Regulations 2016 come into operation."
- "The number of residents of a bedroom in a designated centre shall not be increased from the number of residents in the bedroom on the day the Health Act 2007 (Care and Welfare of Residents in Designated Centres for Older People) (Amendment) Regulations 2016 come into operation."

[5] S.I. No. 293/2016 – Health Act 2007(Care and Welfare of Residents in Designated Centres for Older People)(Amendment) Regulation 2016

The 2016 **"National Standards for Residential Care Settings for Older Person in Ireland"** specifies the following on bedroom floor space requirement for all new builds and extension;

- 80% of residents to be accommodated in single en-suite rooms.
- Minimum of 12.5 square metres usable floor-space (excluding en-suite facilities) for all single rooms.
- All multi-occupancy bedroom occupancy is limited to maximum of 4 residents.

A nursing home may be inspected by the chief inspector of the HIQA to see whether the Schedule 6 requirements are being met. A registration may be terminated or made conditional following a HIQA inspection for statutory non-compliance, which, from on January 1, 2022, will include failure to meet Schedule 6 standards.

7.2 Purpose Built Facilities

Almost three quarters of the respondents were discovered to be operating from purpose-built nursing home facilities; in total, 68% of respondents were operating from such facilities. 24% were revealed to operate from refurbished facilities converted from another use, while the remaining 8% were classified as 'Other'.

7.3 Years in Operation

The average period for which respondents were found to have operated their facility was 23 years. This has slightly reduced since 2020 indicating that the development of new homes has increased. Facilities in the Dublin North and South-East region we note are the most recently developed. The average length of time respondents were found to be operating in that region was 18 years.

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

8 Profile of Services Available

8.1 Specialised Dementia Facilities

According to The Alzheimer Society of Ireland, currently there are around 64,000 people with dementia living in Ireland and it is estimated that this figure will double in the next 25 years. This represents a 33% increase since the 2014 survey. The ageing of the Irish population will result in an increase in the total number of people with the dementia condition in the coming decades. This indicates demand for specialised, high-dependency care in devoted care settings is likely to rise as the number of people living with the condition increases. In Ireland annually, the cost of dementia care is just over €1.69 billion across all services[6].

Dementia is an umbrella term used to describe a range of conditions which cause changes and damage to the brain. Additionally, The Alzheimer Society of Ireland indicates that each year 11,000 new instances of dementia are diagnosed in Ireland. Every day, at least 30 people are diagnosed with dementia. In Ireland, one out of every ten dementia patients are under the age of 65.

Our survey found that across all the respondent's home c.53% of residents have been diagnosed with dementia. 24% of the respondents stated they provide specialised dementia care units in their home and of the 24% homes providing specialised dementia care, we note that they had c.40% of the beds in the home dedicated to dementia specialised care.

8.2 Other Specialist Facilities

Across all the homes that informed of providing specialised units, we found that on average 23% of the beds in the homes were dedicated to other specialised service. These specialised beds include units dedicated to physical disability, challenging behaviour, intellectual disability, acquired brain injury.

8.3 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	100.0%
Daily Delivery of Newspapers	91.1%
Providing Chiropody Service	94.7%
Providing Dry Cleaning Service	58.9%
Providing Ophthalmic/Dental Service	90.8%
Transport	90.8%
Providing Hairdressing Service	94.7%

8.4 Physiotherapy & Occupational Therapy

The survey found that almost 65% of respondents retained/employed a physiotherapist and/or occupational therapist in their homes.

[6] Dementia in the Media, The Alzheimer Society of Ireland

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 & voluntary 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 & voluntary nursing homes for the care of these residents (This category is commonly used by the HSE to deliver high dependency care and rehabilitative type care, which is not adequately reimbursed through 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 2021	0.6%	86.8%	10.7%	2.0%
% Residents 2020	1.0%	82.0%	16.0%	1.0%

The figures above strongly illustrate that the Fair Deal system is currently funding the majority of residents. Residents who are funded through the Fair Deal scheme have significantly increased by c. 62% from 2009 to c. 86.8% in 2021. As HSE Contract and Subvention beds are being phased out, it is likely that this proportion will increase further.

9.2 Age Profile of Residents

An age profile of residents accommodated in respondents' nursing homes is set out below. c. 81% per cent of all residents were found to be aged over 76 in the respondents' homes.

Age Profile	≤65	66-75	76-85	86-90	91-95	96-100	>100
% Residents 2021	8.3%	10.7%	30.1%	30.4%	14.6%	4.9%	0.9%
% Residents 2020	4.0%	11.0%	31.0%	28.0%	18.0%	7.0%	1.0%

9.3 Dependency Levels

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

Category	Low	Medium	High	Max
% Residents	17.4%	27.7%	25.6%	29.3%

Interestingly, in comparison to our previous survey, we note that the number of persons classified as maximum dependency have increased to 29.3% from 26% previously. This is reflective of the increasing high-dependency, specialised care needs in nursing homes.

The increase in dependency levels indicate that older persons are cared for in their own homes as long as possible and are 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 Nursing Homes Support Scheme (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 majority of respondents utilising this dependency assessment index.

9.4 Long-stay residents

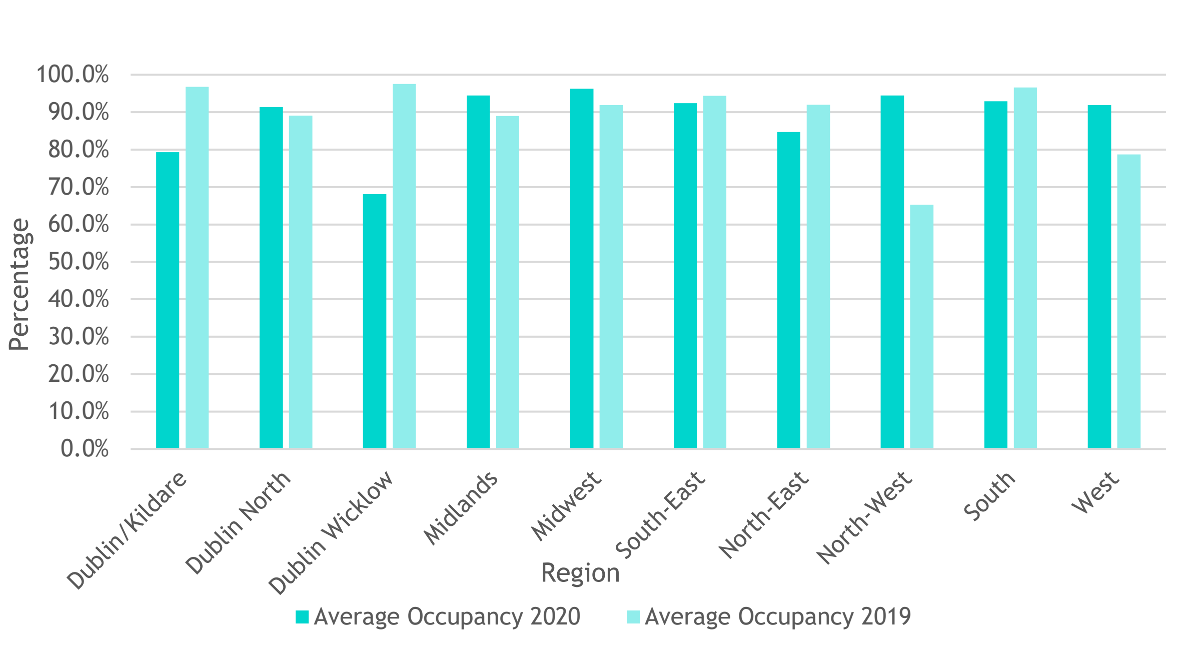
Long-stay residents accounted for 76% of all residents in respondents' nursing homes. The Average Length Of Stay (ALOS) per resident was reported to be 3.65 years.

10 Occupancy Levels

10.1 Occupancy by location

The graph below illustrates the annual average percentage occupancy levels reported by survey respondents in each area for 2020.

Average Occupancy by Region



The average occupancy in 2020 within nursing homes nationally was 89.77%. This represents a decrease of 1.2% since the completion of the 2019/2020 National Nursing Home Survey. The Midwest region recorded the highest average occupancy in 2020 with an average occupancy of c. 96.2%. Correspondingly the Dublin-Wicklow region recorded the lowest average at c. 68.1%. However, it is important to note that this included new build and outbreak associated occupancies which would be deemed to have a sharp but temporary impact. The average occupancy in the North-West region showed a significant increase compared to 2019 however we note that occupancy in the previous period was substantially lower as a result of responses in that period including a report of 33% occupancy.

Overall, occupancy in the respondents nursing homes for the year 2020 decreased slightly nationally, with half the regions reporting a decrease in occupancy. It would have been anticipated that there would be increases in a pre-pandemic environment given reducing beds and increasing demand. However, decreases observed in some regions can be due to several reasons such as a nursing home having undergone refurbishments and / or extensions.

In this period, the most prominent of all is the Covid-19 pandemic which would have reduced occupancy in many homes as a result of self-imposed or public health restrictions. On a closer look at the occupancy levels reported by the respondents, we see a trend of lower occupancy compared to 2019 in regions that are densely populated. This may suggest the impact of Covid-19 was higher in such regions. However, we equally appreciate the majority of build works also take place in such regions where the opening of new beds / ramp up activities may have been temporarily hindered during the pandemic. Another important point to note is that the occupancy level stated is based on year-end 31 December 2020 or closest year end. This does not encompass a full year of the Covid-19 environment when the average occupancy level was reported.

11 Weekly Fair Deal Rates

11.1 Overview - The Fair Deal

The commencement of the Nursing Home Support Scheme (“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 & voluntary nursing home sector in Ireland.

The Scheme is a scheme of financial support for people who need long-term nursing home care. Under the NHSS, 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.

A resident’s contribution includes 80% (40% for a couple) of assessable income (income received on a regular basis minus deductions such as tax, PAYE, health expenses) and 7.5% (3.75% for a couple) of assets (e.g., land, property). The first €36,000 (€72,000 if you are part of a couple) of your assets is excluded from the assessment[7].

The 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, there are currently 433 private & voluntary nursing homes under the Fair Deal scheme and the remaining 20 homes are voluntary homes contracted to offer services on behalf of the HSE. The NTPF is agreeable to negotiating short (i.e., one year or less) or longer-term 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 is tasked with the negotiation of rates for long-term care on behalf of the HSE.

During the period under analysis by the survey, the NTPF have been providing Fair Deal rate increases in excess of 2 percent per annum to nursing home providers. However, this does 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. Additionally, in more recent times, inflationary pressures have grown, and larger Fair Deal rate increases are required.

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. This can be seen in the table below. The leasehold interest is now the second most common ownership structure after a company structure.

Ownership Structure	% of Respondents
Company	53%
Leasehold Interest	23%
Personal Ownership	9%
Charitable Trust	8%
Partnership	4%
Other	2%

[7] Financial Assessment: Your Payment Towards Care, HSE

It is also worth noting that of the 453 private & voluntary nursing homes operating in Ireland in 2022, c.48% of the homes form part of a group that contains one or more nursing homes. Recent market activity and entry of several global operators in the nursing home market suggest that this trend is likely to continue and consolidation is further expected to grow in the coming years.

Turning to the NTPF pricing methodology, a majority of operators surveyed believe the methodology for 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.

More recently the Covid-19 Nursing Homes Expert Panel 2020 report to the Minister for Health stated several organisations took issue with the current model of nursing home funding, the National Treatment Purchase Fund (NTPF) and the complexity of care. Organisations noted that the cost of care model, as currently configured and utilised by the NTPF, does not recognise the levels of care and services provided, and the substantial cross-subsidisation required, for which a budget is not allocated. Further, the funding of nursing home care by the NTPF does not align with the complexity and evolving care needs of residents."[8]

Published in 2020, the Comptroller & Auditor General, Special Report on the Nursing Homes Support Scheme (Fair Deal) found: "While the average dependency level of residents is not formally recognised as a criterion, the examination noted that there is some evidence that general dependency levels in the nursing home are discussed during price negotiations. However, the NTPF has not provided a model explaining how the various criteria are weighed and combined, stating that all the criteria are considered in the aggregate. Consequently, it is unclear how these criteria influence the negotiation of the price that is agreed with the nursing home. The report also suggested that NTPF does not have internal written procedures or a guidance manual for its staff involved in the negotiation process." [9]

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 (Dementia Services Information and Development Centre) and the Oireachtas Health Committee.

The ESRI further stated: "Despite HIQA requiring Long Term Residents Care homes to meet standards for the provision of care for residents living with dementia, the NHSS does not currently allocate additional funding for cognitive impairment, including dementia."[10]

"The Public Accounts Committee report "Examination of C&AG Special Report 110 – Nursing Homes Support Scheme (Fair Deal)" issued on January 2021 recommends that the Department of Health, as the Government Department responsible for the legislation, reviews the Nursing Homes Support Scheme Act 2009 to provide alternative mechanisms to facilitate more effective negotiations between the NTPF and private or voluntary nursing homes".[11]

---

[8] Covid 19 Nursing Homes Expert Panel - Examination of Measures 2021, Government of Ireland, August 2020
[9] Special Report 110 - Nursing Homes Support Scheme (Fair Deal), Office of the Comptroller and Auditor General, August 2020
[10] Projections for Expenditure for Primary, Community and Long-term Care in Ireland, 2019-2035, based on the Hippocrates Model, ESRI, July 2021
[11] Examination of C&AG Special Report 110 –Nursing Homes Support Scheme (Fair Deal), House of the Oireachtas, January 2021

11.2 Amendments to the Fair Deal scheme

In recent years, the Government have made amendments to the Fair Deal scheme to address some of the concerns that users of the scheme had. One such amendment came into place in October 2021 which is designed to enhance protections for family farms and businesses. Prior to this amendment, the capital value of the individual's principal private residence was only included in the financial assessment for the scheme for the first 3 years of their time in care. This is known as the 3-year cap. This unqualified 3-year cap did not apply to productive assets such as farms and businesses, except in the case where a farmer or business owner suffers a sudden illness or disability and as a result requires nursing home care. With the new legislation, after a period of 3 years, the value of family-owned farms and businesses will no longer be taken into account when calculating the cost of a person's nursing home care. This will happen where a family successor commits to working the farm or business. The new Act will also extend the existing 3-year cap on contributions to the cost of care to the proceeds of sale of a person's principal residence[12]. It is intended that this change will remove any disincentive for people who want to sell their vacant home while on Fair Deal.[13]

A further amendment passed by Government in July 2022, and due to come into operation over the coming months, will see a participant's assessable income towards the cost of care reduce from 80% to 40% for rental income from the participant's principal residence[14]. The main aim of this measure is to free up accommodation across Ireland in an effort to tackle the housing crisis. Subsequently, this measure could also have a secondary effect of increasing demand for nursing home beds across Ireland.

[12] The 3-year cap, HSE, October 2021.
[13] Minister Butler welcomes signing into law of the Nursing Homes Support Scheme (Amendment) Bill 2021, Department of Health, July 2021.
[14] Regulation of Providers of Building Works and Miscellaneous Provisions Act 2022, House of the Oireachtas, July 2022.

11.3 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 of May 2022 are outlined below[15]:

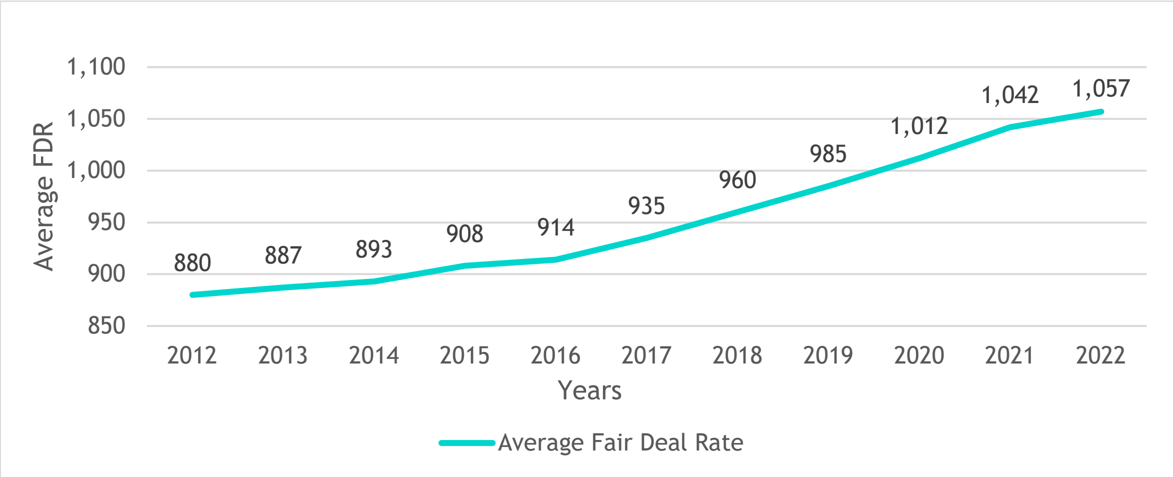
County	Private & Voluntary Nursing Homes May-22 €	Private % change %	Private & Voluntary Nursing Homes Oct-20 €	Public Nursing Home 2022 €
Co. Carlow	981	4.4%	939	1,575
Co. Cavan	1,019	4.5%	975	1,765
Co. Clare	963	5.8%	910	1,603
Co. Cork	1,055	4.0%	1,014	1,571
Co. Donegal	955	5.7%	904	1,639
Co. Dublin	1,235	2.9%	1,200	1,776
Co. Galway	967	5.6%	916	1,642
Co. Kerry	964	5.2%	916	1,508
Co. Kildare	1,108	3.2%	1,074	1,803
Co. Kilkenny	1,007	4.5%	963	1,815
Co. Laois	1,027	4.8%	980	2,342
Co. Leitrim	982	4.5%	940	1,532
Co. Limerick	973	5.6%	922	1,704
Co. Longford	979	3.5%	947	2,078
Co. Louth	1,056	3.1%	1,024	1,777
Co. Mayo	975	6.0%	921	1,556
Co. Meath	1,074	3.7%	1,035	1,874
Co. Monaghan	1,026	4.6%	980	1,819
Co. Offaly	988	6.8%	925	1,831
Co. Roscommon	970	6.5%	910	1,607
Co. Sligo	1,063	4.0%	1,023	1,672
Co. Tipperary	966	5.2%	919	1,588
Co. Waterford	1,016	3.9%	978	846
Co. Westmeath	962	5.3%	914	1,939
Co. Wexford	980	5.5%	929	1,632
Co. Wicklow	1,113	3.4%	1,076	1,766
National Average	**1,057**	**4.4%**	**1,012**	**1,669**

[15] About the Fair Deal Scheme, HSE, May 2022.

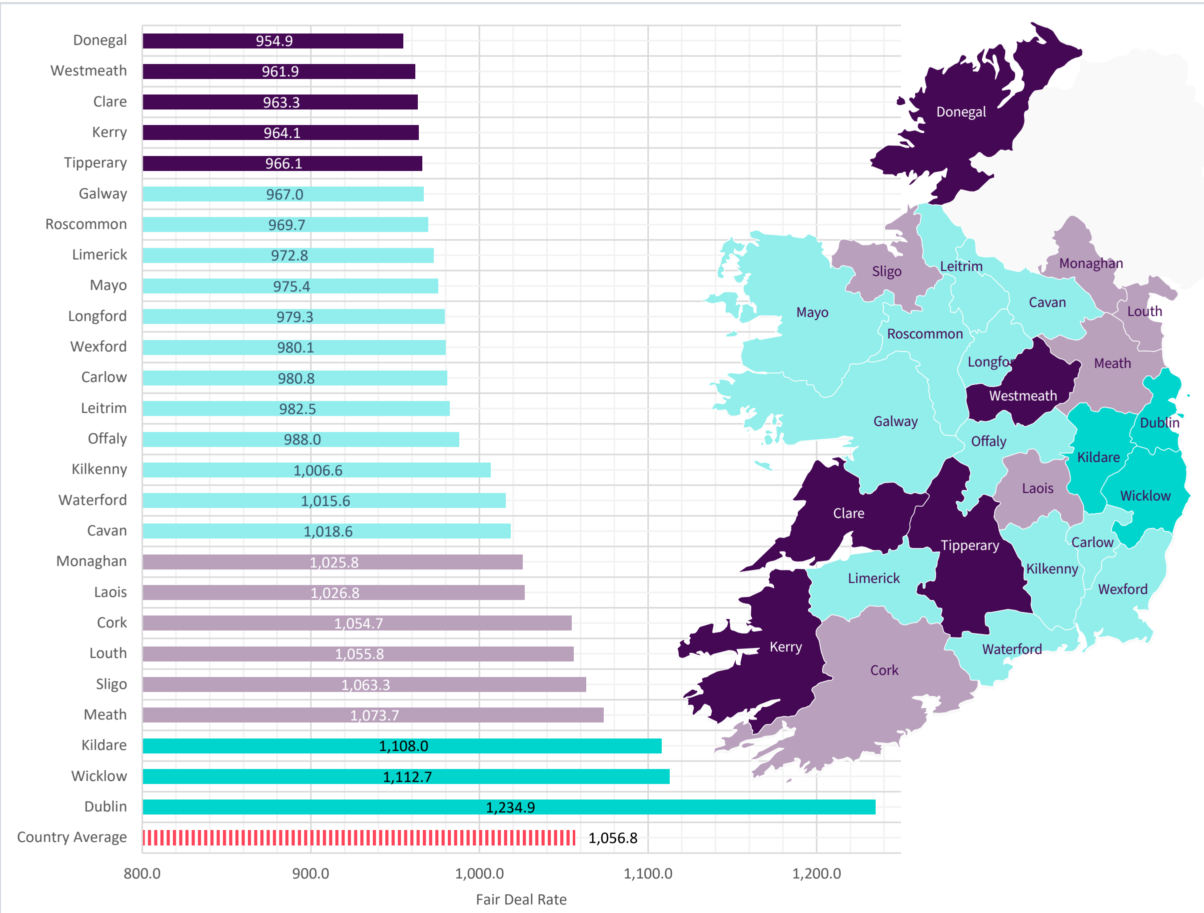
The average weekly Fair Deal rate has risen in all counties since 2020. The highest relative weekly Fair Deal rate increase was in Offaly at 6.8%. Dublin had the highest county average rate of €1,235, a 2.9% increase from 2020. As can be seen above, without exception, the published weekly rates for publicly 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 2020, is 4.4% representing a circa 2% annual increase. As can be seen from the above table, the average weekly rate of public homes is 58% higher than the private & voluntary home average weekly Fair Deal rate.

Average Fair Deal Rate since 2012



Average Weekly FDR (May 2022)



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

Outlined below are the current average weekly Fair Deal rates prevailing for private & voluntary operators in each NHI Region as of May 2022.

NHI Region	No. of Nursing Homes	Average Weekly rate €
Dublin/Kildare	37	1,162
Dublin North	45	1,230
Dublin/Wicklow	46	1,193
Midlands	21	983
Midwest	46	969
South-East	51	987
North-East	37	1,054
North-West	22	987
South	65	1,031
West	63	970
Country Average	**433**	**1,057**

11.5 Services Included under the Fair Deal scheme

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

- 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

Charges for services covers services which are provided outside the terms of the Fair Deal scheme and are agreed in the contract of care.

11.6 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 has 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. 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, in their most recent NTPF negotiations, 83.9% of respondents received an increase, while 5.36% of respondents kept their current rate. There were no operators who suffered Fair Deal rate reductions. The survey also observed that around 96% of respondents did not believe the NTPF recognized the reality of expenses incurred to deliver high-dependency, person-focused, and specialised care throughout the negotiation process.

This reveals 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.

12 Financial Performance

12.1 Turnover per Registered Bed by Location

The average turnover per registered bed is provided below based on the May 2022 FDR (and so excludes other incomes) and the bed numbers provided by each private & voluntary nursing home in the country. Results were found to vary widely by location.

NHI Region	Average Turnover Per Bed
Dublin/Kildare	€60,432.4
Dublin North	€63,955.4
Dublin Wicklow	€62,014.5
Midlands	€51,113.5
Midwest	€50,392.5
South-East	€51,327.1
North-East	€54,819.2
North-West	€51,321.6
South	€53,612.8
West	€50,431.7
Country Average	**€54,954.3**

The average turnover per bed as outlined above is €54,954. Respondents in the Dublin North region receive an average turnover per bed of €63,955, This was the highest average amongst all regions. However, respondents in the Midwest region, reported the lowest average turnover per bed at €50,392. This shows the disparity in turnover per bed across regions while the costs are consistent for many cost categories. This makes it difficult for homes in regions with lower Fair Deal rates to compete for and retain staff given the current staffing shortage across the country. The regional income disparity is challenging operating conditions in areas outside urban locations and in many locations the cost of new developments is unviable.

12.2 Turnover by Size

Average annual turnover per bed categorised by size of nursing home is set out below based on the Fair Deal rate as of May 2022 for private & voluntary nursing homes. The below excludes any additional incomes secured outside of the Fair Deal scheme.

Home Size	<25	25-39	40-59	≥60
Average Turnover per bed (May 2022)	€53,569	€52,390	€53,559	€57,762

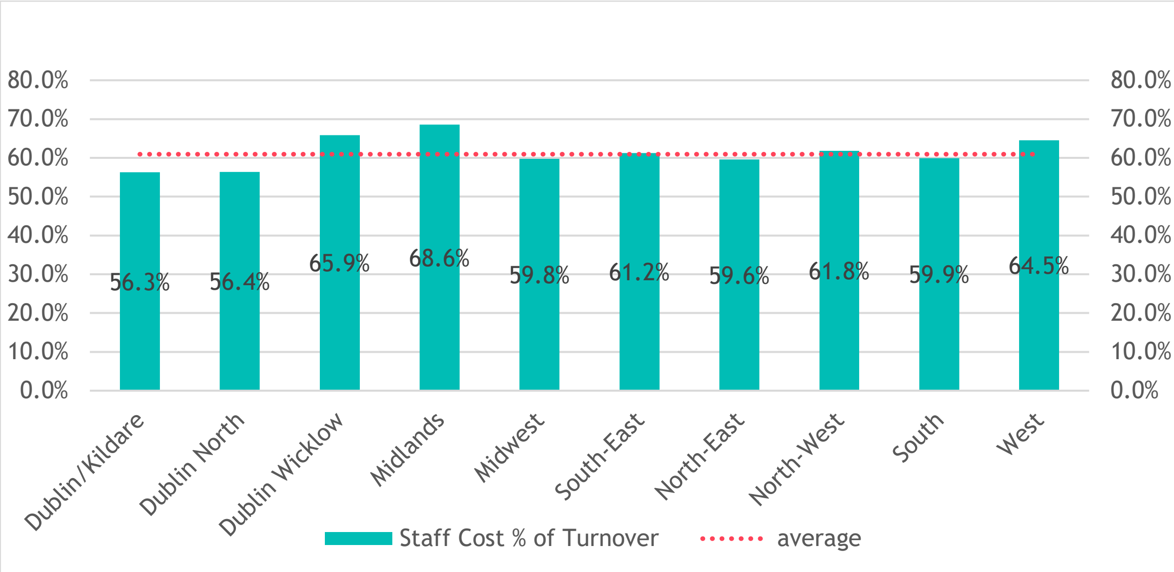
13 Staffing Matters

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, staff costs accounted for 61% of average turnover in respondents' homes in 2020 Staff costs have risen by 1% since the figure reported in 2019. Regionally, staff costs accounted for the following percentages of turnover:

Staff Cost % of Turnover



The Midlands region (Laois, Longford, Offaly, and Westmeath) reported the highest staff cost as a percentage of turnover (68.6%). However, each county in this region is on the lower end of the average weekly FDR. Dublin/ Kildare region reported the lowest % of staff cost of 56.3%. We note that Dublin / Wicklow has significantly high staff costs as a % of turnover considering its higher Fair Deal rates however on a review of occupancy in the period, we observe that occupancy on average was significantly impacted which likely gave rise to this oddity.

The table below summarises the staff cost as % of turnover based on the size of the nursing home. Smaller homes have higher staff costs as a percentage of turnover in comparison to home in excess of 40 beds.

Home Size	<25	25-39	40-59	≥60
Staff Cost as % Turnover	64.8%	68.6%	58.4%	60.1%

61%

of turnover for staff costs

13.2 Individual Salary Levels & Hourly Rates

Director of Nursing & Clinical Nurse Manager

In 2020 the average gross salaries reported by survey respondents for Directors of Nursing and Clinical Nurse Manager (CNM) were c.€76k and c.€50k respectively.

Care Staff

The average hourly rates (excluding PRSI and levies) for Registered General Nurse (RGN) and Health Care Assistant (HCA) in 2021 were €20.40 and €11.70 respectively. A schedule of hourly rates by NHI Region is outlined below:

NHI Region	RGN Hourly Rate 2021	HCA Hourly Rate 2021	RGN Hourly Rate 2020	HCA Hourly Rate 2020
Dublin/Kildare	€19.8	€11.5	€21.2	€11.6
Dublin North	€21.7	€12.8	n/a	n/a
Dublin Wicklow	€22.0	€12.8	€24.3	€13.0
Midlands	€20.0	€11.3	€18.0	€11.0
Midwest	€20.0	€11.4	€19.7	€11.2
South-East	€20.7	€11.7	€21.4	€11.4
North-East	€19.7	€11.6	€19.5	€10.8
North-West	€21.1	€11.2	€19.0	€11.5
South	€19.4	€11.6	€20.3	€12.2
West	€19.5	€11.3	€18.5	€10.5
Average	**€20.4**	**€11.7**	**€20.4**	**€11.5**

Pay rates are largely in line with the previous survey, with only HCA rates increasing on average by 1.7%. Regionally, there has been a fluctuation with average pay rates with some regions being higher/lower than 2020 however this can simply be due to differing respondents in each of the surveys. Additionally, we have been informed that there is pressure on operators to increase staff pay rates with 76% of respondents indicating that they expected to increase rates in 2022. Of the respondents who expected to pay an increase in 2022, the average expected increase for nurses was 3% with the average increase for care assistants expected to be 3%.

Support Staff - Hourly Rates

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

Position	Hourly Rate 2021	Hourly Rate 2020
Domestic Assistant	€11.4	€11.0
Chef	€15.4	€15.0
Kitchen Assistant	€11.1	€11.0
Administrator	€16.0	€17.0
Receptionist	€12.9	€13.0
Maintenance Staff	€14.9	€16.0

13.3 Other Staff Related Findings

Outlined below are some other key staff related survey findings:

- Staff turnover: respondents reported an 18.5% staff turnover in 2020. This has increased on 2019 when staff turnover was 16%.
- The most common reason cited for nursing staff leaving was to take up employment with another private nursing home, followed by leaving for the HSE where remuneration packaged offered are high in comparison.
- In the case of care assistants, the most common reason for leaving was retirement, followed by leaving for the HSE.

13.4 Other Staffing Matters

Nursing homes in Ireland have had to deal with a variety of challenges as a result of Covid-19. Subsequently, many staffing issues arose in nursing homes as a result of lower wage rates when compared to the standard living wage. Nursing homes are more clinically modelled environments as a result of Covid-19 and healthcare workers are now seeking higher pay rates as compensation. Nursing homes are becoming increasingly concerned about losing health workers to the HSE who are provided with fees under Fair Deal that are substantively more than those payable per resident to private & voluntary providers, enabling State operated homes pay higher rates.

A survey of 118 private & voluntary nursing homes was conducted at the end of 2021 by NHI to determine the scope of the nursing home staffing crises. A quarter of the Nursing Homes in Ireland were surveyed, and the results show that 1,000 healthcare assistants and 300 nurses had vacated their roles in specific nursing homes the previous year. These results show there is immense pressure on nursing homes in trying to retain staff.

One of the key findings in the survey was the proportion of nursing staff and healthcare assistants vacating roles in private & voluntary nursing homes for the HSE.
The NHI survey revealed[16]:

- In the previous year in private & voluntary nursing homes, on average 9.4 healthcare assistants and 2.86 Nurses had left their positions.
- In the second half of 2021, an average of 4.36 healthcare assistants had left each private & voluntary nursing home to work for the HSE; an average of 2.15 nurses left.
- HSE hospitals were the most popular destination for healthcare assistants and nurses leaving, followed by HSE nursing homes.

The survey numbers clearly indicate the level of staff turnover is at an unacceptable level especially for homes with specialised care where it is critical to retain experienced staff to provide the level of care required. The majority of care staff are leaving for state owned homes whereby private and voluntary homes have been unable to meet the same pay rates and benefits being offered given the current Fair Deal funding for HSE compared to private & voluntary is significantly higher. Additionally, in August 2020, the Covid-19 nursing home expert panel recommended that a review of employment terms and conditions of nurses and healthcare assistants in nursing homes be undertaken. This is to be carried out by the Department of Enterprise Trade and Employment (DETE) to ensure staff are available to

[16] Nursing home staffing emergency will have consequences for health & social care, NHI, January 2022.

provide care, however this has not been progressed and has contributed to a crisis for nursing home in retaining and recruiting staff.

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[17]

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 3.61 care hours per day to each resident accommodated in their respective nursing homes. This seems to be largely in line with our last survey. However, it is important to note we have observed the care hours in the responses differ from home to home based on the individual care assessment and the overall dependency mix driving the average care hours in the home.

[17] S.I. No. 415/2013 - Health Act 2007 (Care and Welfare of Residents in Designated Centres for Older People) Regulations 2013, ISB, 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 2020:

Home Size	<25	25-39	40-59	≥60
Food Cost Per Bed 2020	€3,442.6	€2,923.9	€2,339.3	€2,319.4
Food Cost Per Bed 2019	€2,318.0	€2,600.0	€2,190.0	€2,254.0
Food Cost as % of Turnover	4.8%	5.0%	4.4%	4.2%

On average, the food cost as percentage of turnover accounted c.4.6% of total turnover. 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. We can also see that food costs in all size homes have increased from 2019. This has been due to increased inflation.

15 Other Expenditure

15.1 Repairs & Maintenance (R&M) Costs

On average in 2020, the respondents reported that 2.4% of turnover was spent on repairs within their homes. The below table analyses the repairs and maintenance costs per bed in relation to home size:

Home Size	<25	25-39	40-59	≥60
Average of R&M Per Bed	€2,641.4	€1,223.1	€1,178.5	€873.7
R&MN as % Turnover	2.8%	2.5%	2.6%	1.8%

15.2 Staff Training Costs

Staff training costs are accountable for a considerable proportion of expenditure. On average, respondents reported that 0.51% of turnover was spent on staff training in 2020. The below table analyses the staff training costs per bed as a percentage of turnover. In comparison to the previous survey, staff training cost have increased from 0.36% of turnover to 0.51%, indicative of increase in intensified training and associated costs as a result of Covid-19.

NHI Region	Average Training cost as a % of Turnover
Dublin/Kildare	0.72%
Dublin North	0.66%
Dublin Wicklow	1.28%
Midlands	0.52%
Midwest	0.25%
South-East	0.25%
North-East	0.68%
North-West	0.27%
South	0.43%
Western	0.49%
Average	**0.51%**

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	€247.9	€169.7	€248.6	€220.6
Training as % Turnover	0.4%	0.4%	0.5%	0.6%

16 Summary Schedule by Size

Home Size	<25	25-39	40-59	≥60
Staff Costs as % of Turnover	64.8%	68.6%	58.4%	60.1%
Food Cost per Bed	€3,442.6	€2,923.9	€2,339.3	€2,319.4
Food Cost as % Turnover	4.8%	5.0%	4.4%	4.2%
R&M per Bed	€2,641.4	€1,223.1	€1,178.5	€873.7
R&M as % of Turnover	2.8%	2.5%	2.6%	1.8%
Training Cost per Bed	€247.9	€169.7	€248.6	€220.6
Training as % of Turnover	0.4%	0.4%	0.5%	0.6%

The table above summarises the survey findings categorised by home size.

As illustrated above, larger homes can generally benefit from economies of scale insofar as staff costs are concerned however staff costs can vary widely across all homes depending on a number of factors including, but not limited to size, layout and care needs profile.

Furthermore, as is evidenced above larger homes typically are seen to garner efficiencies in terms of other direct and overhead costs including food and repairs and maintenance.

Other costs such as training costs remain relatively similar across all size of homes.

0.51%

*average of turnover spent on staff training**

**2020*

17 Area Summaries

The population summaries for 2022 are based on preliminary 2022 CSO data released on a regional basis, which we have extrapolated for ageing demographics to county level based on CSO estimates.

17.1 Dublin/Kildare/Wicklow

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

Regions	Population	Population ≥ 65	Private Beds
Dublin	1,450,701	194,700	7,587
Kildare	246,977	32,223	1,514
Wicklow	155,485	20,286	971

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

Area Statistics	2022
Number of private homes	137
Number of private beds	10,072
Population ≥ 65 per private bed	24.5
Survey Results	**2022**
Average occupancy (2020)	80%
Average weekly Fair Deal rate (May 2022)	€1,197
Average turnover per bed (May 2022)	€62,239

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	91,657	12,875	235
Longford	46,634	6,551	223
Offaly	82,668	11,612	352
Westmeath	95,840	13,462	546

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

Area Statistics	2022
Number of private homes	21
Number of private beds	1,356
Population ≥ 65 per private bed	32.8
Survey Results	**2022**
Average occupancy (2020)	94%
Average weekly Fair Deal rate (May 2022)	€983
Average turnover per bed (May 2022)	€51,114

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	205,444	35,094	1,124
Clare	127,419	21,766	725
Tipperary North	83,831	14,320	485

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

Area Statistics	2022
Number of private homes	46
Number of private beds	2,334
Population ≥ 65 per private bed	30.5
Survey Results	**2022**
Average occupancy (2020)	96%
Average weekly Fair Deal rate (May 2022)	€969
Average turnover per bed (May 2022)	€50,393

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	81,201	13,817	390
Monaghan	64,832	11,032	306
Louth	139,100	18,148	487
Meath	220,296	28,742	1,067

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

Area Statistics	2022
Number of private homes	37
Number of private beds	2,250
Population ≥ 65 per private bed	31.9
Survey Results	**2022**
Average occupancy (2020)	85%
Average weekly Fair Deal rate (May 2022)	€1,054
Average turnover per bed (May 2022)	€54,819

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-Wast Regions	Population	Population ≥ 65	Private Beds
Donegal	166,321	28,301	620
Sligo	69,819	11,880	314
Leitrim	35,087	5,970	121

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

Area Statistics	2022
Number of private homes	22
Number of private beds	1,055
Population ≥ 65 per private bed	43.7
Survey Results	**2022**
Average occupancy (2020)	94%
Average weekly Fair Deal rate (May 2022)	€987
Average turnover per bed (May 2022)	€51,322

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	581,231	93,125	2,810
Kerry	155,258	24,875	762

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

Area Statistics	2022
Number of private homes	66
Number of private beds	3,572
Population ≥ 65 per private bed	33.0
Survey Results	**2022**
Average occupancy (2020)	93%
Average weekly Fair Deal rate (May 2022)	€1,031
Average turnover per bed (May 2022)	€53,613

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	61,931	10,045	334
Kilkenny	103,685	16,818	645
Waterford	127,085	20,613	626
Wexford	163,527	26,524	863
Tipperary South	83,831	14,320	504

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

Area Statistics	2022
Number of private homes	61
Number of private beds	2,972
Population ≥ 65 per private bed	29.7
Survey Results	**2022**
Average occupancy (2020)	92%
Average weekly Fair Deal rate (May 2022)	€987
Average turnover per bed (May 2022)	€51,327

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	276,451	46,639	1,541
Mayo	137,231	23,152	877
Roscommon	69,995	11,809	532

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

Area Statistics	2022
Number of private homes	63
Number of private beds	2,950
Population ≥ 65 per private bed	27.7
Survey Results	2022
Average occupancy (2020)	92%
Average weekly Fair Deal rate (May 2022)	€970
Average turnover per bed (May 2022)	€50,432

18 Appendix: Nursing Home Directory[18]

Title	Address	County	Maximum Occupancy (Total Beds)
Abbey Haven Care Centre & Nursing Home	Carrick Road, Boyle, F52 AX24	Co.Roscommon	63
AbbeyBreaffy Nursing Home	Dublin Road (N5), Castlebar, F23 NY75	Co.Mayo	55
Abbeylands Nursing Home	Carhoo, Kildorrery, P67 NH76	Co.Cork	50
Abbot Close Nursing Home	St. Marys Terrace, Askeaton, V94 F864	Co.Limerick	65
Aclare Nursing Home	4/5 Tivoli Terrace South, Dun Laoghaire, A96 FX74	Co.Dublin	27
Acorn Lodge	Ballykelly, Cashel, E25 W528	Co.Tipperary	50
Adare and District Nursing Home	Adare Road, Croagh, V94 TN82	Co.Limerick	84
Ailesbury Private Nursing Home	58 Park Avenue, Sandymount, D04 Y437	Co.Dublin	45
Aisling House Nursing Home	Sea Bank, Arklow, Y14 X670	Co.Wicklow	50
Altadore Nursing Home	Upper Glenageary Road, Glenageary, A96 EW77	Co.Dublin	66
Alzheimer's Care Centre	Highfield Healthcare, Swords Road, Whitehall, D09 H343	Co.Dublin	154
Amberley Home and Retirement Cottages	Acres, Fermoy, P61 AP57	Co.Cork	71
An Teaghlach Uilinn Nursing Home	Kilrainey, Moycullen, H91 RW96	Co.Galway	75
Anam Cara	Anam Cara Housing with Care, St Canice's Road, Glasnevin, D11 FF10	Co.Dublin	56
Anna Gaynor House	Our Lady Hospice & Care Services, Harold's Cross, D6W RY72	Co.Dublin	89
Annabeg Nursing Home	Meadow Court, Ballybrack, A96 KW54	Co.Dublin	41
Anovocare Nursing Home	Stockhole Lane, Cloghran, Swords, K67 T8P0	Co.Dublin	89
Aperee Living Ballinasloe	Bridge Street, Ballinasloe, H53 H327	Co.Galway	60
Aperee Living Ballygunner	Bishopscourt, Ballygunner, X91 F5YH	Co.Waterford	64
Aperee Living Bantry	Seafield, Bantry, P75 KT35	Co.Cork	50
Aperee Living Belgooly	Belgooly, Kinsale, P17 E208	Co.Cork	68

[18] Per HIQA Directory (May 2022)

Title	Address	County	Maximum Occupancy (Total Beds)
Aperee Living Callan	Friary Walk, Callan, R95 RT91	Co.Kilkenny	60
Aperee Living Camp	Knockglassmore, Camp, Tralee, V92 YY96	Co.Kerry	35
Aperee Living Churchtown	Churchtown, Mallow, P51 F519	Co.Cork	50
Aperee Living Conna	Conna, Mallow, P51 W110	Co.Cork	50
Aperee Living Galway	Ballinfoyle, Headford Road, H91 HD74	Co.Galway	60
Aperee Living Tralee	Skahanagh, Tralee, V92AX22	Co.Kerry	68
Araglen House Nursing Home	Loumanagh, Boherbue, Mallow, P51 T990	Co.Cork	57
Aras Chois Fharraige	Pairc, An SpidÃ©al, H91 H9C7	Co.Galway	42
Aras Ghaoth Dobhair	Meenaniller, Derrybeg, Letterkenny, F92 X295	Co.Donegal	41
Aras Mhic Shuibhne	Mullinsole, Laghey, F94 DV22	Co.Donegal	48
Aras Mhuire Nursing Facility	Beechgrove, Drogheda, A92 HN29	Co.Louth	30
Aras Mhuire Nursing Home	Greenville, Listowel, V31 WF61	Co.Kerry	38
Aras Ui Dhomhnaill Nursing Home	Milford, F92 HX32	Co.Donegal	48
Archersrath Nursing Home	Archersrath , Kilkenny, R95 VA43	Co.Kilkenny	61
Archview Lodge Nursing Home	Drumany, Letterkenny, F92 KT99	Co.Donegal	30
Ard Na RÃ Nursing Home	Holycross, Bruff, V35 P027	Co.Limerick	32
Ardeen Nursing Home	Abbey Road, Thurles, E41 CY91	Co.Tipperary	40
Asgard Lodge Nursing Home	Monument Lane, Kilbride, Arklow, Y14 E862	Co.Wicklow	34
Ashbury Private Nursing Home	1A Kill Lane, Kill O'The Grange, Blackrock, A94 RK81	Co.Dublin	99
Ashford House Nursing Home	6 Tivoli Terrace East, Dun Laoghaire, A96 T853	Co.Dublin	78
Ashlawn House Nursing Home	Carrigatoher, Nenagh, E45 FA31	Co.Tipperary	52
Ashley Lodge Nursing Home	Tully East, Kildare, R51 VW22	Co.Kildare	55
Athlunkard House Nursing Home	Athlunkard, Westbury, V94 C564	Co.Clare	103
Atlanta Nursing Home	Sidmonton Road, Bray, A98 KW25	Co.Wicklow	43

Title	Address	County	Maximum Occupancy (Total Beds)
Ave Maria	Tooreen, Ballyhaunis, F35 AC63	Co.Mayo	41
Bailey's Nursing Home	Mountain Road, Tubbercurry, F91 AX97	Co.Sligo	46
Ballard Lodge Nursing Home	Borris Road, Portlaoise, R32 YW82	Co.Laois	24
Ballinamore House Nursing Home	Ballinamore, Kiltimagh, F12 HW70	Co.Mayo	48
Ballincurrig Care Centre	Ballincurrig, Leamlara, T56 TC04	Co.Cork	55
Ballinderry Nursing Home	Kilconnell, Ballinasloe, H53 H973	Co.Galway	44
Ballymote Community Nursing Unit	Carrownanty, Ballymote, F56EP48	Co.Sligo	32
Beach Hill Manor Private Nursing Home	Lisfannon, Fahan, F93 EK06	Co.Donegal	48
Beaumont Residential Care	Woodvale Road, Beaumont	Co.Cork	73
Beech Lodge Care Facility	Bruree, V35 E868	Co.Limerick	66
Beech Park Nursing Home	Dunmurry East, Kildare Town, R51 PC58	Co.Kildare	47
Beechfield Manor Nursing Home	Shanganagh Road, Shankill, D18 P389	Co.Dublin	69
Beechlawn House Nursing Home	Beechlawn House Nursing Home, High Park, Grace Park Road, Drumcondra, D09 YK82	Co.Dublin	57
Beechtree Nursing Home	Murragh, Oldtown, A45 KC97	Co.Dublin	79
Beechwood House Nursing Home	Newcastle West, V42 P308	Co.Limerick	67
Beechwood Nursing Home	Rathvindon, Leighlinbridge, R93 DD43	Co.Carlow	57
Belmont House Private Nursing Home	Galloping Green, Stillorgan, A94 KW44	Co.Dublin	161
Bethany House Nursing Home	Main Street, Tyrrellspass, N91 P5P6	Co.Westmeath	90
Bishopscourt Residential Care	Liskillea, Waterfall, Near Cork, T12 RV0P	Co.Cork	60
Blackrock Abbey Nursing Home	Cockle Hill, Blackrock, Dundalk, A91 RP76	Co.Louth	64
Blackrocks Nursing Home	The Green Road, Foxford, F26 WE00	Co.Mayo	50
Blair's Hill Nursing Home	Blair's Hill, Sunday's Well, T23 NY65	Co.Cork	37
Blake Manor Nursing Home	Ballinderreen, Kilcolgan, H91 F510	Co.Galway	39

Title	Address	County	Maximum Occupancy (Total Beds)
Blarney Nursing and Retirement Home	Killowen, Blarney, T23 X084	Co.Cork	23
Borris Lodge Nursing Home	Main Street, Borris, R95 X060	Co.Carlow	52
Boyne Valley Nursing Home	Dowth, Drogheda, A92 HK70	Co.Meath	18
Brabazon House	2 Gilford Road, Sandymount, D04 TN93	Co.Dublin	51
Bramleigh Lodge Nursing Home	Cashel Road, Cahir, E21 AY88	Co.Tipperary	26
Brampton Care Home	Main Street, Oranmore, H91 AR23	Co.Galway	79
Brentwood Manor Private Nursing Home	Letterkenny Road, Convoy, F93 PK11	Co.Donegal	56
Bridhaven Nursing Home	Spa Glen, Mallow, P51 WK80	Co.Cork	182
Brindley Manor Private Nursing Home	Letterkenny Road, Convoy, F93 ND80	Co.Donegal	43
Brookfield Care Centre	Leamlara, T56 YX21	Co.Cork	63
Brookhaven Nursing Home	Donoughmore, Ballyraggett, R95 YP63	Co.Kilkenny	71
Brooklodge Nursing Home	Ballyglunin, Tuam, H54 W950	Co.Galway	45
Brookvale Manor Private Nursing Home	Hazelhill, Ballyhaunis, F35 HX77	Co.Mayo	37
Brymore House	Thormanby Road, Howth, D13 VK82	Co.Dublin	29
Bushfield Care Centre	Bushfield, Oranmore, H91 Y299	Co.Galway	45
Bushmount Nursing Home	Bushmount, Clonakilty, P85 VP94	Co.Cork	79
Bushy Park Nursing Home	Nenagh Road, Borrisokane, E45 TX95	Co.Tipperary	34
Caherass Nursing Home	Caherass, Croom, V35 RP28	Co.Limerick	50
Cahercalla Community Hospital & Hospice	Cahercalla Road, Ennis, V95 NR59	Co.Clare	112
Cahereen Residential Care Centre	Codrum, Macroom, P12 ND25	Co.Cork	27
Cairnhill Nursing Home	Herbert Road, Bray, A98 VF88	Co.Wicklow	93
Caiseal Geal Teach Altranais	School Road, Castlegar, H91 P2K1	Co.Galway	42
Cara Care Centre	Northwood Park, Santry, D09HW01	Co.Dublin	103
CareBright Community Centre	Ardykeohane, Bruff, V35 H922	Co.Limerick	18

Title	Address	County	Maximum Occupancy (Total Beds)
CareChoice Ballynoe	Whites Cross, T23 VH39	Co.Cork	46
CareChoice Clonakilty	Clogheen, Clonakilty, P85 PX09	Co.Cork	50
Carechoice Dungarvan	The Burgery, Dungarvan, X35 DE02	Co.Waterford	109
CareChoice Finglas	Finglas Road, Tolka Valley, Finglas, D11 X4YP	Co.Dublin	89
Carechoice Macroom	Gurteenroe, Macroom, P12 VW62	Co.Cork	62
CareChoice Malahide	Mayne River Street, Northern Cross, Malahide Road, D17 YF77	Co.Dublin	165
Carechoice Montenotte	Middle Glanmire Road, Montenotte, T23 A583	Co.Cork	111
Carechoice Swords	Bridge Street, Swords, K67F5D0	Co.Dublin	158
CareChoice Trim	Longwood Road, Trim, C15 HD43	Co.Meath	174
Carlingford Nursing Home	Old Dundalk Road, Carlingford, A91 C853	Co.Louth	44
Carna Nursing and Retirement Home	TEACH ALTRANAIS CARNA, Carna, H91 YX64	Co.Galway	51
Carrigoran House	Carrigoran, Newmarket-on-Fergus, V95 RX54	Co.Clare	109
Carthage Nursing Home	Mucklagh, Tullamore, R35 EK85	Co.Offaly	59
Carysfort Nursing Home	7 Arkendale Road, Glenageary, A96 W566	Co.Dublin	49
Castle Gardens Nursing Home	Drumgoold, Enniscorthy, Y21 EP11	Co.Wexford	64
Castlebridge Manor Nursing Home	Ballyboggan Lower, Castlebridge, Y35 C526	Co.Wexford	95
Castlemanor Nursing Home	Billis, Drumalee, H12 VH73	Co.Cavan	71
Castleross	Carrickmacross, A81X242	Co.Monaghan	125
Castleturvin House Nursing Home	Athenry, H65 VX20	Co.Galway	42
Catherine McAuley House	Beaumont Woods, Beaumont, D09A9PD	Co.Dublin	35
Catherine McAuley House	Old Dominic Street, V94 DX58	Co.Limerick	33
Cedar House Nursing Home	35 Mount Anville Park, Goatstown, D14 F240	Co.Dublin	24
Central Park Nursing Home	Clonberne, Ballinasloe, H53 KN24	Co.Galway	67
Cherry Grove Nursing Home	Priesthaggard, Campile, New Ross, Y34 TC61	Co.Wexford	60

Title	Address	County	Maximum Occupancy (Total Beds)
Cherryfield Housing with Care	Cherryfield Lawn, Hartstown, D15DH9C	Co.Dublin	56
Cherryfield Lodge Nursing Home	Milltown Park, D06 V9K7	Co.Dublin	20
Claremount Nursing Home	Claremount, Claremorris, F12C436	Co.Mayo	70
Clarenbridge Care Centre	Ballygarriff, Craughwell, H91 RW18	Co.Galway	56
Clearbrook Nursing Home	Heathfield View, Cappagh Road, Finglas West, D11 CX2T	Co.Dublin	90
Clontarf Private Nursing Home	5 - 7 Clontarf Road, Clontarf, D03 NA78	Co.Dublin	35
Cloverlodge Nursing Home	Clonmullion, Athy, R14 DD43	Co.Kildare	60
Cobh Community Hospital	Aileen Terrace, Cobh, P24 AD85	Co.Cork	44
College View Nursing Home	Clones Road, Cavan, H12 ER27	Co.Cavan	69
Corbally House Nursing Home	Mill Road, Corbally, V94 KC78	Co.Limerick	41
Corpus Christi Nursing Home	Mitchelstown, P67 X528	Co.Cork	42
Corrandulla Nursing Home	Carrow Beg South, Corrandulla, H91F2W1	Co.Galway	21
Costello's Care Centre	Ballyleague, Lanesboro, N39 WR89	Co.Roscommon	28
Craddock House Nursing Home	Craddockstown Road, Naas, W91 D432	Co.Kildare	89
Cratloe Nursing Home	Gallows Hill, Cratloe, V95 NY72	Co.Clare	32
Croft Nursing Home	2 Goldenbridge Walk, Inchicore, D08 AY24	Co.Dublin	37
Cuan Chaitriona Nursing Home	The Lawn, Castlebar, F23 NP64	Co.Mayo	58
Curam Care Home Dundalk	Toberona, Dundalk, A91 ET86	Co.Louth	82
Curam Care Home, Navan Road	Navan Road, Cabra, D07 YDW4	Co.Dublin	106
Curragh Lawn Nursing Home	Kinneagh, Curragh, R56 RW32	Co.Kildare	37
Dargle Valley Nursing Home	Cookstown Road, Enniskerry, A98 N478	Co.Wicklow	30
Darraglynn Nursing Home	Carrigaline Road, Douglas, T12YP92	Co.Cork	25
Deerpark Nursing Home	Deerpark Nursing Home, Lattin, E34 WF64	Co.Tipperary	33
Douglas Nursing and Retirement Home	Moneygourney, Douglas, T12 HW35	Co.Cork	58

Title	Address	County	Maximum Occupancy (Total Beds)
Drakelands House Nursing Home	Drakelands, Kilkenny, R95 YR02	Co.Kilkenny	72
Droimnin Nursing Home	Brockley Park, Stradbally, R32 Y580	Co.Laois	101
Drumbear Lodge Nursing Home	Cootehill Road, H18 DX45	Co.Monaghan	94
Drumderrig House	Abbeytown, Boyle, F52 RC95	Co.Roscommon	107
Dunboyne Nursing Home	Waynestown, Summerhill Road, Dunboyne, A86 XF89	Co.Meath	61
Dunlavin Nursing Home	Dunlavin, W91 P3C6	Co.Wicklow	62
Ealga Lodge Nursing Home	Shinrone, Birr, R42 EA34	Co.Offaly	48
Eliza Lodge Nursing Home	Boherdurrow, 5 Roads, Banagher, R42 XP20	Co.Offaly	50
Elm Green Nursing Home	New Dunsink Lane, Castleknock, D15 E403	Co.Dublin	120
Elm Hall Nursing Home	Elm Hall Nursing Home, Loughlinstown Road, Celbridge, W23 P6EX	Co.Kildare	62
Elmhurst Nursing Home	Hampstead Avenue, Ballymun Road, Glasnevin, D09 XNV2	Co.Dublin	48
Ennis Nursing Home	Showgrounds Road, Drumbiggle, Ennis, V95 R968	Co.Clare	60
Ennis Road Care Facility	Meelick, Ennis, V94 T276	Co.Clare	66
Esker Lodge Nursing Home	Esker Place, Cathedral Road, H12T996	Co.Cavan	70
Esker Ri Nursing Home	Kilnabin, Clara, R35 XH96	Co.Offaly	130
Eyrefield Manor Nursing Home	Church Lane, Greystones, A63KN63	Co.Wicklow	53
Fairfield Nursing Home	Quarry Road, Drimoleague, P47 HP28	Co.Cork	49
Fairlawns Nursing Home	Cavan Road, Bailieborough, A82 KP08	Co.Cavan	37
Fairy Hill Nursing Home	Kennel Hill, Anabelle, Mallow, P51 FT98	Co.Cork	22
Fearna Manor Nursing Home	Tarmon Road, Castlerea, F45 V104	Co.Roscommon	53
Fennor Hill Care Facility	Cashel Road, Urlingford, E41 PX70	Co.Kilkenny	56
Ferbane Care Centre	Main Street, Ferbane, R42 TN84	Co.Offaly	65
Fingal House Nursing Home	Spiddal Hill, Seatown West, Swords, K67 VE44	Co.Dublin	17
Firstcare Beneavin House	Beneavin House, Beneavin Road, Glasnevin, D11 F576	Co.Dublin	150

Title	Address	County	Maximum Occupancy (Total Beds)
Firstcare Beneavin Lodge	Beneavin Road, Glasnevin, D11 HA25	Co.Dublin	70
Firstcare Beneavin Manor	Beneavin Road, Glasnevin, D11 F576	Co.Dublin	115
Firstcare Blainroe Lodge	Blainroe, A67 VK52	Co.Wicklow	72
Firstcare Earlsbrook House	41 Meath Road, Bray, A98 DH95	Co.Wicklow	64
Flannery's Nursing Home	Chapel Road, Abbeyknockmoy, Tuam, H54 PX79	Co.Galway	37
Foxrock Nursing Home	Westminster Road, Foxrock, D18 KX82	Co.Dublin	41
Friars Lodge Nursing Home	Convent Road, Ballinrobe, F31 XP58	Co.Mayo	64
Gahan House	Gahan House, High Street, Graignamanagh, R95 ET80	Co.Kilkenny	12
Garbally View Nursing Home	Brackernagh, Ballinasloe, H53 P688	Co.Galway	36
Gascoigne House	37-39 Cowper Road, Rathmines, D06 HW18	Co.Dublin	50
Glebe House Nursing Home	Kilternan Care Centre, Glebe Road, Kilternan, D18 Y201	Co.Dublin	54
Glenashling Nursing Home	Oldtown, Celbridge, W23 X279	Co.Kildare	75
Glenaulin Nursing Home	Lucan Road, Chapelizod, D20YT66	Co.Dublin	84
Glendonagh Residential Home	Dungourney, Midleton, P25 HK59	Co.Cork	42
Glengara Park Nursing Home	Lower Glenageary Road, Dun Laoghaire, A96 H242	Co.Dublin	66
Glyntown Care Centre	Glyntown, Glanmire, T45 H795	Co.Cork	39
Good Counsel Nursing Home	Kilmallock Road, Limerick City, V94 RT96	Co.Limerick	28
Gormanston Wood Nursing Home	Gormanston, K32 NA71	Co.Meath	89
Gowran Abbey Nursing Home	Gowran Abbey Nursing Home Limited, Abbey Court, Gowran, R95 Y953	Co.Kilkenny	51
Grange Con Nursing Home	Carrigrohane, T12 H271	Co.Cork	24
Greenhill Nursing Home	Waterford Road, Carrick-on-Suir, E32 FY09	Co.Tipperary	55
Greenpark Nursing Home	Tullinadaly Road, Tuam, H54 C596	Co.Galway	51
Greystones Nursing Home	Church Road, Greystones, A63 HK44	Co.Wicklow	64
Griffeen Valley Nursing Home	Esker Road, Esker, Lucan, K78 V208	Co.Dublin	26

Title	Address	County	Maximum Occupancy (Total Beds)
Hamilton Park Care Facility	Balrothery, Balbriggan, K32 X377	Co.Dublin	135
Harbour Lights Nursing Home	Townasligo, Bruckless, F94 N597	Co.Donegal	45
Haven Bay Care Centre	Ballinacubby, Kinsale, P17 A580	Co.Cork	127
Hazel Hall Nursing Home	Prosperous Road, Clane, W91 DA07	Co.Kildare	46
Heatherfield Nursing Home	Bush Lane, Raynestown, Dunshaughlin, A85 KC62	Co.Meath	30
Heatherlee Nursing Home	Lawlor's Cross, Tralee Road, Killarney, V93 KX85	Co.Kerry	22
Hillcrest House Nursing Home	Long Lane, Letterkenny, F92 YY38	Co.Donegal	31
Hillcrest Nursing Home The Lodge	Long Lane, Letterkenny, F92 YY38	Co.Donegal	27
Hillside Nursing Home	Attidermot, Aughrim, Ballinasloe, H53 E090	Co.Galway	25
Hillview Convalescence & Nursing Home	Tullow Road, R93 YX46	Co.Carlow	54
Hillview Private Nursing & Retirement Residence	Rathfeigh, Tara, C15V291	Co.Meath	26
Hollybrook Lodge	St Michael's Estate, Bulfin Road, Inchicore, D08KF63	Co.Dublin	50
Hollymount Private Nursing and Retirement Home	Kilrush, Hollymount, Claremorris, F12 R292	Co.Mayo	36
Holy Family Nursing Home	Magheramore, Killimor, Ballinasloe, H53 KP28	Co.Galway	46
Holy Family Residence	Little Sisters of the Poor, Holy Family Residence, Roebuck Road, Dundrum, D14 C7W2	Co.Dublin	60
Holy Ghost Residential Home	Cork Road, X91 NN88	Co.Waterford	60
Howth Hill Lodge	Thormanby Road, Howth, D13 KN22	Co.Dublin	48
Kenmare Nursing Home	Killaha East, Kenmare, V93 KT10	Co.Kerry	26
Kerlogue Nursing Home	Kerlogue, Y35 ND37	Co.Wexford	89
Kilbrew Recuperation and Nursing Care	Kilbrew Demense, Curragha, Ashbourne, A84 TR72	Co.Meath	74
Kilcara House Nursing Home	Kilcara, Duagh, Listowel, V31 W266	Co.Kerry	31
Kilcolgan Nursing Home	Kilcolgan, H91 Y7N3	Co.Galway	48
Kilcoole Lodge Nursing Home	Kilcoole Lodge Nursing Home, Ballydonarea, Kilcoole, A63 YW71	Co.Wicklow	89
Killarney Nursing Home	Rock Road, Killarney, V93 Y981	Co.Kerry	56

Title	Address	County	Maximum Occupancy (Total Beds)
Killeline Nursing Home	Cork Road, Newcastle West, V42 C501	Co.Limerick	63
Killure Bridge Nursing Home	Airport Road, X91 NP44	Co.Waterford	79
Kilmainhamwood Nursing Home	Kilmainhamwood, Kells, A82 DN84	Co.Meath	43
Kilminchy Lodge Nursing Home	Kilminchy, Portlaoise, Portlaoise, R32 WK35	Co.Laois	52
Kilrush District Hospital Limited	Cooraclare Road, Kilrush, V15 CH98	Co.Clare	43
Kilrush Nursing Home	Kilrush Nursing HomeCo. Clare	Co.Clare	46
Kiltipper Woods Care Centre	Kiltipper Road, Tallaght, D24 A248	Co.Dublin	121
Kinvara House Nursing Home	3 - 4 Esplanade, Strand Road, Bray, A98 VY10	Co.Wicklow	36
Knockeen Nursing Home	Knockeen, Barntown, Y35CY80	Co.Wexford	49
Knockrobin Hill Care Home	Knockrobin, Port Road, Wicklow, A67 ED27	Co.Wicklow	99
Kylemore House Nursing Home	Sidmonton Road, Bray, A98 PA09	Co.Wicklow	38
Lake House Nursing Home	Portnablagh, Dunfanghy, F92 PF58	Co.Donegal	49
Lakes Nursing Home	Hill Road, Killaloe, V94 NR79	Co.Clare	57
Larchfield Park Nursing Home	Monread Road, Naas, W91 PX94	Co.Kildare	70
Larissa Lodge Nursing Home	Carnamuggagh, Letterkenny, F92 Y726	Co.Donegal	64
Laurel Lodge Nursing Home	Templemichael, Longford, N39 XE92	Co.Longford	114
Lawson House Nursing Home	Knockrathkyle, Glenbrien, Enniscorthy, Y21 AW82	Co.Wexford	65
Leeson Park House Nursing Home	10 Leeson Park, D06 TC65	Co.Dublin	49
Leopardstown Park Hospital	Foxrock, D18XH70	Co.Dublin	109
Lexington House	Monastery Road, Clondalkin, D22 F2N2	Co.Dublin	92
Lisheen Nursing Home	Stoney Lane, Rathcoole, D24 Y042	Co.Dublin	118
Little Flower Nursing Home	Labane, Ardrahan, H91 ND26	Co.Galway	50
Lough Erril Private Nursing Home	Lough Erril, Mohill, N41 XE39	Co.Leitrim	45
Loughshinny Residential Home	Blackland, Ballykea, Loughshinny, Skerries, K34 DV78	Co.Dublin	123

Title	Address	County	Maximum Occupancy (Total Beds)
Lourdesville Nursing Home	Athy Road, Kildare Road, Kildare Town, R51 PY94	Co.Kildare	42
Lucan Lodge Nursing Home	Ardeevin Drive, Lucan, K78Y192	Co.Dublin	74
Lystoll Lodge Nursing Home	Skehenerin, Listowel, V31 EC92	Co.Kerry	48
Maria Goretti Nursing Home	Proonts, Kilmallock, V35T104	Co.Limerick	57
Marian House	Holy Faith Convent, Glasnevin, D11 HN8F	Co.Dublin	26
Marian House Alzheimer Unit	Ballindine East, Ballindine, Claremorris, F12 C950	Co.Mayo	12
Maryborough Nursing Home	Maryborough Hill, Douglas, T12 AX28	Co.Cork	37
Maryfield Nursing Home	Farnablake East, Athenry, H65 DD54	Co.Galway	23
Maryfield Nursing Home	Old Lucan Road, Chapelizod, D20 WC89	Co.Dublin	69
Marymount Care Centre	Westmanstown, Lucan, K78 FD29	Co.Dublin	140
Marymount University Hospital & Hospice	Curraheen Road, Curraheen, T12A710	Co.Cork	63
Maynooth Lodge Nursing Home	Rathcoffey Road, Crinstown, Maynooth, W23 P237	Co.Kildare	85
Maypark House Nursing Home	Maypark Lane, X91 WV18	Co.Waterford	38
Middletown House Nursing Home	Ardamine, Gorey, Y25 P6H7	Co.Wexford	51
Milford Nursing Home	Milford Care Centre, Plassey Park Road, Castletroy, V94 H795	Co.Limerick	69
Mill Lane Manor Private Nursing Home	Sallins Road, Naas, W91 W329	Co.Kildare	70
Millbrae Lodge Nursing Home Limited	Newport, V94 H2V3	Co.Tipperary	81
Millbrook Manor Nursing Home	Slade Road, Coolmines, Saggart, D24 A9RY	Co.Dublin	63
Millbury Nursing Home	Commons Road, Navan, C15 WY88	Co.Meath	101
Moate Nursing Home	Dublin Road, Moate, N37 MT68	Co.Westmeath	50
Mooncoin Residential Care Centre	Polerone Road, Mooncoin, X91 T638	Co.Kilkenny	78
Moorehall Lodge Ardee	Hale Street, Ardee, A92 W967	Co.Louth	81
Moorehall Lodge Drogheda	Dublin Road, Drogheda, A92 XP03	Co.Meath	121
Mount Cara Nursing Home	Redemption Road, Blackpool, Cork, T23 YY93	Co.Cork	26

Title	Address	County	Maximum Occupancy (Total Beds)
Mount Carmel Nursing Home	Abbey Street, Corner of Limerick Road, Roscrea, E53 RD23	Co.Tipperary	31
Mount Carmel Supported Care Home	Prologue, Callan, R95 RKW2	Co.Kilkenny	20
Mount Hybla Private	Farmleigh Woods, Castleknock, D15 Y977	Co.Dublin	66
Mount Sackville Nursing Home	College Road, D20 FH56	Co.Dublin	33
Mount Tabor Nursing Home and Care Centre	Mount Tabor, Sandymount Green, D04 YT68	Co.Dublin	46
Mountbellew Nursing Home	Mountbellew, H53 PV34	Co.Galway	35
Mountpleasant Lodge	Clane Road, Duncreevan, Kilcock, W23 XT7W	Co.Kildare	81
Moycullen Nursing Home	Ballinahalla, Moycullen, H91 CC60	Co.Galway	53
Moyglare Nursing Home	Moyglare Road, Maynooth, W23 HF82	Co.Kildare	54
Mullinahinch House Private Nursing Home	Mullinahinch, H18 PR68	Co.Monaghan	54
Mystical Rose Private Nursing Home	Knockdoemore, Claregalway, H91 HK37	Co.Galway	54
Nazareth House	Malahide Road, Clontarf, D03 KW08	Co.Dublin	120
Nazareth House	Dromahane, Mallow, P51 T889	Co.Cork	120
Nazareth House	Fahan, Lifford, F93 VR99	Co.Donegal	48
Nazareth House Nursing Home Sligo	Church Hill, Sligo Town, F91 A243	Co.Sligo	70
Nenagh Manor Nursing Home	Yewston, Nenagh, E45 K280	Co.Tipperary	50
Nephin Nursing Home	132 - 134 Navan Road, Cabra, D07 X294	Co.Dublin	62
New Lodge Nursing Home	Stocking Lane, Rathfarnham, D16 C6T4	Co.Dublin	24
New Ross Community Hospital	Hospital Road, New Ross, Y34 NH39	Co.Wexford	35
Newbrook Nursing Home	Ballymahon Road, Mullingar, N91 D232	Co.Westmeath	119
Newpark Care Centre	Newpark , The Ward , D11 RW27	Co.Dublin	72
Newtownpark House	Newtownpark Avenue, Blackrock, A94 KC59	Co.Dublin	62
Nightingale Nursing Home	Lowville, Ahascragh, Ballinasloe, H53 TY71	Co.Galway	31
Northwood Residential Home	Old Ballymun Road, Northwood, D09H32H	Co.Dublin	118

Title	Address	County	Maximum Occupancy (Total Beds)
Norwood Grange	Ballinora, Waterfall, Near Cork, T12 WA47	Co.Cork	30
O'Gorman Home	Castle Street, Ballyragget, R95EC91	Co.Kilkenny	12
Oak View Nursing Home	The Commons, Belturbet, H14 A585	Co.Cavan	61
Oakdale Nursing Home	Kilmalogue, Gracefield, Portarlington, R32 P025	Co.Laois	58
Oakfield Nursing Home	Ballinakill, Courtown, Gorey, Y25NX33	Co.Wexford	91
Oaklodge Nursing Home	Churchtown South, Cloyne, P25 FF88	Co.Cork	65
Oakwood Lodge Nursing Home	Kilreesk Road, Skephubble, St Margaret's, K67 CX23	Co.Dublin	45
Oakwood Private Nursing Home	Hawthorn Drive, Athlone Road, Roscommon, F42 A528	Co.Roscommon	56
Oakwood Private Nursing Home	Circular Road, Ballaghaderreen, F45XT27	Co.Roscommon	49
Oghill Nursing Home	Oghill, Monasterevin, W34 YE26	Co.Kildare	34
Orwell Private	112 Orwell Road, Rathgar, D06 TN66	Co.Dublin	170
Orwell Queen of Peace	Garville Avenue, Rathgar, D06 F6C4	Co.Dublin	46
Our Lady of Fatima Home	Our Lady of Fatima Home, Oakpark, Tralee, V92 HW58	Co.Kerry	66
Our Lady of Lourdes Care Facility	Kilcummin Village, Killarney, V93 A279	Co.Kerry	68
Our Lady's Manor	Bulloch Castle, Dalkey, A96 P9C1	Co.Dublin	118
Our Lady's Manor Nursing Home	Dublin Road, Edgeworthstown, N39 VR04	Co.Longford	61
Padre Pio Nursing Home	Graiguenoe, Holycross, Thurles, E41 F6F7	Co.Tipperary	49
Padre Pio Nursing Home	50-51A Cappaghmore, Clondalkin, D22YR71	Co.Dublin	31
Padre Pio Nursing Home	Sunnyside, Upper Rochestown, T12 WF29	Co.Cork	25
Padre Pio Rest Home	Kilderriheen, Cappoquin, P51 XH68	Co.Waterford	24
Parke House Nursing Home	Boycetown, Kilcock, W23 X3NR	Co.Kildare	145
Patterson's Nursing Home	Lismackin, Roscrea, E53 F402	Co.Tipperary	25
Peamount Healthcare Older Persons Service	Newcastle, D22 Y008	Co.Dublin	50
Pilgrims Rest Nursing Home	Barley Hill, Westport, F28 W525	Co.Mayo	35

Title	Address	County	Maximum Occupancy (Total Beds)
Portiuncula Nursing Home	Multyfarnham, N91 RW14	Co.Westmeath	60
Portumna Retirement Village	Brendan's Road, Portumna, H53 TF88	Co.Galway	63
Powdermill Nursing Home & Care Centre	Gunpowdermills, Ballincollig, P31 XV25	Co.Cork	40
Prague House	Chapel Street, Freshford, R95 R8EV	Co.Kilkenny	22
Queen of Peace Nursing Home	Churchfield, Knock, F12 A027	Co.Mayo	32
Raheny Community Nursing Unit	St. Joseph's Hospital Campus, Springdale Road, Raheny, D05 VR66	Co.Dublin	100
Raheny House Nursing Home	476 Howth Road, Raheny, D05TP26	Co.Dublin	43
Rathborne Nursing Home	Ashtown, D15 CAA4	Co.Dublin	120
Rathkeevan Nursing Home	Rathkeevin, Clonmel, E91 EW98	Co.Tipperary	61
Ratoath Manor Nursing Home	Ratoath, A85 YW73	Co.Meath	60
Retreat Nursing Home	Loughandonning, Bonnavalley, Athlone, N37 DK07	Co.Westmeath	37
Riverbrook Nursing and Respite Care	Belmont Road, Castleconnell, V94 K682	Co.Limerick	22
Riverdale House Nursing Home	Blackwater, Ardnacrusha, V94 A7D0	Co.Clare	29
Riverdale Nursing Home	Laragh, Ballon, R93F229	Co.Carlow	31
Riverside Nursing Home	Milltown, Abbeydorney, Tralee, V92 YN92	Co.Kerry	27
Riverstick Nursing Home	Riverstick Nursing Home, Curra, Riverstick	Co.Cork	95
Rivervale Nursing Home	Rathnaleen, Nenagh, E45 DX49	Co.Tipperary	43
Rochestown Nursing Home	Monastery Road, Rochestown, T12 FK84	Co.Cork	23
Rockshire Care Centre	Rockshire Road, Ferrybank, X91 YA31	Co.Waterford	38
Rosedale Residential Home	Rosedale, Upper Kilmacow, X91 F750	Co.Kilkenny	15
Roselodge Nursing Home	Killucan, N91 PC95	Co.Westmeath	50
Rosemount House Nursing Home	Garrabeg Road, Church Street, Gort, H91 E223	Co.Galway	40
Rosenalee Care Centre	Poulavone, Ballincollig, P31 HE98	Co.Cork	66
Roseville House Nursing Home	Killonan, Ballysimon, V94 YN81	Co.Limerick	39

Title	Address	County	Maximum Occupancy (Total Beds)
Roseville Nursing Home	49 Meath Road, Bray, A98 XW24	Co.Wicklow	30
Rush Nursing Home	Kenure, Skerries Road, Rush, K56 VW68	Co.Dublin	56
Rushmore Nursing Home	Knocknacarra, H91WR26	Co.Galway	24
Ryevale Nursing Home	Leixlip, W23 DX80	Co.Kildare	172
SacrÃ© Coeur Nursing Home	Station Road, Tipperary Town, E34 R227	Co.Tipperary	26
Sacred Heart Nursing Home	Crosspatrick, Johnstown, E41 EY74	Co.Kilkenny	48
Sacred Heart Residence	Little Sisters of the Poor, Sybil Hill Road, Raheny, D05 XK58	Co.Dublin	86
Saint Louis Nursing Home	1-2 Clonmore, Ballymullen, Tralee, V92 AXV1	Co.Kerry	25
Sally Park Nursing Home	Sally Park Close, Firhouse, D24 CC90	Co.Dublin	43
Sancta Maria Nursing Home	Parke, Kinnegad, N91 XF65	Co.Meath	71
Santa Sabina House	Navan Road, Cabra, D07 WK25	Co.Dublin	40
Shalom Nursing Home	Presentation Convent, Kilcock, W23 FH30	Co.Kildare	33
Shannagh Bay Nursing Home	2-3 Fitzwilliam Terrace, Strand Road, Bray, A98 FV48	Co.Wicklow	43
Shannon Lodge Nursing Home	Main Street, Rooskey, N41 YE03	Co.Roscommon	36
Sheelin Nursing Home	Mountnugent, A82 EK53	Co.Cavan	30
Shrewsbury House Nursing Home	164 Clonliffe Road, Drumcondra, D03 PF68	Co.Dublin	35
SignaCare Bunclody	Newtownbarry, Bunclody, Y21 E8V0	Co.Wexford	62
SignaCare Killerig	Killerig, R93 V5X8	Co.Carlow	45
SignaCare New Ross	Newtown Commons, New Ross, Y34 VX44	Co.Wexford	62
SignaCare Waterford	Rocklands, Ferrybank, Waterford, X91 KT3F	Co.Waterford	64
Silvergrove Nursing Home Limited	Main Street, Clonee , D15 HW82	Co.Meath	28
Simpson's Hospital	Ballinteer Road, Dundrum, D16P732	Co.Dublin	48
Skibbereen Residential Care Centre	Baltimore Road, Skibbereen, P81 V064	Co.Cork	50
Sligo Nursing Home	Ballytivnan, F91 AY17	Co.Sligo	62

Title	Address	County	Maximum Occupancy (Total Beds)
Sonas Nursing Home Ard Na Greine	Bothar na CÃ©, Enniscrone, F26 AW86	Co.Sligo	57
Sonas Nursing Home Ashborough	Lyre Road, Milltown, V93 HH92	Co.Kerry	58
Sonas Nursing Home Athlone	Cloghanboy, Ballymahon Road, Athlone, N37 AC90	Co.Westmeath	58
Sonas Nursing Home Belmullet	Tallagh, Belmullet, F26 HW71	Co.Mayo	48
Sonas Nursing Home Carrick-on-Suir	Waterford Road, Carrick-on-Suir, E32 D681	Co.Tipperary	53
Sonas Nursing Home Cloverhill	Lisagallan, Cloverhill, F42 VW21	Co.Roscommon	53
Sonas Nursing Home Innis Ree	Ballyleague, Lanesborough, N39 R122	Co.Roscommon	58
Sonas Nursing Home Knock	Ballyhaunis Road, Knock, F12 K292	Co.Mayo	57
Sonas Nursing Home Melview	Prior Park, Clonmel, E91 XY26	Co.Tipperary	49
Sonas Nursing Home Moyridge	Ridgepool Road, Ballina, F26 HW56	Co.Mayo	44
Sonas Nursing Home Riverview	Morrison Terrace, Mullauns, Ballina, F26 E799	Co.Mayo	59
Sonas Nursing Home Tullow	Shillelagh Road, Tullow	Co.Carlow	60
St Anne's Nursing Home	Clones Road, Ballybay, A75 K193	Co.Monaghan	33
St Anne's Private Nursing Home	Sonnagh, Charlestown, F12 KH73	Co.Mayo	28
St Camillus Nursing Centre	Killucan, N91 VF51	Co.Westmeath	57
St Carthage's House	Townspark East, Lismore, P51V320	Co.Waterford	42
St Catherine's Nursing Home	Bothar BuÃ, Newcastle West, V42 PR80	Co.Limerick	73
St Colmcille's Nursing Home	Oldcastle Road, Towns Park, Kells, A82 D902	Co.Meath	42
St Columban's Nursing Home	Magheramore, A67 HY02	Co.Wicklow	24
St Columban's Retirement Home	Dalgan Park, Navan, C15 AY2Y	Co.Meath	33
St David's Nursing Home	Gentian Hill, Knocknacarra, Salthill, H91 EA46	Co.Galway	18
St Doolagh's Park Care and Rehabilitation Centre	Malahide Road, Balgriffin, D17 YE97	Co.Dublin	72
St Elizabeth's Nursing Home	Kells Road, Athboy, C15EE63	Co.Meath	36
St Fiacc's House	Killeshin Road, Graiguecullen, R93D825	Co.Carlow	17

Title	Address	County	Maximum Occupancy (Total Beds)
St Francis Nursing Home	Kilkerrin, Ballinasloe, H53 WF97	Co.Galway	34
St Gabriel's Nursing Home	Glenayle Road, Edenmore, D05PK84	Co.Dublin	68
St John's House	202 Merrion Road, Ballsbridge, D04 VP92	Co.Dublin	56
St Joseph's Home	Abbey Road, Ferrybank, X91 F882	Co.Waterford	48
St Joseph's Home	Ballymacprior, Killorglin, V93 TD99	Co.Kerry	48
St Joseph's Hospital	Bon Secours Care Village, Mount Desert, Lee Road, T23 D30F	Co.Cork	103
St Joseph's Supported Care Home	Kilmoganny, R95 T850	Co.Kilkenny	20
St Joseph’s Nursing Home	Lurgan Glebe, Virginia, A82 A268	Co.Cavan	52
St Kieran's Care Home	The Pike, Rathcabbin, Roscrea, R42 WV32	Co.Tipperary	23
St Lazerian's House	Royal Oak Road, Bagenalstown, R21 K542	Co.Carlow	18
St Luke's Home	Castle Road, Mahon, T12 PY50	Co.Cork	128
St Martha's Nursing Home	Glenswilly House, Cappauniac, Cahir, E21 K665	Co.Tipperary	26
St Martha's Nursing Home	Love Lane, Clybee, Charleville, P56 H268	Co.Cork	36
St Mary's Residential Care Centre	Shantalla Road, H91 VND6	Co.Galway	62
St Pappin's Nursing Home	Ballymun Road, Ballymun, D09 DX39	Co.Dublin	51
St Paul's Nursing Home	St Nessan's Road, Dooradoyle, V94 VY10	Co.Limerick	57
St Phelim's Nursing Home	Dromahair, F91 VY83	Co.Leitrim	76
St Teresa's Nursing Home	Friar Street, Cashel, E25 TC65	Co.Tipperary	30
St Ursula's Nursing Home	Golf Links Road, Bettystown, A92 PY76	Co.Meath	24
St. Anthony's Nursing Home	Kilduff Castle, Pallasgreen, V94 PF76	Co.Limerick	62
St. Attracta's Residence	Hagfield, Charlestown, F12 KN36	Co.Mayo	70
St. Brendan's High Support Unit	Mulranny, Westport, F28 A386	Co.Mayo	33
St. Dominic Savio Nursing Home	Cahilly, Liscannor, V95 Y927	Co.Clare	28
St. Eunan's Nursing Home	Rough Park, Ramelton Road, Letterkenny, F92 FP21	Co.Donegal	42

Title	Address	County	Maximum Occupancy (Total Beds)
St. Francis' Nursing Home	Mount Oliver, Dundalk, A91 TC21	Co.Louth	25
St. Gladys Nursing Home	53 Lower Kimmage Road, Harold's Cross, D6W C566	Co.Dublin	51
St. Gobnaits Nursing Home Ltd T/A St. Gobnaits Nursing Home	Drewscourt, Ballyagran, Killmallock, V35E188	Co.Limerick	20
St. Joseph's Centre	Crinken Lane, Shankill	Co.Dublin	62
St. Joseph's Nursing Home	Killowen, Kenmare, V93 RW94	Co.Kerry	49
St. Michael's Nursing Home	One Hundred Acres East, Caherconlish, V94 E400	Co.Limerick	80
St. Patrick's Care Centre	Dublin Street, Baldoyle, D13V085	Co.Dublin	78
St. Peter's Nursing Home	Sea Road, Castlebellingham, A91TV02	Co.Louth	69
St. Theresa's Nursing Home	Dublin Road, Thurles, E41 V263	Co.Tipperary	26
St. Theresa's Nursing Home	Leadmore East, Kilkee Road, Kilrush, V15 PC56	Co.Clare	40
Stella Maris Nursing Home	Baylough, Athlone, N37 EC53	Co.Westmeath	25
Stella Maris Nursing Home	Cummer, Tuam, H54 C992	Co.Galway	43
Strawhall Nursing Home	Strawhall, Fermoy, P61 XV22	Co.Cork	30
Summerville Healthcare	Strandhill, F91 KT28	Co.Sligo	47
Suncroft Lodge Nursing Home	Suncroft, The Curragh, R56HX05	Co.Kildare	60
Sunhill Nursing Home	Blackhall Road, Termonfeckin, A92 F902	Co.Louth	92
Swords Nursing Home	Mount Ambrose, Swords, K67 N1W0	Co.Dublin	52
Talbot Lodge Nursing Home	17 Kinsealy Lane, Malahide, K36 D295	Co.Dublin	112
Tara Care Centre	5/6 Putland Road, Bray, A98 YA89	Co.Wicklow	47
Tara Winthrop Private Clinic	Nevinstown Lane, Pinnock Hill, Swords, K67 HH57	Co.Dublin	140
Teach Altra Nursing Home	Scarteen, Newmarket, P51D504	Co.Cork	43
Tearmainn Bhride Nursing Home	Brideswell , Athlone, N37 X046	Co.Roscommon	29
Terenure Nursing Home	122 Terenure Road West, Terenure Road, D6W PW58	Co.Dublin	48
The Cottage Nursing Home	70 Irishtown, Clonmel, E91 XA97	Co.Tipperary	25

Title	Address	County	Maximum Occupancy (Total Beds)
The Fern Dean	Deansgrange Road , Blackrock , A94 TN25	Co.Dublin	140
The Four Ferns	Brighton Road, Foxrock, D18 AX22	Co.Dublin	144
The Marlay Nursing Home	Kellystown Road, Rathfarnham, D16 A363	Co.Dublin	124
The Moyne Nursing Home	The Moyne, Enniscorthy, Y21 XN83	Co.Wexford	25
The Park Nursing Home	Plassey Road, Castletroy, V94NN29	Co.Limerick	56
The Royal Hospital Donnybrook	Morehampton Road, Donnybrook, D04 HX40	Co.Dublin	50
Thomond Lodge Nursing Home	Ballymahon, N39 C597	Co.Longford	48
Thorpe's Nursing Home	Clarina, V94 A562	Co.Limerick	42
Tinnypark Nursing Home	Derdimus, Callan Road, R95 EF21	Co.Kilkenny	47
TLC Carton	Tonlegee Road, Raheny, D05 N5K3	Co.Dublin	163
TLC Centre Maynooth	Straffan Road, Maynooth, W23 H028	Co.Kildare	141
TLC Centre Santry	Northwood Park, Santry, D09 H4X0	Co.Dublin	128
TLC City West	Cooldown Commons, Fortunestown Lane, Citywest, D24 K5KC	Co.Dublin	139
Valentia Hospital	Farranreagh, Valentia Island, V23 V968	Co.Kerry	24
Valentia House Nursing Home	Camolin, Enniscorthy, Y21 C677	Co.Wexford	44
Villa Marie Nursing Home	Grange, Templemore Road, Roscrea, E53 NC56	Co.Tipperary	31
Waterford Nursing Home	Ballinakill Downs, Dunmore Road, X91 TA49	Co.Waterford	60
Willow Brooke Care Centre	College Road, Castleisland, V92 YR5F	Co.Kerry	73
Willowbrook Lodge	Mocklershill, Fethard, E91 R7R2	Co.Tipperary	27
Willowbrook Nursing Home	Borohard, Newbridge, W12 VF40	Co.Kildare	56
Windmill House Care Centre	Churchtown, Mallow, P51 NH6X	Co.Cork	40
Woodlands House Nursing Home	Trim Road, Navan, C15 V585	Co.Meath	36
Woodlands Nursing Home	Bishopswood, Dundrum, E34 NX20	Co.Tipperary	43
Wygram Nursing Home	Davitt Road, Y35 H6P1	Co.Wexford	71
Youghal and District Nursing Home	Gortroe, Youghal, P36 CF88	Co.Cork	54

bdo.ie

Smart business advisors

Nursing Homes Ireland
2051 Castle Drive
Citywest
Dublin 24
D24 K299

Tel: 01 4699800

Fax: 01 4796447

Email: info@nhi.ie