



Market Report

A Snapshot of your Marketing Sector

Adult and Domiciliary Care

This pack has been designed to provide information on setting up a business in the **Adult and Domiciliary Care** industry in Scotland, as well as helping to inform the market research section of your business plan. You can find more information on how to write a business plan from the Business Gateway website (www.bgateway.com/businessplan), including an interactive template and tips to get you started.

This market report was updated by Business Gateway in **September 2025**.

What do I need to know about the Adult and Domiciliary Care market?

The following summary statistics have been taken from market research reports and reliable resources that the Information Service uses to compile industry information. They should give you an indication of how your industry is faring at present and whether there is demand for your type of business:

- ◆ Revenue in the Domiciliary Care industry is anticipated to climb at a compound annual rate of **6.8%** over the five years **through 2025-26 to £6.7 billion**, and by a compound annual rate of **5.2%** over the five years **through 2030-31 to £8.7 billion**. Requests for care have gone up, supported by an ageing population and the rising prevalence of disabilities among the adult population. High demand is seeing more Britons switch to private providers, which generate higher revenue per patient than their public counterparts, further raising industry revenue and lifting profitability. (IBISWorld, *Domiciliary Care in the UK*, August 2025).
- ◆ Over the five years **through 2029-30**, residential and nursing care revenue is estimated to expand at a compound annual rate of **4.1% to £11.4 billion**. Robust demand from an ageing population will support industry growth. Staff shortage concerns will continue to plague nursing care. Due to the high demand for residential nurses, revenue growth has occurred because of cost increases set by nursing care companies. According to LaingBuisson, **average weekly fees** for residential care homes for older people in England need to be **between £696 to £849 per week** for a sustainable return. (IBISWorld, *Residential Nursing Care in the UK*, March 2025).
- ◆ Revenue over the five years **through 2024-25** is estimated to be **£10.3 billion**. Although the ageing population supports revenue, constrained government spending, delayed reform changes and rising costs (particularly for labour) have put pressure on industry profit. Retirement home revenue is expected to climb at a compound annual rate of **1.9%** over the five years **through 2029-30 to £11.3 billion**. **By 2036, the number of people aged 85 and over will hit 2.6 million**, representing 3.5% of the UK population, according to the Office for National Statistics. (IBISWorld, *Retirement Homes in the UK*, February 2025).
- ◆ The demand for home care services is on the rise as the UK's population is ageing, with over **950,000 disabled and older individuals** already receiving such services. This trend is expected to escalate further, as the number of people over 65 is projected to grow by 10% in the next 5 years, leading to an increased need for home care assistance. **Revenue is anticipated to grow by 3.7% in 2024-25**, helped by the DHSC making £4.7 billion available in 2024-25 to support adult social care. (IBISWorld, *Social Services for the Elderly & People with Disabilities in the UK*, September 2024).
- ◆ The national organisation for this industry is [Scottish Care](#). Other industry bodies include [The Care Inspectorate](#), the [Scottish Social Services Council](#), the [Coalition of Care and Support Providers](#) and [Care Information Scotland](#).

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Where can I find more information on my market?

The Information Service has access to a number of databases which can offer more detail on this industry. Some of these reports are listed below - if you would like to be sent extracts from any of these reports, please contact us on **0300 013 4753** or email info@bgateway.com.

- ◆ **IBISWorld – Domiciliary Care in the UK (August 2025).** According to the UK Parliament's Adult Social Care Reform report, May 2025, two million people aged 65 and over don't get the care they need because of staff shortages and high demand. The shortage of care workers is hampering domestic providers' ability to expand services and offer high-quality care. In May 2025, the UK government announced that overseas recruitment of care workers will be prohibited as part of efforts to reduce net migration and curb visa-related exploitation. Providers may therefore face sustained pressures and difficulty in finding care workers, compromising care outcomes in the future.
- ◆ **IBISWorld – Residential Nursing Care in the UK (March 2025).** Smart home technologies, including remote monitoring, automated lighting and fall detection sensors have improved safety and security for residents. According to Autumna in January 2025, acoustic monitoring is becoming more popular in care homes, being used to detect unusual sounds like distress calls or falls, discreetly and without invading privacy. The system analyses noise patterns, alerting staff when needed, thus reducing room checks. This innovation improves response times and supports personalised care by providing data on residents' needs and behaviours, boosting the quality of care for residents, whilst relieving some of the burden on residential nurses.
- ◆ **Statista – Care & Support, UK (July 2025).** In 2025, on average, care homes in Scotland were more expensive than in England or Wales. In the UK, the average residential care home cost £1,406 per week – in Scotland £1,439. This is the cheapest type of care home, which provides support for day-to-day activities like dressing and bathing. Nursing homes, on the other hand, cost £1,549 per week in Scotland, providing nursing care around the clock. Specialized care like dementia care will also cost more.
- ◆ **Mintel – Adult Social Care, UK (August 2022).** Mintel estimates the value of adult social care in the UK to grow by 9.9% between 2022/23 and 2026/27, with total spend in the market forecast to be worth £55.1 billion (excluding the value of informal care). Informal care continues to account for the majority of the total domiciliary care market, at an estimated 74% in 2021/22.

There are also a number of online resources you may find helpful:

- ◆ **The Care Inspectorate** – offers a number of publications and statistical reports on various sectors within the care industry in Scotland. (www.careinspectorate.com).
- ◆ **The Scottish Government** website has a number of statistical datasets relating to health and social care that you can access ([Health and Social care analysis](#))
- ◆ **Public Health Scotland** – publishes regular releases on a variety of topics which present data from across NHSScotland, including statistics on social & community care. ([Public Health Scotland](#)).

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How can I find out about my competitors?

Business Gateway's online guide to [Competitor Analysis](#) explains how to find your competitors, how to research what they're doing and how to act on what you learn about them.

Immediate competition will be from other businesses in your local area. There are several online directories which can be used to find company information and generate lists easily and at no expense. Many Local Authorities also publish local business directories on the web. Below are some key web resources:

- ◆ General business directories such as [Yell](#), [Thomson Local](#) or [Google Maps](#)
- ◆ Trade specialists like [EuroPages](#) (European directory), [The Wholesaler](#) or [Free Index](#)
- ◆ Business to business (B2B) specialists such as [Kompass](#)

Likewise, your local Chamber of Commerce may publish a members' directory; find your local Chamber on the [Scottish Chambers](#) website.

Once you've identified who your competitors are, the next step is to gather information on the way they do business. Which services do they provide? How do they market themselves? How much do they charge?

To learn about your competitors:

- ◆ Look for articles or adverts in local newspapers, trade press and directories.
- ◆ Try to read their marketing material; if the company has an online presence, visit the company's website as a first port of call. Not only does it give you a better understanding of the company's activities, it can also offer a wealth of information such as a company history or staff biographies, as well as the company's partners or suppliers
- ◆ Search for information on limited UK companies via the [Companies House](#) website
- ◆ Gain an insight into your competitor's performance using credit checks and the accounts that limited companies are required to submit to Companies House each year.

We can provide credit checks free of charge; if you are interested in using this resource, or looking for us to help you find relevant publications, please contact us by emailing info@bgateway.com or by calling **0300 013 4753**



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What about suppliers?

[Choosing and Managing Suppliers](#) can help you decide what you need from a supplier, how to identify one and how to choose one to deal with.

Trade associations or industry specific organisations may also be able to recommend suppliers or contacts. You can also use the aforementioned resources for finding competitors to find suppliers.

Once you have decided on a supplier, we can run a credit check on the company to help assess their financial stability. We provide credit checks free of charge; if you are interested in using the resource please contact us on info@bgateway.com or by calling **0300 013 4753**.

Who are my customers?

Your business plan should include information about the customers you would expect. Business Gateway's guides on [Market and customer research](#) will help you to identify new trends, opportunities, customers and competitors.

It can be useful to group your customers by geographical location, age or lifestyle. The websites listed below are freely available and can provide most of this information. If you can't find what you're looking for from these websites, please contact us and one of the team will be happy to help:

- ◆ Access the latest population estimates from the [National Records of Scotland \(NRS\)](#). NRS also offers demographic factsheets for each council area in Scotland, which can provide summary statistics for the area you will be based in.
- ◆ Information from the most recent census in 2011 is released via the official website. See in particular the [Census Area Profiles](#). Clicking on your area of interest will give the latest population figures, including estimates by age.
- ◆ [Understanding Scottish Places](#) has interactive profiles of towns and cities across Scotland. It can be useful for understanding the interrelationships and flows between towns, and also gives comparisons between two or more places.
- ◆ [Scottish Government Statistics](#) provide accurate and up-to-date statistics on Scotland, covering population, health, education and housing.
- ◆ [The Scottish Household Survey](#) provides information on the structure, characteristics, attitudes and behaviour of Scottish households, both at a national and local level.
- ◆ [Office for National Statistics \(ONS\)](#) is the recognised national statistical body for the UK. ONS covers a wide range of demographic, economic and social issues at a UK level.



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How can you help me with other aspects of starting my business?

The Business Gateway website has guides, videos, online tutorials and tips on all aspects of starting up a business in Scotland. Follow the links below to explore each resource:

Accountancy

Institute of Chartered Accountants of Scotland's (ICAS) "[Find a Chartered Accountant](#)" tool

Funding

[Practical information](#) on finance and funding for starting and growing your business

Insurance

[Business insurance guide](#)

Legal Help

Gov.uk "[Licence Finder](#)" tool

Law Society of Scotland's "[Find a Solicitor](#)" tool

Pricing

Business Companion [Pricing & payment guide](#).

Please note: the most effective way to research pricing is to conduct your own research – visit wholesalers or suppliers to obtain price lists, find quotes from similar companies and work out what other businesses in your area are charging

Promotion

[BG guides to Marketing](#)

Training

[Skills Development Scotland's My World of Work](#)

[Funding for training](#)

[Small Business Bonus Scheme \(Scotland\)](#)

Your local Business Gateway can offer events, workshops and 1:2:1 support on all aspects of starting and developing your business. Call the helpline on **0300 013 4753** to find out what is available in your area.

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