

Older Adults Care Home Market Position Statement

(Addendum to Age Well Market Position Statement)

July 2026

Eva Houghton

Commissioning Officer



Introduction

Purpose:

- Provide insight into the current and future supply and demand for older adult care home provision in Bolton.
- Support market development and strengthen partnership working with care home providers.

Aim:

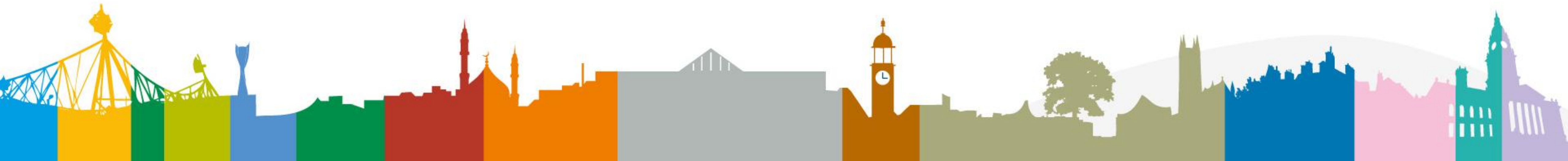
- Inform commissioning intentions and provider business planning.

Resources:

- Includes links to data sources to promote transparency and provide access to further information.

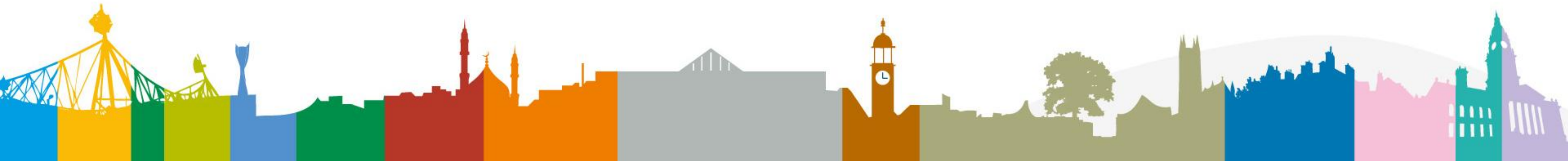
Updates:

- The Market Position Statement will be reviewed and updated every 6-12 months to reflect changes in the market and emerging trends.



Wider Context

- This document is an addendum to the **Age Well Market Position Statement**, published in April 2024 (see [market-position-statement-age-well](#))
- It supplements the key outcomes of the Age Well MPS by supporting the delivery of:
 - High quality residential and nursing care
 - Excellent dementia respite services
 - End of Life care and support for families
- It aligns with wider strategic priorities, including partnership working, co-production, collaboration, TEC and the workforce development.



Bolton Overview & Demographics

<https://www.boltonjsna.org.uk/>

Understanding Bolton’s changing population is critical for shaping future care home provision.

Bolton’s Population Profile (2024):

- Bolton’s population is **310,085**
- **52,356** residents (17%) are aged 65 and over
- Of these, **6,205** are aged 85+, the age group most likely to require residential and nursing care.

Age Profile:

- Females outnumber males across all age groups, particularly 75+

Diversity:

- Bolton has a diverse population, with **31.2%** of residents from non-white ethnic backgrounds, however, diversity amongst those aged 65+ is considerably lower (around **9%**).
- Culturally responsive care and support services are increasingly important which may create future opportunities for market development.

Age Group	Male Population	Female Population	Total Population
65–74	13,101	13,787	26,888
75–84	8,779	10,484	19,263
85+	2,388	3,817	6,205
Total	24,268 (46.35%)	28,088 (53.65%)	52,356

Table as of 2024

More detail can be found on <https://www.boltonjsna.org.uk/>.



Bolton Overview - Future Population Trends

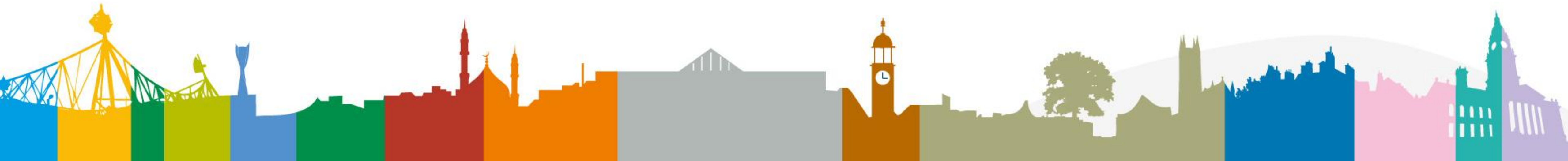
<https://www.boltonjsna.org.uk/>

Future Population Trends:

- By **2030**, the **65–75 age group** is projected to have the largest growth in population.
- By **2040**, Bolton's total population is projected to reach **317,000**.
- **62,027 (19.6%)** people will be aged **65+**, an increase of **9,671 older people** compared to current population.
- The population aged **75+** is projected to increase by **more than 20% between 2025 and 2040**.

Implications for the Care Home Market:

Population ageing, increasing health complexity and levels of deprivation are expected to drive rising demand for care services.



Bolton Overview – Factors Driving Demand

Key Demand Drivers:

- Older people are increasingly living with **multiple health conditions** and higher levels of dependency.
- **Frailty** is a significant factor in admission to long term residential and nursing care.
- Number of people living with **dementia** is predicted to grow and drive the need for relevant service development.
- **Falls** and **reduced mobility** often result in increased need for long term residential and nursing care.

Implications for the Care Home Market:

- Growing demand for dementia friendly facilities, both residential and dementia nursing designed for people with more complex needs.
- Increasing need for general residential supporting people with frailty and at risk of falls.
- Greater importance of integrated health and social care services to support people with complex needs.



Frailty

- Reduced resilience, complex needs, multiple conditions and medications
- Often leads to permanent care home residence



Dementia

Estimated cases in Bolton (65+):
2018: 3,274 → 4,089 by 2030

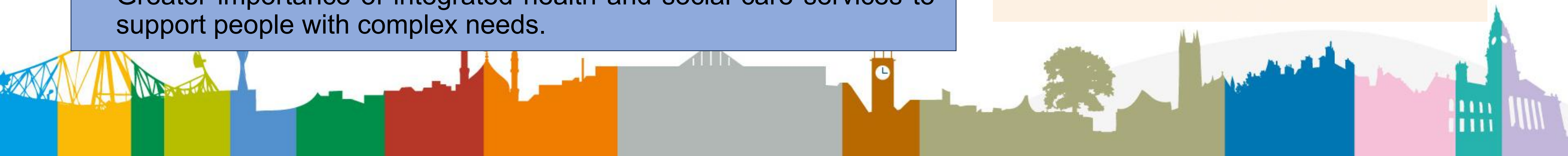
With severe dementia cases projected to be: 3,078 by 2030

Approximately 70% of care home residents currently have dementia or severe memory problems



Falls

- 30% of aged 65+ and 50% of aged 80+ fall annually
- Falls often cause hospitalisation and long-term care admissions



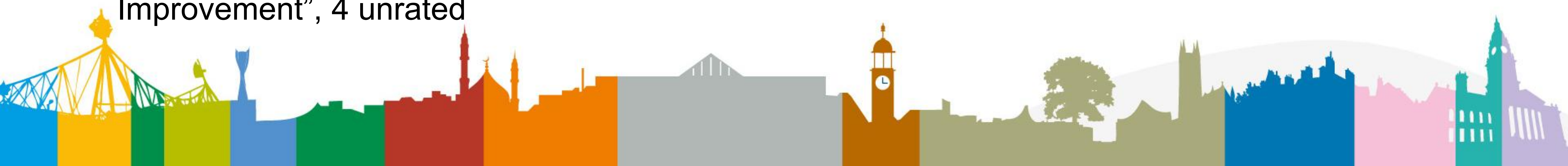
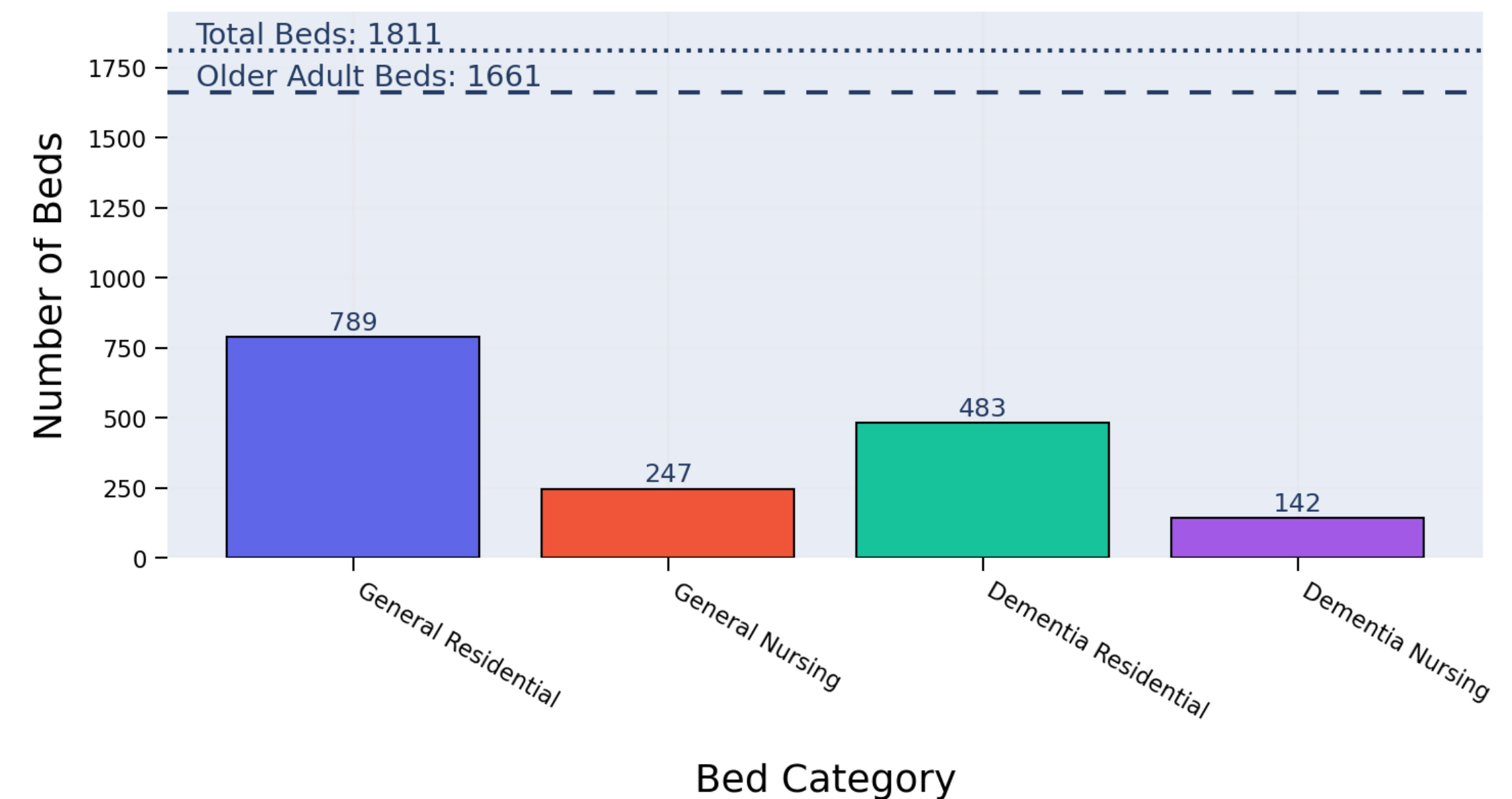
Bolton Care Home Market

<https://capacitytracker.com/>

As of 6th July 2026, there are:

- 59 CQC registered care homes in Bolton, 3 of these are Intermediate care services operated by the council or NHS
- 35 care homes are predominantly for older people, including 12 nursing homes
- 21 care homes are predominantly for younger adults
- 1,811 CQC registered beds
- 1,661 beds are predominantly for older adults aged 65 years and over (increased from 1,570 in March 2025)
- **Quality of care** – Bolton has 4 care homes rated “Outstanding”, 43 rated “Good”, 8 “Requires Improvement”, 4 unrated

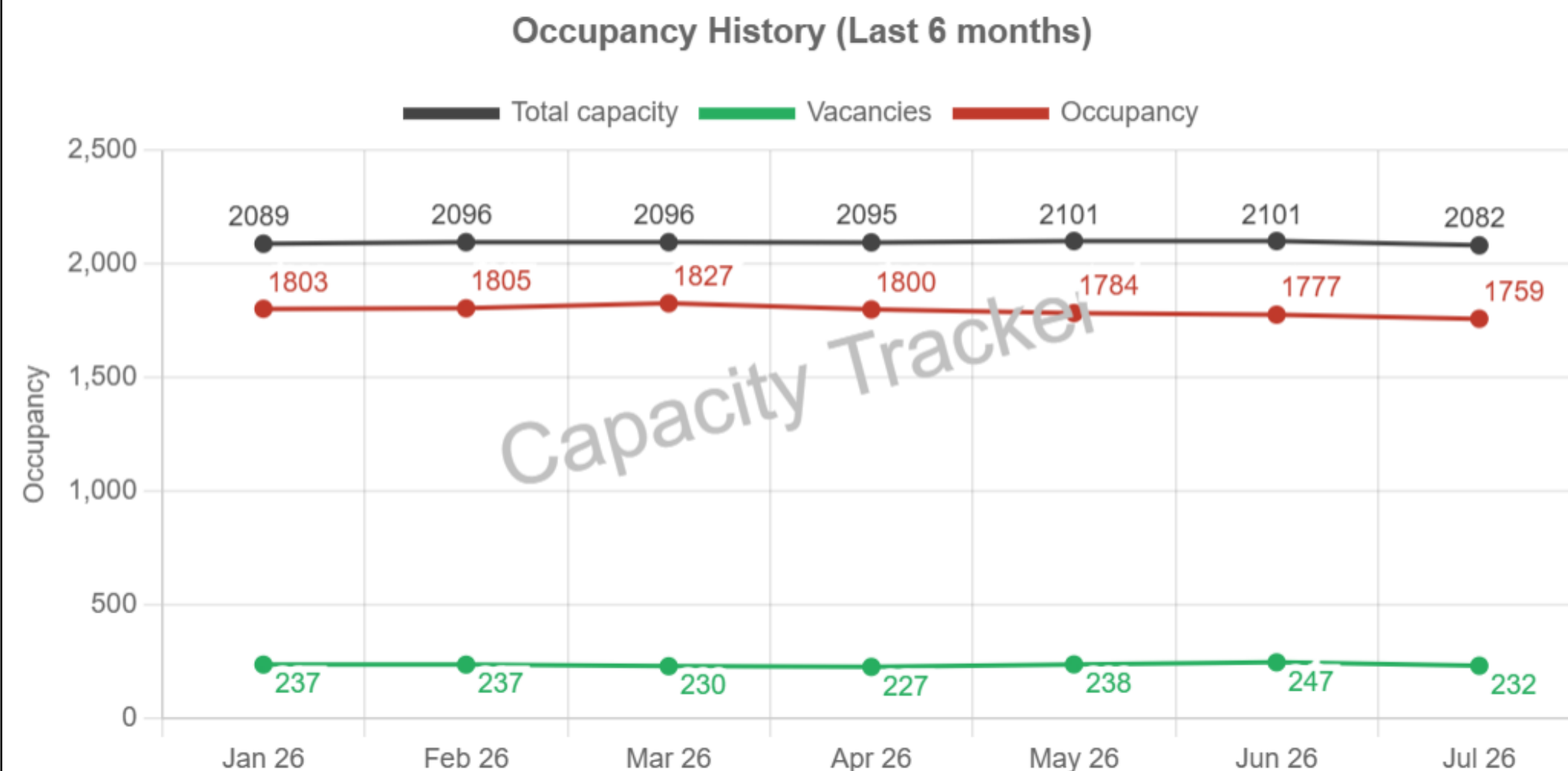
CQC Registered Beds by Category (July 2026)



Occupancy Trends and Available Capacity

<https://capacitytracker.com/>

- Healthy market is at around 85-90% of occupancy. Current occupancy across Bolton care homes is 93%, indicating limited capacity (6.7.26).
- However, there are seasonal fluctuations.



- Dementia nursing and general residential provision have the lowest vacancy rate, suggesting consistently strong demand.

Vacancy Type	Vacancies	Total	Occupancy	Occupancy %
Dementia Nursing	2	142	140	99%
Dementia Residential	39	483	444	92%
General Nursing	27	247	220	89%
General Residential	41	789	748	95%

Created: 06/07/2026

Implications for the Market:

High occupancy levels may limit the market's ability to absorb future increases in demand and will require development of capacity.

Out of Borough Care Home Placements

Key facts

- As of 19th July 2026, 105 people (65+) are in long term out of area placements, representing 11.8% of all long term care home placements made by Bolton Council.
- Most out of area placements in general residential care are due to individual choice (e.g. proximity to relatives)
- Out of area placements in specialist residential and nursing homes are often due to limited local availability of suitable provision.

Trends

- Increasing complexity of care needs is driving demand for more specialist care and support.
- Demand for specialist nursing and complex care provision is growing and cannot always be met within the local market.

Increasing demand for specialist and complex care highlights opportunities for further market development within Bolton.

People in out-of-area placements



People in out-of-area placements, by age band



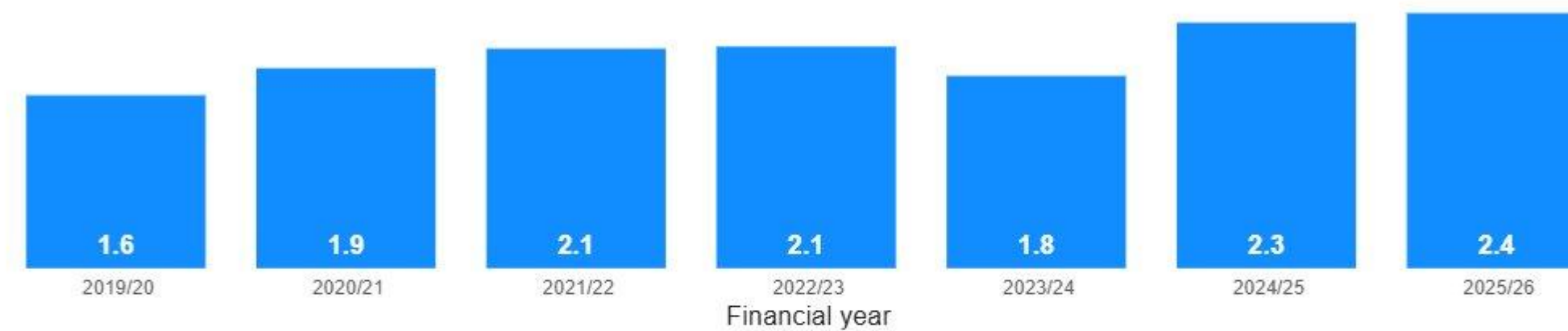
Increasing Length of Stay in Care Homes

Data by Information Analysis Team, Bolton Council

- Length of stay (LoS) has increased, and can be seen looking at the length of both concluded and ongoing stays
- Average LoS over the last 5 years approx. 2 years 2 months vs. 2 years 5 months for DHN

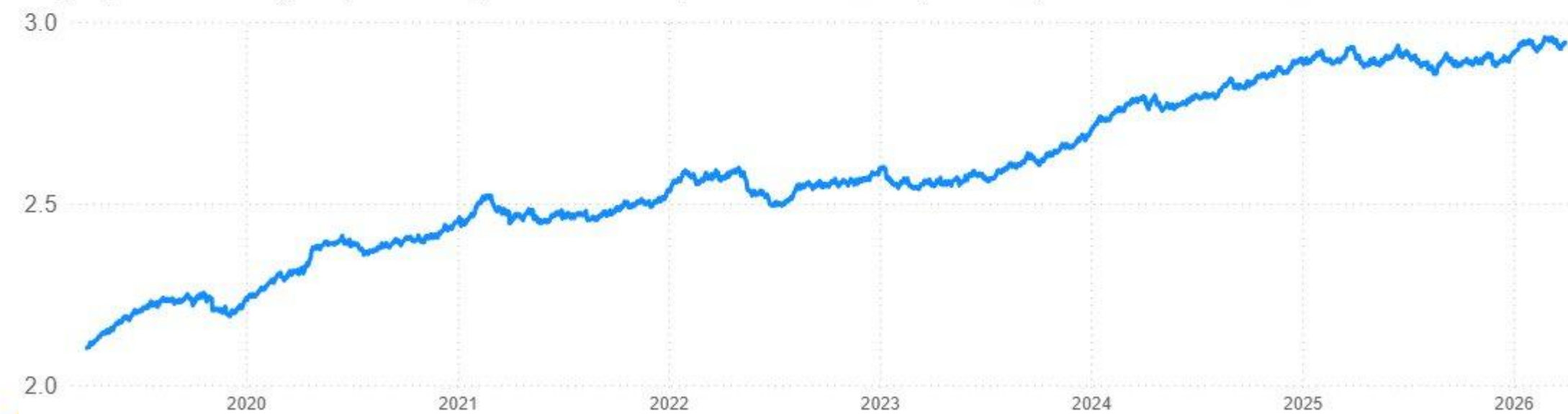
Bolton Commissioned Placements

Concluded length of stay
By ended financial year



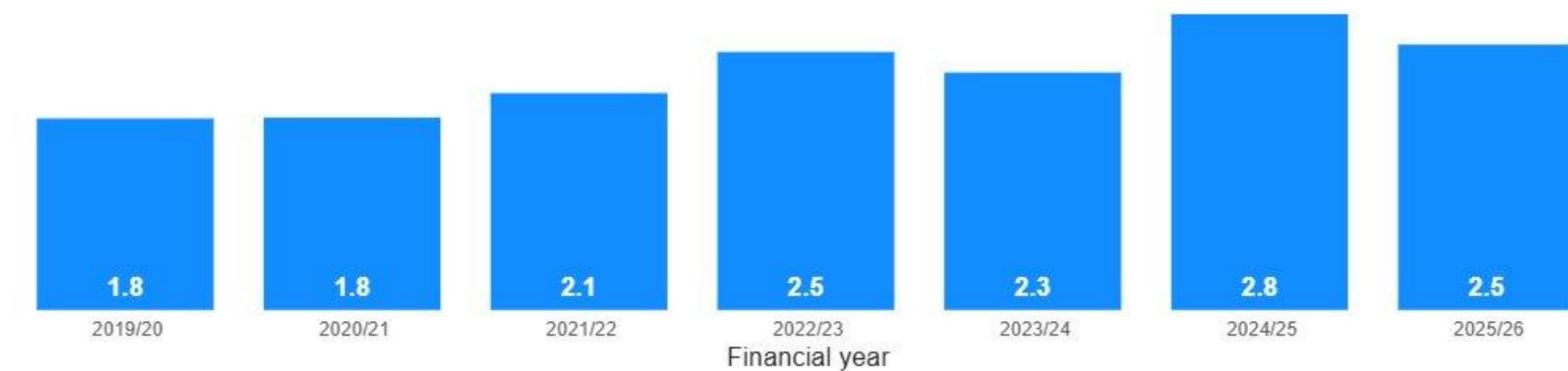
Ongoing length of stay

Every day, measures how long each person currently in a care home has spent in total across their long-term nursing/residential. Note vertical scale.



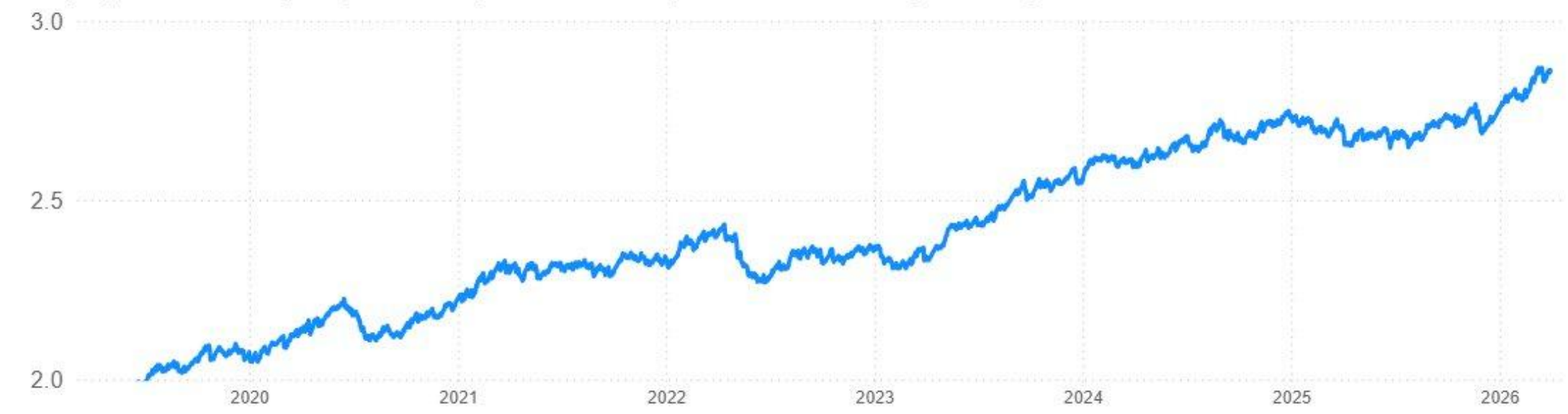
Dementia High Needs Placements

Concluded length of stay
By ended financial year



Ongoing length of stay

Every day, measures how long each person currently in a care home has spent in total across their long-term nursing/residential. Note vertical scale.

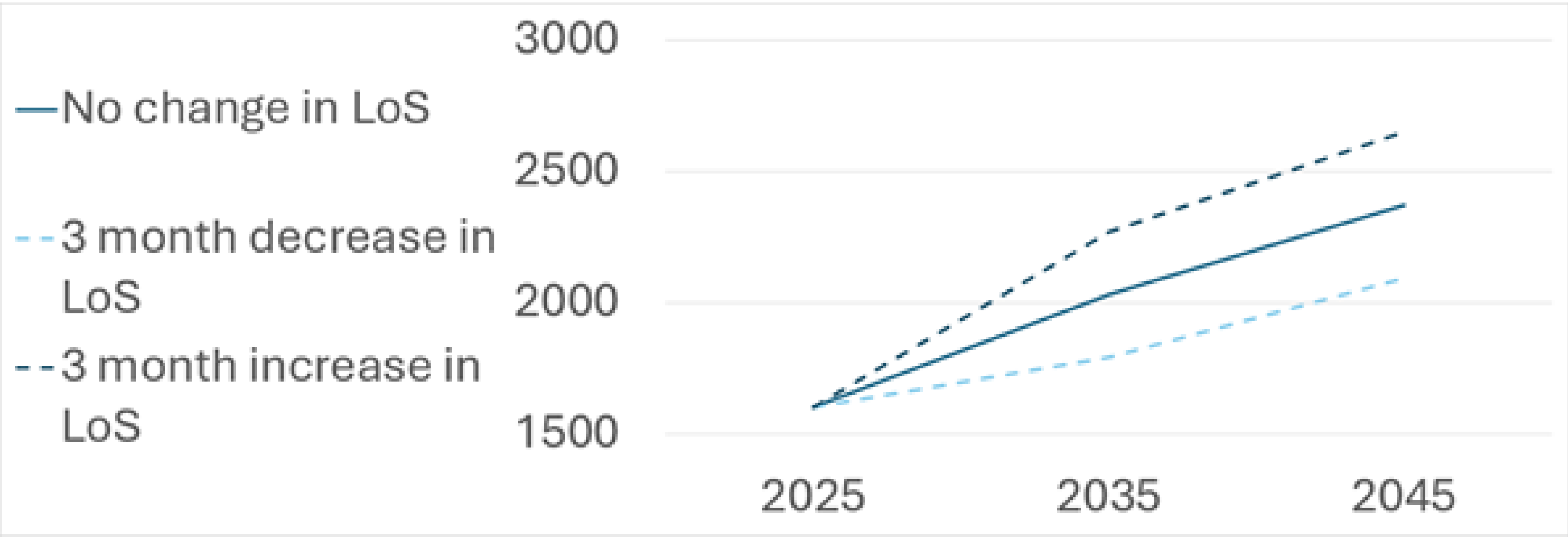


Projected Future Demand for Care Home Places

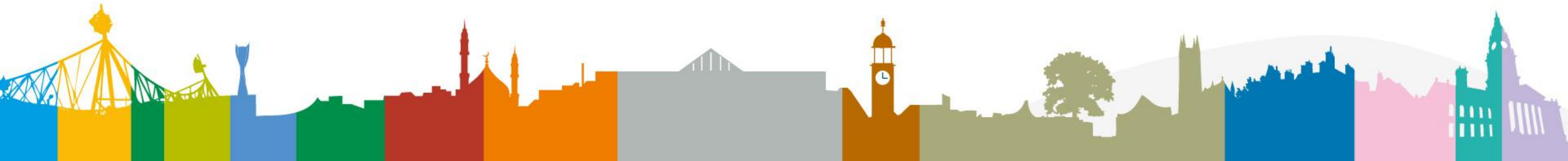
Data by Information Analysis Team, Bolton Council

The following forecasting is based on:

- Predicted 80+ population growth to estimate future admission numbers
- Approximately 1,600 people living in care homes in 2025
- Current average LoS of approximately 2 years 2 months



	2025	2035	2045
No change in LoS	1600	2030	2371
3 month decrease in LoS	1600	1792	2092
3 month increase in LoS	1600	2268	2649



Holistic Approach to Tackling Frailty

- People are **living longer** but spending more years in **poor health**, increasing frailty, falls, loneliness and preventable decline.
- Common themes preceding a move to a care home include reduced mobility, incontinence, dementia, falls, sensory impairment, hypertension, history of UTIs.
- **Physical activity** is one of the most effective ways to reduce frailty and maintain independence. Loss of mobility, rather than age alone, is often key driver of support needs.
- The government highlights the need for increased physical activity in older age as a preventative measure to maintain people's independence and ability to live at home for as long as possible and prevent or delay the need for long term care home admission.



<https://www.skillsforcare.org.uk/>

Key Information:

- According to Capacity Tracker, there are currently 1,560 employed Care Providing Staff, 605 Non Care Providing Staff and 136 employed Registered Nurses in care homes in Bolton.

Recruitment & Retention Challenges:

- Providers continue to report challenges recruiting and retaining registered nurses and care staff
- Adult Social Care Employment in the North West is projected to increase by **23% by 2040** (from approximately 260,000 to 320,000).

Workforce Risks and Mitigations:

- Workforce demographics, future immigration policy and increasing demand for social care will all impact workforce resilience and recruitment.
- Bolton Council supports the **GM Good Employment Charter ambition** for care providers to pay the **Real Living Wage**, helping to attract and retain staff.
- **The Employment Rights Act** may increase workforce stability and employment protections, while creating additional cost and compliance pressures for providers.
- Bolton Council is currently developing a **Workforce Strategy**.



Market Sustainability and Fair Cost of Care

Fair cost of Care:

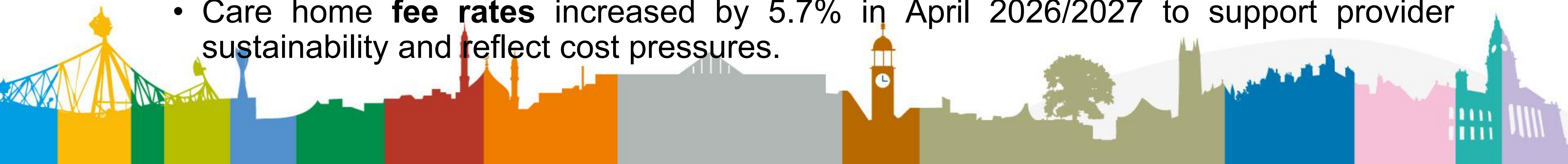
- In 2022, the Department of Health and Social Care (DHSC) required local authorities to undertake a **Fair Cost of Care** exercise to understand the true cost of providing residential and nursing care within the local market.

Key Market Findings:

- Bolton has fewer care home beds than national average. Care home occupancy is at 93%, compared with 87% nationally, indicating limited spare capacity.
- Workforce pressures, inflation and increasing demand continue to place financial pressure on providers.

Fees and Funding Response:

- Bolton's [Market-sustainability-plan-march-2023](#) set out actions to support market sustainability and capacity.
- The **Top-Up Policy** published in 2025 and is currently undergoing further update to increase clarity, improve transparency and sustainability.
- Care home **fee rates** increased by 5.7% in April 2026/2027 to support provider sustainability and reflect cost pressures.



Partnership Working with Care Home Providers

What Bolton Council Offers Providers:

- Regular Provider forums, communication and shared market intelligence
- Workforce development and training support
- Dedicated Quality Assurance link officer
- Opportunities to shape future service development through co-production and engagement

What Bolton Seeks from Providers:

- A commitment to co-production, innovation and continuous improvement
- Outcome-focused services that promote independence and wellbeing
- Delivery of social value through local employment and community investment
- Transparency, collaboration and sharing of market intelligence
- Achieve **CQC Good or Outstanding** rating

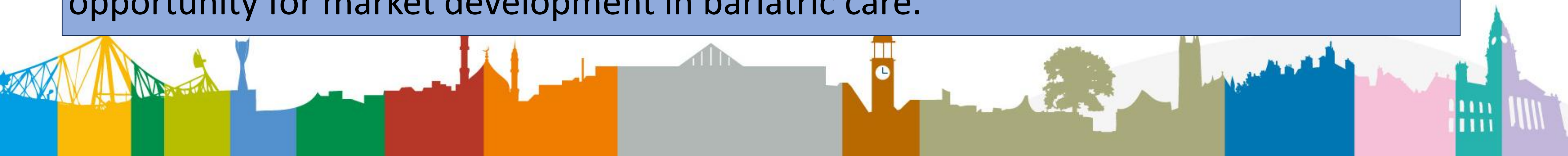


Bariatric bed review – Bolton Opportunity

- Market engagement indicates that Bolton has limited bariatric provision across **residential** (3) and **intermediate care** (2) services.
- Providers identified several **challenges** in supporting people with bariatric needs, including building design and room sizes, specialist equipment requirements, workforce demands, increased clinical risks and overall complexity of care.
- Demand for both long term and respite bariatric placements is evident and is expected to increase alongside rising levels of obesity and associated health conditions.

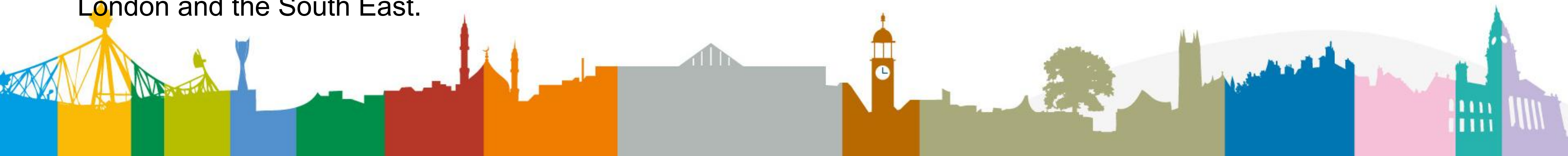
Implications for the Care Home Market:

Limited specialist provision, combined with increasing demand presents an opportunity for market development in bariatric care.



Care Home Development Opportunities in the current MPS

- Recent planning proposals and approvals have focused on larger, purpose-built care homes, typically accommodating 60-70 residents. These developments are often designed to meet more complex care needs, including nursing and dementia care.
- Purpose built care homes can better support accessibility, mobility, dementia friendly design and changing care needs.
- Egerton Manor was the first purpose-built care home constructed in Bolton since the pandemic. (Woodlands Westhoughton was the last one before this in 2015).
- New developments in process:
 - Horwich (Cedar Avenue) – a 62 bed care facility for adults with complex needs (approved June 2025)
 - Astley Bridge (Eagley Brook Way) – 66 bed care home (approved 2025).
- Savills estimate that UK will require an additional 139,000 care home beds in the next decade to keep pace with population growth. [Savills UK | Savills: The UK requires 139,000 new care home beds by 2036, increasing current supply by c. 30%](#)
- Since 2020 only 15% of new care home beds have been built in Northern England with around half being built in London and the South East.



Opportunities For Innovation

- **Artificial Intelligence (AI) and Care Technology:** Advances in AI and digital technologies present opportunities to enhance quality, improve outcomes, support preventative approaches and increase workforce efficiency.
- **Falls Prevention and Movement Monitoring:** AI enabled sensors and monitoring systems can identify falls, changes in mobility and unusual activity patterns, enabling timely intervention and reducing risks.
- **Predictive Health Alerts:** Data driven technologies can help identify early signs of deterioration, infection, frailty or cognitive decline, supporting proactive care and earlier intervention.
- **Digital Care Management:** Electronic care planning, digital recording systems and improved information sharing can support more efficient, person-centred care and reduce administrative burden.
- **Digital Inclusion:** Continued investment in digital skills and infrastructure will be important to maximize the benefits of technology for both residents and staff.



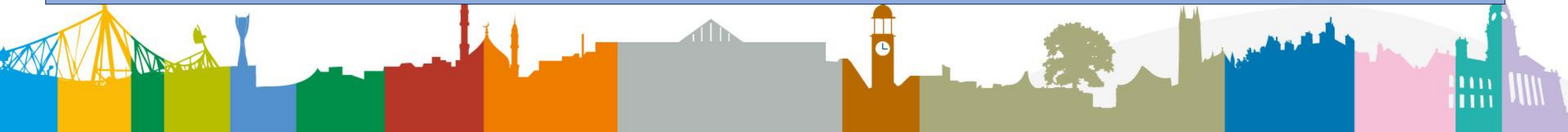
Commissioning Intentions & Market Opportunities

Bolton Council's Priorities

- **Expand dementia provision** through additional dementia care beds, dementia respite and intermediate care services. Expand dementia respite and flexible respite options.
- **Increase capacity for complex needs**, including dementia, nursing, bariatric care, to meet growing demand and reduce reliance on out of area placements.
- **Support innovative model of care**, including technology enabled care, digital solutions and preventative approaches that promote independence.
- **Strengthen respite services** by developing flexible and sustainable respite options that support carers and prevent crisis admissions.
- **Develop a skilled and sustainable workforce** through training, career development, fair employment practices and workforce retention initiatives.
- **Work in partnership with providers** to deliver high-quality, outcome-focused services that promote independence, wellbeing and social value.

Market Opportunity

Bolton's ageing population, increasing complexity of need and projected requirement for additional care home capacity present opportunities for investment in general residential, dementia, nursing and specialist provision.



Appendix - Care Home Fees 2022 Onwards

Category	2022/23	2023/24 (+%)	2024/25 (+%)	2025/26 (+%)	2026/27 (+%)
Residential (Older People)	£573	£653 (+13.96%)	£707 (+8.27%)	£754 (+6.65%)	£797 (+5.7%)
Residential Dementia (Older)	£644	£724 (+12.42%)	£785 (+8.43%)	£838 (+6.75%)	£886 (+5.73%)
Nursing Older People (Excl FNC)	£573	£703 (+22.69%)	£761 (+8.25%)	£812 (+6.70%)	£858 (+5.67%)
Nursing Dementia (Excl FNC)	£644	£774 (+20.19%)	£839 (+8.40%)	£896 (+6.79%)	£947 (+5.7%)



Provider Engagement and Feedback

- *Provider Engagement Session, 29th July 2026*
- **91% of providers** found the MPS helpful for business planning and understanding future market direction.
- Providers welcomed the data and intelligence provided, with no respondents identifying unnecessary content.
- Key **themes** included:
 - Recruitment and retention challenges.
 - Demand of information on grants, funding opportunities and local pilots – **Grant opportunities are advertised via the North-West Procurement Portal - The Chest.**
 - Opportunities to strengthen discharge planning and community support.
 - The importance of staff development, cultural awareness and partnership working.
 - The majority of providers preferred the presentation format, finding it clear and easy to digest

