Caring Britain

Caring Britain: how the care home landscape is changing









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Foreword

by Will Blackwell (CEO, Tomorrow's Guides)

This is the second report in our series exploring how the care landscape in the UK is evolving and changing, using **carehome.co.uk**'s unique data and insight. While our first report focused on how people search for and choose care, this report turns to the other side of the picture: the supply of care homes for older people, and how the sector is responding to growing and increasingly complex demands and care needs.

The care home market is under sustained pressure. An ageing population, rising prevalence of dementia and long-term conditions, workforce shortages and escalating costs are reshaping how care is delivered across the UK. At the same time, families are often navigating care decisions during moments of crisis, relying on the availability, quality and transparency of local provision to support some of the most important decisions they will ever make.

Drawing on carehome.co.uk's extensive database of care providers, this report provides a timely snapshot of how the supply of older person care homes is changing. It shows a sector that is professionalising: consolidating in scale, investing in modern facilities and expanding specialist provision. Yet it also highlights persistent regional differences in capacity, affordability and access to specialist care, all of which combine to shape people's experiences of finding care.

Understanding these supply-side trends is essential. For providers, they point to the structural challenges and opportunities shaping long-term sustainability. For partners, they underline the importance of investment, workforce planning and regulatory oversight. And for families, they help explain why the experience of finding care can vary so widely depending on where you live and the type of care required. We hope the wide array of options available to care seekers encourages early and thoughtful planning of care needs.

At the heart of this report is the role of information and trust. In a complex and emotionally demanding system, up-to-date provider information and trusted reviews all play a critical role in helping people make choices with confidence. By shining a light on how the care home market is changing, I hope this report supports more informed decision-making and contributes to a care system that is more transparent, resilient and responsive to the needs of older people and those who care for them.

Report #2
looks at the supply of care homes for older people.

Introduction

The UK's care home sector is undergoing a period of significant transition. As the population ages and demand for older person care continues to rise, providers are adapting their offer, their scale and their operating models.

This second report in our series focuses on the supply of older person care homes, drawing on unique market-wide data from carehome.co.uk to examine how provision is changing across England, Scotland and Wales. Whilst the total number of registered care homes has declined slightly, the overall supply of care beds has grown - reflecting a sector that is consolidating, professionalising and, in many cases, investing in larger, purpose-built environments designed to meet increasingly complex care needs.

At the same time, there continues to be considerable regional differences in care offering. Differences in care home size, facilities, specialist provision, regulatory oversight and cost continue to shape people's experiences of finding care.

By examining these trends, this report aims to support providers and industry partners to better understand how the care home market is changing. Crucially, it shows how improved transparency, better information and trusted reviews play a critical role in helping people navigate an often complex and emotionally challenging system.

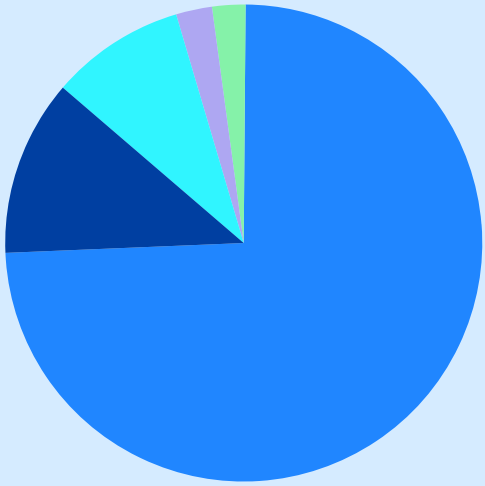


About our research

Care home supply statistics in this report are based on data drawn from care provider listings on carehome.co.uk, which hosts information and reviews for all the 10,500 older person care homes in the UK, making it the largest publicly available dataset of its kind.

The data in this report covers the period December 2024 to December 2025 and includes information on care home size, facilities, care types offered, regional distribution, indicative pricing and regulatory status.

carehome.co.uk is the UK's leading website for helping people find support for their own or their loved ones' older care needs, combining verified provider information with hundreds of thousands of independent reviews from residents and families.



Time spent on older person care search websites[1]

75%	carehome.co.uk
13%	homecare.co.uk
7%	lottie.org
3%	trustedcare.co.uk
2%	autumna.co.uk

Data taken from **December 24–December 25**

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

[1] *Source: similarweb.com December 2025*

Headline findings

In 2025, the total number of registered care homes **fell by 0.6%** while bed numbers **increased by 0.9%**

The average care home now provides **47 beds**

87% of care homes nationally operate on a commercial basis. Alongside 10% not-for-profit operators, only **3% of older person care homes are operated by local authorities or the NHS**

Care home fees for self-funders **rose by an average of 10%** between Dec 2024-2025

Access to advanced and complex dementia care **varies by region, creating gaps** as needs progress

<3.6% of care homes in England are rated 'Outstanding', rising to **>5%** in the East of England and South West

More than half of care homes in England **have not been rated** in the last four years

Whether comparing prices, ratings, specialist supply or the age of the stock, the **provision of care homes across the UK remains geographically contingent**

Section 1

Sector professionalisation

The care home market is consolidating as providers scale up to meet rising demand and operational pressures.

2025 saw the care home sector professionalise and undergo structural change in several important ways. Whilst the **total number of registered care homes has declined slightly (-0.6%), the number of beds available increased by 0.9%,** signalling a continued shift towards larger-scale provision.

carehome.co.uk data shows that the **average care home now offers 47 beds**, with the strongest growth over the past year among homes with 60-79 beds. In contrast, the number of smaller homes continues to fall, with around a 6% reduction in care homes offering fewer than 20 beds in the year to December 2025.

These trends reflect a sector adapting proactively to sustained cost pressures and increasing care complexity. Larger homes can benefit from economies of scale that support greater investment in staffing, facilities, training and specialist services, as well as having more resilient operating models.

2025 saw growth in larger homes with the average care home offering 47 beds.

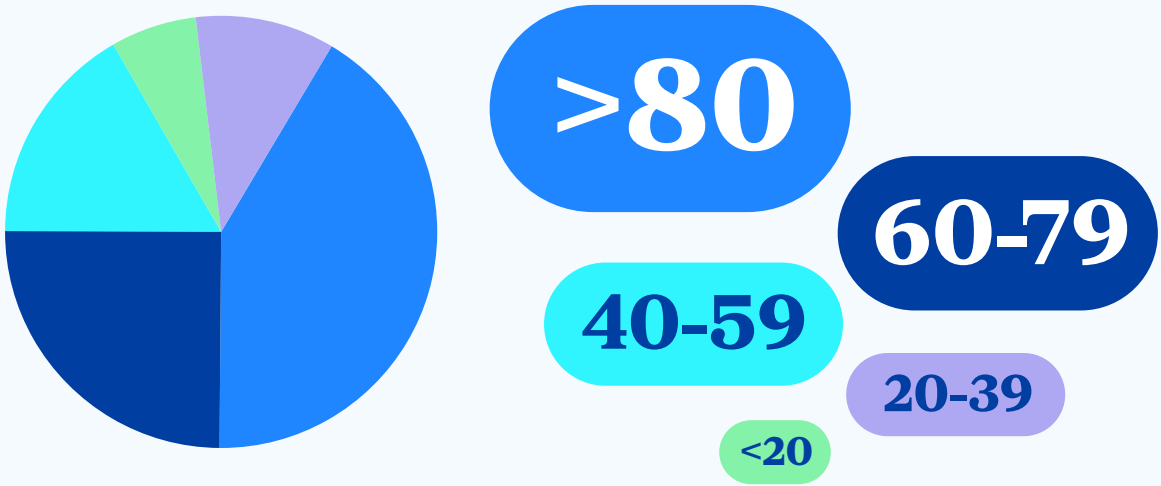
Ownership patterns further underline this shift. **Private operators now provide 87% of registered care home beds nationwide**, highlighting the central role of commercial providers in meeting growing demand for older person care. Some **10% of care beds are run by not-for-profit providers**, with the remaining **3% of beds being local authority or NHS funded**. In regions such as the **North East and East Midlands, commercial operation rises to 91%,** reflecting market structures where larger, private providers are particularly important to maintaining bed capacity and investment. By comparison, in the **South West of England, 18% of care homes are not-for-profit**, the highest proportion in the UK.

87% of care home beds are privately provided

10% of care home beds are operated as not-for-profit

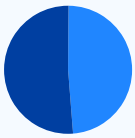
Changes in operator group size further illustrate the consolidation taking place across the sector. The number of care operators with 50-99 care homes within a group increased by 25%, highlighting the continued expansion of larger providers. By contrast, the number of operators managing 2-10 homes and 10-25 homes declined modestly over the same period, suggesting a gradual shift toward greater scale in parts of the market.

Older person care home estate by number of beds





This shift is also evident in the physical estate. **Purpose-built care homes now account for 57% of the market**, offering modern layouts, improved accessibility, ensuite facilities and specialist amenities that converted or older properties can struggle to provide. These environments are increasingly important as residents enter care later in life with higher and more complex needs.



57% of care homes are purpose-built

Alongside changes in scale and building design, a broad baseline of facilities is now common across the sector. At a national level, over 90% of care homes are wheelchair accessible, and many offer features such as pet-friendly policies (60%) and communal social spaces including cafés or bars (15%). This reflects a gradual shift towards environments that support both accessibility and quality of life, alongside the delivery of personal and clinical care.

Importantly, this consolidation does not signal the end of smaller providers. Many continue to thrive by offering highly personalised care in intimate settings that appeal to certain residents and families. The diversity of provision remains a defining strength of the sector, but one that is increasingly underpinned by professional standards, transparency and accountability.

Paul McPartlan
Chief Operating Officer at Maria Mallaband Care Group (MMCG)

"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.

Providing training and development in-house delivers a level of consistency that's hard to achieve without strong structure and an operational HQ. We have a central training centre, an online education hub, a consistent onboarding process and have our own dementia training modules, for example. Our apprenticeship programmes are a game changer in supporting progression - our Nurse Development Pathway even allows us to train our own nurses. Being a larger operator means we can offer highly attractive career pathways. We have many team members who started as carers and are now running homes or working in regional roles.

Central oversight both drives improvement and supports consistency across our homes, as we've seen with the rollout of programmes like More... and Hug on a Plate, setting standards around lifestyle, wellbeing, and the dining experience. That said, each home remains a reflection of the community it serves. While embracing the advantages of being part of a bigger group, we retain that individual home identity - we are at that sweet spot where we achieve that."

Teresa Weis RGN
Home Manager at St Faith's Nursing and Residential Home

"Our recent investment at St Faith's was about future-proofing the service and making sure we can support people earlier in their care journey, not just when their needs have already become very complex. Families are looking for reassurance that their loved one will not have to move again if their needs change, and developments like our brand-new residential wing featuring 18 refurbished bedrooms and communal spaces, all help us offer that true 'home for life' approach.

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. At Lilian Faithfull, we believe that the physical environment plays a big role in this - spaces that are calm, accessible and designed around community living help people feel more at ease, more confident and more connected to those around them.

When residents feel comfortable in their surroundings, it supports better wellbeing and allows our teams to focus on what matters most: building relationships and delivering compassionate, person-centred care."



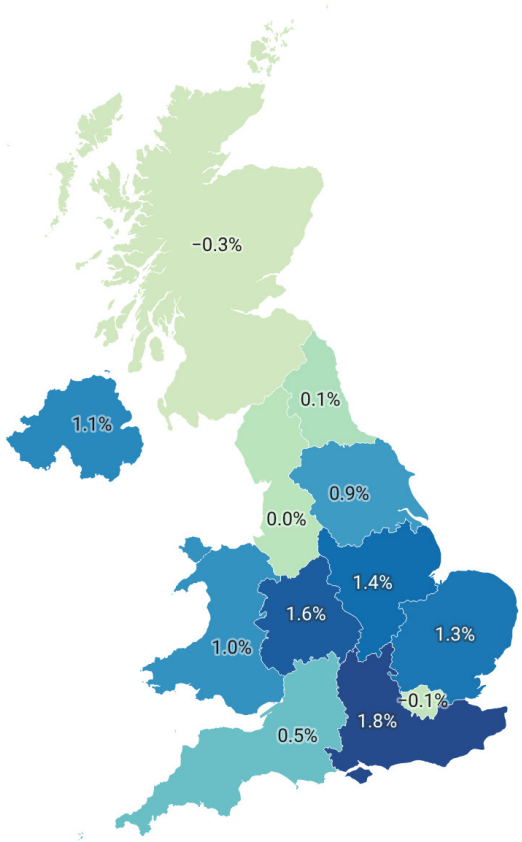
Section 2

Regional differences in care home provision

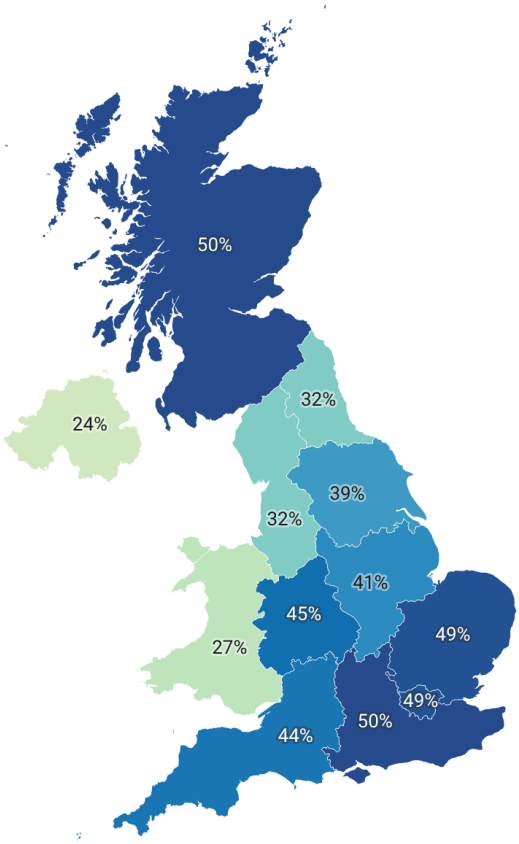
The supply of older person care homes is not changing evenly across the UK. While overall bed numbers continue to grow, changes in capacity at the local level varies sharply by region, shaping the choices available to families at a local level.

Between December 2024 and December 2025, **the South East and West Midlands recorded the strongest growth in care home bed numbers, increasing by 1.8% and 1.6%** respectively. In contrast, London and Scotland experienced modest declines of 0.1% and 0.3%, reflecting a combination of higher operating costs, workforce pressures and limited opportunities for new development in dense or constrained markets.

Growth in older person Care Home beds by region



Proportion of care homes beds with single wet rooms by region



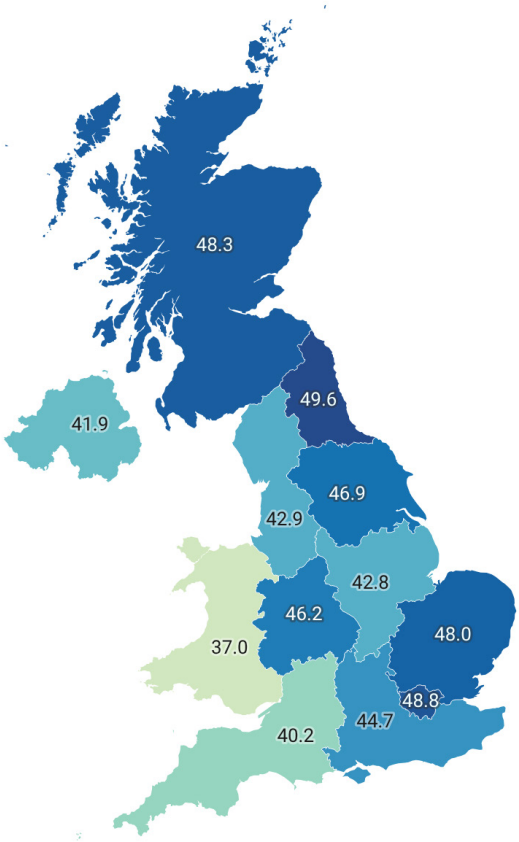
Care home amenities can also vary by region. In the South East of England and Scotland, **more than half of care beds offer single ensuite wet rooms,** compared with **fewer than 35% in the North East of England and Wales**. These differences reflect long-term patterns of investment and the age of local care home estates, rather than resident need.

Average care home size provides useful context, but does not on its own determine the facilities available within a region. In the **North East of England, average care home size is relatively high at 49.6 beds,** reflecting a stock of larger, more established homes. In **Wales, where the average home has 37 beds,** provision tends to be smaller in scale and more dispersed. These differences largely reflect historic development patterns and the age of the local care home estate.

Taken together, these structural characteristics help to explain why the availability of modern facilities varies across regions. The pace of upgrades is influenced by factors such as building design, planning constraints and the scale at which providers operate, all of which differ locally.

For families seeking care, these regional characteristics can shape the choices available close to home. Many people wish to remain near family and established social networks, limiting their ability to relocate. As a result, access to specific facilities or services is often influenced by local market structure as much as by individual care needs.

Average number of beds per older person care home by region



Section 3

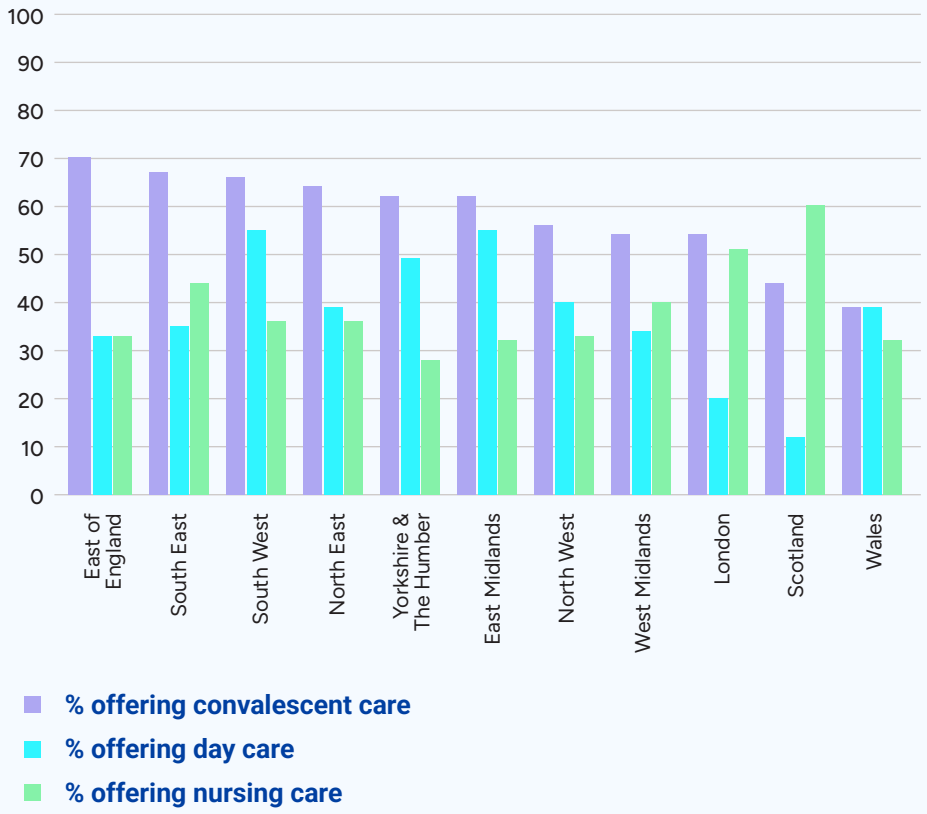
Specialist care provision

The availability of specialist care continues to improve, but provision remains uneven across both care types and regions, with clear gaps emerging as needs become more complex.

Palliative and respite care are widely available across the country, reflecting long-established demand and delivery models. Palliative care typically supports people at the end of life, while respite care provides short-term stays to offer relief for unpaid carers or to support recovery following illness or hospital discharge. Both are now core components of most care home offers.

By contrast, other forms of specialist provision are far more uneven. Convalescent care, which supports short-term rehabilitation and recovery, nursing care, which requires registered nursing staff, and day care, which offers flexible, non-residential support, vary significantly by region. For example, 70% of care homes in the East of England offer convalescent care, compared with 44% in Scotland, while day care provision ranges from 55% of homes in the East Midlands to just 20% in London. These differences limit flexibility for residents whose needs change over time and reduce the ability of families to access stepped or preventative support close to home.

Percentage of older person care homes that offer different types of care



Dementia Care

Dementia care represents one of the most significant and growing pressures facing the care home sector today. While many care homes are equipped to support people in the earlier stages of dementia, capacity reduces sharply as needs become more complex and clinical.

Regional variation further compounds this challenge. **London leads in the availability of advanced and complex dementia care, with 57% of care homes able to meet higher-level needs, compared with just 28% in Wales and 34% in North West England.** This uneven

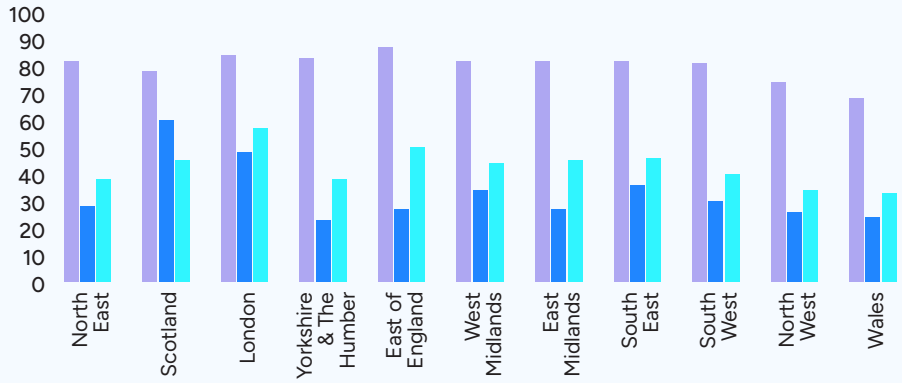
distribution means that, depending on where someone lives, the range of options available as dementia progresses can differ substantially.

This capacity gap matters because dementia is typically a progressive condition, with care needs increasing over time. Where advanced dementia or dementia nursing care is unavailable locally, residents may be forced to move care settings as their condition worsens, disrupting continuity of care and placing additional emotional strain on families.

Alzheimer's Society UK estimate that around 80% of care home residents are living with dementia or have severe memory problems. The charity predict there will be 1.4m people in the UK living with dementia by 2040, at an estimated cost of £90bn to the UK.

This points to a growing mismatch between demand and supply at the more complex end of dementia care. As prevalence continues to rise, the ability of care homes to provide progressive, specialist dementia care within a single setting will become increasingly important.

Proportion of care homes offering different types of dementia care, by region



Claire Peart
National Lead Dementia Nurse Specialist for Barchester Healthcare

"As a provider we are proactive in recognising the changing needs of all residents, including potential new admissions to any service.

We focus on staff recruitment, development and retention as it may be that we need to have more staff on each shift to support the unique needs of some of our residents. We also regularly hold training sessions so our staff can support and understand the complex behaviours associated with some types of dementia.

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. The use of reminiscence and cognitive stimulation is also important to enable residents to share experiences and help staff understand potential past trauma and any possible triggers for distress.

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. It helps staff to work with residents and families to ensure a person-centred approach is adopted, enabling the resident to be as involved as possible in all aspects of support planning, while promoting an open culture when discussing potentially delicate and difficult topics and conversations."

Section 4

Regulatory ratings

Regulatory ratings continue to play a crucial role in shaping confidence in care quality. For families navigating care decisions, often under time pressure and emotional strain, a regulator's judgement provides important reassurance.

Across England, the majority of older person care homes meet expected standards, with the Care Quality Commission (CQC) rating just over 70% of homes 'Good' or 'Outstanding'.

In Scotland and Wales, care homes are not given a single overall rating. Instead, regulators assess homes across core quality categories. The figures presented here summarise those domain-level grades to provide a simplified overview, but they are not directly equivalent to the CQC's overall ratings in England.

In Scotland, around three quarters of older person care homes are graded 'Good', 'Very Good' or 'Excellent' across all of the assessed categories. In Wales, where Care Inspectorate Wales only began publishing ratings in April 2025, **59% of older person care homes are not yet rated.** Among those assessed so far, just over a third are graded 'Good' or 'Excellent' across all the core categories.

68% of care homes in England rated **'Good' or 'Outstanding.**

Over 50% of care homes in England have **not been inspected in the last 4 years.**

Regional variation in top-rated care

Even among homes meeting expected standards, the distribution of higher ratings varies by region. **In London and the North East of England, around 80% of care homes are rated 'Good' or 'Outstanding'.** By comparison, this figure stands at **63% in the West Midlands and 66% in Yorkshire and the East of England.**

These differences are shaped by a combination of factors, including the age of local care home stock, workforce availability and historic patterns of investment.

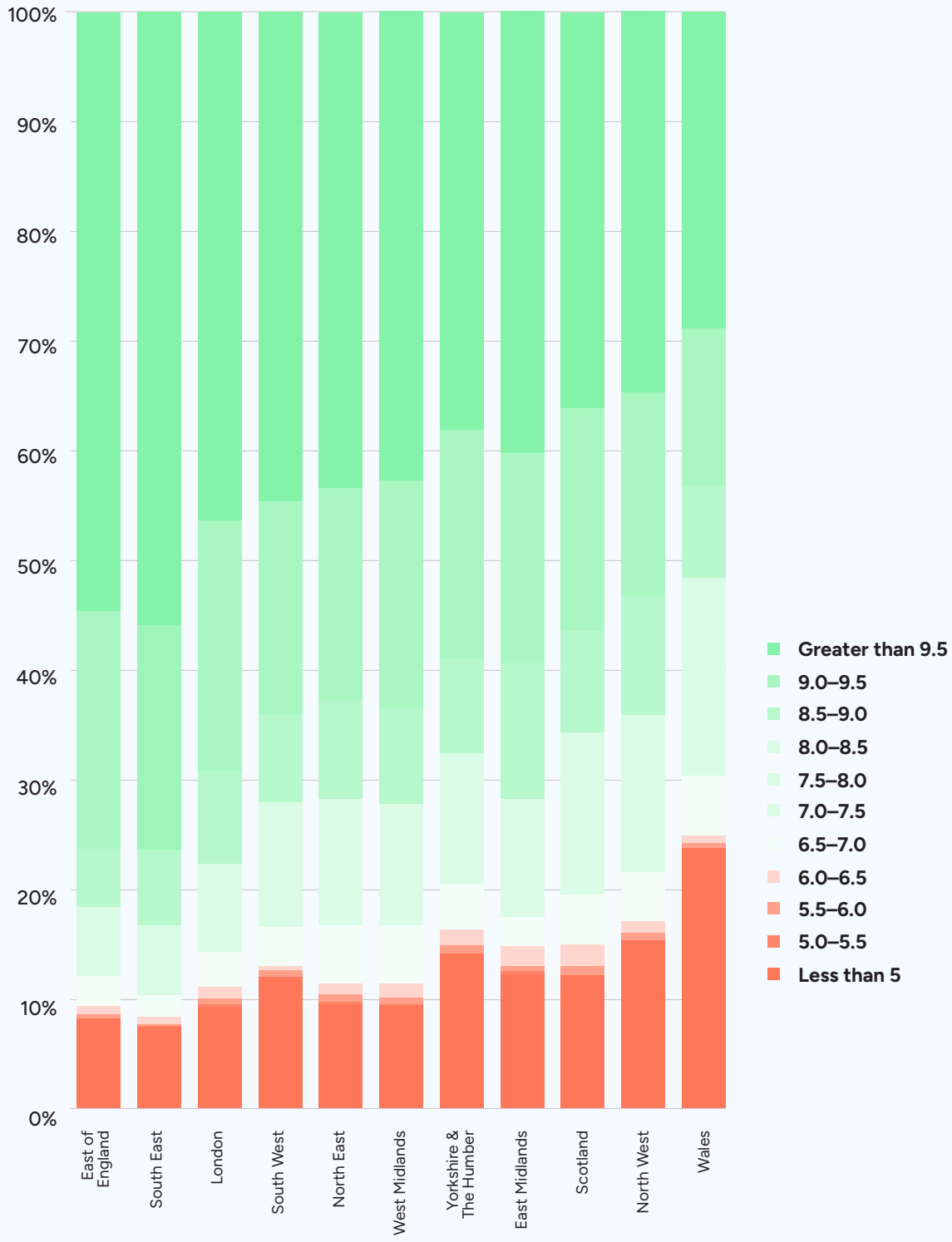
The rating gap

Alongside regional disparities, the timeliness of CQC ratings remains a key challenge. Many care homes experience long gaps, meaning ratings may lag behind changes in staffing, management or facilities. In a sector that is professionalising and evolving quickly, this creates an information gap at the point families most need clarity.

More than half of care homes in England have not been rated in the last four years, reflecting the scale and strain of the regulatory task.

In this context, reviews increasingly act as a vital proxy for quality, offering families more current, experience-led insights into how homes operate day to day. Reviews from residents and relatives provide transparency, reassurance and nuance that formal ratings alone cannot always capture – particularly where inspections are infrequent.

Reviews on carehome.co.uk also show variation by region, and provide an additional layer of insight into people's lived experiences of care. **In the East and South East of England, close to three quarters of homes are rated between 9 and 10**, reflecting consistently positive feedback from residents and their families. In Wales, a smaller proportion of homes fall within this top rating band, at just over two fifths.


100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
East of England
South East
London
South West
North East
West Midlands
Yorkshire & The Humber
East Midlands
Scotland
North West
Wales
Greater than 9.5
9.0–9.5
8.5–9.0
8.0–8.5
7.5–8.0
7.0–7.5
6.5–7.0
6.0–6.5
5.5–6.0
5.0–5.5
Less than 5

Reviews play an important role in helping families understand what life in a care home is actually like. While regulatory ratings provide an essential baseline of safety and compliance, user reviews offer real-time, experience-led detail on the day-to-day 'feel' of a care home. This might include interactions with staff, communication with families, the atmosphere, and the responsiveness to individual needs. In areas where inspections are infrequent or ratings may be out of date, this qualitative insight can be particularly valuable.

Taken together, regulatory ratings and reviews offer a more rounded picture of care quality that combines formal oversight with the voices of those who live in and rely on care homes every day.

Section 5

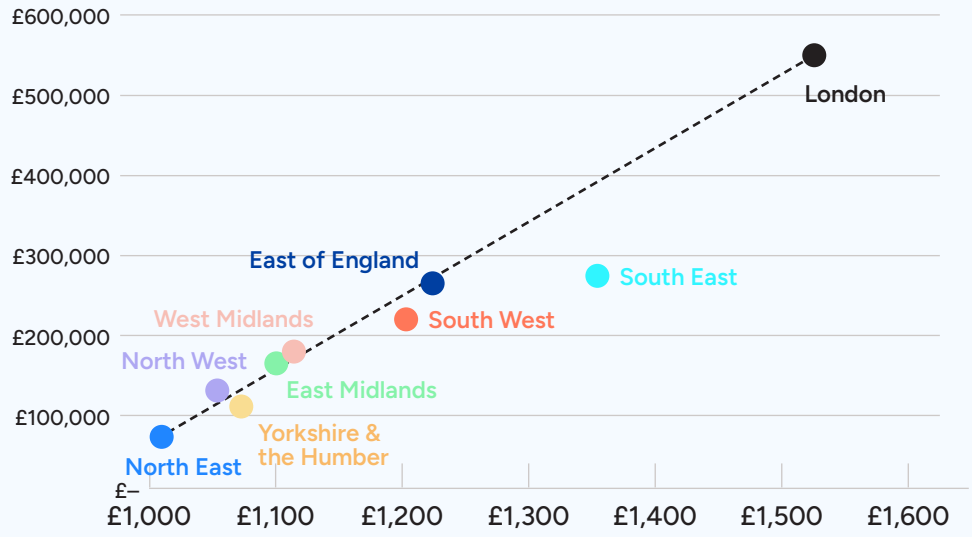
The cost of care

Cost pressures across the care sector remain acute, with substantial regional variation in both the level and pace of fee growth.

In 2025, **Scotland and London remain the most expensive regions, with average self-funded residential weekly fees exceeding £1,500, while the North East of England remains the most affordable at around £1,100 per week.** Much of this disparity can be explained by regional variation in property prices, with higher rents naturally placing upward pressure on the cost of care. Care fees in Scotland may also be higher because care workers there receive a higher minimum wage than those in England and Wales.

Across the UK, care home fees continued to rise over the past year. Between December 2024 and December 2025, fees increased by around 10% on average, as providers responded to rising wage costs, energy prices and broader inflationary pressures. Growth varied by region, with increases ranging from 7.8% in the East of England to 11.3% in the North West, reinforcing existing geographic differences in affordability. In Scotland, self-funded residential care home fees rose by 11.9% to £1,561 per week, and in Wales equivalent fees grew by 11.8% to £1,138 per week.

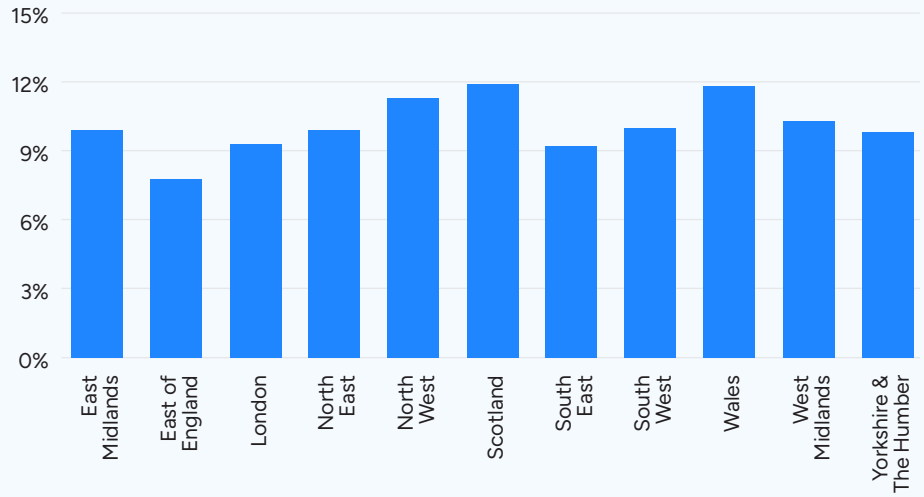
Average Self-funded Residential Care Home fees per week vs Average House prices across England





Office for National Statistics (ONS), Average House Price Data released Nov 2025

% change in self-funded residential care home fees by region



While higher fees are often concentrated in London and the South East where higher salaries and housing costs are most acute, fee growth has been evident across all regions, including those traditionally seen as more affordable. This reflects the fact that many of the cost pressures facing providers are national in nature, even if their impact is felt differently at a local level.

For families, particularly self-funders, these trends underline the importance of understanding costs early in the care journey and planning accordingly. For providers, sustained cost pressures continue to shape pricing decisions, investment capacity and long-term sustainability across the sector.

Professor Martin Green OBE
CEO at Care England

"Care homes are supporting people with some of the most complex health and social care needs

In the last 18 months we have seen significant cost increases, many of which have been deliberately placed on the sector by the government actions. The increases to Employers' national insurance contributions, have increased costs, in some cases by millions of pounds a year and we have also seen energy and food price inflation and this has led to increases in the cost of care.

The increases that care providers had to levy have been exacerbated by the fact that local authority residents are significantly underfunded and fee levels have not kept pace with the true cost of delivering high-quality care."

Conclusion

The care home sector is changing. While overall capacity continues to grow, it is doing so through consolidation, investment and professionalisation rather than expansion in the number of providers.
Larger, purpose-built homes are becoming more common, specialist care provision is improving, and transparency is increasingly central to how people choose care. Yet regional disparities, affordability pressures and staggered regulatory oversight continue to shape the experience of care seeking in the UK.

Over the past decade, the number of reviews on carehome.co.uk has grown significantly, rising from 45,070 to more than 415,000 - an increase of over 800%. This growth reflects a wider trend of consumers increasingly relying on online reviews to inform purchasing decisions, including when choosing care for themselves or loved ones.

In this environment, trusted, up-to-date information is essential. Reviews, ratings and detailed provider data play a critical role in helping people navigate care choices with confidence - particularly at moments of emotional strain.

As demand continues to rise, supporting a professional, transparent and responsive care home market will be central to ensuring that older people can access the right care, in the right place, at the right time.

Appendix

Section 1

Table 1 - Growth in older person care homes and care beds. Dec 2024 - Dec 2025

	Growth rate
Number of older person care homes	-0.6%
Number of older person care home beds	0.9%

Table 2 - Number of older person care home estate by number of beds

Number of Beds	Number of Care Homes
Less than 20	10%
20-39	37%
40-59	27%
60-79	19%
80 or more	7%

Table 3 - Number of older person care homes by building type

	Not for purpose built	Purpose built
Grand total	43%	57%

Table 4 - Proportion of older person care homes that are commercially run

Region	Percentage of care homes that are commercially run
East Midlands	91%
North East England	91%
East of England	89%
Yorkshire & the Humber	89%
West Midlands	88%
South East England	87%
North West England	87%
Wales	86%
South West England	85%
London	84%
Scotland	76%

Section 2

Table 1 - Growth in older person care home beds by region, Dec 2024 - 2025

Region	Growth rate
South East England	1.8%
West Midlands	1.6%
East Midlands	1.4%
East of England	1.3%
Wales	1.0%
Yorkshire and the Humber	0.9%
South West England	0.5%
North East England	0.1%
North West England	0.0%
London	-0.1%
Scotland	-0.3%
Overall	0.9%

Table 2 - Proportion of care home beds with single wet rooms by region

Region	Percentage of care homes with single wet room
South East England	50%
Scotland	50%
East of England	49%
London	49%
West Midlands	45%
South West England	44%
East Midlands	41%
Yorkshire and the Humber	39%
North West England	32%
North East England	32%
Wales	27%
Grand Total	42%

Table 3 - Average number of beds per older person care home by region

Region	Average size
North East England	49.6
London	48.8
Scotland	48.3
East of England	48.0
Yorkshire and the Humber	46.9
West Midlands	46.2
South East England	44.7
North West England	42.9
East Midlands	42.8
South West England	40.2
Wales	37.0

Section 3

Table 1 - Proportion of older person care homes offering different types of care

Region	% offering convalescent care	% offering day care	% offering nursing care
East of England	70%	55%	60%
South East England	67%	55%	51%
South West England	66%	49%	48%
North East England	64%	40%	44%
Yorkshire and the Humber	62%	39%	40%
East Midlands	62%	39%	36%
North West England	56%	35%	36%
West Midlands	54%	34%	33%
London	54%	33%	33%
Scotland	44%	27%	32%
Wales	39%	20%	32%
Northern Ireland	37%	12%	28%

Table 2 - Proportion of older person care homes offering different types of dementia care

Region	% offering convalescent care	% offering day care	% offering nursing care
North East England	82%	28%	38%
Scotland	78%	60%	45%
London	84%	48%	57%
Yorkshire and the Humber	83%	23%	38%
East of England	87%	27%	50%
West Midlands	82%	34%	44%
East Midlands	82%	27%	45%
South East England	82%	36%	46%
South West England	81%	30%	40%
North West England	74%	26%	34%
Isle of Man	67%	29%	29%
Wales	68%	24%	33%
Northern Ireland	48%	30%	23%

Section 4

Table 1 - Older Person Care Home Regulatory Ratings Breakdown, England

Region	Outstanding	Good	Inadequate	Requires improvement	(Blank)
South East England	4%	68%	1%	15%	11%
North West England	2%	66%	2%	17%	13%
South West England	5%	73%	1%	11%	11%
East of England	5%	61%	2%	18%	14%
West Midlands	3%	60%	1%	22%	15%
East Midlands	4%	64%	1%	19%	12%
Yorkshire & The Humber	3%	63%	15	17%	15%
London	2%	79%	0%	9%	10%
North East England	4%	75%	1%	9%	11%

Table 2 - Older Person Care Home Regulatory Ratings Breakdown, Wales

CIW Older Person Care Home Rating	Percentage
All Excellent	0%
All Good & Excellent	37%
All good	0%
Other	4%
Not yet rated	59%
Total	100%

Table 3 - Older Person Care Home Regulatory Ratings Breakdown, Scotland

CIS Older Person Care Home Rating	Percentage
All Excellent	6%
Mix V. Good & Excellent	2%
All V. Good	8%
Mix Good +	2%
Mix Good / V. Good	39%
All Good	15%
Other	27%
Total	100%

Table 4 - Carehome.co.uk review score distribution by region

Region	Less than 5	5.0-5.5	5.5-6.0	6.0-6.5	7.0-7.5	7.5-8.5	8.0-8.5	8.5-9.0	9.0-9.5	9.5+
East of England	8%	0%	0%	0%	1%	3%	6%	5%	22%	55%
South East England	7%	0%	0%	0%	1%	2%	6%	7%	20%	56%
London	9%	0%	0%	1%	1%	3%	8%	8%	23%	46%
South West England	12%	0%	0%	1%	0%	4%	11%	8%	19%	45%
North East England	9%	0%	0%	1%	1%	5%	12%	9%	19%	43%
West Midlands	9%	0%	0%	1%	11	5%	11%	9%	21%	43%
Yorkshire and the Humber	14%	0%	0%	1%	11	4%	12%	9%	21%	38%
East Midlands	12%	0%	0%	1%	14	3%	11%	12%	19%	40%
Scotland	12%	0%	0%	1%	2%	5%	15%	9%	20%	36%
North West England	15%	0%	0%	1%	1%	4%	14%	11%	18%	35%
Wales	24%	0%	0%	0%	1%	5%	18%	8%	14%	29%
TOTAL	11%	0%	0%	1%	1%	4%	11%	9%	20%	44%

Section 5

Table 1 - Average weekly fees for self funded residential care against average house price by region

Region	Avg Residential Care Home Fees per week (Dec 25)	Avg House Price (ONS, Nov 25)
North East	£1,097	£167,000
North West	£1,144	£217,000
Yorkshire and the Humber	£1,151	£209,000
East Midlands	£1,166	£242,000
West Midlands	£1,173	£249,000
South West	£1,290	£306,000
East of England	£1,315	£338,000
South East	£1,416	£381,000
London	£1,555	£553,000

Table 2 - Change in weekly fees for self funded residential care by region, Dec. 2024 - Dec 2025

Region	Growth
East Midlands	9.9%
East of England	7.8%
London	9.3%
North East England	9.9%
North West England	11.3%
Scotland	11.9%
South East England	9.2%
South West England	10.0%
Wales	11.8%
West Midlands	10.3%
Yorkshire and the Humber	9.8%

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