

## Care Home Market Report:



| Caring Britain: How the care home landscape is changing

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# TODAYS OBJECTIVES



What we will be covering today

**1**

Share insights drawn from thousands of care homes.

**2**

Understand how care home supply is 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

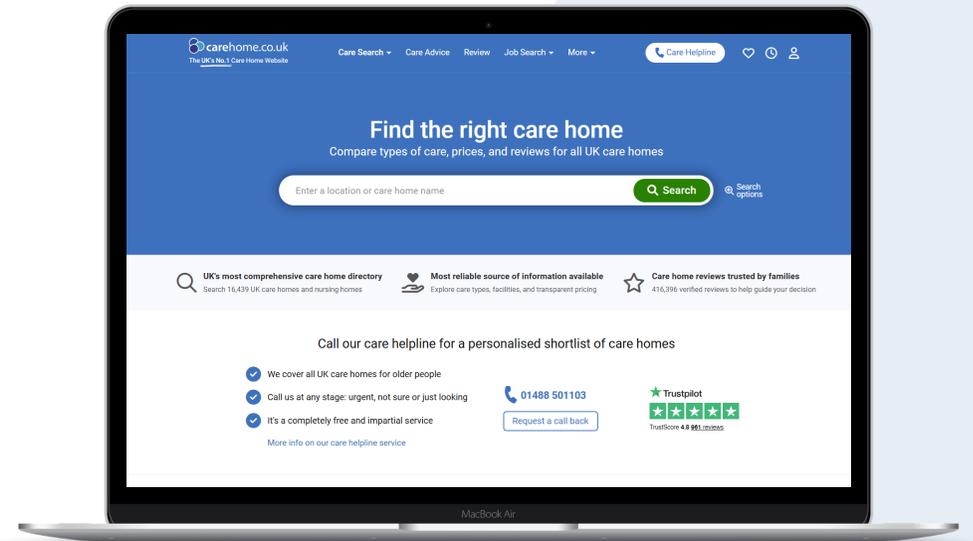
| 10,500 older person care homes listed

| Over 15 million visits a year

| Insights from **over 2.5 million data points** about UK care homes

...Including data on bed capacity, facilities, care types, pricing and regulatory status.

...The largest publicly available dataset of its kind in the UK



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

Over 415k reviews on carehome.co.uk

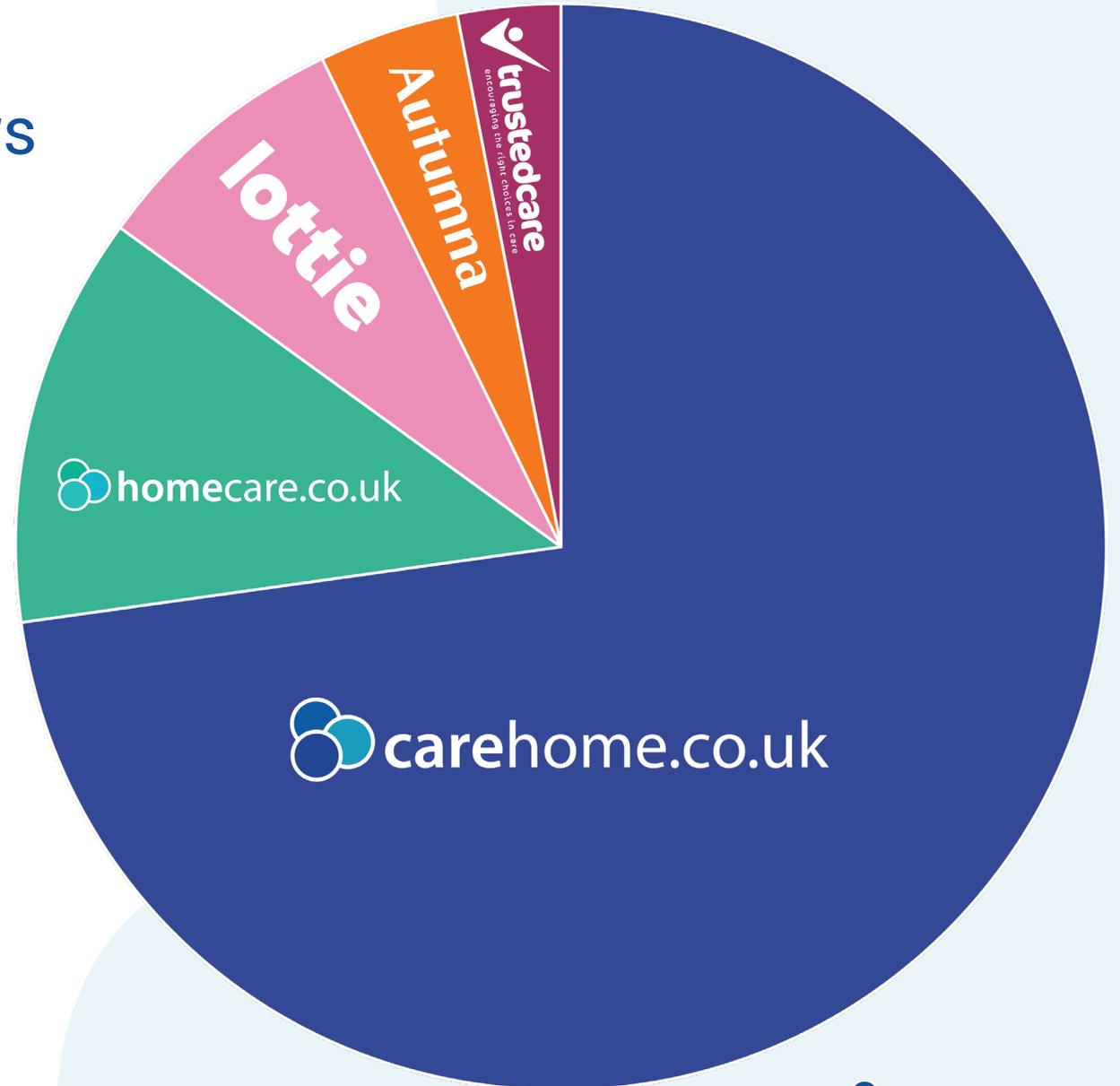


Total number of older person care reviews on carehome.co.uk and Google as of 9<sup>th</sup> January 2026

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

85%

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



Source:  similarweb January 2026

# Introduction

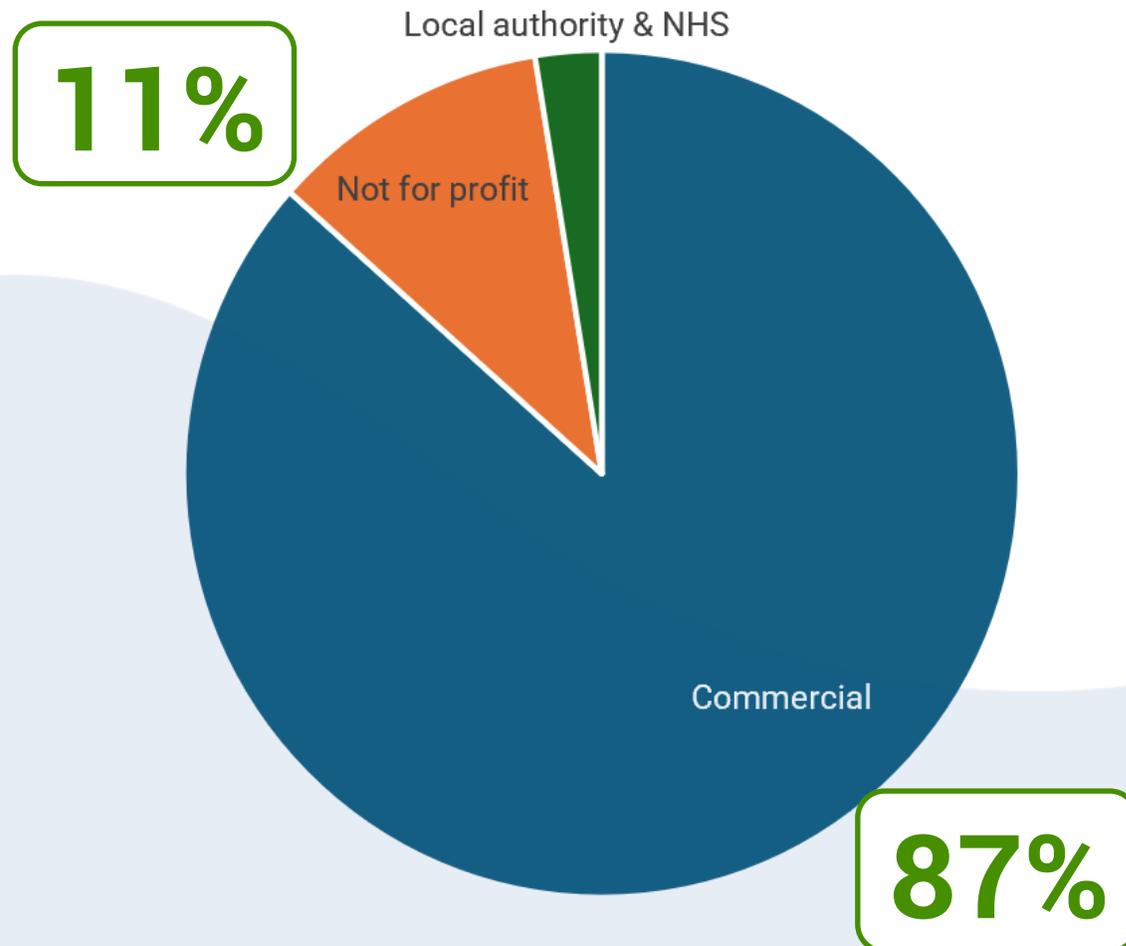


The UK care home sector is under sustained pressure...

- Ageing population, with more complex conditions.
- Government has outsourced Social Care to the private and not for profit sectors.
- Care provision is consolidating and professionalising - Fewer homes overall, but more beds available.
- Regional differences continue to shape access, facilities and affordability.

# The sector remains primarily commercially run...

## Proportion of older person care home beds by operating model



...across all regions

North East	91%
East Midlands	91%
East	89%
Yorkshire & Humber	89%
North West	87%
West Midlands	87%
Wales	87%
South East	86%
Northern Ireland	84%
London	84%
Scotland	82%
South West	82%

# Sector Professionalisation: Key Trend

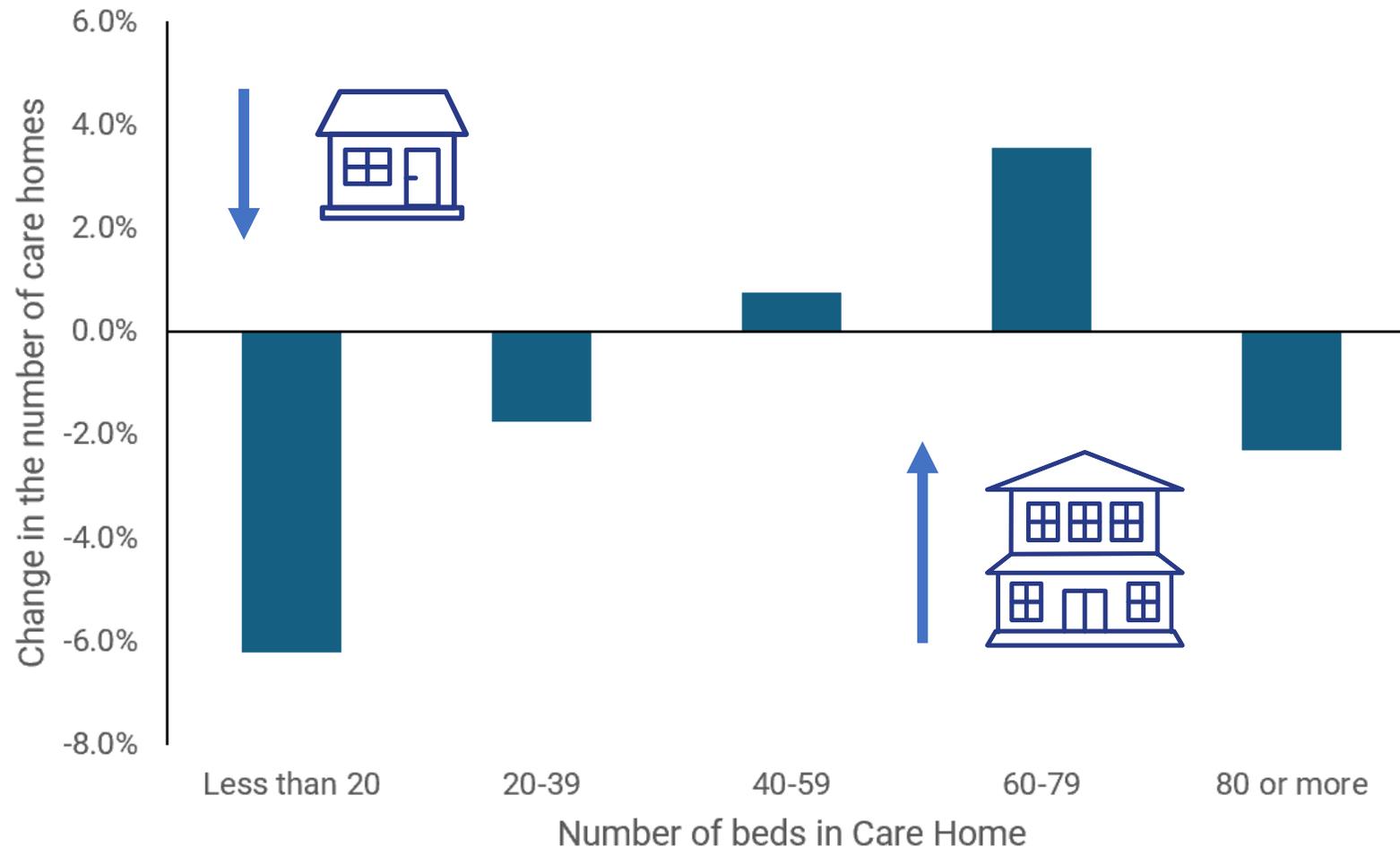
The market is consolidating as providers scale up to meet rising demand.

2025 change in supply:



# Shift Away From Smaller Homes

Change in the number of older person care homes Dec 2025 vs Dec 2024



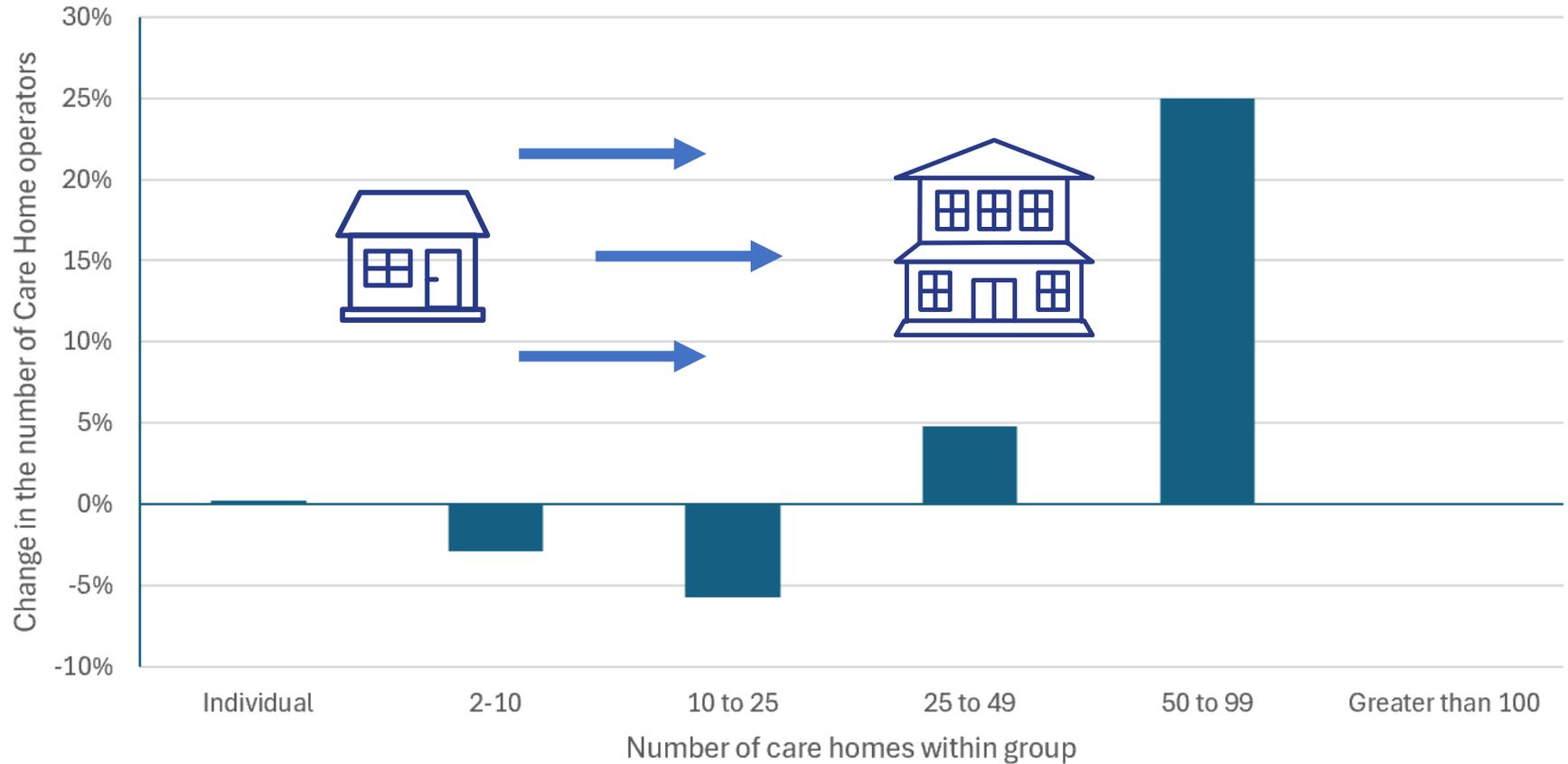
Smaller homes declining.

Larger homes benefit from economies of scale (e.g. staffing, specialist services).

Economies of scale support resilience under cost and workforce pressures.

# Shift Away From Smaller Care Home groups

Change in the number of older person care operators, by group size Dec 2025 vs Dec 2024



Smaller care home groups are declining.

Larger home groups benefit from economies of scale (e.g. staffing, specialist services).

# Operators are leveraging scale to deliver high quality care

**Paul McPartlan** – COO at Maria Mallaband



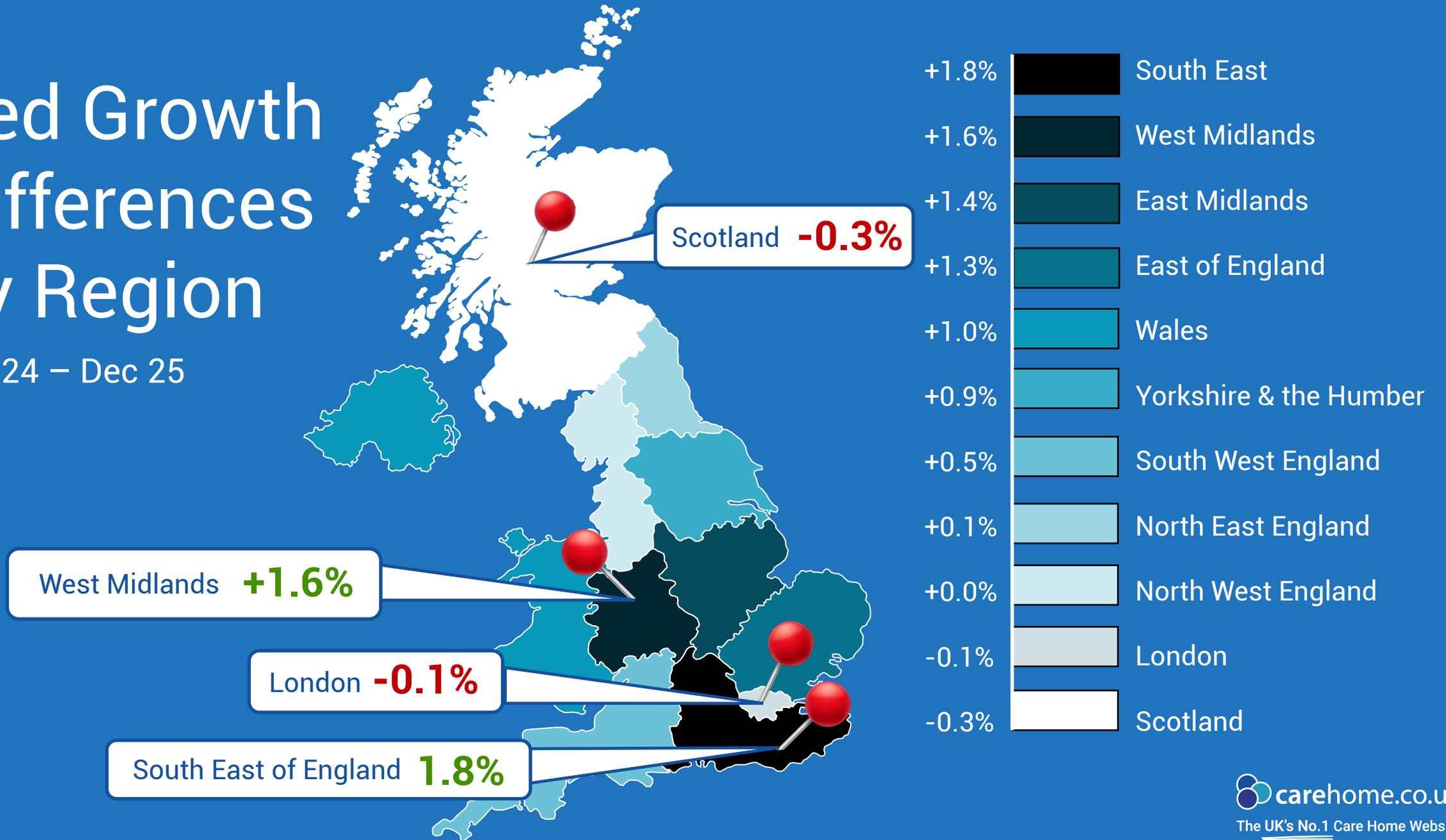
*“With 77 care homes, we benefit from scale on many fronts, from support and oversight to governance – we can pivot quickly with changing legislation and regulatory requirements.*

*We have a central training centre, an online education hub, a consistent onboarding process and have our own dementia training modules.*

*Our apprenticeship programmes are a game-changer in supporting progression – our Nurse Development Pathway even allows us to train our own nurses.*

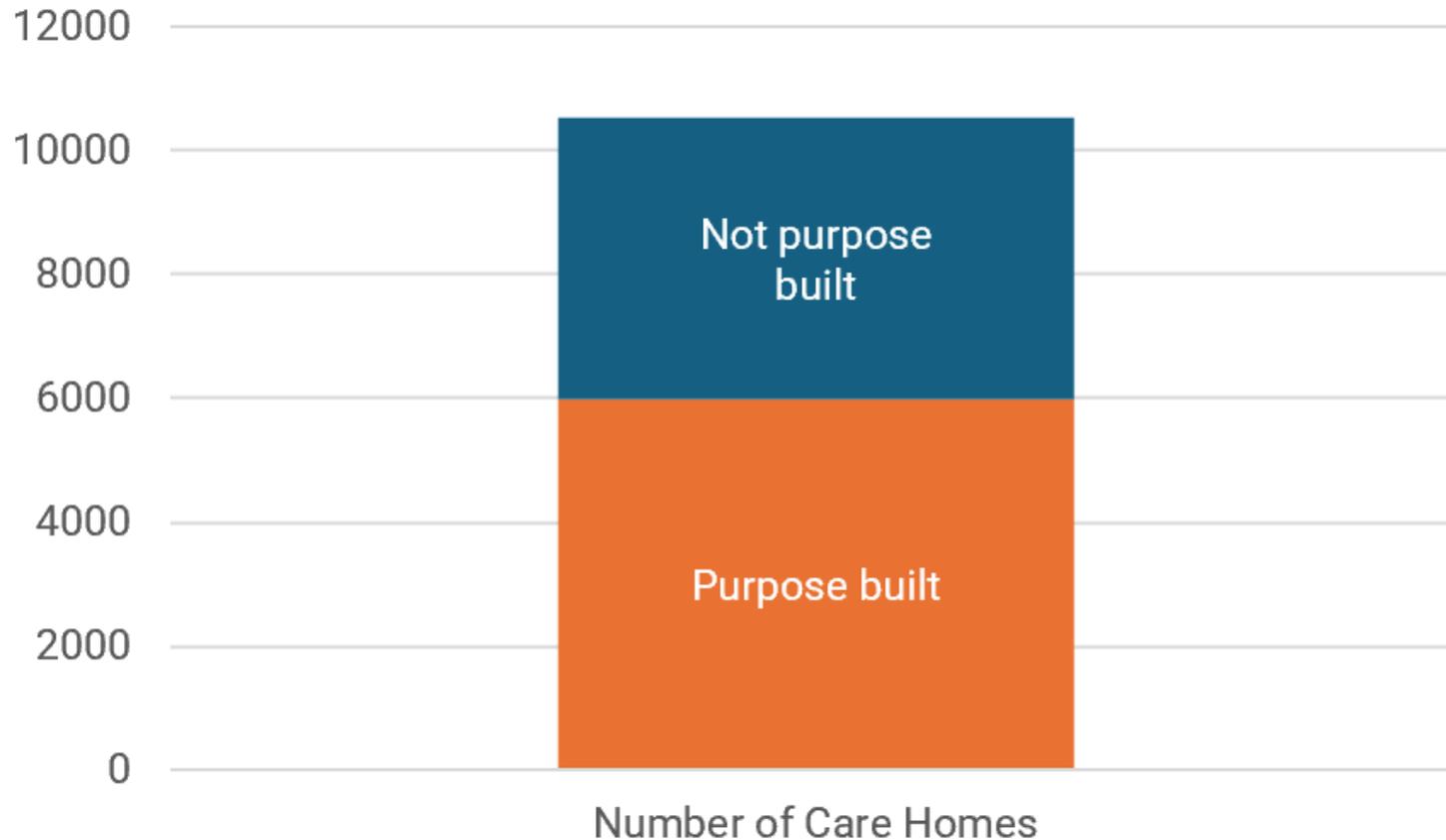
# Bed Growth Differences by Region

Dec 24 – Dec 25



# 57% of older person care homes have been purpose built

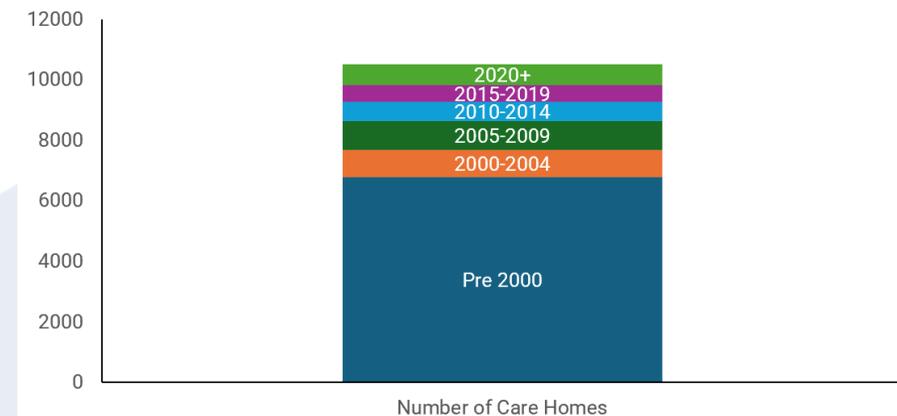
Number of older person care homes by building type



Purpose-built environments support accessibility, ensuite provision and specialist amenities.

...35% of care homes have been built since 2000

Number of older person care homes by date location first registered



# Care Home Operators are investing in excellent facilities

**Teresa Weis** – Home Manager at St Faith's

*“Expectations of care homes have changed significantly over the years. People want environments that feel welcoming, comfortable and personal, rather than institutional. They also expect a wider range of support on site, from wellbeing and activities to specialist nursing care, so that everyday life can continue with as much normality as possible.”*



# Maintaining Diversity in Provision



Consolidation does not signal the end of smaller providers.



Standards are improving with investment across all care homes



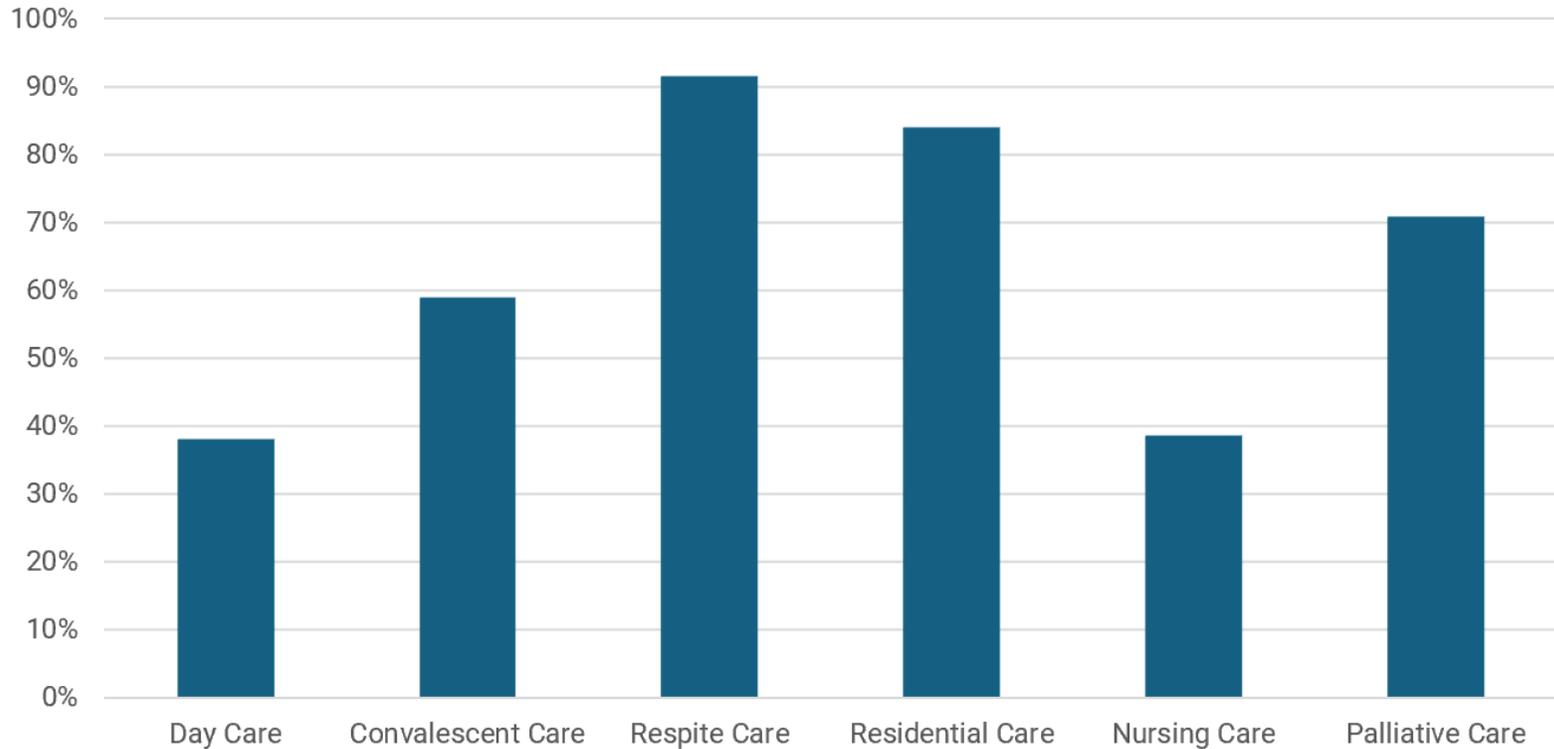
Many smaller homes thrive by offering highly personalised care.



Diversity of provision remains a key strength of the sector.

# Specialist Care Provision

**Proportion of older person care homes that cater for different stages of care**

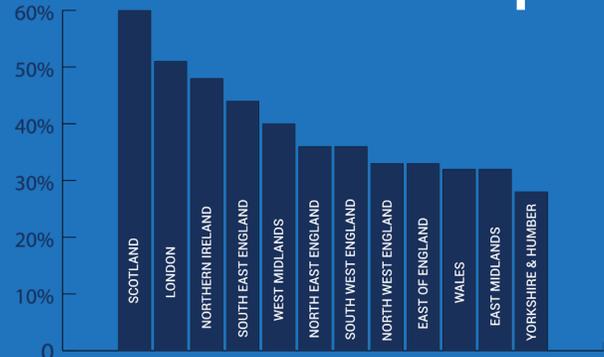


Specialist care availability is improving but remains uneven.

Palliative and respite care are widely available nationwide.

Access to other specialist services is more localised.

# Access to Specialist Services varies widely between regions



Nursing Care



Day Care



Convalescent Care

**Nursing Care**  
Scotland **60%**

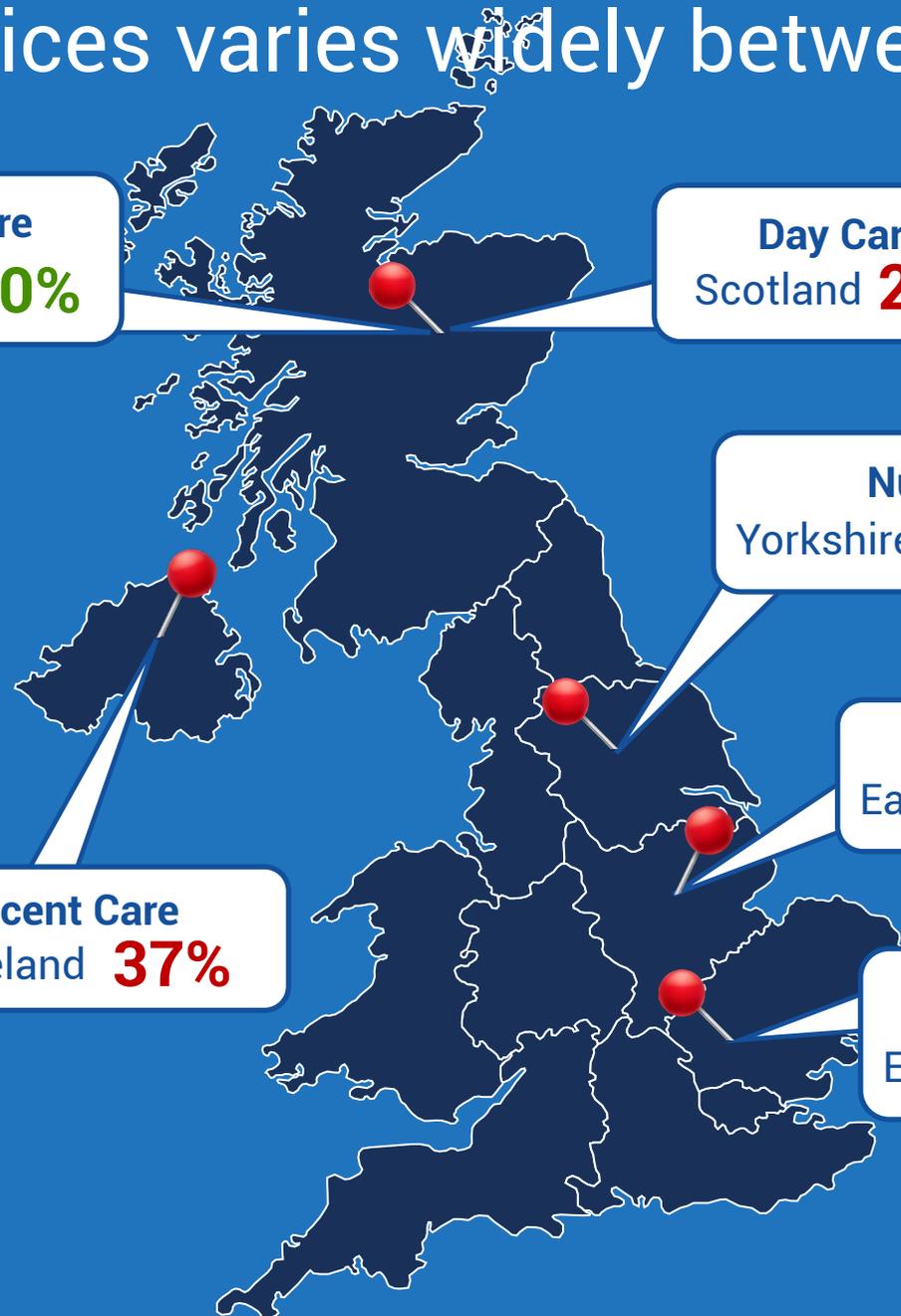
**Day Care**  
Scotland **21%**

**Nursing Care**  
Yorkshire & Humber **29%**

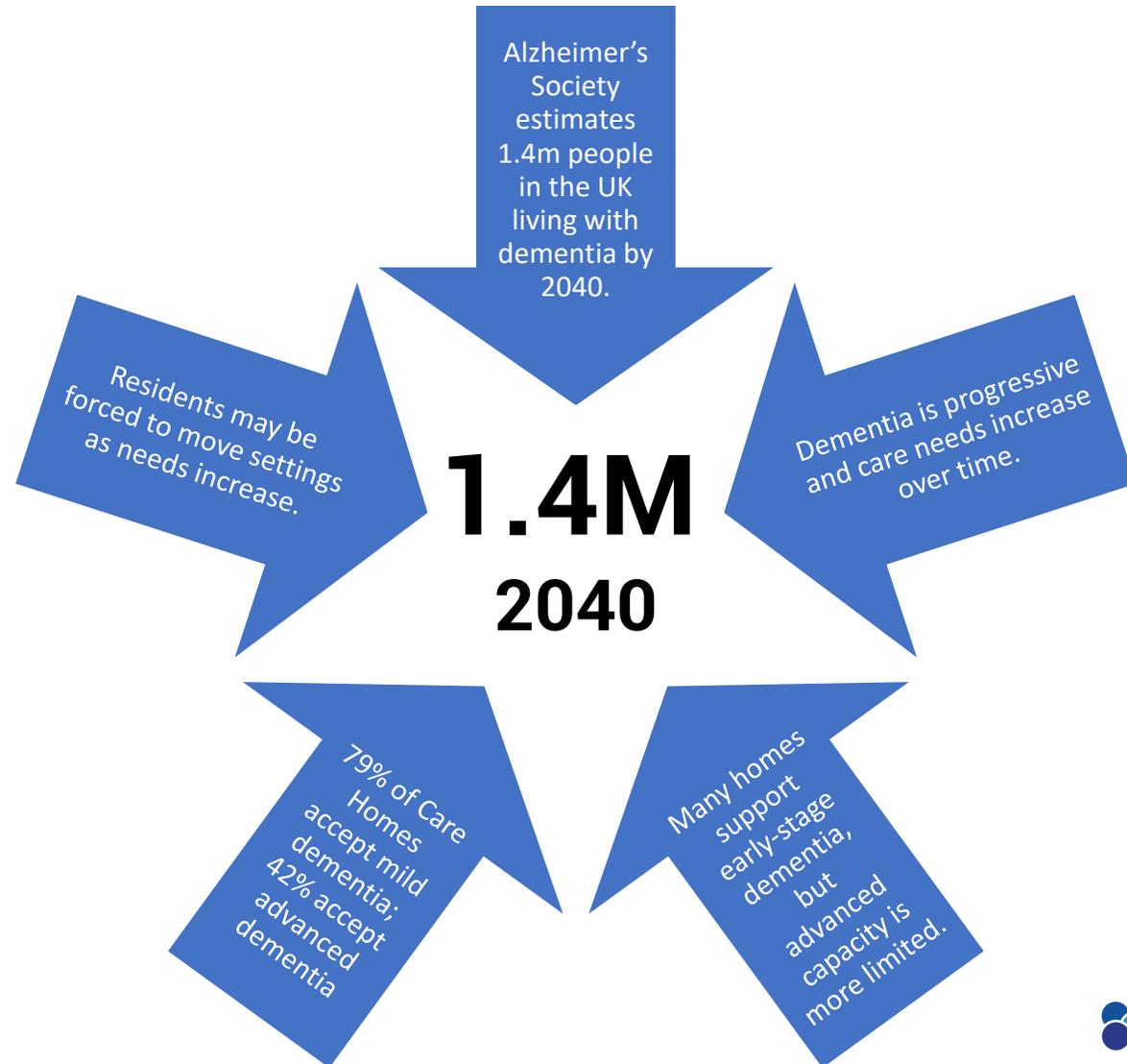
**Day Care**  
East Midlands **55%**

**Convalescent Care**  
Northern Ireland **37%**

**Convalescent Care**  
East of England **70%**

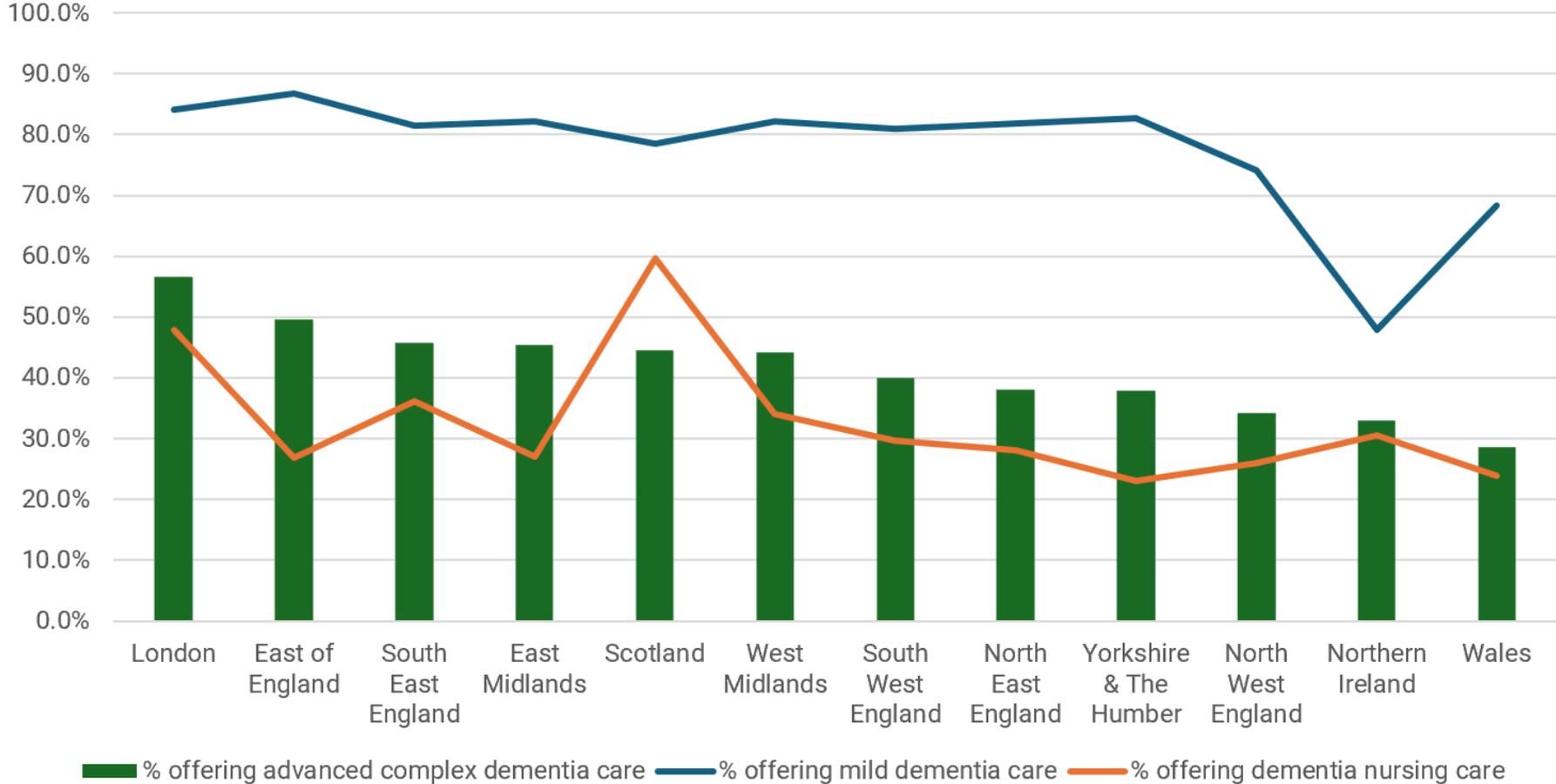


# Dementia care is one of the sector's most significant pressures.



# Advanced/complex dementia care availability varies widely between regions.

Proportion of older person care homes offering different levels of dementia care



**London**  
Advanced Dementia **57%**

**Wales**  
Advanced Dementia **28%**

# Design, technology and training are supporting dementia care



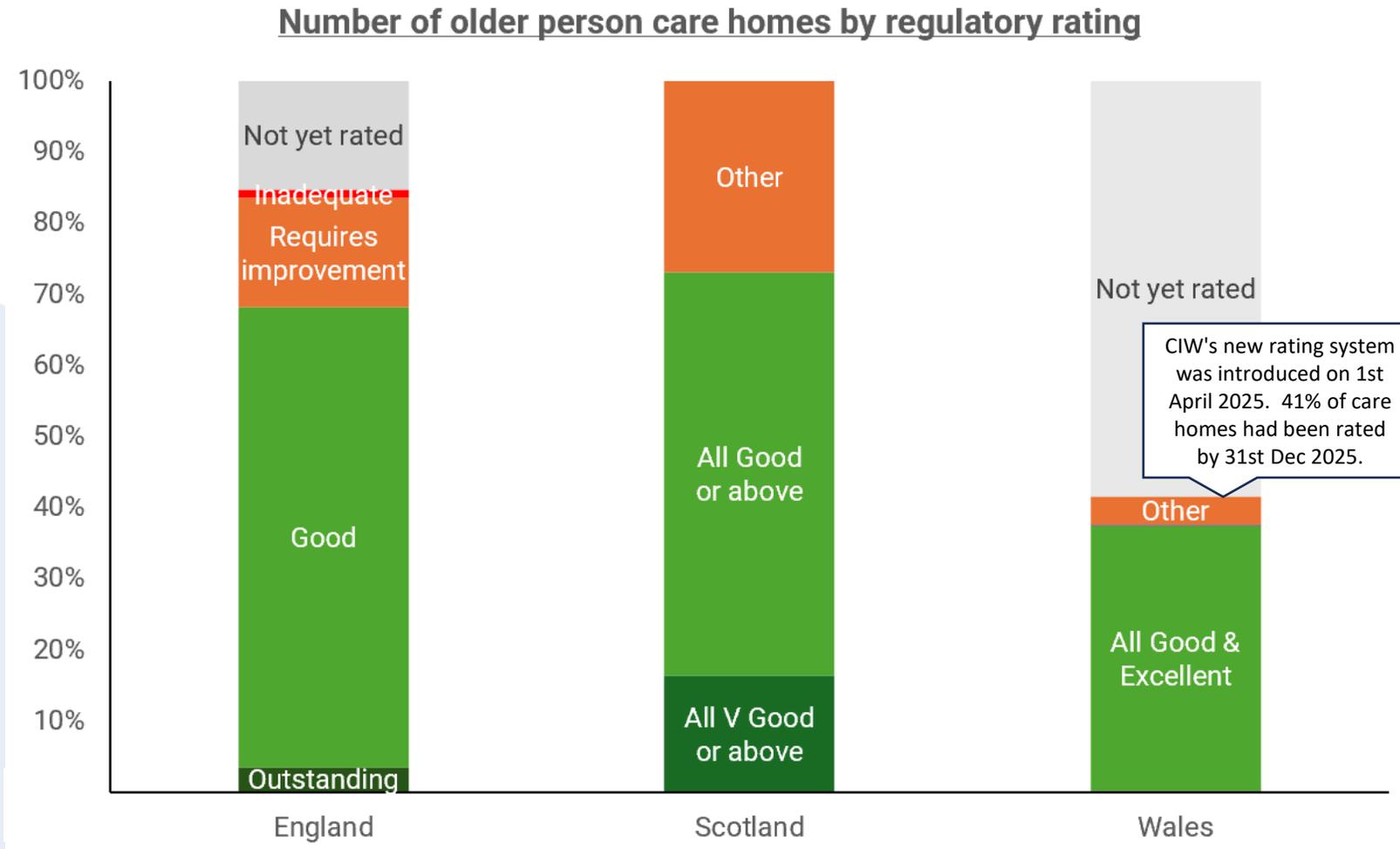
*"We tailor our care homes to the needs of our residents and identify any potential identified risks with furniture for example, as well as theming and signage to further support social engagement and help residents find their way around the home.*

*Residents use digital products such as iPads, interactive tables and VR headsets which can be tailored to be person centred and therefore support a variety of social needs and interests.*

*By having good training resources and an understanding of some of the potential complex aspects of dementia, care home staff are able to better support the resident. This also aids family understanding and acceptance, as well as supporting discussions around setting realistic goals and choices."*

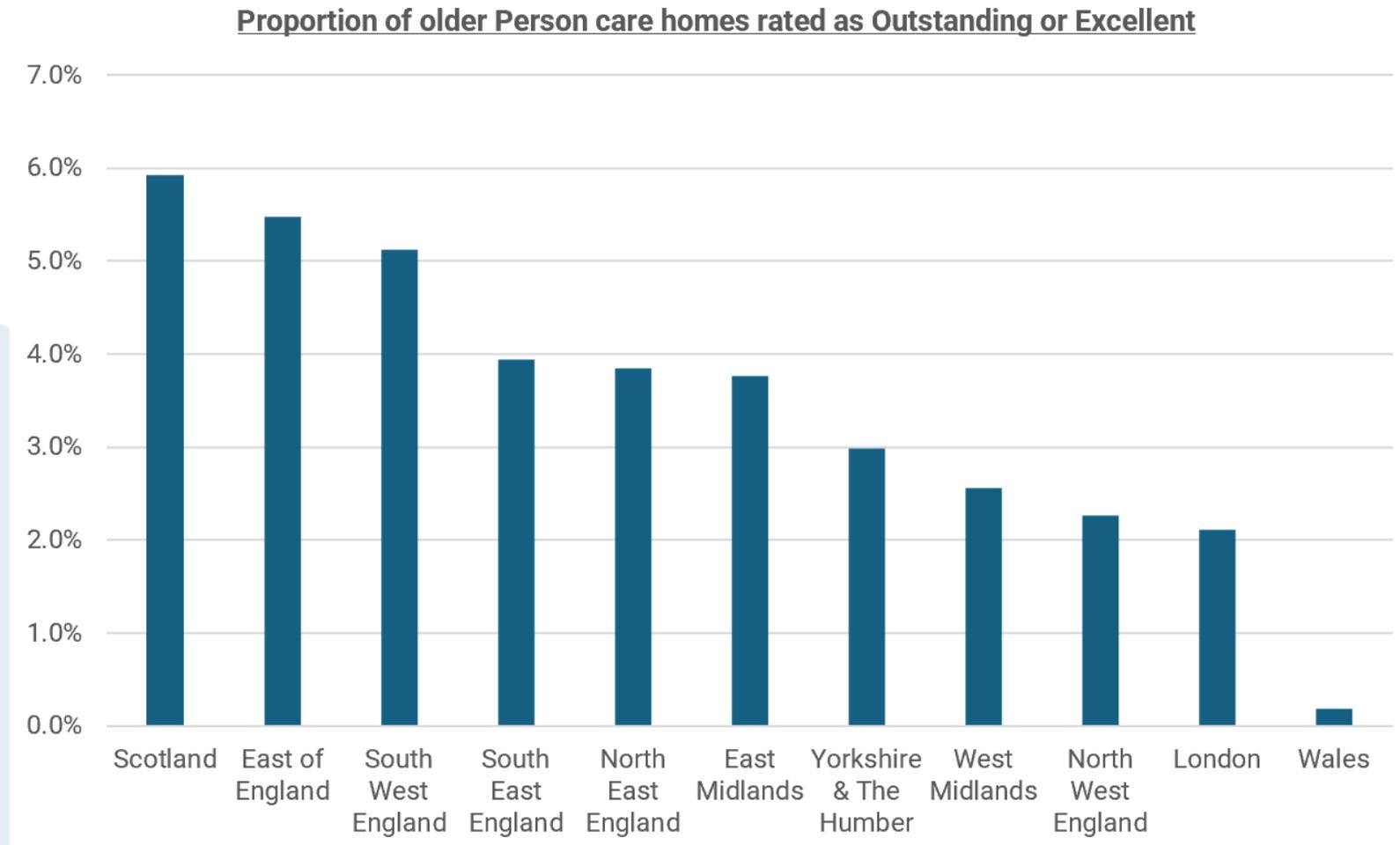
# >70% of Care Homes are rated Good or Excellent

Regulatory ratings provide reassurance to families making difficult decisions.



# The best care homes are not evenly distributed regionally

Nationally, 3.6% of homes are rated Outstanding or Excellent.



% of Care Homes with Outstanding ratings in England.

% of Care Homes with all Excellent ratings in Scotland and Wales. CIW rating system was introduced from 1st April 2025, by end Dec 2025 41% of homes had been rated.

# Many Care Homes have not been rated within the last 5 years

Many homes experience long gaps between inspections.

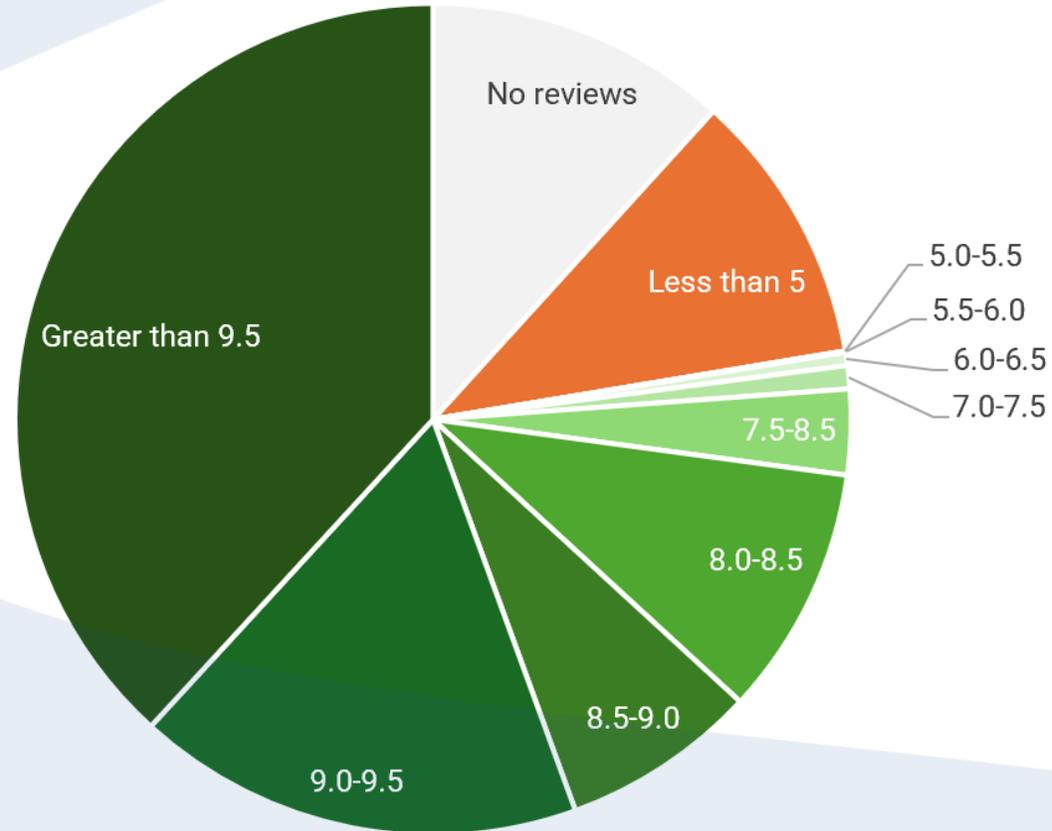
Ratings often lag behind changes in staffing, management and facilities.



Reviews are often more current and can complement regulatory ratings.

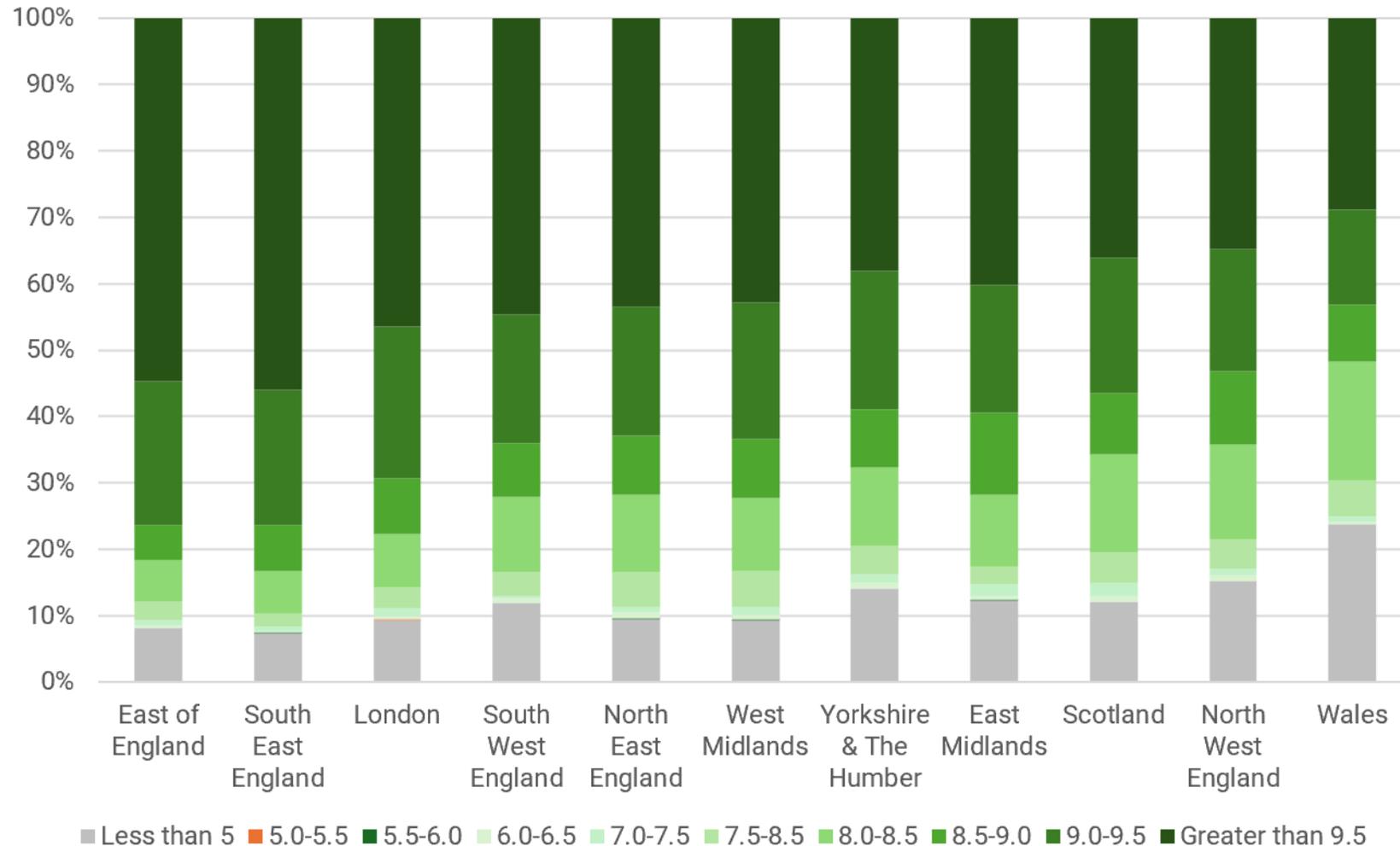
# 73% of Care Homes achieve a reviews score of 8.0 or more

Number of older person care homes by Carehome.co.uk review score



# The best care homes are not evenly distributed regionally

Carehome.co.uk Review Score distribution by region



## East of England:

#1 for 9.0+ review scores on Carehome.co.uk

#2 for % rated Excellent by CQC

## Wales:

#11 for 9.0+ review scores on Carehome.co.uk

#11 for % rated Excellent by CQC

# Residential older person care costs from £1282/week on average across the UK, but fees vary widely between region

## Min Self Funded Residential Care Fees

Northern Ireland  
**£847**

Scotland  
**£1561**

North East  
**£1097**

Wales  
**£1138**

London  
**£1555**

Regional variance in self-funded care home fees driven by differences in:

- property rents & prices
- salaries
- local authority funding

Scotland	£1,561
London	£1,555
South East England	£1,416
East of England	£1,315
South West England	£1,290
North West England	£1,173
West Midlands	£1,166
East Midlands	£1,151
Yorkshire and the Humber	£1,144
North East England	£1,138
Wales	£1,097
Northern Ireland	£847

# Cost pressures remain acute across the sector

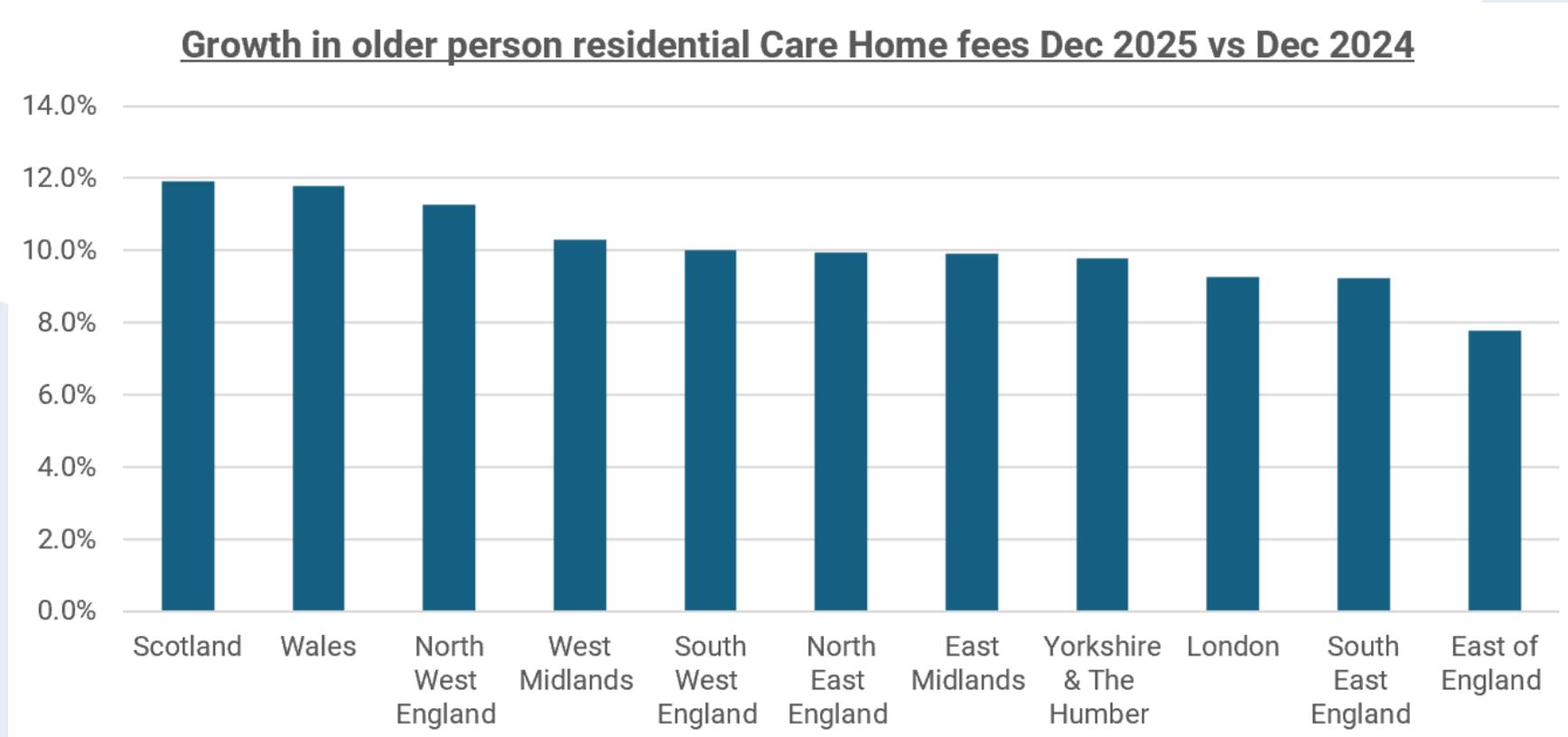
**Martin Green** – CEO at Care England



*“Over the last few months, we have seen significant increases in the cost of delivering care. Many of these increases have been delivered by the actions of government and each year it becomes more and more challenging to make ends meet when the costs of delivering care outstrip the cost of the funding packages. We need a long term and sustainable solution to the funding of social care... and I hope that we will work together to achieve this in the coming years.”*

# Care Home fees are rising across all regions of UK

Self Funded, care home fees increased by around 10% on average in the last year.



Driven by wage growth, energy prices and inflationary pressures.

# What does this all mean for Families?



- Many people want to stay close to family and social networks.
- Regional availability of facilities can limit options close to home.
- Local market structure influences choice as much as individual care needs.

As an industry we must add and improve capacity where it is needed the most...

...so every family can have access to the great care that they need.

# 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.*



# Key Takeaways ★★★★★

1. Care home supply continues to consolidate.
2. The average care home is getting bigger.
3. The sector is primarily commercially run.
4. Care costs (& fees) are on the rise.
5. Specialist supply is unevenly distributed across the UK.
6. Top regulatory ratings are rare and unevenly distributed across the UK.
7. Inspection delays are creating an information gap, that reviews can help bridge.

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