

Ageing Britain: How Demand for Care Homes is Changing



| National trends and demand insights for 2025

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TODAYS OBJECTIVES



What we will be covering today

1

Share insights drawn from millions of searches and enquiries

2

Understand how care-seeking behaviours are shifting across the UK.

3

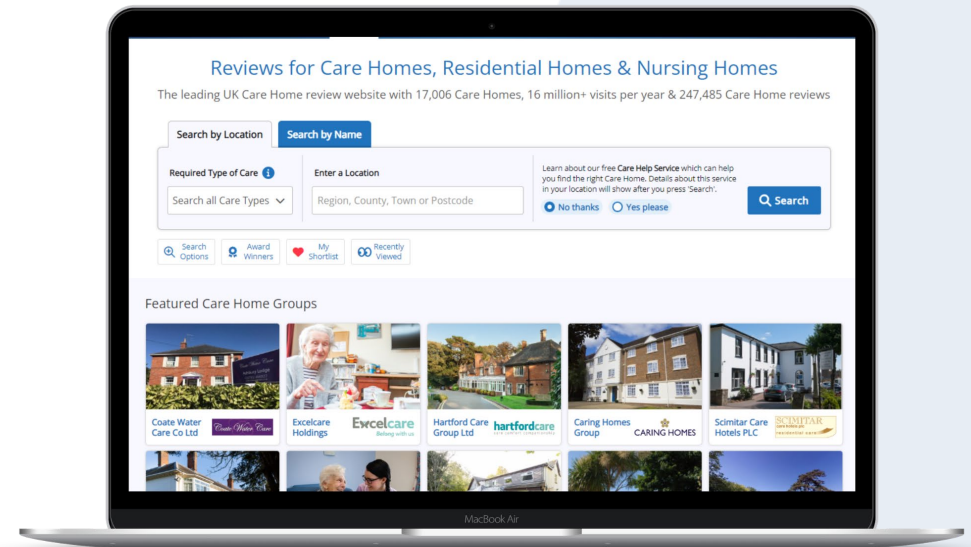
Help care providers plan for 2026, given those trends.

carehome.co.uk is the leading website for helping people find older people care

- | 16,500 care homes listed

- | Over 15 million visits a year

- | Insights from over 235k verified care enquiries in the last 12 months



carehome.co.uk has
more verified reviews
than any other
platform

Over
400k reviews
on carehome.co.uk



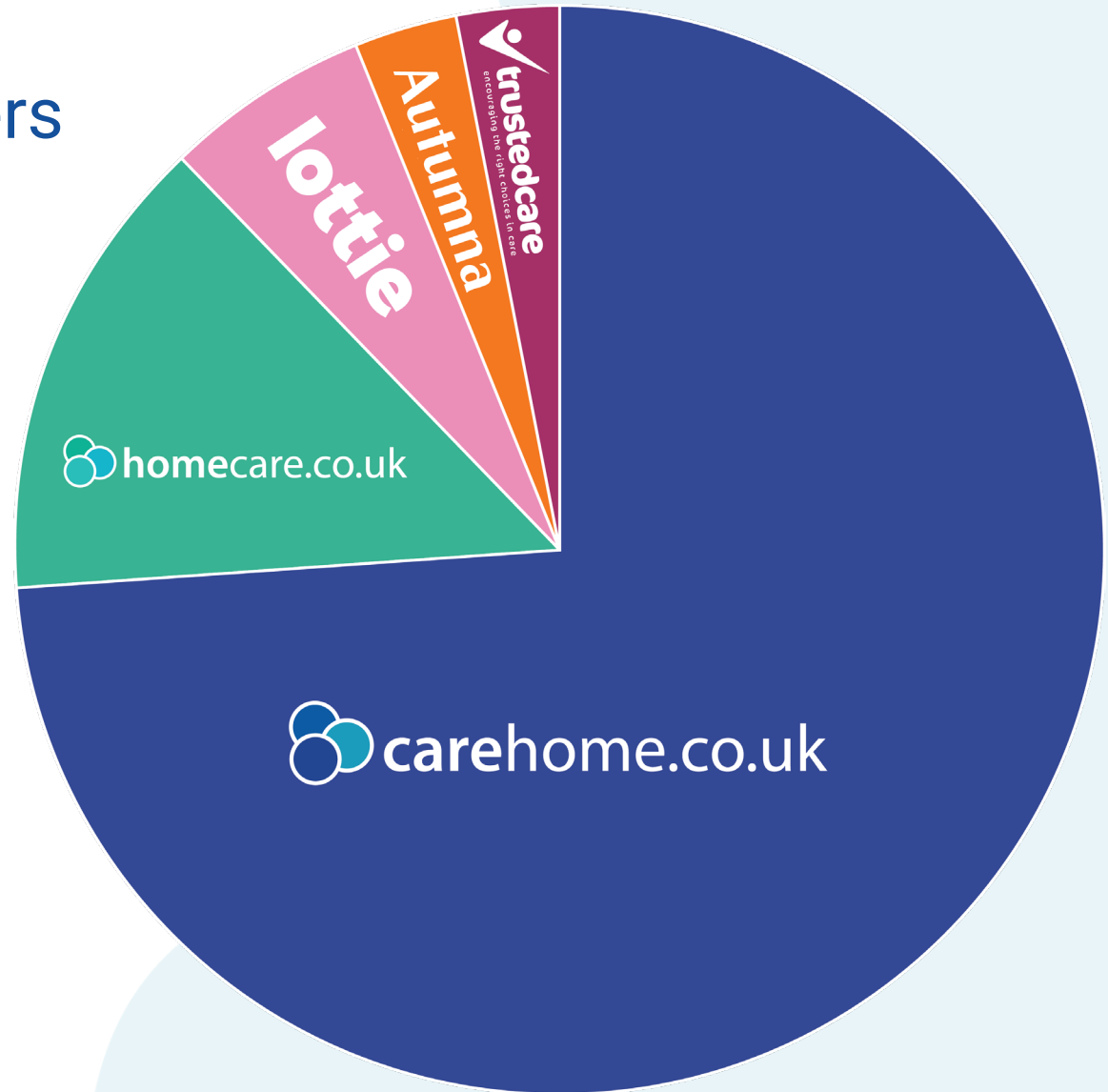
Total number of older person care reviews on carehome.co.uk and Google as of 9th January 2026



carehome.co.uk is the leading website for helping care seekers find older people care

>80%

of older care seeker
research takes place on
carehome.co.uk &
homecare.co.uk



Source:  similarweb December 2025

The Changing Care Landscape



5.8M carers in the UK

3M+ carers are also in paid work

Care decisions increasingly emotionally complex and time-pressured

Growing Caring Responsibilities



Women disproportionately
carry unpaid care



Two-thirds of care seekers
for parents are daughters



More adults now care for an
older person than a child

Searching for care is difficult



Cheryl's story – Looking for care in Cheltenham

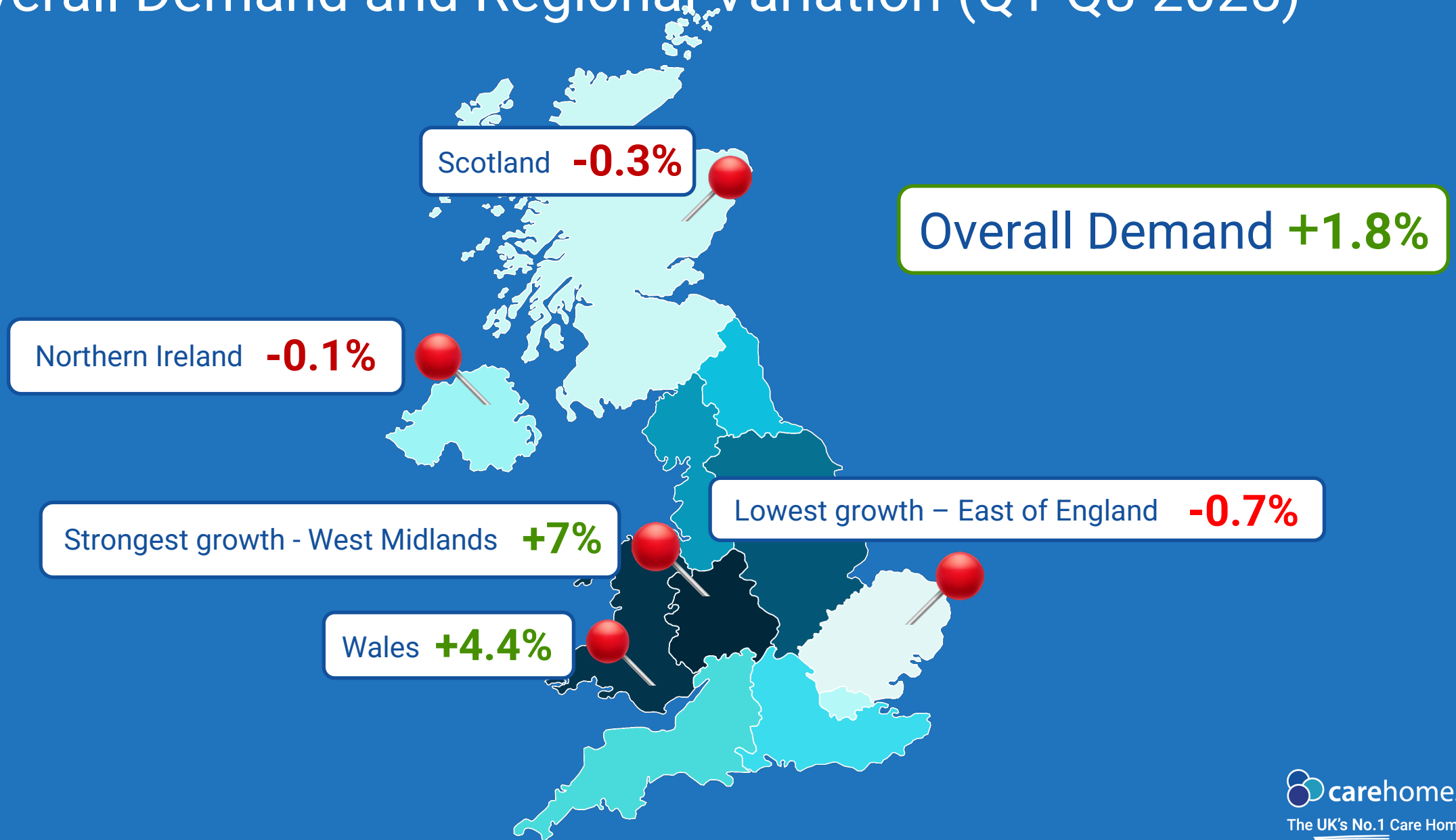
I could finally let go of the immense pressure of having to make the right choice.



Alison's story – care seeker from Cardiff

I have felt I am at my most vulnerable because of the emotional strain and I desperately needed someone to guide me through.

Overall Demand and Regional Variation (Q1-Q3 2025)



Who is Seeking Care? Gradual Shifts in Responsibility

3%



Growth in demand from people seeking care for family members other than a parent or partner.

2.6%



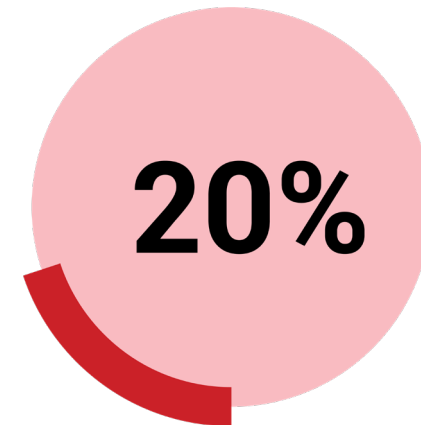
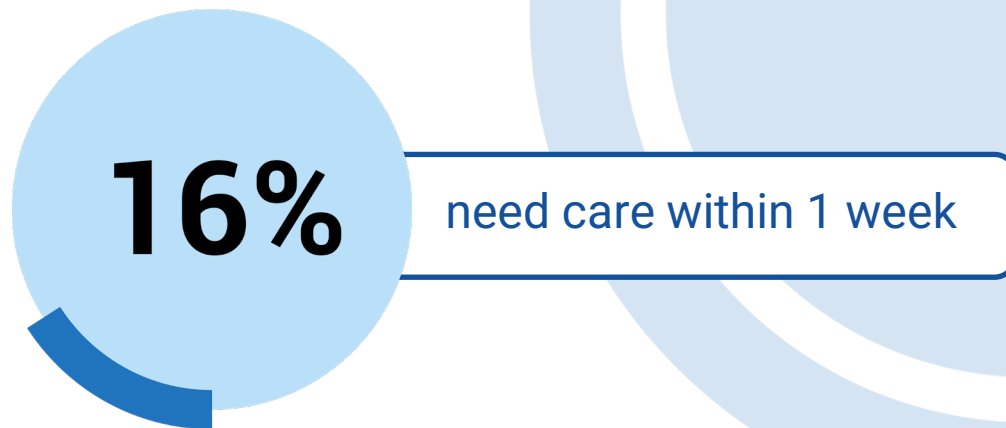
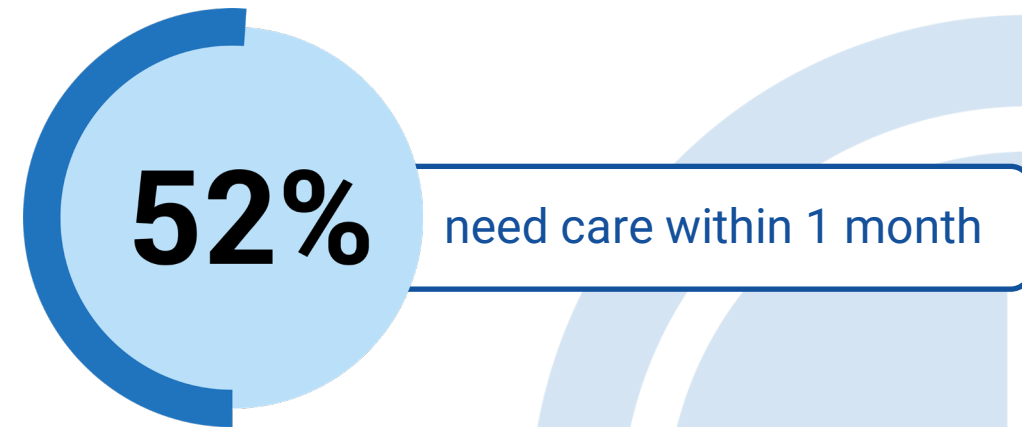
Growth in people seeking care for themselves

4%

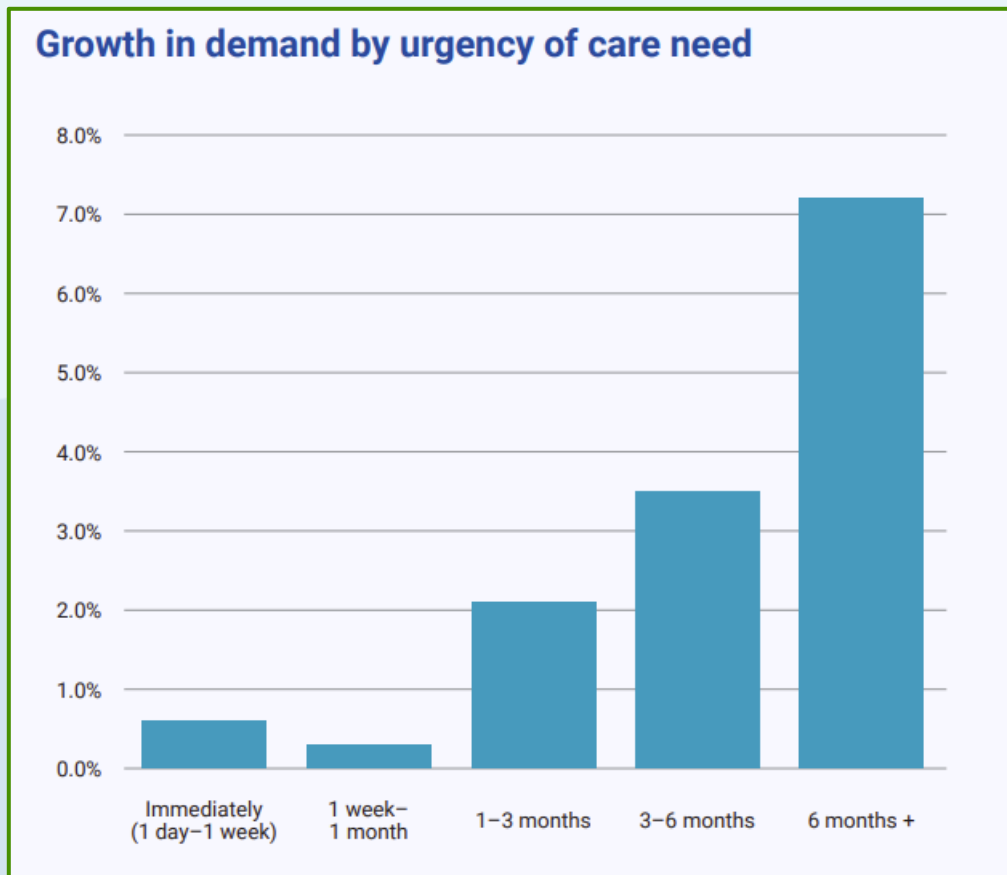


Decrease in searches for care for a client indicating unpaid carers are absorbing responsibility

Crisis Demand Dominates



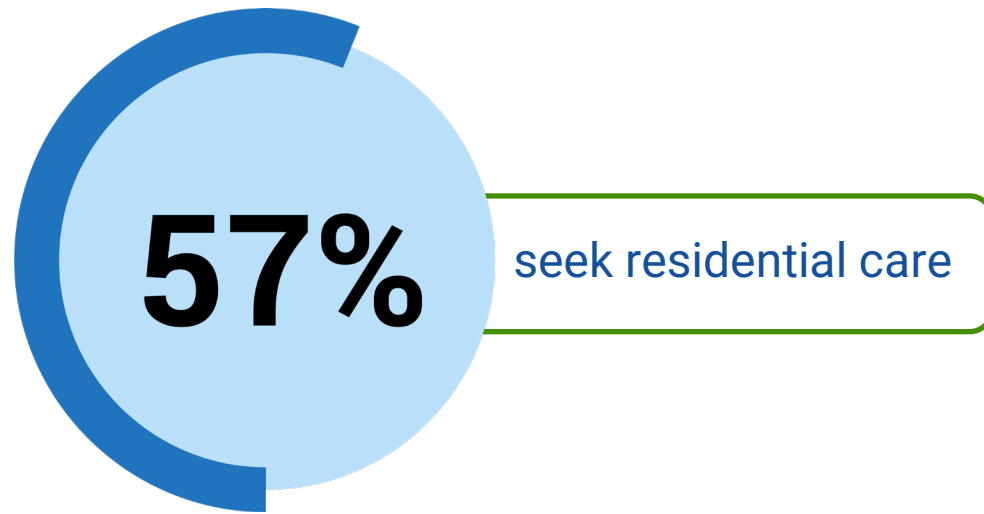
But Encouragingly Early Planning Is Growing



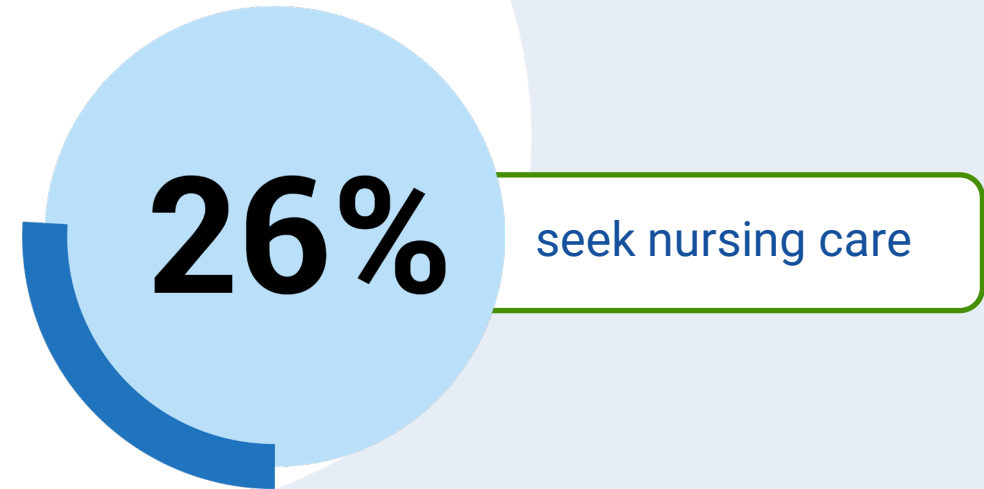
7% growth in people searching 6+ months ahead

Most proactive: those seeking care for themselves (21%)

Residential Care Demand Dominates and is Strengthening



2.2% growth vs 2024



0.3% growth vs 2024

Respite Care Under-Used

73%

seek permanent placements

27%

seek respite care



Opportunity: Respite can prevent crises & support carers

Funding Landscape

49% of all Care Home placements are fully self-funded (market)



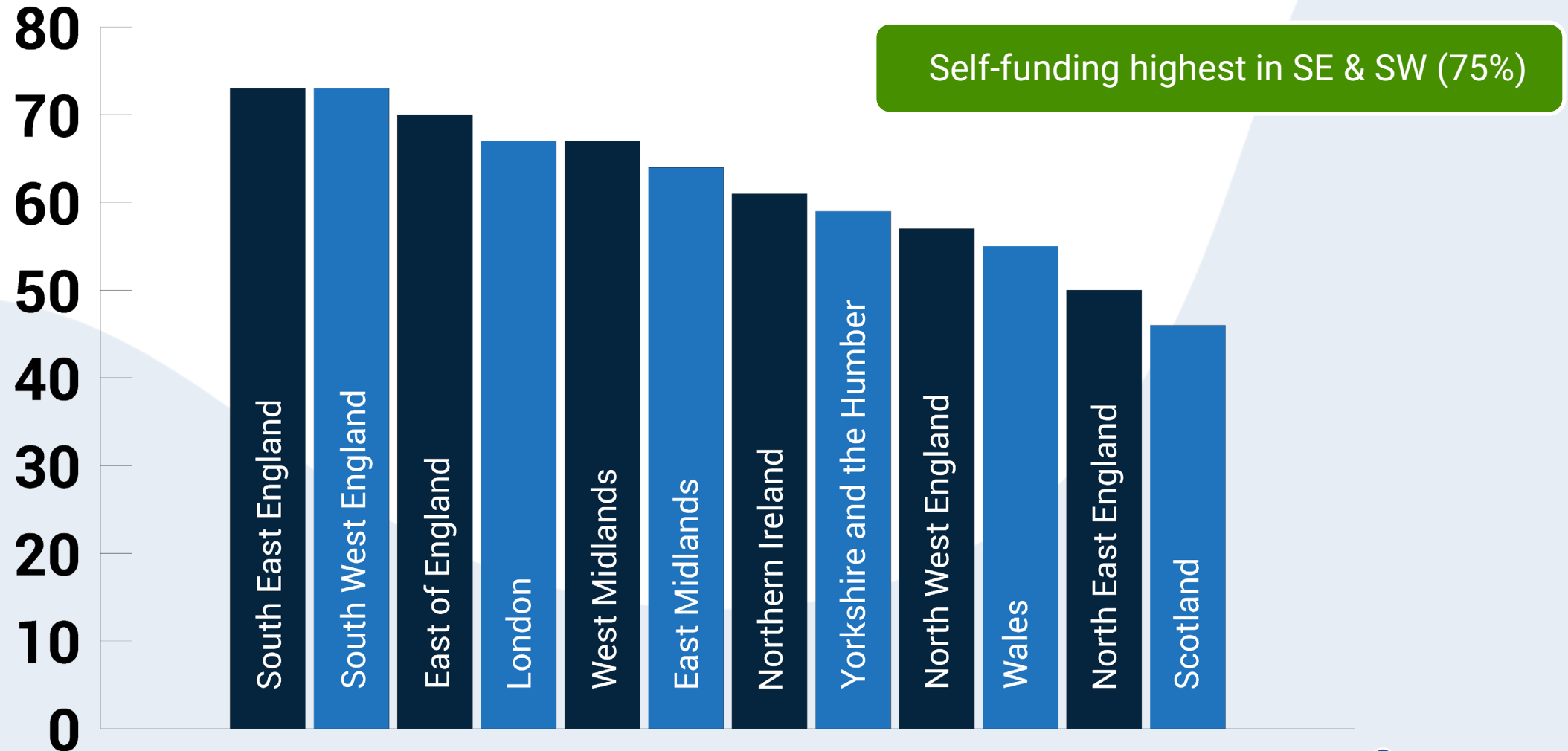
69% of carehome.co.uk enquirers (who know their route) expect to self-fund



£1,298 is the average weekly cost of a self funded residential care home in the UK

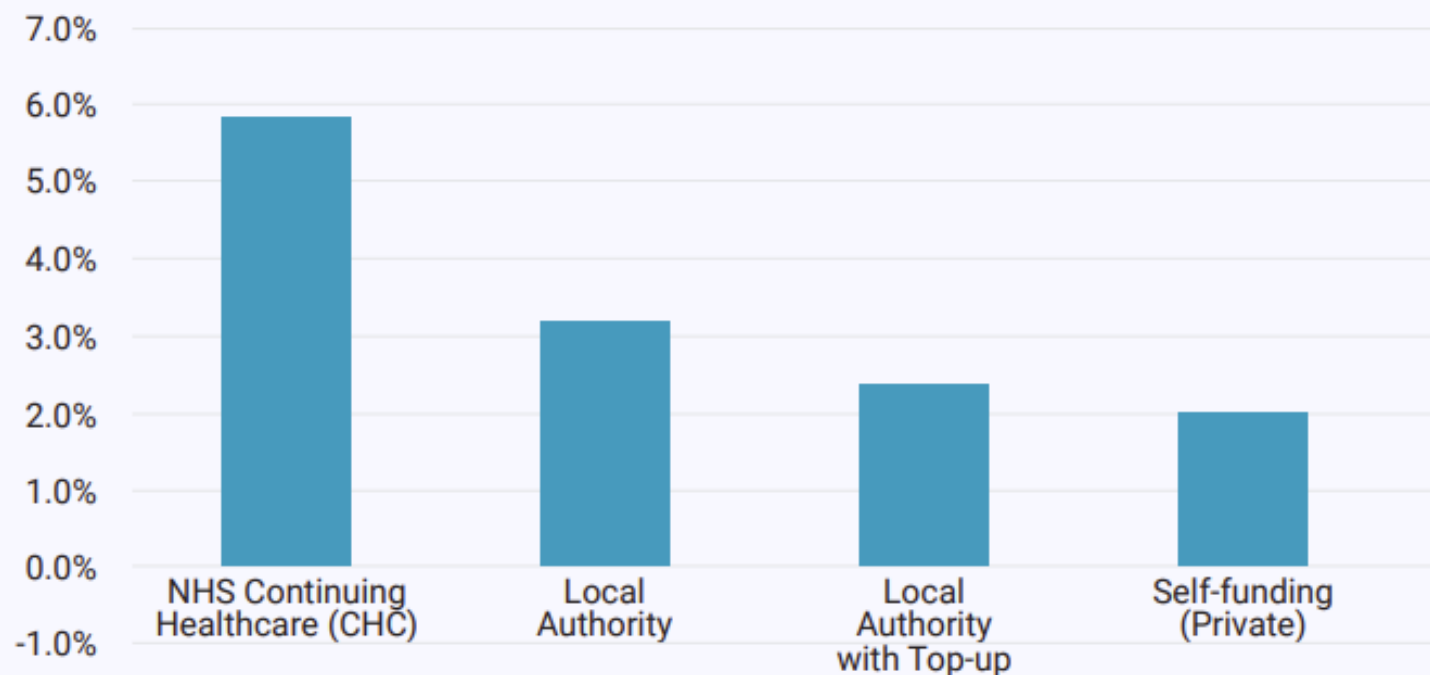
The average permanent stay in a residential care home in the UK is **109 weeks**

Funding Landscape - Regionally



State-Funded Demand Rising

Demand for care homes by funding type, 2025 vs 2024



State-funded enquiries grew **4%** vs overall demand growth of **1.8%**



LA-funded long-term care decreased from **8.2%** → **3.6%** in 20 years

Funding Challenges

21%

don't know how they will fund care

How much?
Deferred payment scheme
Assets Local authority
Nursing Financial help Top-up fees
Dementia Residential
Average cost HOME Who pays? Budget plan
Financial assessment COSTS Typical cost
Equity release Self-funding
Allowances

Searching for care – Care seeker journeys Part 3



Diana's story – a care seeker in Leeds

As soon as social services come to do that assessment, you are dropped - you're left on your own. You don't know what to do, there's no support, no guidance, nothing. As soon as they realise you're self-paying, it's like a door closes - and you're left to face everything by yourself

What Families Need



Clearer guidance on costs and care options



Early conversations and planning



Support through emotionally difficult decisions

Who is winning in this market?



Larger groups (21+ homes) generate **36% more enquiries** per care home than smaller groups (5 or less homes)



Professionalised marketing + stronger brand visibility



Trust & reviews remain essential for all providers

WEBINAR



Takeaways

1

Crisis-driven care is still the norm

2

Early preparation improves outcomes for everyone

3

With excellent service delivery and investment in marketing, providers can outperform the market



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