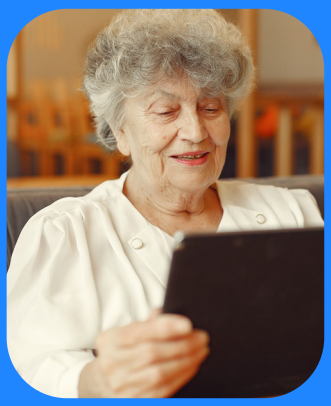
Caring Britain

Caring Britain: how demand for care homes is changing

Exploring the changing demand for care homes for older people











How care seekers research and find care homes: national trends and demand insights for 2024–2025

carehome.co.uk

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Foreword

by Will Blackwell (CEO, Tomorrow's Guides)

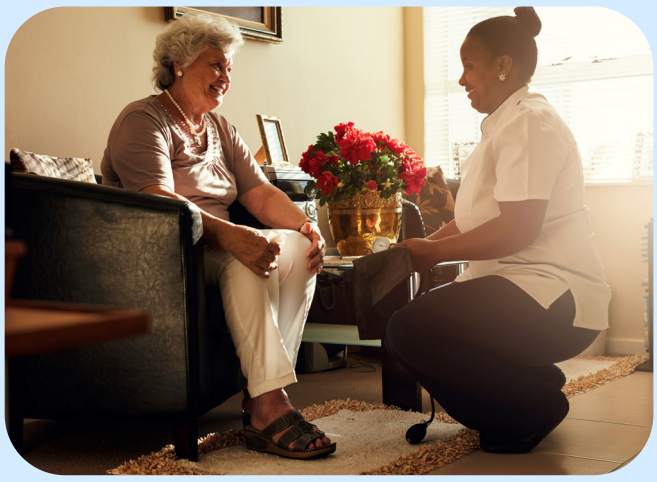
This report is the first in our new series exploring how people search for and choose care, using unique insights from carehome.co.uk. Every day, individuals and families across the UK come to **carehome.co.uk** to explore care options during some of the most difficult and emotionally challenging moments of their lives.

Our trusted information, verified user reviews from residents and their families, expert guidance, and care-finding tools support people and families right across the UK to find the right support for them and their loved ones. carehome.co.uk's enquiries form one of the most detailed, real-time pictures of how people search for care for older people across the country.

We are launching this series because it is more important than ever to understand people's experiences of finding care, and the changing patterns in demand. More people than ever are caring for others, often balancing this alongside work and parenting. At the same time, our population is rapidly ageing, and the prevalence of dementia and other conditions associated with later life are soaring.

This first report looks at demand for care homes for older people (aged 65 and over). Future reports will explore other parts of the care journey, providing a rounded view of people's behaviours, preferences and needs as they navigate a system that can be complex and emotionally demanding.

Insight into the care journey - and how it is changing - can, I hope, shine a light on the pressures and opportunities facing the sector, and support and encourage more families to start planning for future care needs earlier. Most of all, I hope these reports help ensure every person, wherever they live and whatever their circumstances, can access the right care at the right moment.



Report #1
is looking at demand for care homes for people aged 65 and over.

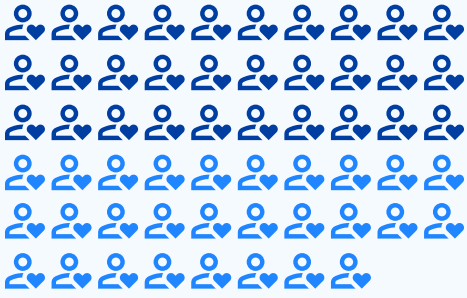
Introduction

The UK's care landscape is evolving as demographic pressures grow and financial pressures intensify. This has led to more people taking on unpaid caring roles, with the latest Census data 2021, revealing there are 5.8 million carers in the UK. Over 3 million of these are in paid employment, trying to balance work, family life as well as supporting their families and loved ones. Drawing on millions of searches and hundreds of thousands of enquiries made through carehome.co.uk, this report provides one of the most comprehensive snapshots of how and where older people and those who support them are seeking care in 2025.

Across the market, 2025 growth in care seekers' enquiries for care homes rose a modest 1.8% from 2024. But enquiries followed the typical peaks and troughs of the year, and providers will have felt a pickup in enquiries as the year wore on as enquiries steadily climbed. We know that many carers seek formal support from a care provider after the holiday season, often having spent time with family, having discussions about the new year, and assessing budgets for the year ahead. This is mirrored in annual growth trends, which see spikes in demand in January - with the most recent data showing a 24% increase in searches between December 2024 and January 2025 before tapering off in the first quarter[2].

While overall demand growth has been slow between 2024 and 2025, this masks entrenched regional differences and rapidly evolving behaviours: more working adults now support an older relative than a child[1], more people are beginning to research their options earlier, and demand for residential and state-funded care is rising more quickly than expected. These shifts reflect not only demographic change, but also the difficult, often lonely decisions people face when navigating care options.

The intention of this report is to highlight to families the need to plan for their care needs in the future, and to support policymakers, providers and the broader adult social care system in understanding how and when people are searching for care. That way, we can all work together to better identify the points in the journey where information, reassurance and early planning could make the greatest difference.



There are
5.8 million
carers in the UK.

Over 3 million
are in paid employment.

= *100,000 carers*

= *100,000 carers in paid employment*

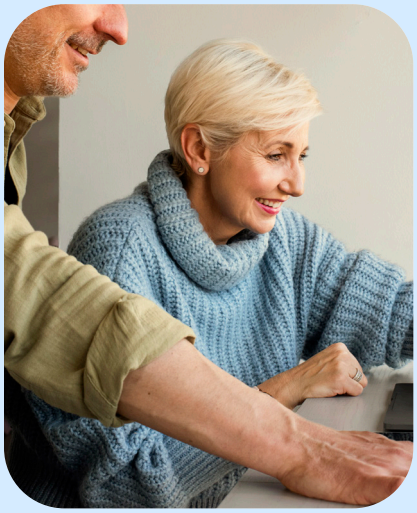
[1] *Office for National Statistics (ONS), 2021*
[2] *Google trends Dec24-Nov25*

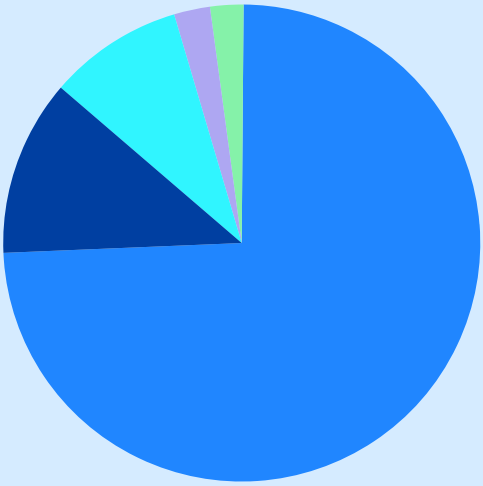
About the research

Demand measures in this report are based on the number of unique enquirers contacting Care Home operators via carehome.co.uk, combined with search activity on Google to benchmark our above-market growth against the wider sector.

The data in this report is taken from January to September 2024 and January to September 2025.

carehome.co.uk is the number one website in the UK for helping people find support for their own or their loved ones' older care needs.





Time spent on older person care search websites[3]

76%	carehome.co.uk
13%	homecare.co.uk
5%	lottie.org
3%	trustedcare.co.uk
2%	autumna.co.uk

Note: carehome.co.uk and homecare.co.uk traffic numbers have been adjusted to exclude jobs traffic

[3] *Source: similarweb.com September 2025*

Headline findings

Nationally, care home demand has **grown 1.8%** since 2024.

But the picture varies widely by region. Demand grew fastest in the **West Midlands (+7%)** and slowest in the **East of England (-1%).**

Residential care homes dominate demand and **dementia residential care accounts for about half** — a key driver of this trend.

People are researching care choices earlier, but most **enquiries are still crisis-demand.**

Larger groups generate higher levels of demand per care home than smaller groups and independent operators.

More working adults now care for an **older adult** than a child, with **women bearing the brunt** of unpaid care and also the ones choosing residential care for their parents.

Demand for **state-funded care is rising faster** than self-funded. However the proportion of older people receiving local-authority-funded long-term social care has declined dramatically over the past two decades.

While the share of self-funders differs across regions, it is consistently highest in the **South East and South West of England.**

Section 1

Growing caring responsibilities and changing family dynamics

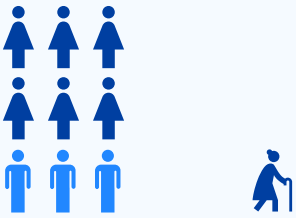
Caring is a mainstream workplace issue

In 2025, more working adults care for an older relative than for a child[4] – a product of our ageing population and older retirement age.

This marks a major societal shift and extends the trend observed in 2024. Working adults are juggling employment and care, and 2025 has seen increased public awareness of unpaid carers through increased media attention on the 'sandwich carers' who support both a child and an older adult.

Our carehome.co.uk data shows that two-thirds of people seeking care for a parent are daughters – supporting Carers UK research highlighting the disproportionate numbers of women providing unpaid care.

Often discussed as 'unsung heroes behind closed doors', the data shows that this is in fact a mainstream issue that needs closer support from employers, policy makers, and by way of public understanding.



Two-thirds of people seeking care for a parent are **daughters**.

[4] *Office for National Statistics (ONS), 2021*

Cheryl's story – looking for care in Cheltenham

"I had to look for care for both my parents. There was a huge sense of responsibility, as I had to look at what my parents' needs were but also think about future needs. There are social and emotional aspects when making choices, in addition to meeting physical needs. I investigated over 30 homes before finding the right one, which took up a lot of time and resources. I was looking for reliability and solidly good CQC reports, as well as the activities they offered.

When I eventually found a care home, I could finally let go of the immense pressure of having to make the right choice. After 62 years of marriage, my parents were able to stay together during a period that turned out to be the last six weeks of my father's life. It is a huge comfort knowing that my parents were together at the end, and it remains an enormous relief to have found such a good care home."



Impact on care demand

Most people looking for care are looking for help caring for a parent (c.60%) and demand from this segment grew by 1% in 2025.

But the story of 2025 is the broadening scope of unpaid care:

+3%

growth in demand from people seeking care for other family members (not a partner or parent)

+2.6%

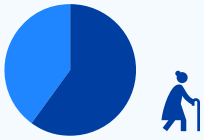
increase in people seeking care for themselves

-4%

decrease in searches for care for a client, indicating unpaid carers are absorbing more responsibility

This shift reflects changing family structures, more older people living alone, and increasing numbers of people without a nearby or able 'next of kin'[5].

Our data shows older people are, on average, nearly a third more likely to go into a care home after spending time with their family over the Christmas period. Over the last three years, carehome.co.uk has seen a dramatic increase in traffic in January, compared with figures in December. In January 2025, the number of visitors to the site surged by 24% with over 288,000 extra visitors to its website compared with the month before. In 2024, the number of visitors rose by over 375,000 and, in 2023, by just over 342,000.5 The festive season often acts as a turning point, as families come together for a longer period and notice a decline in the health, mobility and independence of loved ones and older relatives.



c.60% of people seeking care are doing so for a **parent.**

[5] *The number of people aged over 65 living alone rose from 3.5 million to an estimated 4.3 million from 2014-2024, according to the Office for National Statistics (ONS).*

Section 2

Where people seek help – and how urgently

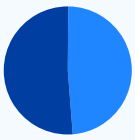
Care is still too often sought in crisis... but green shoots of earlier planning are emerging

Many families still do not proactively plan for the care needs of their loved ones in later life, and often the need for finding care comes from a health emergency or bereavement, meaning decisions are too often made under extreme emotional distress.

In 2025, 52% of people seeking a care home needed help within one month of enquiry, and 16% within one week.

This is closely tied to the nature of unpaid care, particularly as more people juggle working or childcare responsibilities with care for an older person: lack of planning time is leading to limited earlier support and stretched family networks.

The pressure to find a quick 'emergency' solution can mean that people are pressured to select a care home which doesn't adequately meet their needs: 20% of people who use carehome.co.uk's Care Helpline are people seeking to change care homes.



52% of people seeking a care home needed help **within one month**...16% needed help **within one week.**

Shona King-Abraha
Director of Business Development, Greensleeves Care

"We see first-hand how often families are forced to make important care decisions during a crisis. Our own research shows that over a third of care-seekers wished they'd known more about care beforehand, and many tell us they wish they'd had more guidance and emotional support early on.

These moments are incredibly stressful, and no one should have to navigate them alone. That's why we're committed to helping families prepare sooner, including through our Get Care Wise campaign and free resources to build confidence and understanding before a crisis hits. By encouraging earlier conversations, we can reduce the pressure on families, help them feel good about their care decisions and ensure that loved ones get the care that truly meets their needs."



Alison's story - a care seeker from Cardiff

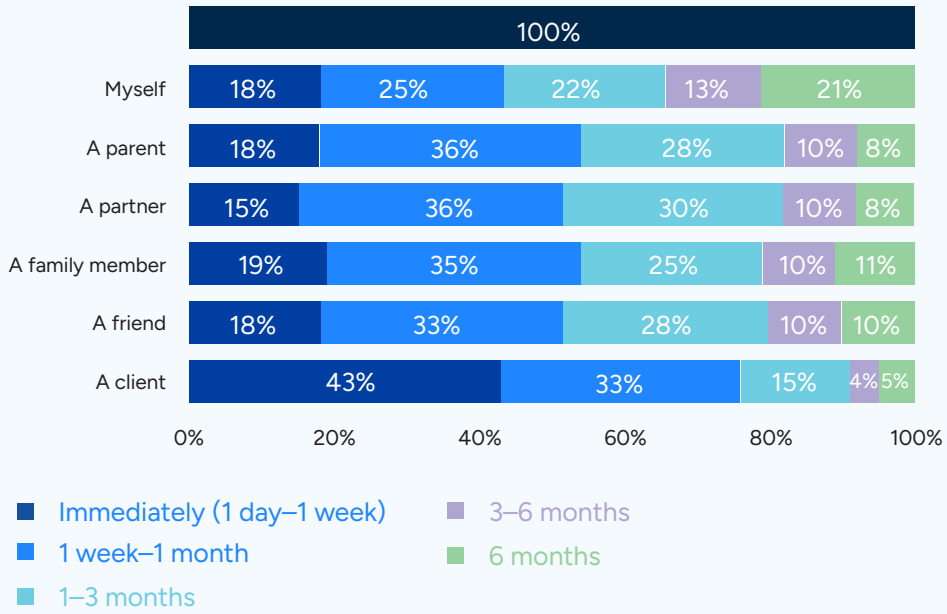
Alison recently had to find a care home for her 95-year-old mum.

"Looking for a care home for my mum is one of the hardest decisions I have had to make. She is totally reliant on me. It's like when the children were little, and I had to search for the right answer. I have become her advocate, her voice, and I just want to get it right for her.

I have felt I am at my most vulnerable because of the emotional strain and I desperately needed someone to guide me through. My mum is also at her most vulnerable, and then I had the additional strain of entering the unknown.

Battling the system was also incredibly challenging. The turnover of social workers was difficult, especially when it happened at crucial points in the process. Best interest meetings were long and hard emotionally. Social workers have a process to follow, and only see a snapshot of your loved one. The whole bigger picture you have, as a carer over a long period of time isn't always taken into account."

Enquirers and no. of settings by relationship to care seeker



By encouraging people to seek support earlier, and better understand how to plan practically and financially, we can improve care experiences and outcomes, and relieve pressure on carers, families and care services.

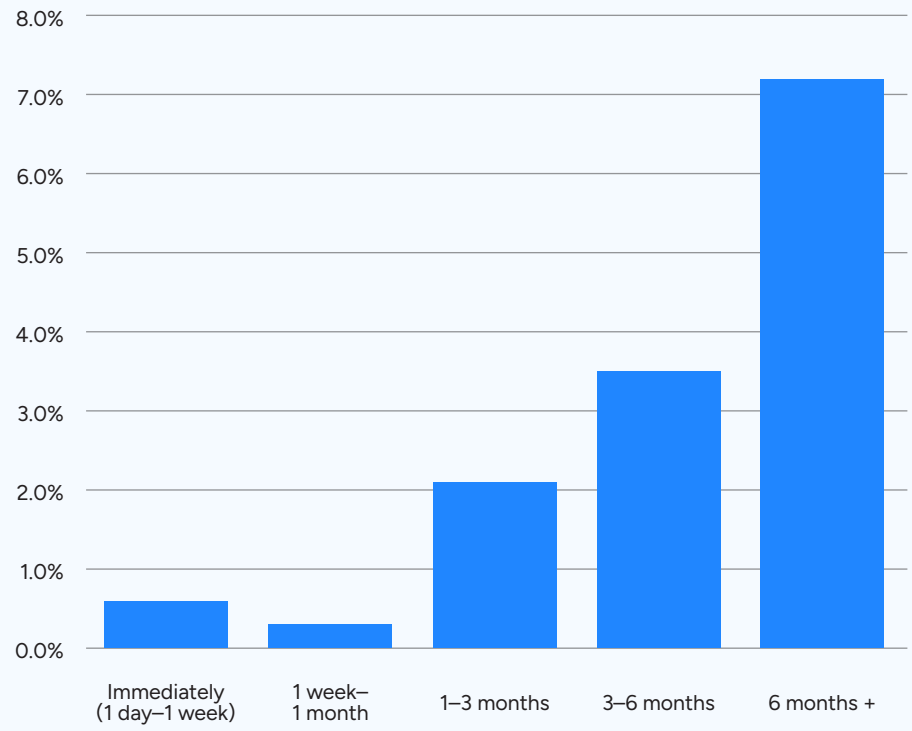
But encouragingly, there are signs of positive change: searches made more than six months ahead of need grew by 7% year-on-year (2024 vs 2025). People are most likely to begin scoping out care home options when seeking support for themselves: 21% of people enquiring about care for themselves searched six months in advance of choosing a care home, compared to 9% enquiring for a parent or partner.

To make the Government's preventative, 'home first' ambition sustainable, people must be supported to understand, and act on, care needs sooner. Without timely advice and planning, system pressures are concentrated at the crisis point, which is more costly for the NHS and local authorities, and more stressful for people organising care placements.



20% of people who use carehome.co.uk's Care Helpline are people seeking to change care homes.

Growth in demand by urgency of care need





Section 3

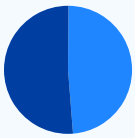
Preferences for care type and setting

Residential demand strengthened

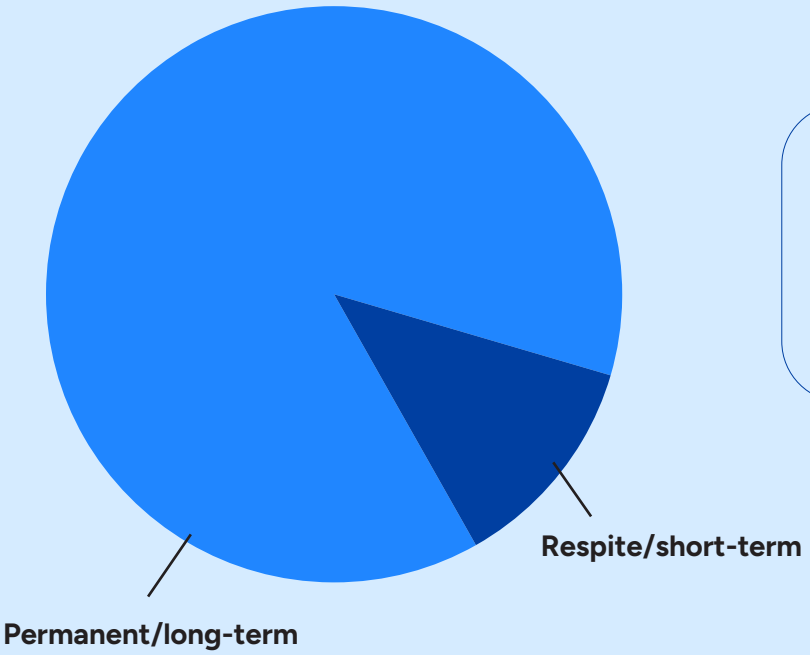
Care seekers increasingly focus on finding residential care over nursing care, with 57% in 2025 seeking residential care. However, dementia residential care accounted for half of this, highlighting the substantial prevalence of dementia among older adults. Nursing care echoed this trend, with dementia nursing care accounting for half of all the demand for nursing care.

Residential care home enquiries grew by 2.2% from 2024 to 2025 – against overall care home market demand of 1.8%.

Permanent placements dominate enquiries (73%), but respite care saw limited growth. This continues to be an under-utilised option for people needing support and for carers – it can boost wellbeing, support independence, prevent crisis decision making, and allow people to trial a home as part of finding the right one for them.



57% of care seekers in 2025 sought residential care.



Enquirers by length of stay

73%

27%

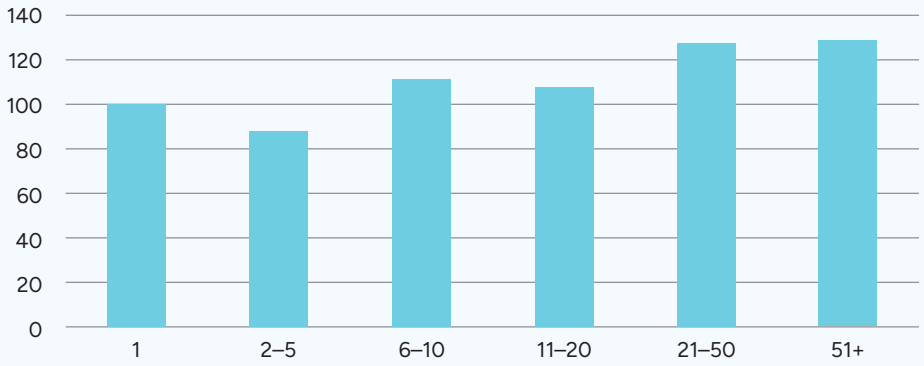
Larger care home groups generate more demand than smaller operators

Care home services in the UK are delivered by a wide variety of different types of operators. Large care home groups with more than 51 care homes operate 18% of all care homes, whereas single site providers operate 25% of all care homes in the UK.

Larger care home operators tend to generate higher levels of demand per care home than smaller operators. A significant contributor to this difference is likely to be the professionalised marketing operations of the larger care home groups.

Care seekers so often face difficult decisions about which care home in their area to choose from, with a huge sense of responsibility to pick the 'right' choice, often under pressure. It's important that care homes effectively articulate the high quality of services that they offer, to be able to attract interest from care seekers and fill their vacancies.

Written enquirers per care home, 2025



Note: data has been rebased to 100 for ease of reference

Choosing care is often an emotionally difficult decision, and it's important that people feel a sense of trust from care providers they might consider. Word-of-mouth recommendations for care homes are an effective tool for building trust within the local community. Trusted, real reviews from residents and families can serve this purpose for groups of all sizes to replicate that word-of-mouth credibility and help people to fully understand their options.

Carole Hunt
Director, Cinnamon Care Collection

"With broader resources and more established infrastructures, larger groups are often able to build sophisticated, data-driven marketing functions that smaller operators may find harder to replicate. Their brand presence tends to be stronger, their messaging more consistent, and their ability to showcase the quality of their care more polished and far-reaching. As a result, care seekers are more likely to discover, trust and engage with these organisations when exploring options for themselves or their loved ones.

That said, while larger groups benefit from greater marketing resources, the most powerful drivers of enquiries have far less to do with marketing spend and far more to do with the quality of care delivered and the reputation a home builds within its community."

Section 4

Regional disparities in demand for older people's care homes

Demand for care home support varies sharply across England, reflecting deep differences in local capacity, funding, affordability and demographic need.

The West Midlands (+7%) saw the fastest growth in demand for care homes in England, driven by a combination of increasing older populations and greater health needs, reflected in the region's significant expansion of care home bed capacity in recent years.

By contrast, London, the East of England and parts of the South saw flat or declining demand for older people's care homes. In these regions, high care home fees, rising operating costs, limited workforce availability and fewer new care home developments have constrained the choices available to families. Many people in these areas delay care for financial reasons or seek alternatives such as home care, live-in support or relocating, suppressing local enquiry growth.

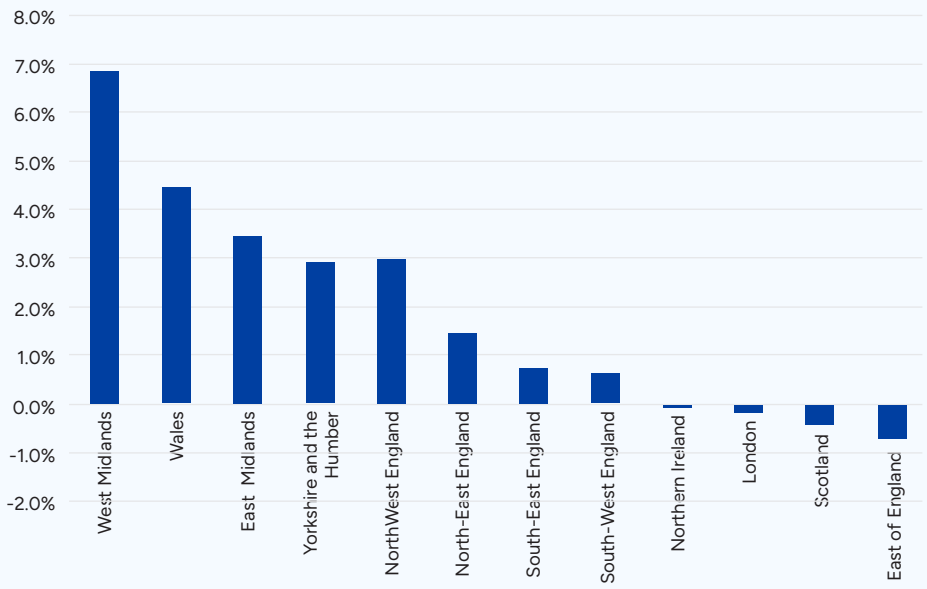
Across the devolved nations, carehome.co.uk data reveals contrasting trends in care home demand for older people between 2024 and 2025. Wales saw the strongest growth (+4.4%), reflecting mounting demographic pressures, with over 21% of its population now aged 65+ (ONS, 2024), and a widening gap between care home bed supply and projected need. Scotland saw a slight decline in enquiries (–0.4%), consistent with its longstanding emphasis on supporting older people at home through free personal care and community-based services. Northern Ireland remained broadly flat (-0.1%), shaped by its integrated Health and Social Care system and strong home care provision.

The West Midlands (+7%) saw the fastest growth in demand for care homes in England.

Care seekers' decisions are shaped not only by care needs but also by local market and cost of living conditions, the availability of beds, the affordability of fees, demographic health differences and how much support councils can commission.

These regional differences highlight the importance of creating a consistent, well-supported care journey across the country that gives people clear options, timely guidance, and the confidence that they can access the care that is best for them regardless of where they live.

Growth in care home demand 2025 vs 2024, by region



Across devolved nations...

Wales (+4.4%)

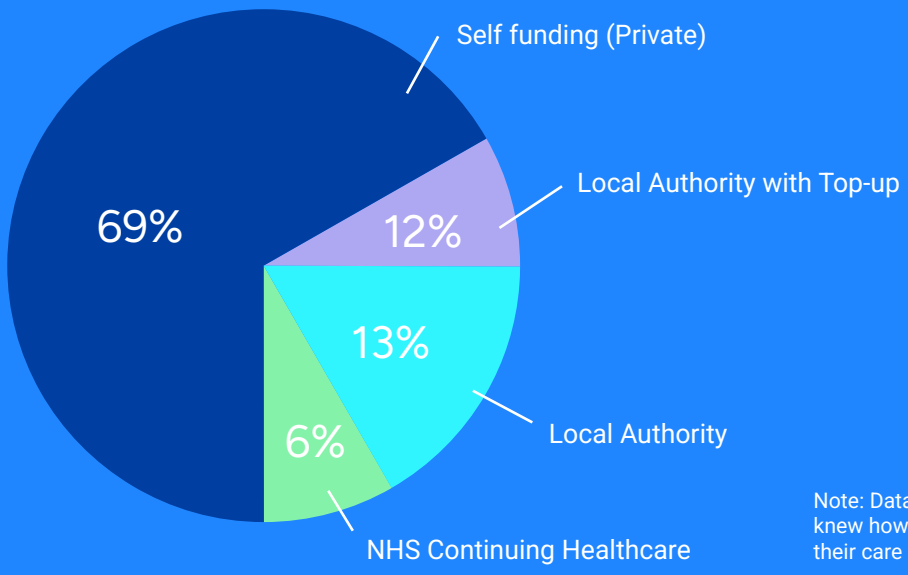
Scotland (-0.4%)

Northern Ireland (-0.1%)

Section 5

Funding and affordability pressures

Planning is crucial for private payers



Note: Data taken from those who knew how they intended to fund their care at time of enquiry

Industry data shows that most people will have to fund their care themselves (49% of older people's residential care placements are entirely self-funded[6]).

Our search enquiry insights show that self-funding options remain the most common care home enquiry – of those who know how they will fund their care, 66% of people are seeking self-funded options.

[6] *https://www.ons.gov.uk/peoplepopulationandcommunity/healthandsocialcare/socialcare/articles/carehomesandestimatingtheselffundingpopulationengland/2022to2023*

Diana's story - a care seeker in Leeds

Diana, whose mum is 88 and has dementia, has found there is virtually no advice and support for those people and their families who are funding their own care.

When you qualify for state-funded care, the local authority walks you through the process. But if you fall above the funding threshold, the support drops away, leaving you to manage a complicated and emotional journey on your own.

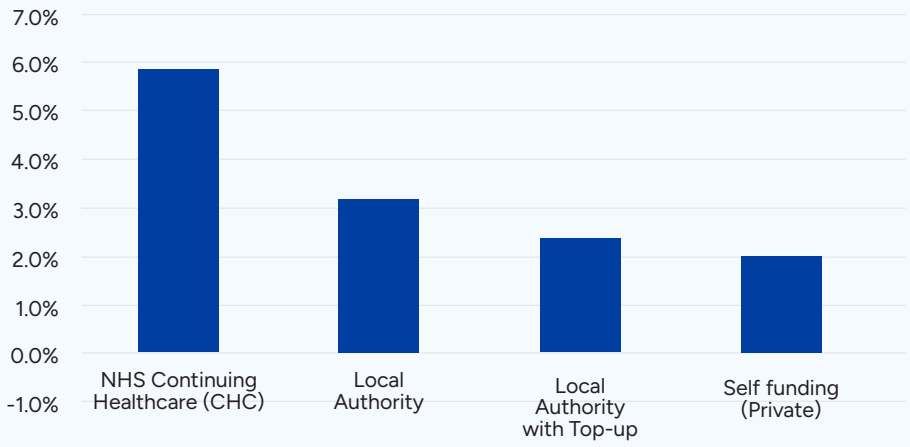
Diana, who is based in Leeds, said:

"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."

Private funding remains dominant, but state-funded demand is rising

However, our search data also shows care seeker enquiries for state funded care growing faster than for self-funded care, and last year grew at twice the rate of overall market demand growth (4%).

Demand for care homes by funding type, 2025 vs 2024





Our data shows the highest number of self-funders are in South-East England and South West England. Of those who know how they are going to fund their care, 75% say they will be self-funding their care home. While 68% of older Londoners are self-funders.

Wales and North East England have the lowest amount of self-funders (55%) and half of people in Scotland pay for their own residential care.

One in 10 people enquiring for a care home on carehome.co.uk said they would be paying a top up fee on top of state funding. With cash-strapped councils facing escalating social care costs, this is a trend that appears likely to grow.

Worryingly, one-fifth (21%) of people do not know whether to expect to fund care themselves or through public funding routes. Clearly, more needs to be done to help people to understand how to pay for care, and understand their options before a crisis point is reached.



One-fifth of people do not know whether to expect to fund care themselves or through public funding routes.



One in 10 people said they would be paying a top up fee.

But it is important to bear in mind that although demand for state-funded care has continued to rise due to an ageing population and increasing levels of need, the proportion of older people actually receiving local-authority-funded long-term social care has fallen sharply over the past two decades - from 8.2% to just 3.6%[7].

This decline reflects a combination of factors, including tighter eligibility criteria, financial pressures on local authorities, and a growing shift towards unpaid care or self-funded support. Access to local authority funded care also seems to be a postcode lottery, as analysis by the Institute of Government (2025) showed local authorities in England with a larger older population have lower rates of access to publicly-funded long-term social care.



[7] *https://www.cqc.org.uk/publications/major-report/state-care/2024-2025*

Sam Monaghan
Chief Executive of Methodist Homes (MHA)

"We find that residential care is something few people consider until it becomes a crisis situation and they need to find a place quickly. A bad fall leads to a hospital stay, which in turns means they need 24-hour care in a residential or nursing home. Or a family visit reveals to children the strain caring for a partner living with dementia is having on their other parent.

People will often come to us as a first point of call because they know of their local home's reputation and wonder if there is a room available. But beyond this, we find there they don't know about how to fund a place, how to navigate care assessments, the difference between local authority and continuing healthcare funding, what a Lasting Power of Attorney is, what questions to ask when visiting a home for the first time, and much more.

But it is not just about the practical knowledge; there is also the emotional support that is needed. This is why MHA set up its online Later Life Hub offering support and expert guidance."

Conclusion

The 2025 data demonstrates the regional inconsistencies affecting care seeker experiences across the UK, and the care sector working hard to keep pace with rising demand and increasing financial pressure.

At the heart of these trends is the importance of early planning and timing. The rapidly ageing population places demand not just on care systems but on people and families, who are increasingly juggling care roles alongside busy lives and other responsibilities. This leaves little time for approaching the sensitive topic of planning for care earlier in the care journey, driving many people to seek care at a point of crisis – after a sudden deterioration, a hospital admission, or the realisation that the caring role has become too heavy to manage alone.

These moments are deeply emotional, and often lonely for carers who have to make hugely important decisions under pressure. This means that too often, people's choices are defined by urgency rather than personal preference or finding the 'right fit'.

The policy landscape signals a shift to greater emphasis on prevention, independence, and the expansion of publicly funded care packages. But these ambitions sit alongside real and immediate constraints: a sector funding gap of more than £1 billion, critical workforce shortages, and widening regional variation in commissioning practices and fee rates. The demand for self-funded care placements therefore still looks set to remain dominant.

Similarly, more people eligible for state-funded residential care are likely to be asked to pay top-up fees as councils grapple with rising costs.

Supporting people to plan for care earlier is essential, through compassionate guidance, clear information about costs and options, and pathways to plan before crisis strikes. Strengthening local care markets and investing in the workforce are equally critical to ensuring that people can access the right support, in the right place, at the right time.

By working together to help people plan earlier, understand their choices, and navigate their options with confidence, our sector can move closer to a more preventive, sustainable and equitable care system – one that honours the dignity and needs of older people and those who care for them.

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