



Homecare Association



The Homecare Deficit 2025

A report on the funding of older
people's homecare across the UK

Adrian Houghton

Policy Specialist - research & data, Homecare Association

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About the Homecare Association

The Homecare Association is the UK's membership body for homecare providers, with almost 2,230 members nationally.

We lead the way in shaping homecare and provide practical support for our members. For more information, please visit www.homecareassociation.org.uk.

Disclaimer

Public organisations provided information for this report under Freedom of Information legislation.

The Homecare Association regularly sense-checked responses. We asked public organisations to clarify their answers when required and corrected obvious mistakes. We excluded data that appeared questionable.

If an organisation gave an unsatisfactory answer or did not provide the specific information requested (which could include using an exemption), we could sometimes estimate the missing data.

We asked for an internal review if we were unhappy with the way a public organisation handled our Freedom of Information request.

With an inquiry of this size, it was not possible to get satisfactory answers to every question. This report presents the most comprehensive dataset we could gain. We note limitations in the data of specific organisations in this report.

Care providers must not use the data in this report as an alternative to the accurate pricing of individual tender bids. Likewise, state commissioners must not use the data to set maximum prices in contracts.

NB. We have rounded the data labels on graphs and figures in this report. But we have used exact figures when, say, adding or subtracting numbers in the text, which may cause occasional rounding differences.

Executive summary

Key messages – evidence of system failure

Homecare enables hundreds of thousands of older people to live well at home, reducing hospital admissions and supporting the wider economy. Yet despite these benefits, public bodies continue to purchase homecare at prices far below the true cost of delivery. This makes legal compliance hard, high-quality care undeliverable, and workforce sustainability unachievable.

Based on 282 Freedom of Information responses from public organisations across the United Kingdom, this report provides the most comprehensive evidence yet that the system has reached a tipping point. The consequences are profound: unmet need is rising, workforce shortages are worsening, and the Government's ambition for 'care closer to home' is becoming unachievable.

Without decisive intervention, older and disabled people will face longer waits for essential care, the NHS will continue to shoulder unnecessary costs, and providers will remain trapped between legal duties and impossible economics. Homecare is vital public infrastructure. Restoring it to sustainability is not only a moral imperative but an economic necessity.

1 A £3.25 billion funding gap threatens care for people who require services

To pay careworkers the same wage as NHS Band 3 healthcare assistants (£13.60 per hour for those with 2+ years' experience) and ensure provider sustainability, the United Kingdom faces a 2025-26 shortfall in homecare of £3.25 billion:

- £2.64 billion in England
- £135 million in Wales
- £320 million in Scotland
- £155 million in Northern Ireland.

Without urgent action, workforce losses to retail and logistics will accelerate, more providers will exit the market, and people will be left without essential care.

2 Systemic underfunding makes legal compliance difficult

- 29% of councils and Health and Social Care (HSC) Trusts pay average rates below the direct employment costs of careworkers at the minimum wage in each UK administration - almost quadruple the 2023 figure.

- No UK nation or region funds homecare at, or above, the Homecare Association's Minimum Price for sustainable homecare.¹
- Only one organisation (Pembrokeshire County Council) meets or exceeds its national Minimum Price.

This is not merely inadequate funding - it compels providers into *de facto* non-compliance with employment and care regulations.

3 The NHS pays less than councils despite higher complexity

The NHS weighted average rate (£23.96 per hour) is £0.43 lower than that for councils and HSC Trusts (£24.39 per hour) - even though NHS-funded homecare supports people with the most complex and intensive needs. This reverses the logic of health and care funding and undermines safe, integrated discharge from hospitals.

4 Hospital discharge gridlock is exacerbated by underfunded homecare

42% of hospital patients are waiting for services provided mainly through social care.² Each occupied bed costs the NHS around £400 per night³, yet commissioners struggle to fund homecare at £25 per hour. The Treasury loses far more in hospital inefficiency than it saves by underfunding social care.

5 Market fragmentation prevents workforce stability and employment-rights compliance

61% of councils and HSC Trusts purchase an average of no more than 500 hours per provider each week - a third or fewer of the 1,500 hours needed for efficient operation and financial sustainability. Only 1% use block contracts guaranteeing provider income. As a result, the forthcoming Employment Rights Bill on guaranteed hours will be unworkable in practice unless commissioning is reformed.

6 Political responsibility crosses party lines, but patterns persist

Long-term underinvestment by successive governments has entrenched poor commissioning and unsustainable fee rates. However, the data show clear trends:

¹ Our Minimum Price for Homecare is the amount required to ensure careworkers receive the minimum wage in each UK nation, and also includes the minimum contribution towards the costs of running a care business to meet quality and other legal requirements. It has gained wide recognition within the health and social care sectors in all four UK administrations.

² [Adult Social Care Reform: the cost of inaction | Health and Social Care Committee](#)

³ [The Hidden Problems Behind Delayed Discharges | The King's Fund](#)

- 69% of councils paying below careworker costs are Labour-controlled.
- 65% of those councils have held power since 2012 or earlier.
- Fee uplifts in most regions (including just 5% in the South East) have failed to keep pace with a 17% National Living Wage increase since 2023-24.

What must happen

Legislate: Introduce a statutory National Contract for Care requiring commissioners to pay cost-reflective rates calculated through an agreed national method.

Invest: Ring-fence social-care budgets and invest at least **£3.25 billion** across the United Kingdom to close the historic funding deficit in homecare.

Reform: Replace competitive minute-by-minute purchasing with geographic, capacity-based contracts that guarantee hours, enable stable employment, and support compliance with the Employment Rights Bill.

Without coordinated action on funding, legislation, and commissioning reform, the Government's commitments to Neighbourhood Health Services, Fair Pay Agreements, and care closer to home will fail. Maintaining the status quo is not merely unsustainable - it is, in effect, unlawful, uneconomic, and unconscionable.

Discussion

Demand, workforce and funding

Demand for homecare keeps rising, driven by population ageing, more complex needs and the push to move care out of hospitals. Yet the workforce is insufficient to meet this. In September 2025, Skills for Care reported a vacancy rate in homecare of 9.8% in England⁴, over four times higher than the wider economy.⁵ In recent research by the Homecare Association, 70% of providers reported being unable to meet demand because they cannot recruit staff.⁶

Government policy has made this worse. Closing international recruitment routes removes a vital stabilising mechanism without creating domestic capacity to replace it. At the same time, the Employment Rights Bill⁷ will increase employment costs by expanding sick pay and introducing guaranteed hours, without additional funding to

⁴ [Recruitment and retention tracker | Skills for Care](#)

⁵ [VACS02: Vacancies by industry - Office for National Statistics](#)

⁶ [Voices of Homecare: Workforce | Homecare Association](#)

⁷ [Employment Rights Bill: factsheets - GOV.UK](#)

meet those obligations. These decisions shift responsibility for national employment reform onto under-funded local commissioners, forcing providers to absorb unfunded costs, which they cannot do, deliver non-compliant care or withdraw from contracts.

Pay levels also distort the wider labour market. Retail and logistics now offer higher entry pay than social care, draining experienced careworkers and increasing turnover. A sector that employs around 540,000 people in England alone⁸ cannot function on goodwill and low margins. Legislating for fair pay without enforcing fair commissioning is politically symbolic but practically meaningless.

Without a coherent workforce strategy linked to sustainable commissioning, ministers cannot deliver on their ambition to expand care in the community. Under-funded homecare impedes discharge from hospitals, worsens inequalities, and raises costs elsewhere in the system.

Commissioning practices

Most commissioning and contracting practices focus on price, not outcomes for the people needing care. Most councils/HSC Trusts rely on using frameworks, but few use block contracts that guarantee hours. Forcing hundreds of small providers to compete at low prices reduces upfront costs for public commissioners. This approach risks safety and quality, creates market instability, discourages investment, and drives high turnover among careworkers who cannot rely on a steady income.

Fragmented purchasing also prevents providers from meeting new legal duties. The Employment Rights Bill's guaranteed hours clause assumes predictable income streams, but the dominance of frameworks and spot contracts will make compliance impossible. Providers risk legal penalties for conditions created by the state's own contracting practices.

A few councils now take a zone-based or lead-provider model, paying for planned capacity rather than minutes of contact. These models reduce transaction costs, improve retention, and strengthen local partnerships with the NHS. Scaling them nationally would align commissioning with the Fair Pay Agreement and help deliver the Government's commitment to Neighbourhood Health Services.⁹

Until commissioners stop rewarding the lowest bid, regardless of safety or legal compliance, the market will continue to fracture, and the workforce reforms Parliament passes will fail on the ground.

⁸ [The state of the adult social care sector and workforce in England 2024-25 | Skills for Care](#)

⁹ [Millions of people to benefit from healthcare on their doorstep - GOV.UK](#)

Pricing below legal and ethical standards

Not a single UK region funds homecare at, or above, its Minimum Price for Homecare. The share of councils paying below careworker costs has dramatically increased, showing a systemic disregard for statutory pay requirements. When commissioners set rates that fall short of legal wage costs, they force providers into non-compliance or exit.

Low fee rates also expose the limits of voluntary commitments like UNISON's Ethical Care Charter. Our findings undermine confidence in voluntary frameworks and show the need for a legislated National Care Contract that makes cost-reflective rates a legal duty.

The impact on the NHS and the wider economy

Under-funding homecare traps people in hospital and inflates NHS costs. 42% of patients in hospital are waiting for services provided mainly through social care.¹⁰ Each occupied bed costs the NHS around £400 per night¹¹, yet councils struggle to fund homecare at £25 an hour. The Treasury loses far more in hospital inefficiency than it saves by underfunding social care.

The government's Ten-Year Health Plan¹² rests on shifting care into the community, but integration cannot happen while the NHS continues to pay lower rates for homecare than local authorities. That pattern reverses the logic of prevention and undermines ministerial pledges on population health.

Homecare investment would pay for itself many times over through avoided admissions, higher productivity, and fewer unpaid carers leaving the workforce. Current policy treats social care as a cost centre rather than economic infrastructure. Reframing it as a productive investment in national capacity is essential if ministers want growth, prevention, and sustainability to mean more than slogans.

Cost-shifting between NHS and councils

Evidence from the Association of Directors of Adult Social Services (ADASS)¹³ suggests some NHS bodies are reducing Continuing Healthcare (CHC) packages or reclassifying healthcare needs as social care needs, transferring costs from the NHS to means-tested council services. This breaches the fundamental principle that NHS treatment should be free at the point of delivery. When complex healthcare needs are reclassified as social care, individuals and families face financial assessments and potential charges for care that should properly be NHS-funded.

¹⁰ [Adult Social Care Reform: the cost of inaction | Health and Social Care Committee](#)

¹¹ [The Hidden Problems Behind Delayed Discharges | The King's Fund](#)

¹² [10 Year Health Plan for England: fit for the future - GOV.UK](#)

¹³ [ADASS Spring Survey 2025 - ADASS](#)

This practice not only increases individual hardship but also shifts costs onto already-strained council budgets, worsening the funding deficit this report documents. The government must issue clear guidance preventing inappropriate cost-shifting and establish robust mechanisms to challenge incorrect needs classifications.

The politics of underfunding

Most councils paying below careworker costs now fall under Labour control, despite the party's pledge to improve pay and conditions. Many local leaders argue they inherited underfunding, but 65% of Labour-run councils paying below careworker costs have held power since 2012 or earlier. Long-term structural underfunding and commissioning practices across administrations have entrenched poor outcomes.

Central government also bears responsibility. Over the last 15 years, central governments have progressively reduced the amount of funding for adult social care, expecting local authorities to cover costs by increasing council tax. Council tax is regressive and this mechanism disadvantages regions of higher deprivation, where needs are often higher. The fiscal framework incentivises councils to contain costs, not to improve quality or sustain markets. Without legislative change, even well-intentioned administrations will continue to commission below cost to survive within capped budgets.

The absence of a statutory floor for care prices allows this cycle to persist. A National Care Contract, underpinned by transparent cost modelling, would break that dependency and create accountability for both local and national decision-makers.

Homecare funding now sits at the intersection of local government finance reform, NHS integration, and labour market regulation. Fixing it requires coordinated policy, not isolated pilots or short-term grants. Until governments treat homecare as a core public service rather than a discretionary purchase, the United Kingdom will keep spending billions managing the consequences of neglect instead of the causes.

Recommendations

The Government must act on three strategic fronts to prevent further deterioration of homecare services and enable delivery of its stated policy objectives. These reforms are interdependent - funding without legislative change will fail, and legislation without commissioning reform will prove unenforceable.

Funding and financial sustainability

The immediate priority is to stabilise the sector financially and establish sustainable funding mechanisms.

Immediately

- **Stabilise funding:** Ring-fence social care budgets and invest at least **£3.25 billion** in homecare across the United Kingdom.
- **Give providers certainty:** Require local authorities and NHS bodies to confirm fee rates for the coming year by the end of February, so providers can plan effectively and meet their employment obligations.

By April 2026

- **Fund Statutory Sick Pay changes:** Allocate ring-fenced funding to local authorities and the NHS so they can uplift homecare contracts in line with the additional costs of Statutory Sick Pay and other measures in the Employment Rights Bill. This should preferably be channelled through a National Contract for Care.

By October 2026

- **Guarantee fair pay parity:** Recognise that ‘fair pay’ means funding a competitive wage rate at least on a par with the NHS. HM Treasury must announce adequate funding to support this ahead of Fair Pay Agreement negotiations. The £500 million announced to date will not achieve the Government's aspirations.¹⁴ Expecting self-funders to cover £300 million of the increase in costs risks them delaying or reducing their purchase of care and relying more on unpaid carers. This could result in more people in hospital and damage to the economy.
- **Fund delegated health tasks:** Allocate dedicated funding for delegated healthcare tasks and require appropriate NHS clinical oversight, recognising that homecare workers increasingly deliver complex healthcare interventions.

Legislative and regulatory reform

Legal frameworks must create enforceable minimum standards and end the cycle of unlawful commissioning.

¹⁴ [£500 million for first ever fair pay agreement for care workers - GOV.UK](#)

Immediately

- **Legislate for fair commissioning:** Introduce a statutory National Contract for Care, with sustainable fee rates calculated using an agreed method, and a legal requirement on commissioners to pay at least this rate, supported by government investment.
- **Plan the workforce:** Develop a credible statutory workforce plan with the sector to ensure enough careworkers are available to meet the UK's ageing population and prevent continued drift to lower-skilled but better-paid employment.

By 2027

- **Give clear commissioning guidance:** Issue statutory directions to commissioners on when it is appropriate to commission, promote or support unregulated care, to prevent unsafe practices and a two-tier system.

Commissioning and system integration

Fundamental reform of how care is commissioned is essential to deliver on government commitments around guaranteed hours, integration and Neighbourhood Health Services.

Immediately

- **Integrate homecare:** Embed homecare fully within Neighbourhood Health Services to support integrated community-based care and align with the Government's prevention agenda.
- **Review signatories:** Call on UNISON to assess all councils that have signed its Ethical Care Charter, given that almost a third of signatories now pay below the cost of employing careworkers.

By 2027

- **Reform commissioning practices:** Work with local authorities to develop a national plan for commissioning and funding that enables the shift away from zero-hours contracts required by the Employment Rights Bill. This must include:
 - ➡ Ending the 'daily auction' of care packages to the lowest bidder.

- ➡ Organising care geographically, with block contracts large enough to support efficient rotas and shift-based rather than minute-by-minute payment.
- ➡ Requiring commissioners to pay for work cancelled at short notice and to fund providers to retain staff whilst clients are in hospital.

Without action across all three strategic areas - funding, legislation and commissioning - the Government's commitments to Neighbourhood Health Services, the Fair Pay Agreement and the Employment Rights Bill cannot be delivered. The evidence demonstrates that piecemeal reform will fail. Only coordinated, comprehensive change can address a crisis that has been 15 years in the making.

Introduction

The Homecare Association wanted to calculate the current funding deficit in homecare. This is the gap between the budget allocated and the amount needed to ensure high-quality, sustainable services.

We asked 276 public organisations in the United Kingdom about fees paid for homecare services. These included local authorities in England, Wales and Scotland; Health and Social Care (HSC) Trusts in Northern Ireland; Integrated Care Boards (ICBs) in England; Local Health Boards in Wales; and regional NHS Boards in Scotland. We used the Freedom of Information Act 2000 and Freedom of Information (Scotland) Act 2002 to gather this information.

We asked each public organisation to provide information, including on the hourly prices it paid to providers, the hours purchased from providers and its total spend on homecare. We asked about regulated homecare services delivered to people aged 65 years and over by homecare providers in the independent and voluntary sector during a sample week in April 2025.

We used the figures to compute the deficit in funding for homecare hours currently purchased. This is based on careworkers receiving the same wage as NHS Band 3 healthcare assistants with 2+ years' experience (£13.60 per hour in 2025-26).

We confined the Freedom of Information (FOI) request to the care of older people. This is partly because services for this group make up the bulk of many independent and voluntary sector providers' work. In addition, services for younger adults also often cost more, which risks hiding underfunding of care for older people.

Two Integrated Care Boards (ICBs) - South Yorkshire ICB and West Yorkshire ICB - split their responses by area (namely, the old Clinical Commissioning Groups within the ICB), resulting in 282 responses. This figure excludes Enfield Council that replied too late to be included in our analysis. 264 of the organisations contacted purchase homecare services from the independent and voluntary sector.

This report is the sixth such Freedom of Information exercise undertaken. It analyses the data from responses to the request and updates our findings from previous editions, most recently in 2023.

To see the full request and for more information on the method used, please see Appendix 1.

Detailed findings

Weighted average prices paid for homecare

The overall weighted average¹⁵ price (across both councils/HSC Trusts and NHS bodies) for an hour of homecare for older people in the United Kingdom during the 2025 sample week was £24.36.

The administration with the highest overall weighted average was Wales, with a rate that was £2.40 per hour above that of any other UK nation. Meanwhile, the weighted average in Northern Ireland was £2.75 below the average for the United Kingdom overall.



Figure 1. Overall weighted average hourly prices paid for homecare in each administration and the United Kingdom during the 2025 sample week

In England and Wales, the weighted average for the NHS was lower than the respective price for local government, repeating a trend that was becoming apparent in the Homecare Deficit 2023.¹⁶ This is deeply worrying, as the NHS restricts funding for homecare to those with the most complex healthcare needs, including care for life-limiting conditions. Greater complexity of need requires higher levels of training and skill and reasonably should incur higher cost to the NHS.

¹⁵ We define a 'weighted average' on page 152 of this report.

¹⁶ [The Homecare Deficit 2023 | Homecare Association](#)

In this year's findings, the UK situation appears to be deteriorating further. In 2023, the council/HSC Trust weighted average was just £0.01 per hour above that for the NHS, while the difference has now increased to £0.43 per hour. This means that people with very complex care needs funded by the NHS have less funding available for their care packages than we have seen before.¹⁷



Figure 2. Weighted average hourly prices paid by councils/HSC Trusts and the NHS for homecare in England, Wales and the United Kingdom during the 2025 sample week

We have also looked at the weighted average rates for individual government and NHS regions of the United Kingdom to compare.

Government regions/devolved administrations

Wales had the highest weighted average within the government regions of England and devolved administrations. Like the respective exercise in 2023, Northern Ireland and Greater London had the two lowest. The gap between them has shrunk slightly - in 2023, it was £0.38 per hour, while it is now only £0.26 per hour. Worryingly, the gap between Greater London (as the second lowest region) and the other regions has almost doubled since 2023.

¹⁷ There is no figure for the NHS in Scotland - we explain this on page 131.



Figure 3. Weighted average hourly prices paid for homecare in the government regions of England and the devolved administrations during the 2025 sample week

NHS regions

The following graph shows the weighted averages in the NHS regions. Note that NHS South East's average was based on information from only a third of the region's ICBs, while we have not included NHS London and NHS North West because only

one body contributed to the weighted average in each region (meaning we cannot calculate a meaningful average).



Figure 4. Weighted average hourly prices paid for homecare in the NHS regions of England and by the NHS in Wales during the 2025 sample week

We now compare weighted averages between respective NHS and government regions within England and Wales. Where necessary, we group regions together to ensure a fair comparison.

Therefore, we have calculated a weighted average for the 'Midlands' government region using council responses from the East Midlands and West Midlands. Similarly, a 'North' government region weighted average incorporates data from councils in the North East, North West and Yorkshire and The Humber, while the 'North' NHS region average uses figures from NHS North East and Yorkshire, and NHS North West.

The following chart contrasts six NHS and government regions from the current sample week, as well as those in 2023 and 2021¹⁸. A positive figure indicates a higher NHS region weighted average.

- Two-thirds of regions had a higher government weighted average than the NHS, most notably the East of England and the South West.

¹⁸ [The Homecare Deficit 2021 | Homecare Association](#)

- The East of England statistic has consistently declined since the FOI request in 2021, when the NHS's weighted average was £0.70 higher.
- In the 'Midlands', the NHS's figure was still higher (by £0.69), but the gap was much smaller than in 2021.
- The NHS average in Wales was £2.92 below that for local government in 2023; however, the difference has now reduced because of a significant increase in the NHS statistic (see Figure 6).

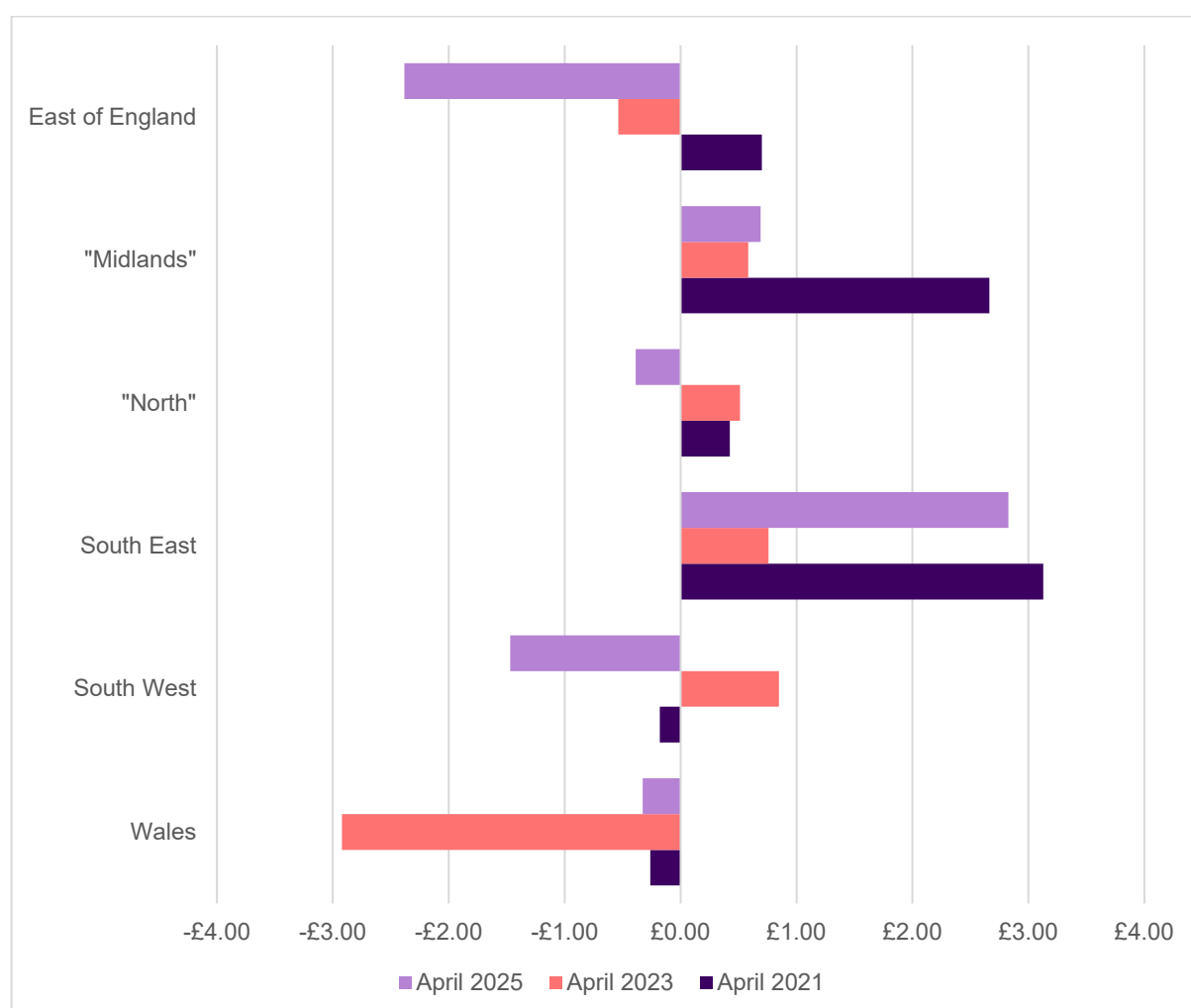


Figure 5. Difference between the weighted average hourly prices paid for homecare in the NHS and government regions of England and Wales during the 2025, 2023 and 2021 sample weeks

The National Living Wage (NLW) has increased by 17% since 2023-24¹⁹ when we conducted the last FOI exercise.²⁰

Despite this, only one administration - NHS Wales - had an uplift in the weighted average that kept pace with this figure.²¹ Most worryingly, the local authority uplift in England was just 13%, the NHS increase 11%. This is particularly concerning, since the prices paid for homecare in England and the devolved nations were too low to begin with, as explained in the next section.

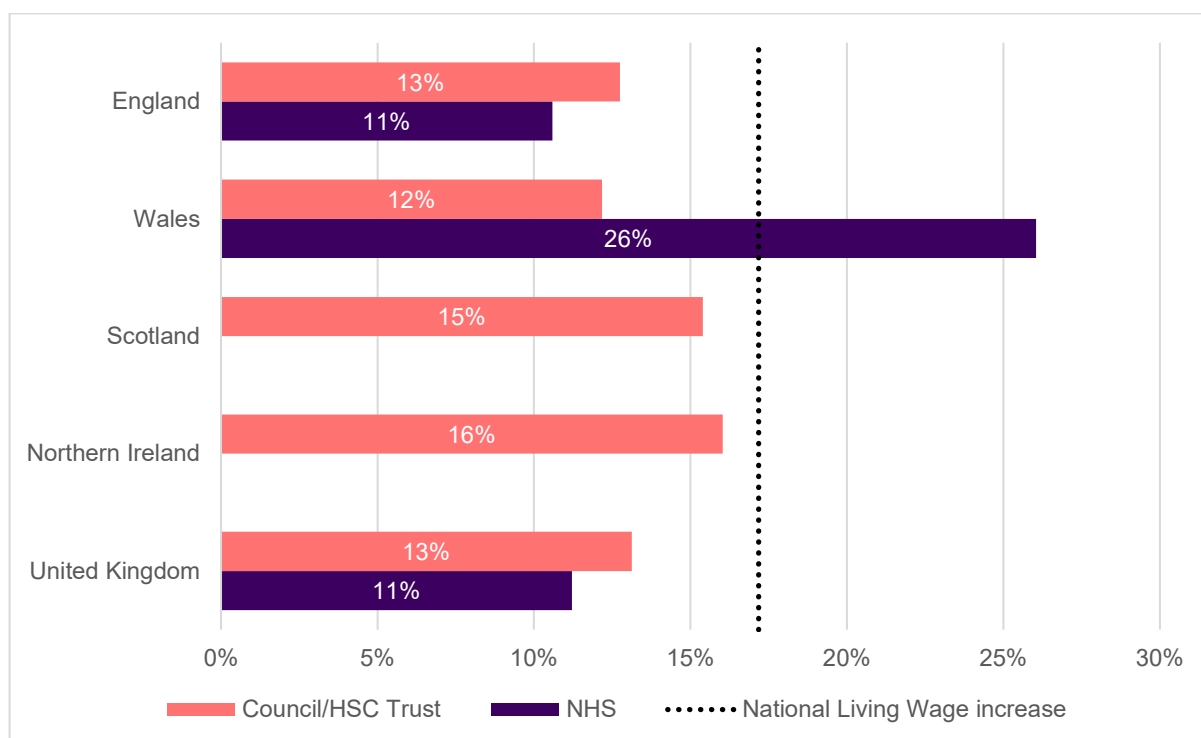


Figure 6. Percentage increase in the weighted average hourly price paid for homecare by councils/HSC Trusts and the NHS (where relevant) in each administration and the United Kingdom since 2023-24

It is unsurprising, therefore, that the uplift in weighted averages from 2023-24 exceeded the NLW increase in only one of England’s government regions - the North East. Outside the North East, the uplift was quite similar in most other regions. However, the South East has become a concerning outlier, as the average increase was only 5%.

¹⁹ [National Minimum Wage and National Living Wage rates - GOV.UK](#)

²⁰ The Autumn Budget 2024 also unveiled major changes to employers’ National Insurance Contributions that have profoundly affected the social care sector.

²¹ The devolved administrations have committed to careworkers receiving the Real Living Wage, but we still include them on this graph to compare with England.

Fees that fall short of the increases in minimum wages put at risk the people who rely on high-quality care to live independently at home. Shortfalls also put immense pressure on providers, careworkers and NHS services.



Figure 7. Percentage increase in the weighted average hourly price paid for homecare by councils in each government region of England since 2023-24

Minimum Price for Homecare

Every year, the Homecare Association calculates a Minimum Price for Homecare for each UK nation. This is the hourly amount required for providers to meet both employment and care regulations and ensure financial sustainability. This helps build capacity in the sector and reduces the flow of talent to lower-skilled but better paid jobs in retail and hospitality. We base the minimum rate on a careworker receiving the National Living Wage in England and the Real Living Wage in the devolved administrations (as committed by each government).

Each Minimum Price comprises three elements: careworker costs (the minimum careworker pay rate plus employment on-costs); business costs and a small profit share.

The following table shows the Minimum Prices for 2025-26 and the amount needed to pay careworker costs only.

Nation	Minimum Price 2025-26	Careworker costs 2025-26
England ²²	£32.14	£22.71
Wales ²³	£33.90	£24.40
Scotland ²⁴	£32.88	£23.42
Northern Ireland ²⁵	£32.84	£23.41

Figure 8. Minimum Price for Homecare 2025-26 and associated careworker costs in each UK nation

No nation or region, in either local government (and HSC Trusts in Northern Ireland) or the NHS, had a weighted average in 2025-26 that met the respective Minimum Price. Worse still, the averages for the Greater London government region and Northern Ireland sat below the value of direct careworker costs.

Among individual local authorities, HSC Trusts and NHS bodies across the United Kingdom, only one organisation, Pembrokeshire County Council in Wales, was paying an average rate at, or above, the Minimum Price for the specific nation. This is just 0.4% overall of all public organisations (councils, HSC Trusts and health bodies) that

²² [Minimum Price for Homecare - England 2025-2026](#)

²³ [Minimum Price for Homecare - Wales 2025-2026](#)

²⁴ [Minimum Price for Homecare - Scotland 2025-2026](#)

²⁵ [Minimum Price for Homecare - Northern Ireland 2025-2026](#)

provided figures and whose response we accepted.²⁶ In fact, Pembrokeshire was also the only organisation to exceed the Minimum Price of any UK nation (£32.14 per hour). This means public organisations across the United Kingdom are commissioning and purchasing homecare at rates that prevent compliance with employment and care regulations.

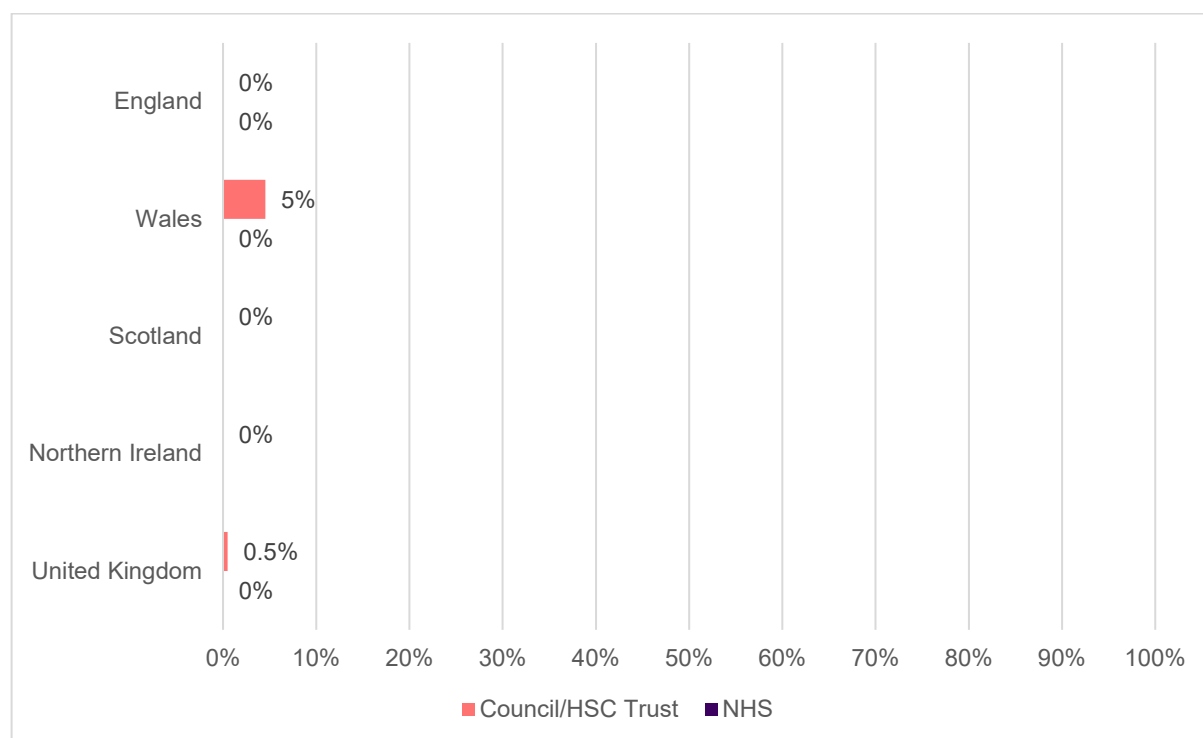


Figure 9. Percentage of councils/HSC Trusts and NHS bodies in each administration and the United Kingdom whose average hourly price paid for homecare during the 2025 sample week was at, or above, the respective Minimum Price

Among UK councils/HSC Trusts only, the percentage meeting the Minimum Price (0.5%) is now notably lower than for any previous FOI exercise we have conducted (based on the specific minimum at that time). Indeed, this statistic has steadily deteriorated since the 2018 sample week and shows that these organisations are consistently failing to fund homecare at sustainable levels.

NB. The Freedom of Information exercises in 2014, 2016 and 2018 did not include NHS bodies.

²⁶ The average price provided by one health body, Bath and North East Somerset, Swindon and Wiltshire ICB, also met the Minimum Price value. However, its figure was significantly higher than any other public organisation in the United Kingdom. While the ICB confirmed the accuracy of its response, we remained unconvinced and so have not used this figure in our analysis.

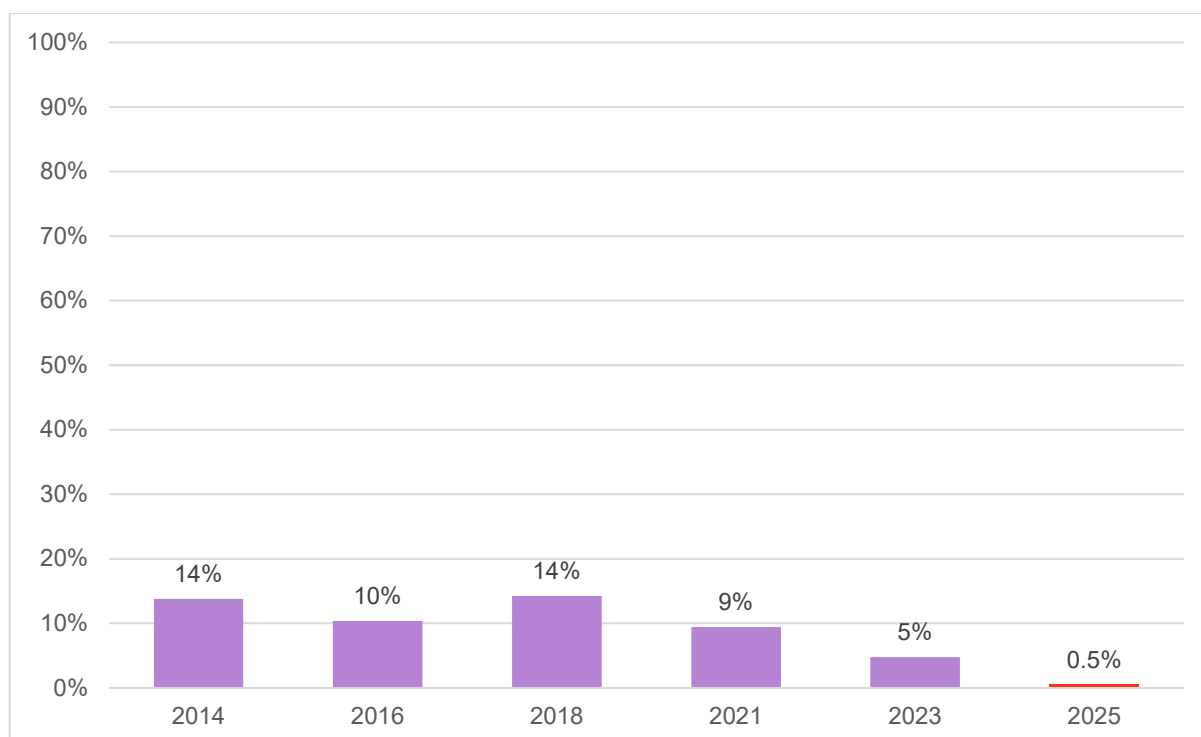


Figure 10. Percentage of councils/HSC Trusts in the United Kingdom whose average hourly price paid for homecare during the sample week was at, or above, the respective Minimum Price by year

We recorded 63 UK public organisations whose average hourly rate was not even enough to cover careworker costs from the Minimum Price for each nation. The overwhelming majority of these were councils/HSC Trusts. Please see Appendix 3 and Appendix 4 for the full list.

- The average of each HSC Trust in Northern Ireland was below the value of careworker costs.
- Around three-tenths of councils in England and Scotland were not meeting careworker costs.
- Only one local authority/NHS body in Wales failed to meet careworker costs (Cardiff Council).

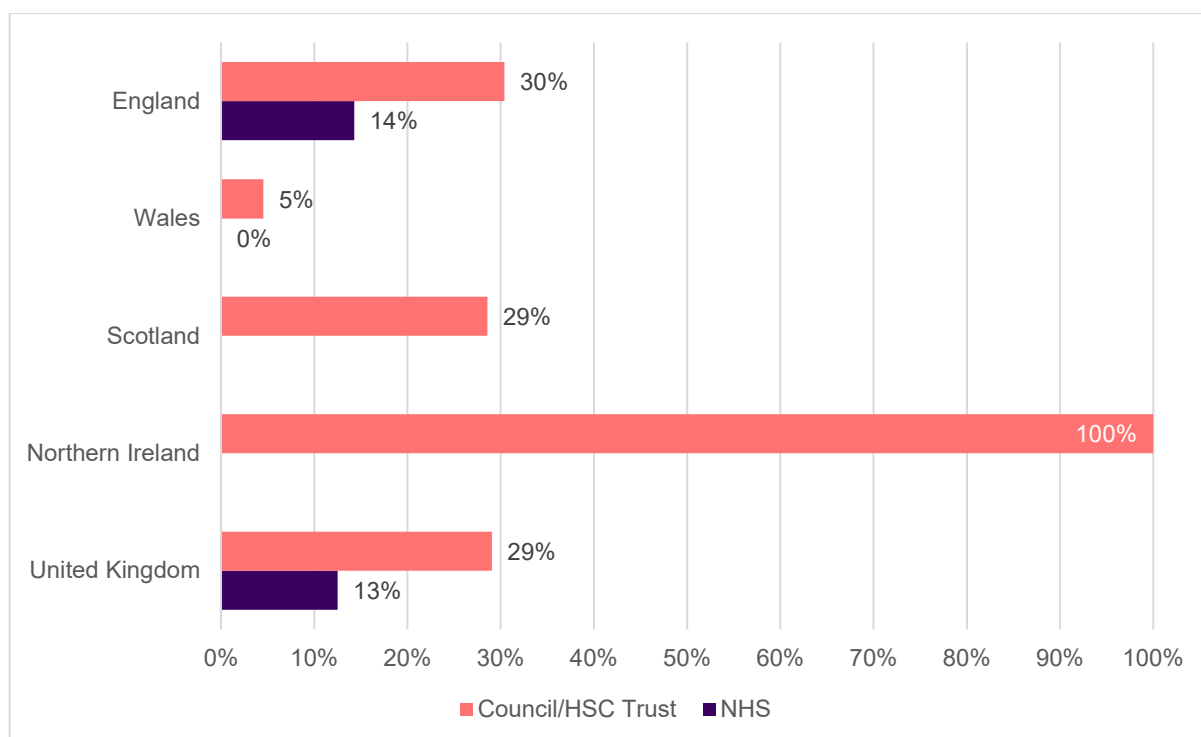


Figure 11. Percentage of councils/HSC Trusts and NHS bodies in each administration and the United Kingdom whose average hourly price paid for homecare during the 2025 sample week was below the value of careworker costs

In the English government regions, nearly three-fifths (59%) of local authorities in Greater London had an average rate below the amount needed to cover careworker costs at the National Living Wage. This is despite many councils in Greater London requiring providers to pay their careworkers at the higher London Living Wage (£13.85 per hour in 2024-25, rising to £14.80 per hour in 2025-26).

Over two-fifths of authorities in both the West Midlands and North East were also paying providers a fee rate below careworker costs on average.

We did not see evidence of average fee rates falling below careworker costs in either the South West or Yorkshire and The Humber.

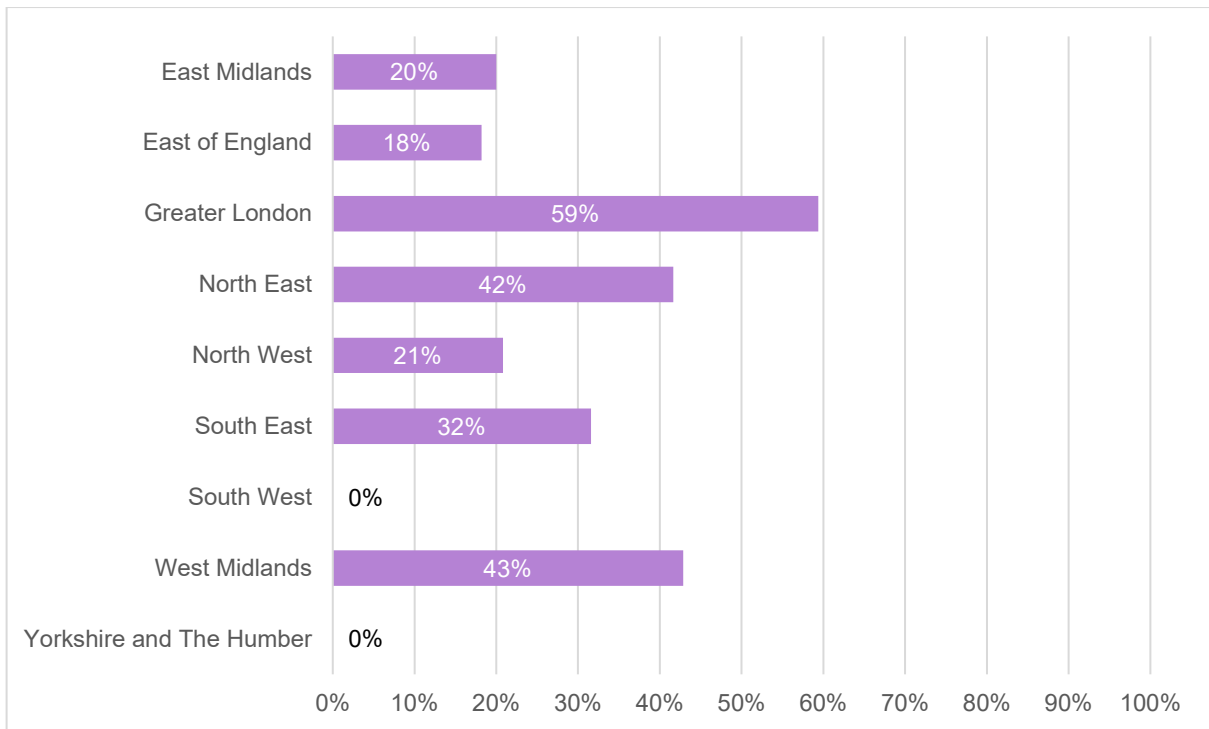


Figure 12. Percentage of councils in each government region of England whose average hourly price paid for homecare during the 2025 sample week was below the value of careworker costs

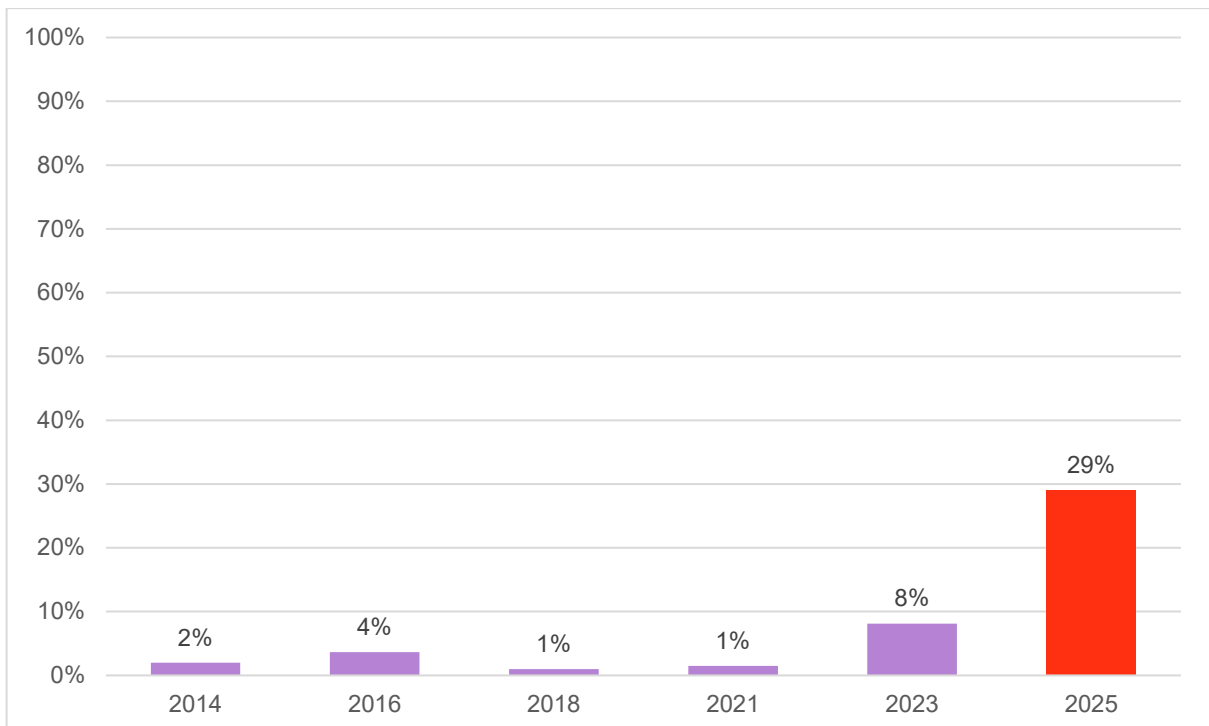


Figure 13. Percentage of councils/HSC Trusts in the United Kingdom whose average hourly price paid for homecare during the sample week was below the respective value of careworker costs by year

The percentage of councils/HSC Trusts whose average did not cover careworker costs (29%) has almost quadrupled since 2023, as shown in Figure 13 above. There were few such organisations in our first four FOI exercises.

Ethical Care Charter

UNISON's Ethical Care Charter²⁷ aims to ensure state commissioning of homecare is ethical, to improve the quality of services accessible to citizens and employment conditions for careworkers.

The Charter includes a pledge to support fair pay for careworkers, payment of travel time and a focus on client need instead of 'time and task' commissioning.

We fully support the Charter's objectives. Indeed, we publish our Minimum Price for Homecare every year to highlight the cost of supporting careworkers to deliver high-quality homecare services.

The Homecare Association has grown increasingly concerned by the number of local authorities that have signed the Charter, but commission homecare far below the cost of delivery. It raises serious questions about the disconnect between national commitments and local commissioning practice. Failure to uplift rates in line with wage legislation undermines both workforce sustainability and the principles of ethical care. Without funding that reflects the true cost of care, these commitments risk becoming symbolic rather than substantive.

From our 2025 FOI exercise, almost a third (31%) of signatories to the Charter²⁸ had an average rate below careworker costs in each nation's Minimum Price. All other signatories were paying a rate above (or equal to) careworker costs, but below the respective Minimum Price.

The following chart summarises by government region and devolved administration (excluding Northern Ireland, as this is for councils only).

The 16 signatories that paid less than careworker costs spanned across five English regions and Scotland. Of most concern again was Greater London, where, on average, 54% of the signatories failed to cover careworker costs.

NB. No local authorities in the East of England and West Midlands have signed the Ethical Care Charter.

²⁷ [The Ethical Care Charter | UNISON](#)

²⁸ [Councils that have adopted the Ethical Care Charter | UNISON](#)

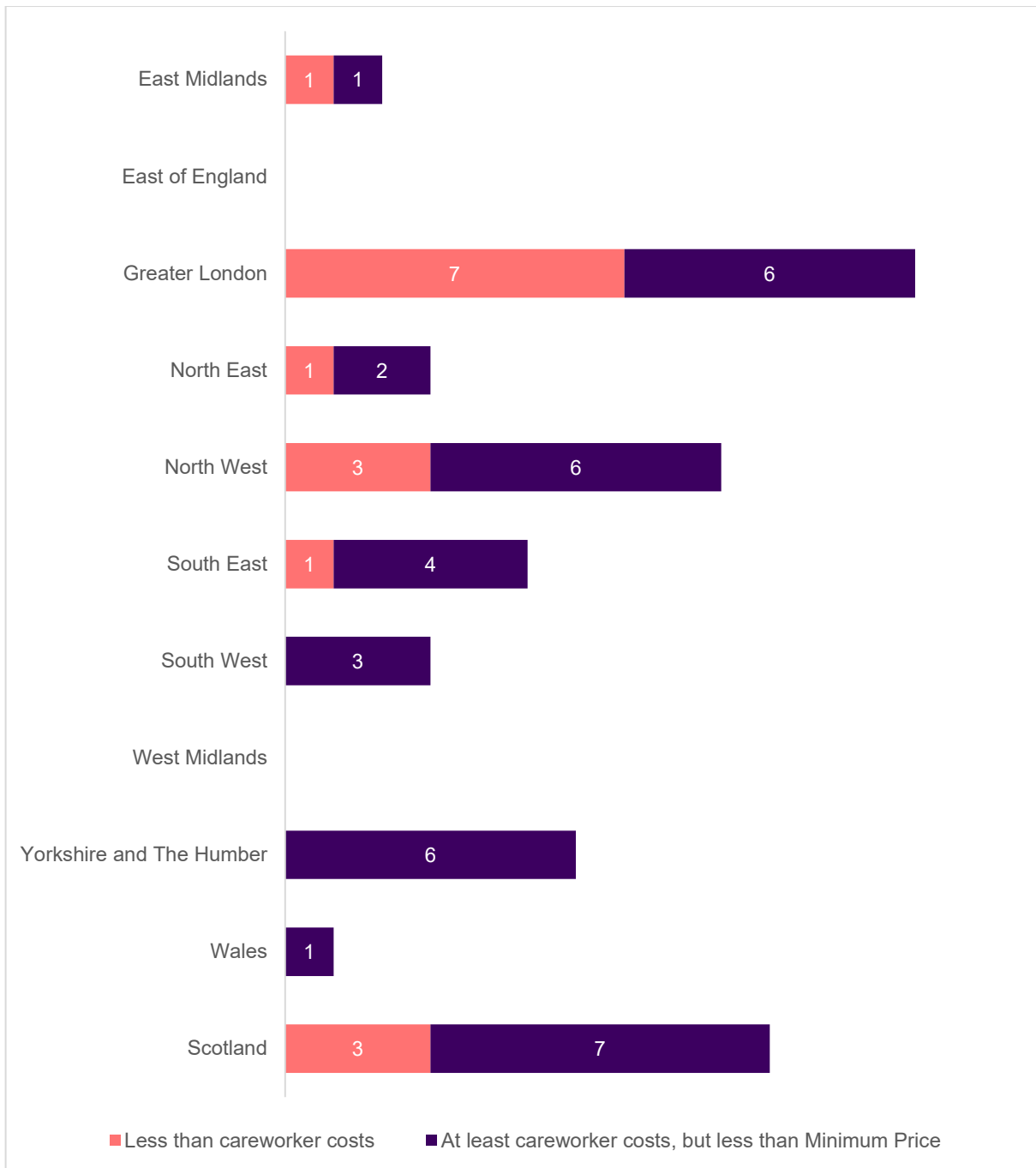


Figure 14. Breakdown of the number of signatories to UNISON's Ethical Care Charter by government region in England/devolved administration and their average hourly price paid for homecare during the 2025 sample week

Political control

Labour held a large majority of the 16 local authorities that had signed the Ethical Care Charter and paid less than careworker costs. This was surprising given UNISON, which developed the Charter, is an affiliated trade union to the party.

Across Great Britain, however, the picture was even worse. Over two-thirds (69%) of all local authorities that failed to cover careworker costs on average were also under Labour control.²⁹

On the surface, this could reflect the wider political balance of power, since national politics often drives local election outcomes. For example, an unpopular Westminster government may prompt voters to punish its councillors at the ballot box.

Yet, as the graph below shows, this explanation is weak. From our research and using data from Open Council Data UK³⁰, our analysis compares the approximate proportion of councils each political party in Great Britain controlled with the share that did not pay careworker costs.³¹

Labour-run councils were over-represented by 17 percentage points, meaning its councils were disproportionately likely to set unsustainably low fee rates.

Other parties' figures were more similar with their overall share of councils. The main recent outlier was Reform UK, which gained control of several councils in 2025, but so far none that paid below careworker costs.

NB. The 'Other' category in the graph includes Plaid Cymru, the Green Party and Aspire (which runs Tower Hamlets).

²⁹ This could include having overall control of the council (where the party had a majority of councillors), running a minority administration or leading a coalition (by, say, having the largest number of councillors) with one or more other political parties.

³⁰ [Open Council Data UK](#)

³¹ Our research updated information from Open Council Data UK where appropriate. Assessing precise political control for some councils was more difficult due to insufficient information. We excluded four councils (Isles of Scilly, North East Lincolnshire, Shetland Islands and Torbay) from the overall percentages as they did not purchase from the independent and voluntary sector, as well as Enfield that did not reply in time to be included in our analysis.

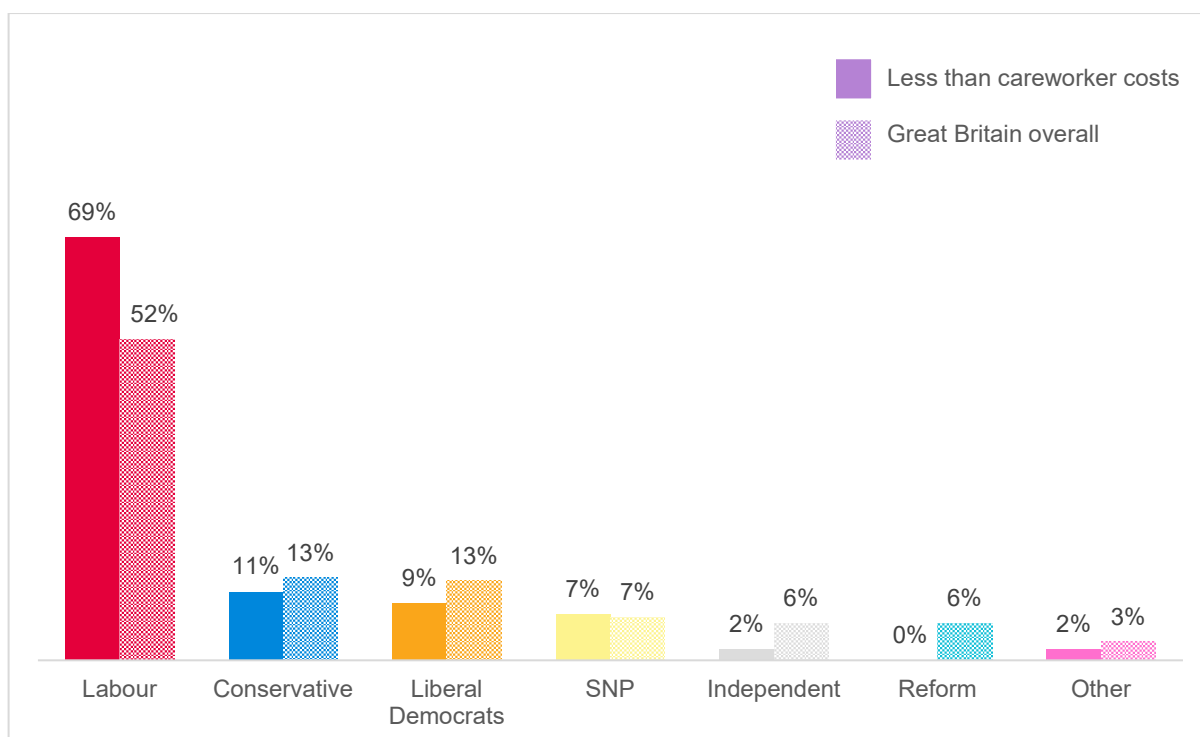


Figure 15. Percentage political control of councils in Great Britain by those paying an average hourly price for homecare during the 2025 sample week below the value of careworker costs and overall

While new administrations may argue that low fee rates stem from their predecessors, this is unconvincing. The same party has run more than half (52%) of councils that failed to cover careworker costs since 2012 or earlier.³² This percentage rose to almost two-thirds (65%) for Labour-run councils. As Figure 16 shows, in most cases, long-standing political leadership has entrenched poor commissioning practice.

NB. As there were several years when there was no change in political control for these councils, we have grouped calendar years together on the graph below.

³² This could include changes such as, for example, the same party losing its majority, but still running the council as a minority administration/by leading a coalition (or vice versa). If there was doubt about previous years, we have assumed council control by the party of the person leading the council.

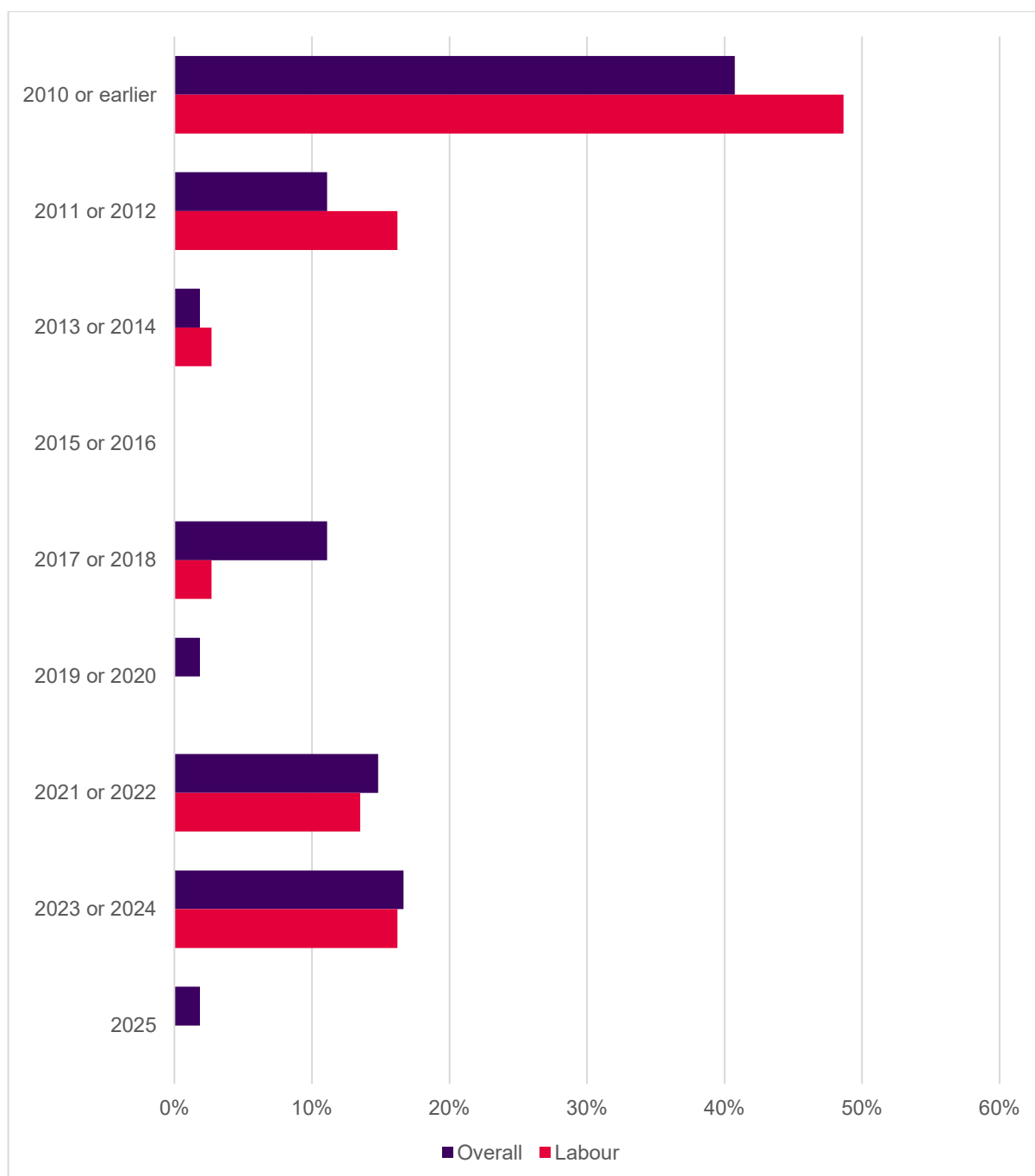


Figure 16. Percentage of councils in Great Britain that paid an average hourly price for homecare during the 2025 sample week below the value of careworker costs by the calendar year the political party currently in control initially took charge

Local authorities rightly point to their reliance on central government funding for adult social care. But over the last 15 years, central governments have progressively reduced this funding, expecting local authorities to cover costs by increasing council tax. Council tax is regressive and this mechanism disadvantages regions of higher deprivation, where needs are often higher.

Moreover, Labour councils are more concentrated in areas with higher needs and lower council tax bases, creating a more challenging fiscal environment. Further analysis comparing funding levels against deprivation indices would strengthen understanding of whether political control or structural disadvantage better explains commissioning practices.³³

Councils and NHS bodies too often agree fee rates that risk unsafe, poor quality care, non-compliance with the National Living Wage, force providers out of business, and drive down pay and conditions. This fuels workforce shortages that leave people without the care they need.

Ultimately, state commissioners remain responsible for setting and agreeing fee rates that reflect wage and cost pressures. Too often, this does not happen.

In our view, it should be unlawful for public organisations to commission and purchase homecare at fee rates that risk non-compliance with employment or care regulations, or create a high chance of provider insolvency.

³³ The English indices of deprivation 2019 were updated at the end of October 2025, too late to be used for analysis in this report: [English indices of deprivation 2025 - GOV.UK](#).

Hours of homecare purchased

The graph below shows the proportion of hours of homecare purchased by councils/HSC Trusts and NHS bodies across the United Kingdom, in £1 price bands, using each organisation's average hourly rate.

In local government and HSC Trusts, more than half (51%) of hours purchased were at an average rate no higher than £24 per hour. The respective percentage for the NHS was even higher (55%), with 18% of hours bought in the £19.01-£20.00 price band. Councils/HSC Trusts bought only 3% of hours above £30 per hour on average, but all NHS hours purchased were at, or below, this value.

Given people's increasingly complex care needs, and the government's drive to delegate more health tasks to careworkers, this is of serious concern.

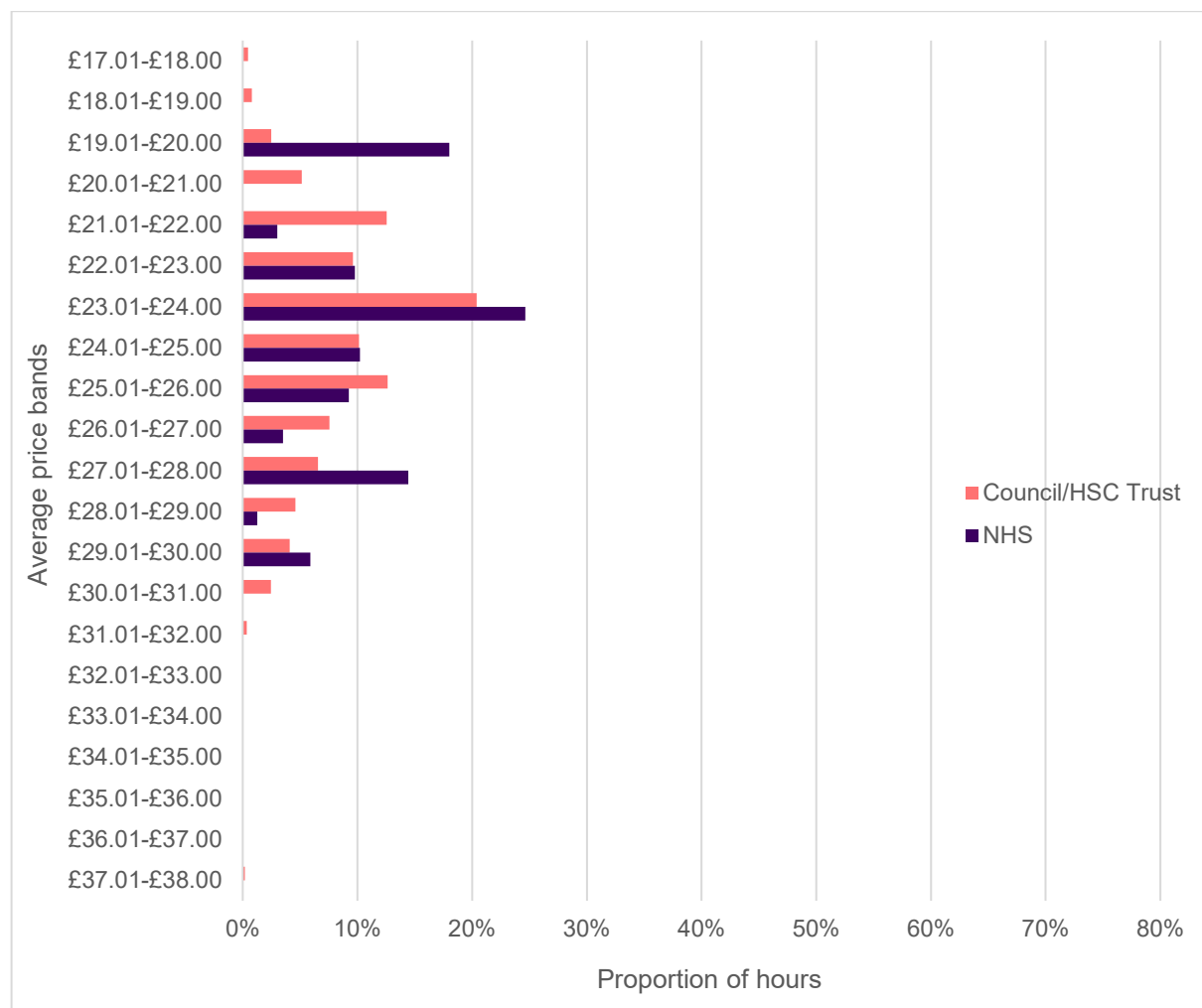


Figure 17. Percentage of hours of homecare purchased by councils/HSC Trusts and the NHS across the United Kingdom during the 2025 sample week at average hourly prices in £1 bands

Figure 18, Figure 19, Figure 20 and Figure 21 display the distribution of average prices in each of the UK’s four administrations. As above, our vertical axis ranges from the lowest average price in the United Kingdom to the highest. For England and Wales, we combine local authorities and NHS bodies together.

As we can see below, the England graph is like that for the United Kingdom. Public organisations bought around a fifth (21%) of hours in the £23.01-£24.00 average price bracket.

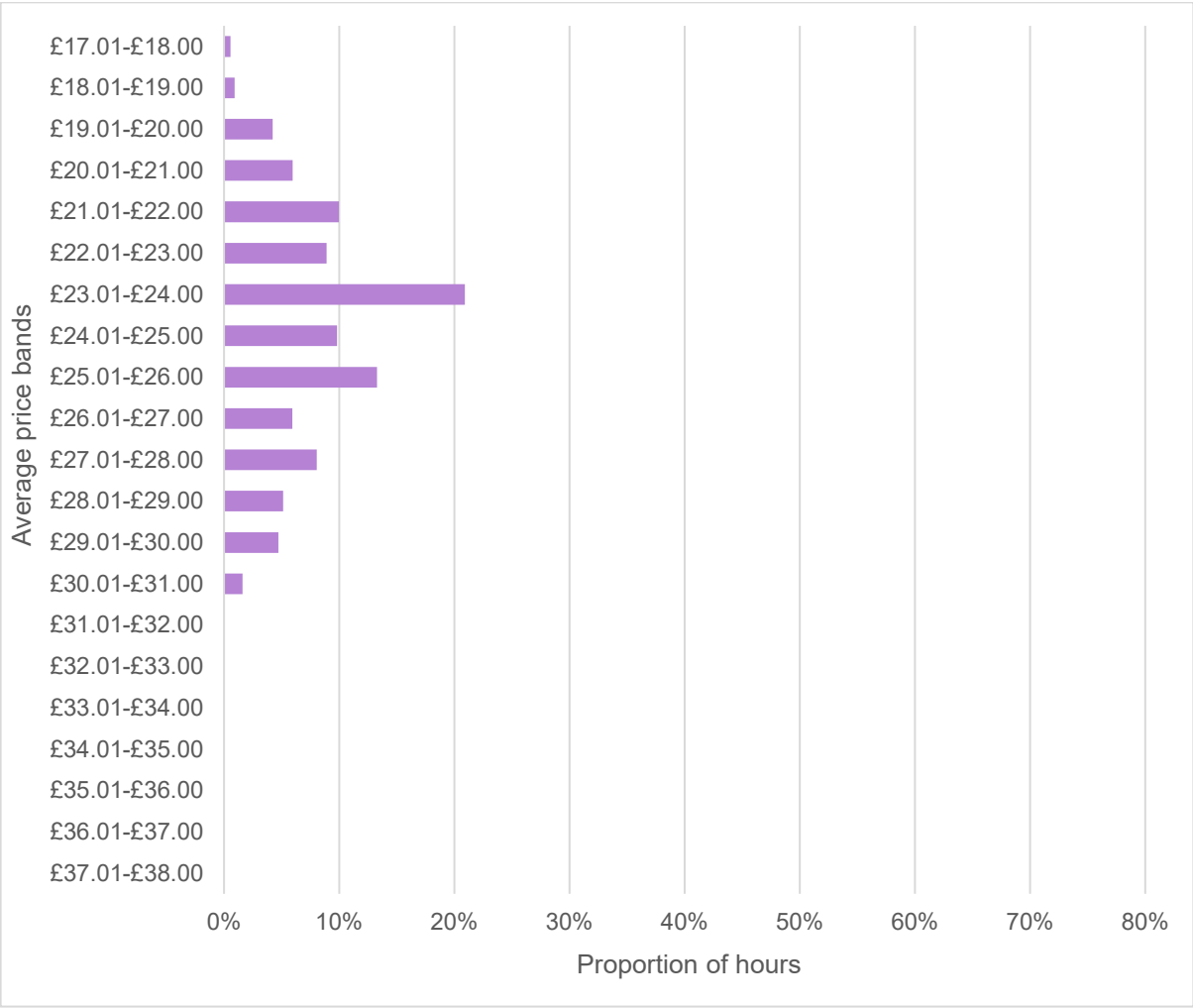


Figure 18. Combined percentage of hours of homecare purchased by councils and the NHS in England during the 2025 sample week at average hourly prices in £1 bands

In Wales, no council or NHS body commissioned hours on average at £23 per hour or below. There were, however, a fifth of hours bought at an average of more than £30 per hour - the highest of any UK nation.

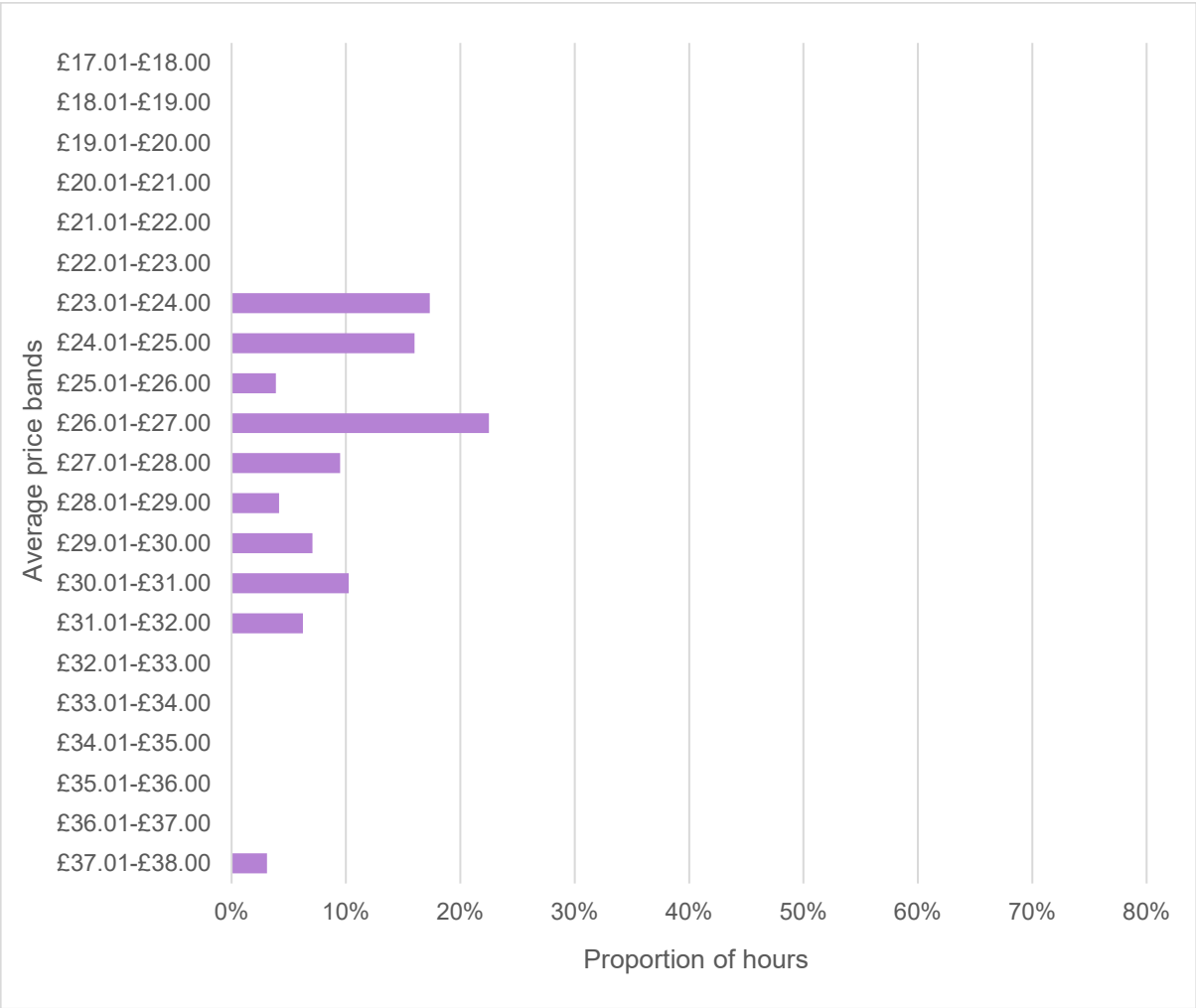


Figure 19. Combined percentage of hours of homecare purchased by councils and the NHS in Wales during the 2025 sample week at average hourly prices in £1 bands

95% of hours commissioned in Scotland were at an average between £22.01 per hour and £27 per hour. Councils only bought 5% of hours above £30.00 per hour.

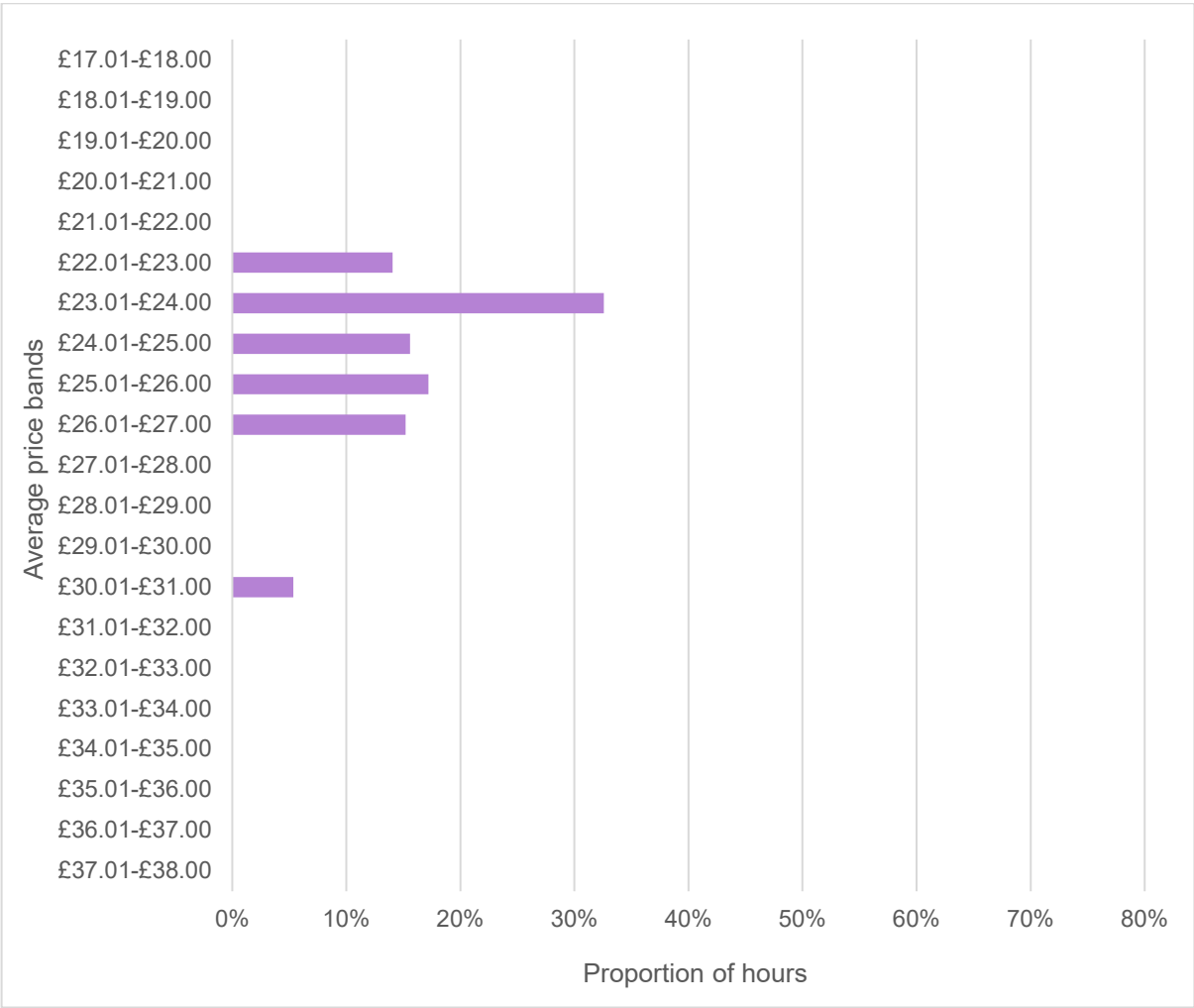


Figure 20. Percentage of hours of homecare purchased by councils in Scotland during the 2025 sample week at average hourly prices in £1 bands

Northern Ireland's HSC Trusts bought hours in two price bands only, with over three-quarters (76%) purchased between £21.01 and £22 per hour.

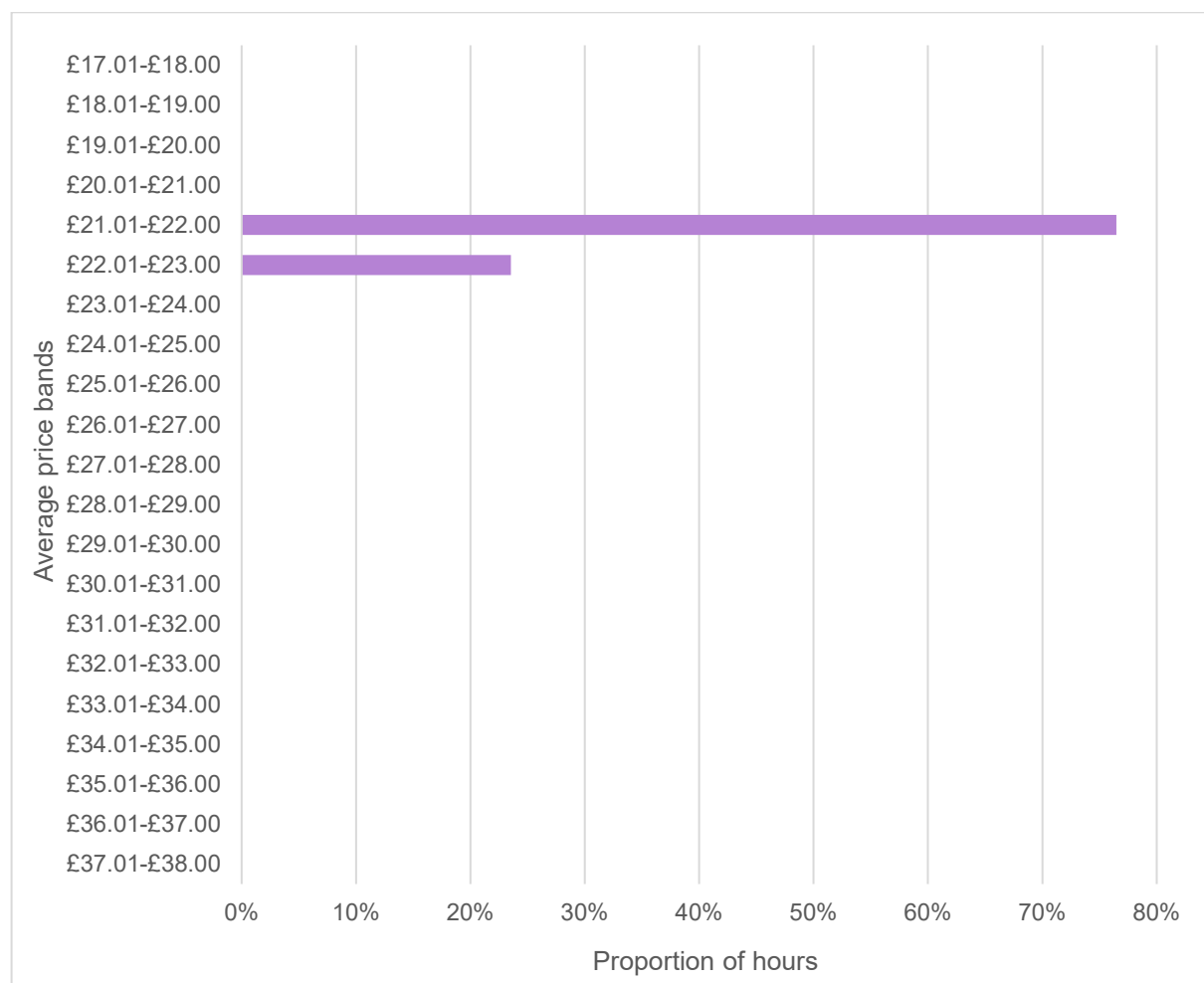


Figure 21. Percentage of hours of homecare purchased by HSC Trusts in Northern Ireland during the 2025 sample week at average hourly prices in £1 bands

In our Freedom of Information request, we asked for figures on the hours of homecare purchased for sample weeks in both April 2024 and April 2025. To compare, we only include organisations which provided data for both weeks.

There was only a 3% increase in the total hours bought since 2024 in the United Kingdom overall. Indeed, England's NHS hours fell by 6% between the years. This finding supports evidence³⁴ suggesting some NHS bodies are reducing Continuing Healthcare (CHC) packages or reclassifying healthcare needs as social care needs, transferring costs from the NHS to means-tested council services. This breaches the fundamental principle that NHS treatment should be free at the point of delivery.

³⁴ [ADASS Spring Survey 2025 - Association of Directors of Adult Social Services \(ADASS\)](#)

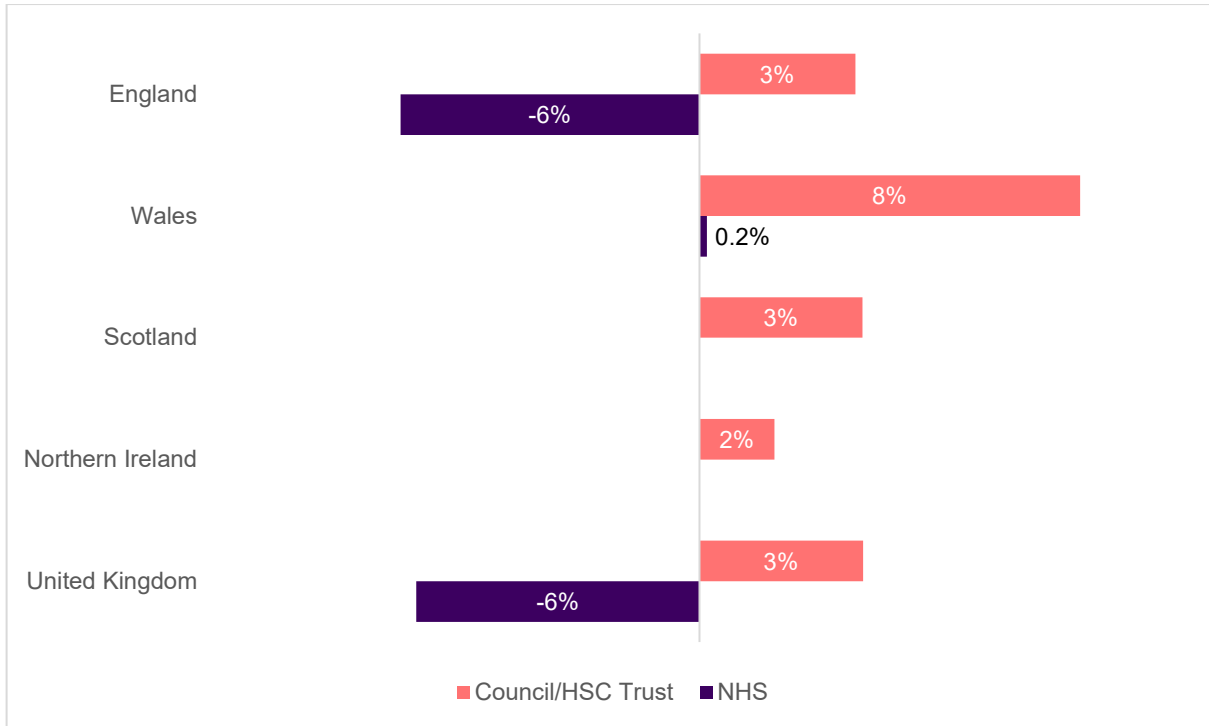


Figure 22. Percentage change in the total hours of homecare purchased in each administration and the United Kingdom between the sample weeks of 2024 and 2025 (where information for both weeks was available)

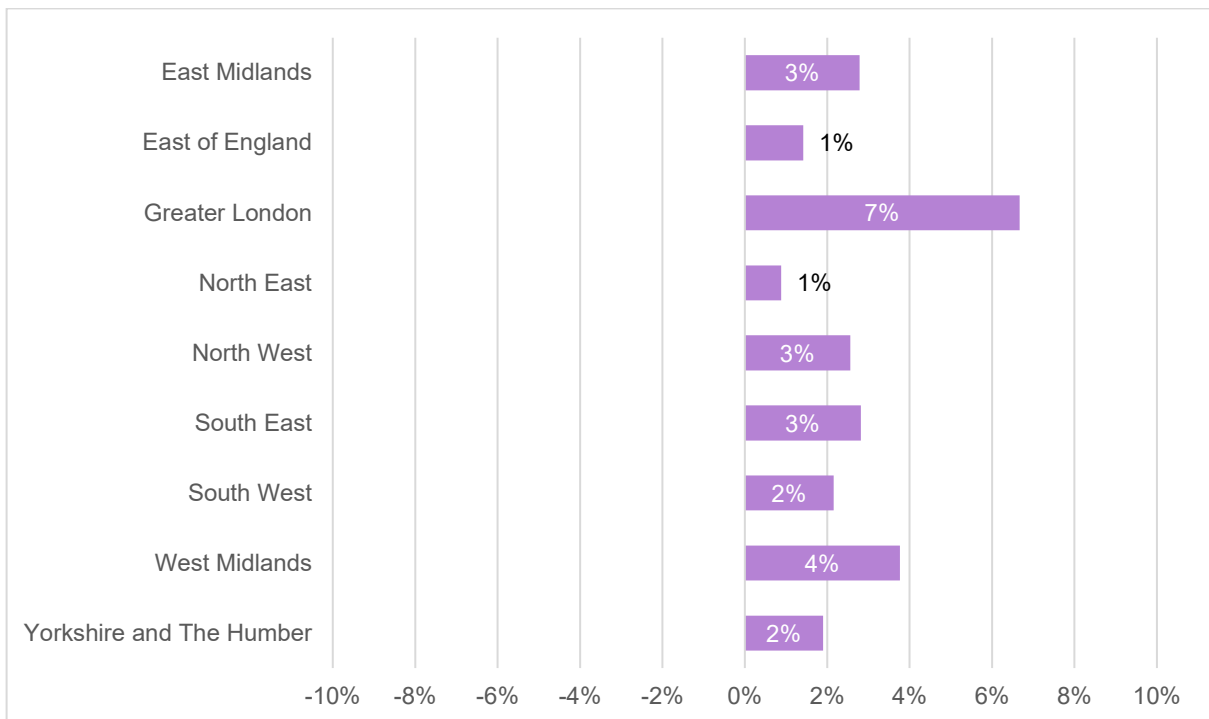


Figure 23. Percentage change in the total hours of homecare purchased by councils in each government region of England between the sample weeks of 2024 and 2025 (where information for both weeks was available)

As Figure 23 above shows, none of England's government regions saw a decrease in the percentage of hours commissioned. However, the increase in the East of England and North East was only marginal. The highest rise was in Greater London (7%), albeit at low fee rates.

Almost a third (32%) of UK public organisations overall reported a fall in the hours purchased between 2024 and 2025. This was particularly an issue in the NHS, where the percentage rose to 55%. Two-fifths of Northern Ireland's HSC Trusts reported a similar decline in hours.

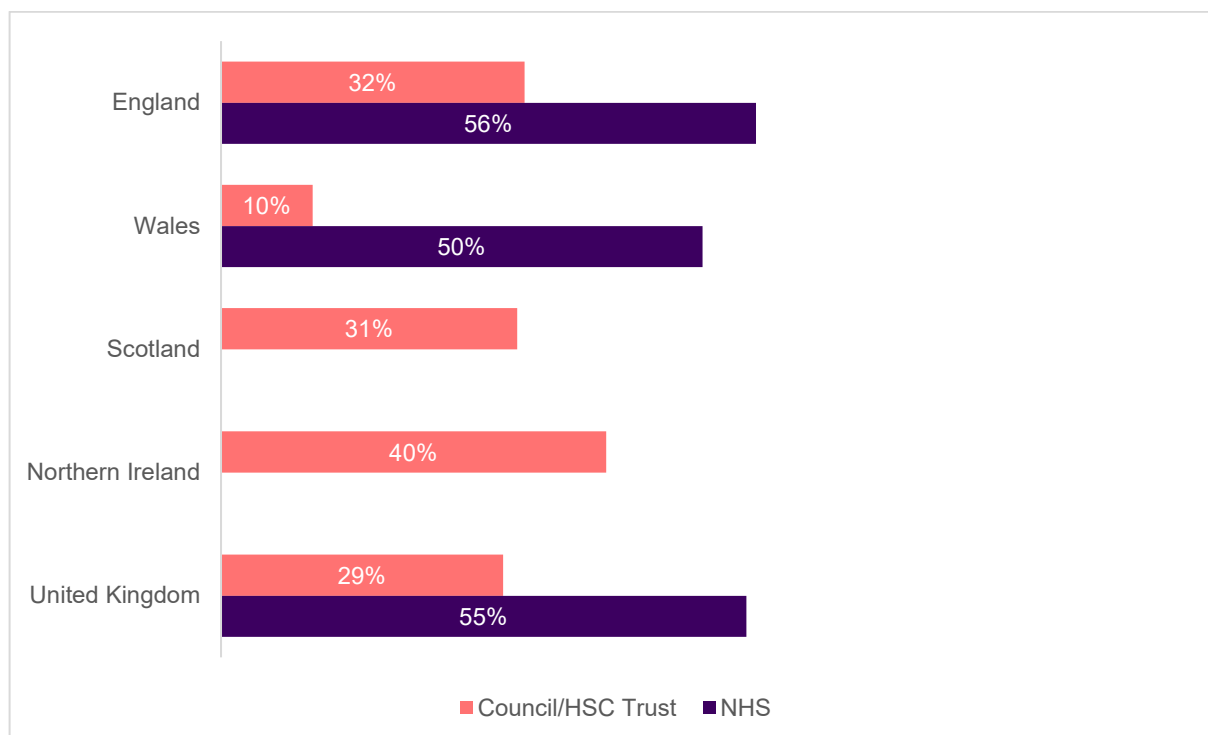


Figure 24. Percentage of public organisations that reported a drop in the hours of homecare purchased between the sample weeks of 2024 and 2025 in each administration and the United Kingdom (where information for both weeks was available)

At least 21% of councils in each government region of England purchased fewer hours in the 2025 sample week than in the 2024 week. This percentage rose to two-thirds in the North East.



Figure 25. Percentage of councils that reported a drop in the hours of homecare purchased between the sample weeks of 2024 and 2025 in each government region of England (where information for both weeks was available)

Hours of homecare per provider

The Freedom of Information request also asked respondents to outline the number of providers delivering the hours of homecare purchased in the 2025 sample week. Therefore, we can combine these two measures to compute the average hours per provider. The following analysis is for councils/HSC Trusts only because of the patchy data provided by NHS bodies.

Our Minimum Price for Homecare model for 2025-26³⁵ assumes a provider delivers 1,500 hours of care in a person's home each week. We believe this is the figure needed for a care business to remain financially sustainable delivering predominantly state-funded care.

We already know there is significant fragmentation of the homecare market across England in particular. Our September 2025 research on CQC registrations showed the number of registered community social care locations increased from 12,574 in June 2024 to 14,137 in August 2025.³⁶ However, there is no clear picture nationally of what this fragmentation means for providers delivering state-funded care packages.

³⁵ [Minimum Price for Homecare - England 2025-2026](#)

³⁶ [Care Quality Commission \(CQC\): regulatory performance in homecare one year on | Homecare Association](#)

Our analysis reveals a deeply fragmented, over-saturated market where providers receive an average number of hours that is not even close to our Minimum Price assumption. This evidence confirms what we already know. Many homecare providers are struggling to remain financially viable delivering state-funded care. We expect this to have major consequences for the continuity of services for people in receipt or need of care.

Homecare providers in 61% of councils and HSC Trusts in the United Kingdom received no more than 500 hours on average in the sample week. This percentage rose to an astonishing 94% in the South East and 92% in the South West of England. The obvious outlier in the graph below is Northern Ireland, where all Trusts were purchasing considerably more than 500 average hours per provider.

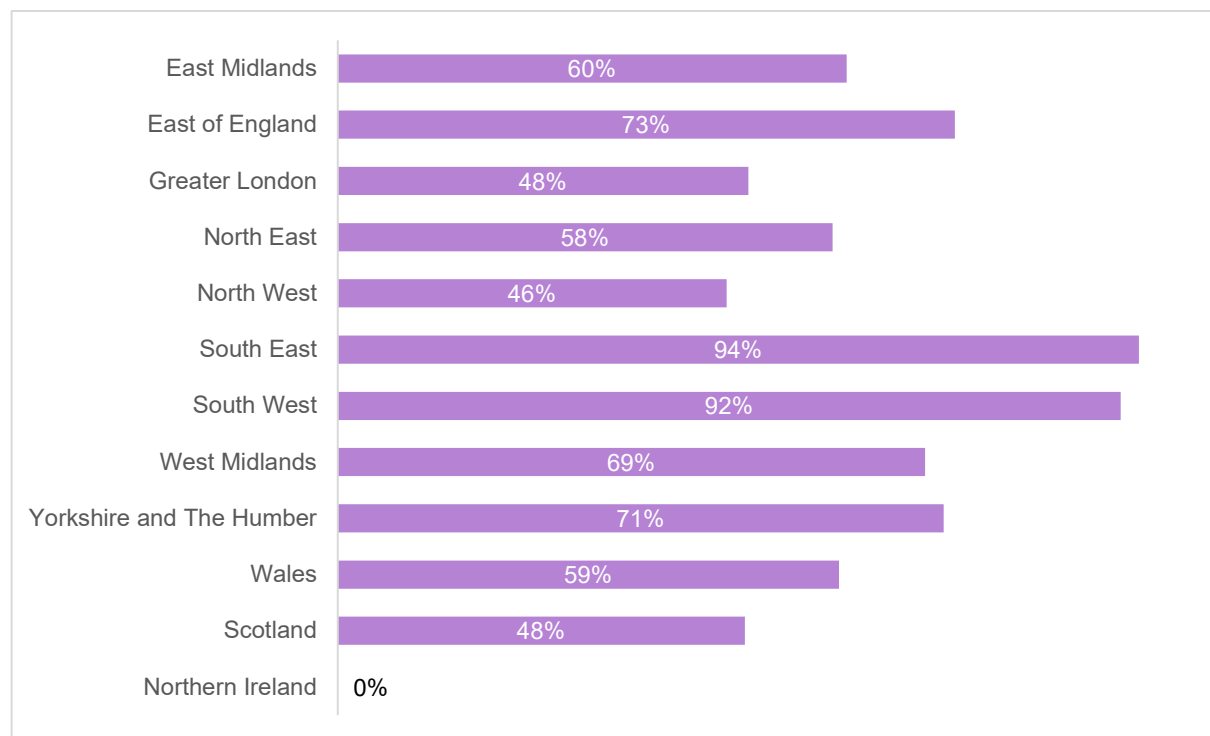


Figure 26. Percentage of councils/HSC Trusts purchasing no more than 500 hours of homecare per provider on average in the government regions of England and devolved administrations during the 2025 sample week

Figure 27 breaks the data down further into bands of the number of hours per provider.

In four English government regions (East Midlands, South East, South West and West Midlands), between 15% and 20% of local authorities purchased no more than 200 hours per provider on average during the sample week. All regions and devolved administrations, except the North East of England and Northern Ireland, had at least one organisation that bought such low average hours per provider.

Even worse, three UK local authorities (Bracknell Forest, East Ayrshire, and Worcestershire) even reported buying 100 hours or fewer per provider on average.

On the opposite end of the scale, commissioned providers received over 1,000 hours on average in only 7% of councils/HSC Trusts across the United Kingdom. While this was exclusively the case in Northern Ireland, more than half (56%) of England's government regions contained no local authorities offering over 1,000 average hours per provider.

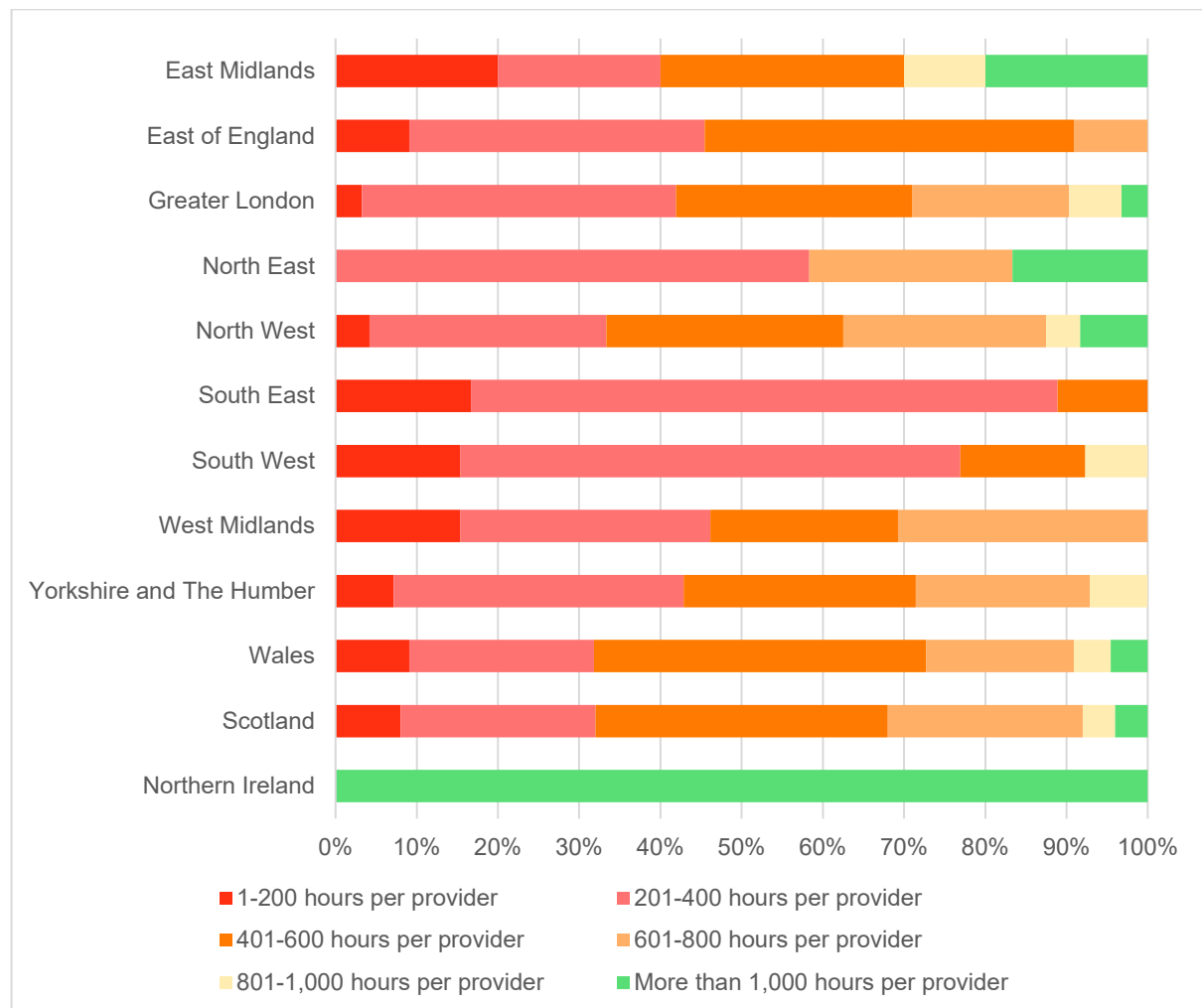


Figure 27. Percentage of councils/HSC Trusts by the hours of homecare purchased per provider on average in the government regions of England and devolved administrations during the 2025 sample week

We can also calculate the estimated average hours per provider for each region and devolved administration.³⁷

Only Northern Ireland surpassed our Minimum Price assumption of 1,500 hours per provider per week. No other region or administration recorded an average of over 530 weekly hours per provider. Worse still, the estimated average provider hours in the South East and South West were below 300 for the sample week.

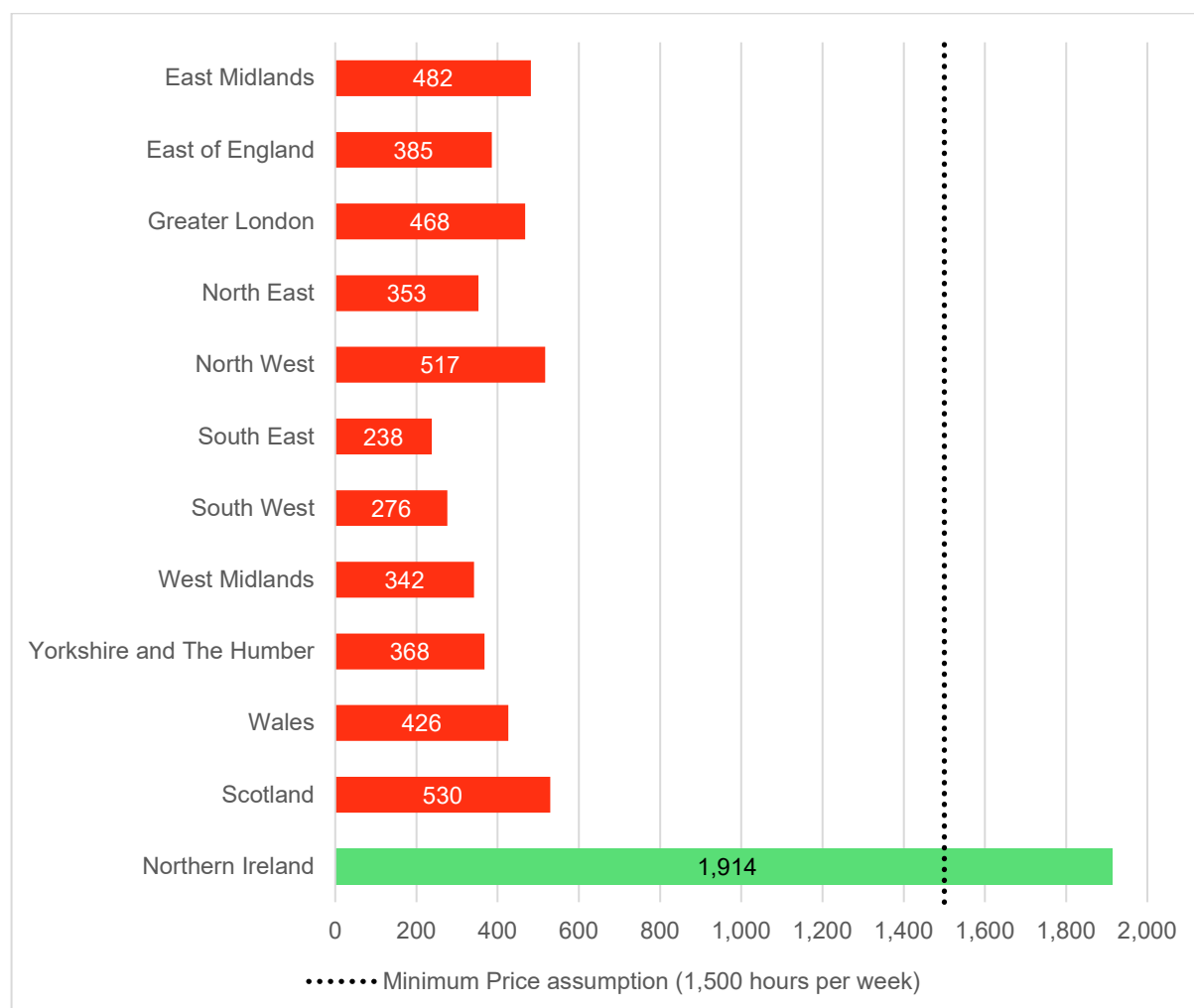


Figure 28. Average number of hours of homecare purchased per provider in the government regions of England and devolved administrations during the 2025 sample week

The map below shows the average hours per provider (where available) for individual local authorities/HSC Trusts in the United Kingdom.

³⁷ These are estimates only as, for example, we cannot account for a provider at a single location that delivered care in more than one local authority area (meaning the same provider will be counted more than once across FOI responses). However, relative to the other data presented, we think our figures are reasonably representative of the true picture.

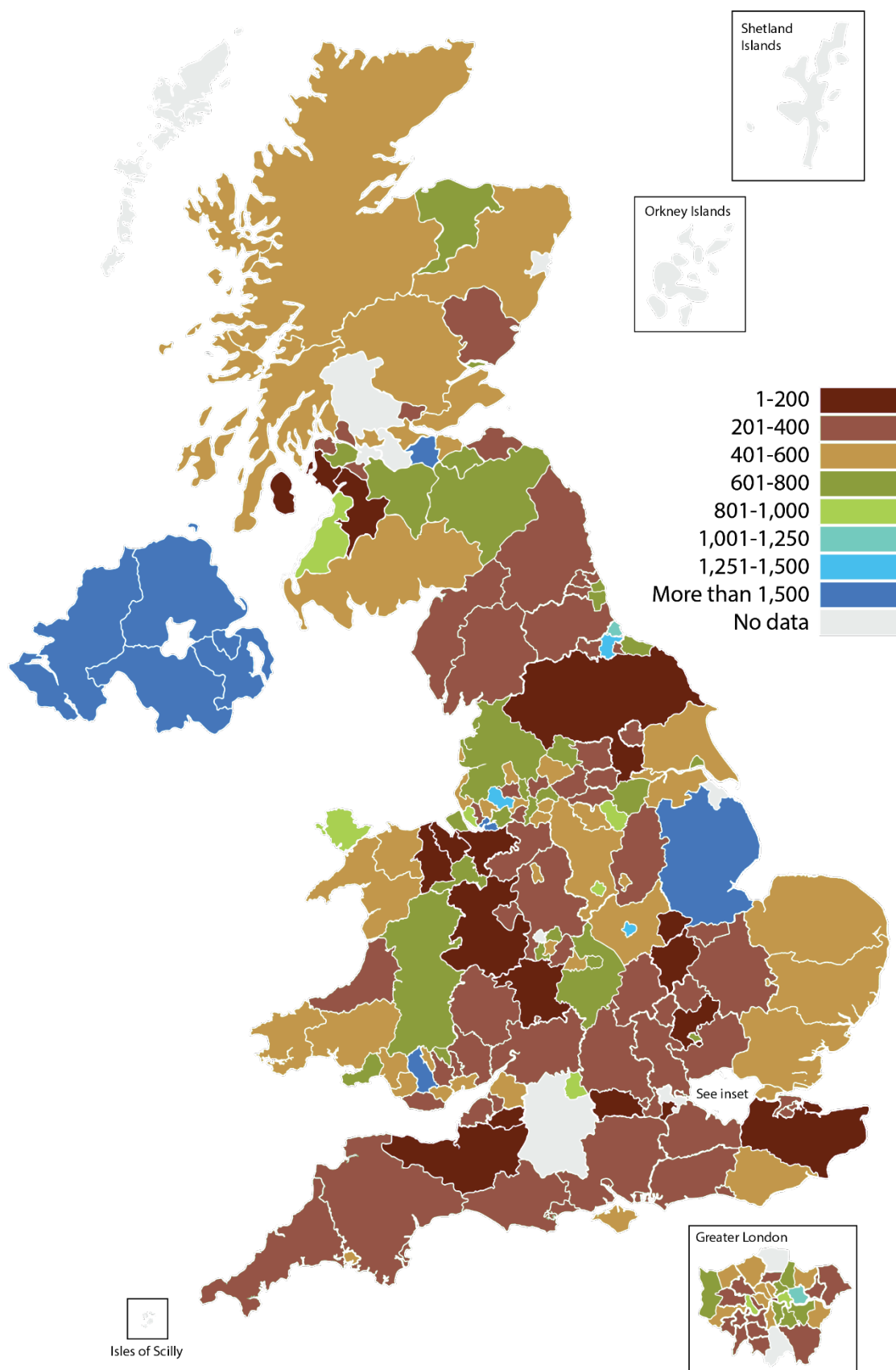


Figure 29. Map showing the average number of hours of homecare purchased per provider by councils/HSC Trusts in the United Kingdom during the 2025 sample week

Hours and spend per client

Our request also asked for information on the number of people aged 65 years and over receiving homecare during the sample week. We can combine this with our hours and spend data, as shown in Figure 30 and Figure 31.

The average number of hours per older person receiving homecare in the sample week was much higher in the NHS than in local government/HSC Trusts (because of the increased complexity of need). Within England's government regions, the hours per client ranged from 12 to 18 hours on average.

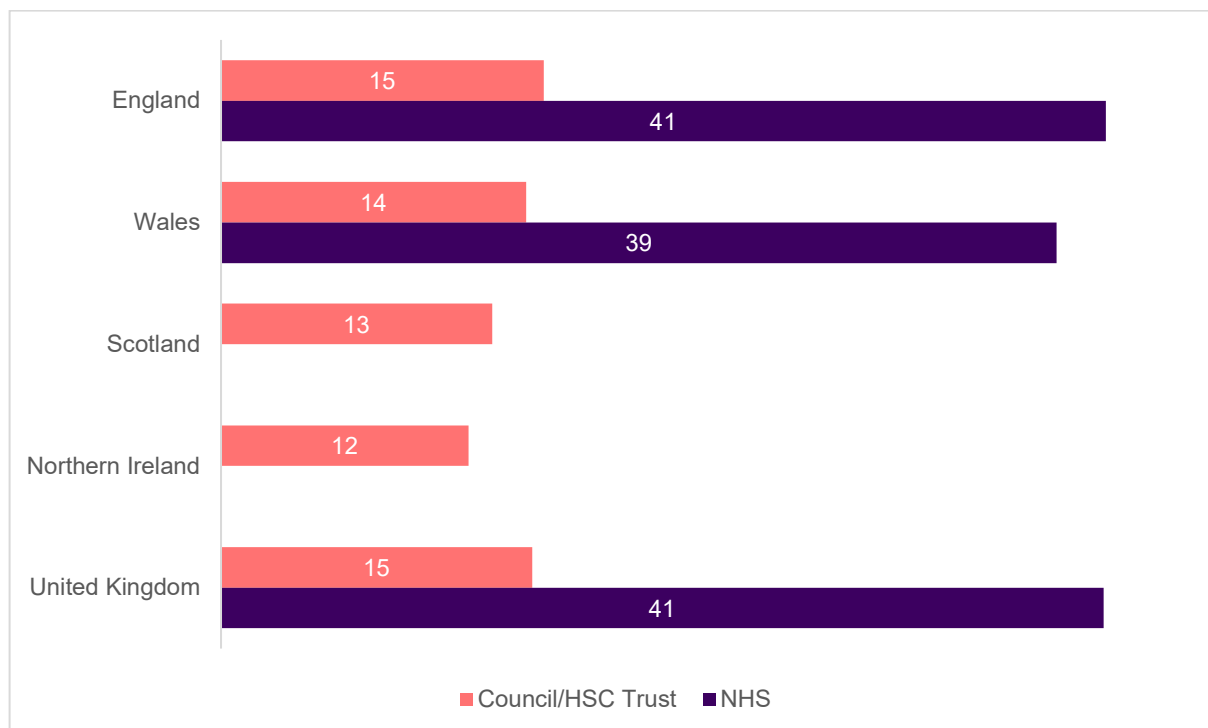


Figure 30. Average number of hours of homecare purchased per homecare recipient aged 65 years and over in each administration and the United Kingdom during the 2025 sample week

Similarly, the average spend per client was £1,063 in the NHS (England and Wales) during the sample week, around three times the figure for councils/HSC Trusts in the United Kingdom. Northern Ireland's spend was only £263 per older person on average, notably lower than in the other administrations.

Spend per care recipient per week in England's government regions ranged from £292 to £407 on average.

Given the low fee rates involved, these figures do not reflect the cost of care and would be much higher if they did.

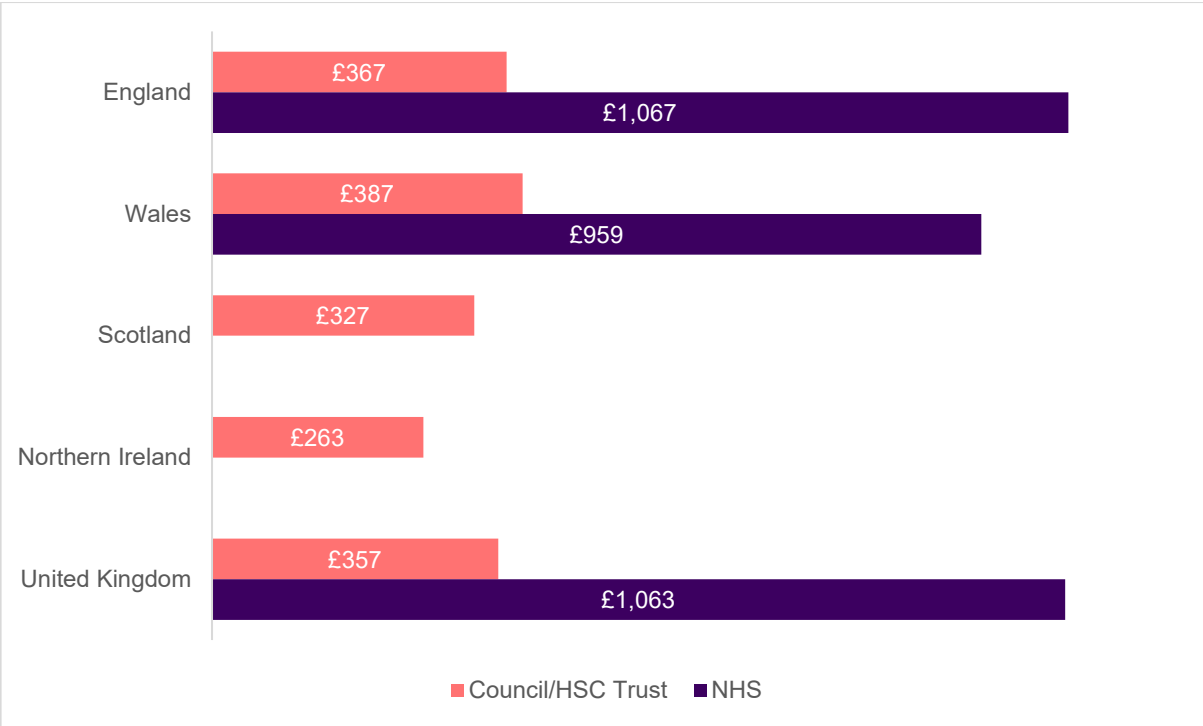


Figure 31. Average spend per person aged 65 years and over receiving homecare in each administration and the United Kingdom during the 2025 sample week

The following map shows the average spend per care recipient in the sample week for individual local authorities/HSC Trusts in the United Kingdom.

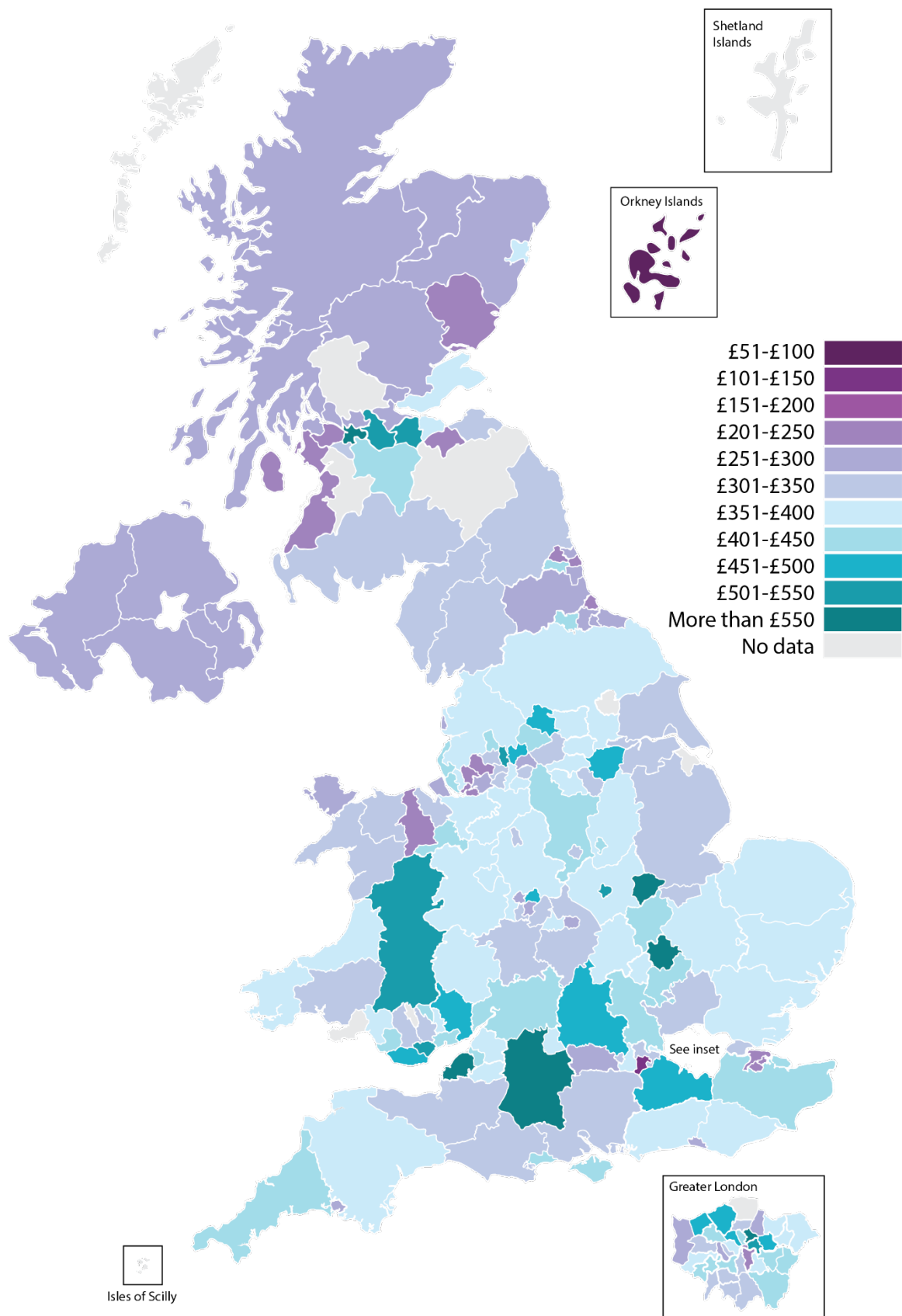


Figure 32. Map showing the average spend per person aged 65 years and over receiving homecare by councils/HSC Trusts in the United Kingdom during the 2025 sample week

The size of the funding deficit

The Homecare Association calculates a Minimum Price for Homecare in England at various wage rates for careworkers. These include the National Living Wage, Real Living Wage and NHS Band 3 with two years' experience. We base our Minimum Price in the devolved administrations on the Real Living Wage.

We can compute annual funding deficits for adult homecare by comparing these and new Minimum Price values with the weighted averages previously described in this report.

To do this, we must estimate the number of hours of homecare delivered to all adults by independent and voluntary sector providers in 2025-26, split by councils/HSC Trusts and NHS bodies in each UK nation (where relevant).

In each case, we used the hours purchased by public organisations from our Freedom of Information request and estimated any missing data (as long as the organisation purchases externally).

Since our request was for homecare delivered to older adults only, we adjusted the total weekly hours to include also care recipients aged 18-64 in each nation.³⁸ Finally, we multiplied the figures by the number of weeks in a year.

We present the results in the following tables.

NB. As services for younger adults often attract higher rates, these calculations are estimates and should be treated as a guide only. Nevertheless, independent sector providers deliver most homecare hours to care recipients aged 65+.

³⁸ We used the following sources to estimate the percentage of hours delivered to adults aged 65+.
England: LaingBuisson, Homecare and Supported Living Market Report, Fifth Edition.
Wales: No recent data, so assumed the same proportion as England.
Scotland: [Care at Home Statistics for Scotland 2023/2024 - Public Health Scotland](#).
Northern Ireland: [Domiciliary care services for adults in Northern Ireland 2023 | Department of Health](#).
We used 2023 data (as the 2024 dataset is incomplete) and assume the same proportion of hours delivered to adults aged 65+ as clients aged 65+.

Funding deficit at the National Living Wage

As the devolved administrations have committed to careworkers receiving the Real Living Wage, this deficit is for England only.

The overall deficit in state-funded homecare (delivered by the independent and voluntary sector to all adults) in England is around £1.98 billion in 2025-26. This is the figure needed for homecare workers to receive the National Living Wage (and a care business complies with quality requirements at a financially sustainable level). This does not assume additional costs we expect to affect the sector following implementation of the Employment Rights Bill.

	Councils	NHS	Overall
England	£1.64 billion	£344.7 million	£1.98 billion

Figure 33. Breakdown of the 2025-26 funding deficit in England, by councils, the NHS and overall, for homecare workers in the independent and voluntary sector to receive the National Living Wage and businesses to be financially sustainable

Funding deficit at the Real Living Wage

This deficit ensures homecare workers in the United Kingdom receive the Real Living Wage (£13.45 per hour in 2025-26).³⁹

NB. In our earlier analysis, we used the Minimum Price 2025-26 for the devolved nations that was based on the Real Living Wage as it was at the time (£12.60 per hour). But here, we can use the new rate (updated in October 2025).

There is a funding deficit of around £3.16 billion in 2025-26 for the United Kingdom overall at this wage rate.

	Councils/HSC Trusts	NHS	Overall
England	£2.13 billion	£441.3 million	£2.57 billion
Wales	£120.1 million	£10.4 million	£130.6 million
Scotland	£311.2 million	-	£311.2 million
Northern Ireland	£151.4 million	-	£151.4 million
United Kingdom	£2.71 billion	£451.7 million	£3.16 billion

Figure 34. Breakdown of the 2025-26 funding deficits in each administration and the United Kingdom, by councils/HSC Trusts, the NHS and overall, for homecare workers in the independent and voluntary sector to receive the Real Living Wage and businesses to be financially sustainable

³⁹ [What is the real Living Wage? | Living Wage Foundation](#)

Funding deficit to NHS Band 3 healthcare assistants

The 2025-26 hourly rate for an NHS healthcare assistant at Band 3 with two or more years of experience is £13.60 per hour.⁴⁰ We use our model to determine a Minimum Price at this pay rate for each UK nation.⁴¹

The funding deficit for homecare workers in the independent and voluntary sector to receive the same pay as their NHS equivalents is around £3.25 billion in 2025-26 for the United Kingdom overall.

The figure for councils in England alone is £2.19 billion.

	Councils/HSC Trusts	NHS	Overall
England	£2.19 billion	£453.0 million	£2.64 billion
Wales	£124.3 million	£10.8 million	£135.1 million
Scotland	£320.2 million	-	£320.2 million
Northern Ireland	£154.7 million	-	£154.7 million
United Kingdom	£2.79 billion	£463.7 million	£3.25 billion

Figure 35. Breakdown of the 2025-26 funding deficits in each administration and the United Kingdom, by councils/HSC Trusts, the NHS and overall, for homecare workers in the independent and voluntary sector to receive the same pay as NHS Band 3 healthcare assistants (2+ years' experience) and businesses to be financially sustainable

⁴⁰ [Pay scales for 2025/26 | NHS Employers](#)

⁴¹ Although we calculated this for England in the Minimum Price 2025-26, the NHS has since updated its pay scales.

Funding deficit to a competitive, entry-level supermarket rate

Providers that cannot fairly reward their careworkers because of low fee rates risk losing those employees to lower-skilled sectors with less training, such as retail and hospitality.

Since September 2025, one supermarket chain has paid a starting rate of £13 per hour across Great Britain.⁴²

By calculating a Minimum Price at this wage for each UK nation, the funding deficit is around £2.90 billion in 2025-26 for the United Kingdom overall.

NB. The same supermarket chain has a higher rate for workers in London that has also increased. If we were to account for this as well, the figures below would be even higher.

	Councils/HSC Trusts	NHS	Overall
England	£1.95 billion	£406.2 million	£2.36 billion
Wales	£107.6 million	£9.4 million	£116.9 million
Scotland	£284.2 million	-	£284.2 million
Northern Ireland	£141.4 million	-	£141.4 million
United Kingdom	£2.48 billion	£415.6 million	£2.90 billion

Figure 36. Breakdown of the 2025-26 funding deficits in each administration and the United Kingdom, by councils/HSC Trusts, the NHS and overall, for homecare workers in the independent and voluntary sector to receive the same pay as a competitive, entry-level supermarket rate and businesses to be financially sustainable

⁴² [Lidl raises pay bringing investment to over £70m in two years - Lidl Great Britain](#)

Contract types

In a new question for our 2025 FOI request, we asked for information on the type of contracts held with homecare providers. This was a qualitative question, and so we assigned responses into different categories, which we define as follows:

- **Framework:** an eligible list of providers who can bid for contracts, but without a guarantee of work. Providers can join the framework only at the time it is created, not subsequently.
- **Spot:** an individual purchase with no guarantee of hours. Public organisations often use this contract type for care limited to a particular length of time, a defined area or a specific person needing services.
- **Block:** guarantees a volume of hours of care at a prearranged price.
- **Lead provider:** a single provider is responsible for services in, say, a specific area, but can subcontract some work to other providers (a few FOI responses mentioned using supporting providers in this model, others did not).
- **Hybrid:** combines one contract type with another, rather than being used separately (e.g. spot purchasing or lead provider within a framework).
- **Dynamic purchasing system:** similar to a framework, but providers can join the eligible list at any time.
- **Approved provider list:** similar to a framework, but without a contractual agreement for future work. Here, we also include supplementary providers to, say, a framework.
- **Other/Not specified:** another contract type, or the FOI response was not clear on the contract(s) used (but the question was answered).

NB. As most public organisations used more than one contract type, percentages in the following text/graphs can sum to more than 100%. The percentage use of a contract type also excludes where that contract type is part of a hybrid model.

We asked this question because evidence from our members suggests contract types with public organisations have had a significant impact on market dynamics, the financial sustainability of providers and commissioning and purchasing practices.

55% of councils/HSC Trusts in the United Kingdom used a framework, a larger percentage than in the NHS. However, over three-quarters (78%) of NHS bodies held spot contracts - a proportion that was 28 percentage points above that for councils/HSC Trusts. A fifth of councils/HSC Trusts used block contracts, but this was less frequently used (6%) in the NHS.

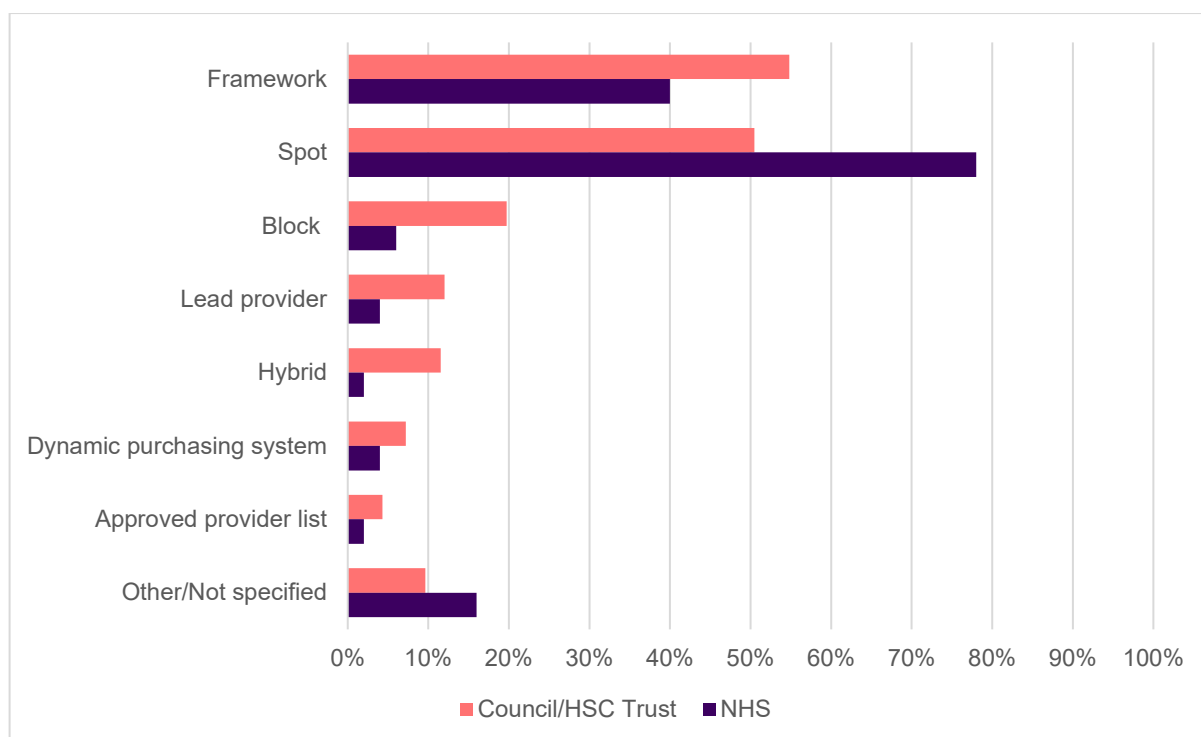


Figure 37. Percentage of contract types currently held with homecare providers by public organisations in the United Kingdom

We now break down the data for councils/HSC Trusts only. The most obvious outlier in the graph below is Northern Ireland, where HSC Trusts only had a few types of contract. All Trusts held at least one block contract, while 80% used spot purchasing. Both proportions were significantly higher than those of the other UK nations.

Only 15% of English local authorities had block contracts, rising to almost a third (32%) in Wales. But more than half of councils (56%) in England spot purchased homecare - 15 and 30 percentage points more than the respective proportions in Wales and Scotland.

At least half of councils in each of England, Wales and Scotland used a framework, with the largest percentage in Scotland (65%).

None of the devolved nations used the lead provider model.

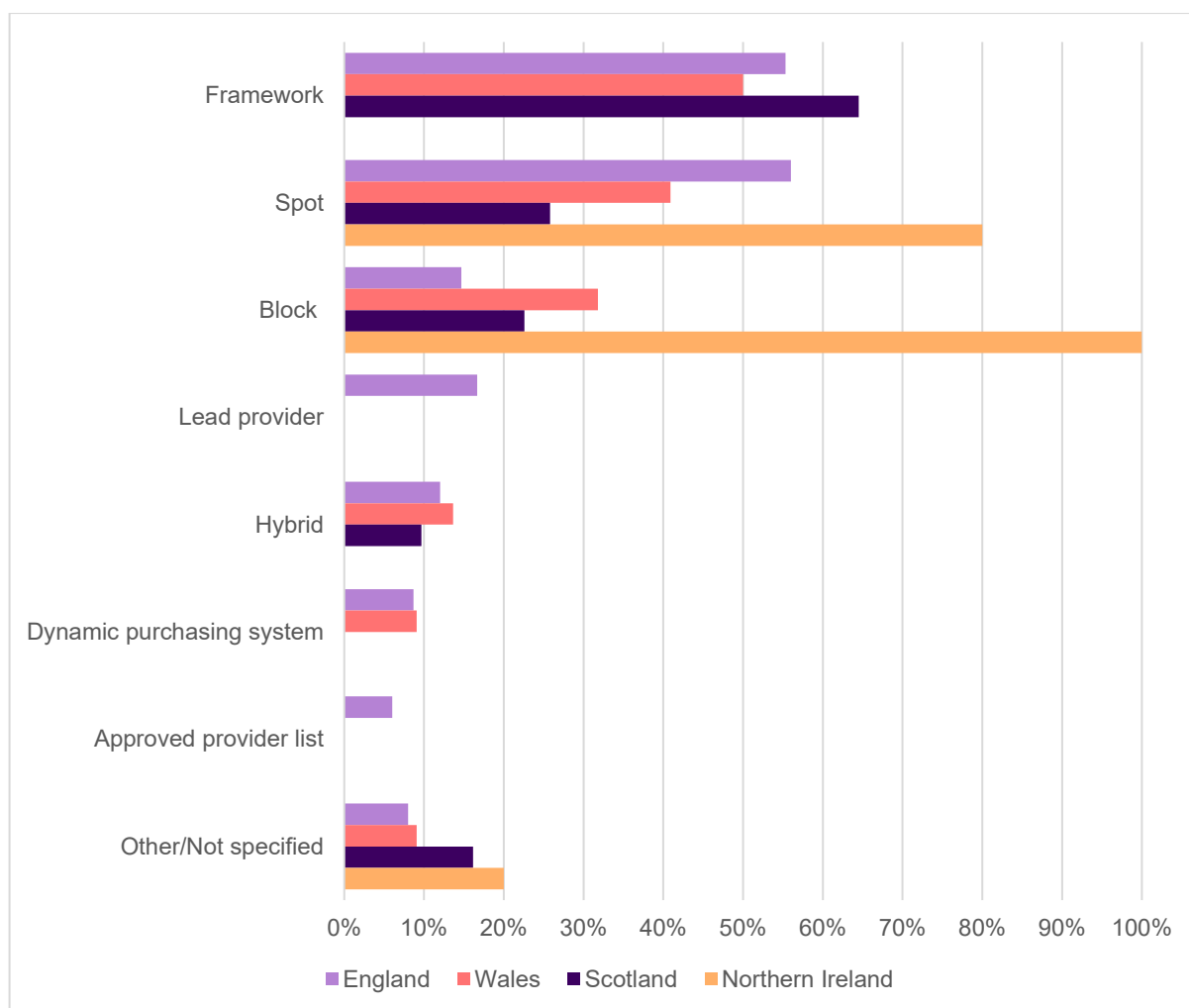


Figure 38. Percentage of contract types currently held with homecare providers by councils/HSC Trusts in the United Kingdom

Block contracts

17% of public organisations overall in the United Kingdom used block contracts, typically mixed with other contract types. But of these, only three (Hartlepool Borough Council, Aberdeen City Council and Isle of Anglesey County Council) were solely using block contracts.

Therefore, just 1% of councils and HSC Trusts in the United Kingdom guaranteed a volume of work to the homecare providers they contracted with.⁴³

This percentage is even lower than a similar statistic from research by UNISON in 2013⁴⁴ and coincides with our findings on the average hours purchased per provider. If public organisations have an over-saturated local market with too many providers, they cannot guarantee a minimum number of hours. This leads to increased job

⁴³ This refers to block contracts only. A lead provider (or zone-based) contract may also guarantee a minimum quantity of hours, but not universally.

⁴⁴ [Rise in zero hours contracts shame councils and hit elderly and vulnerable | UNISON National](#)

insecurity for careworkers, exacerbating retention issues in the sector and adversely affecting homecare services. It also means that upcoming changes in the Employment Rights Bill to guarantee hours for all workers are undeliverable in the homecare sector.

To illustrate the point, there were an estimated⁴⁵ 1,053 average hours purchased per provider by councils/HSC Trusts that solely used block contracts (albeit on a very small sample size). This figure was more than double that for those in local government/HSC Trusts only using frameworks, more than treble the related statistic for spot contracts and much higher than all other single contract types.

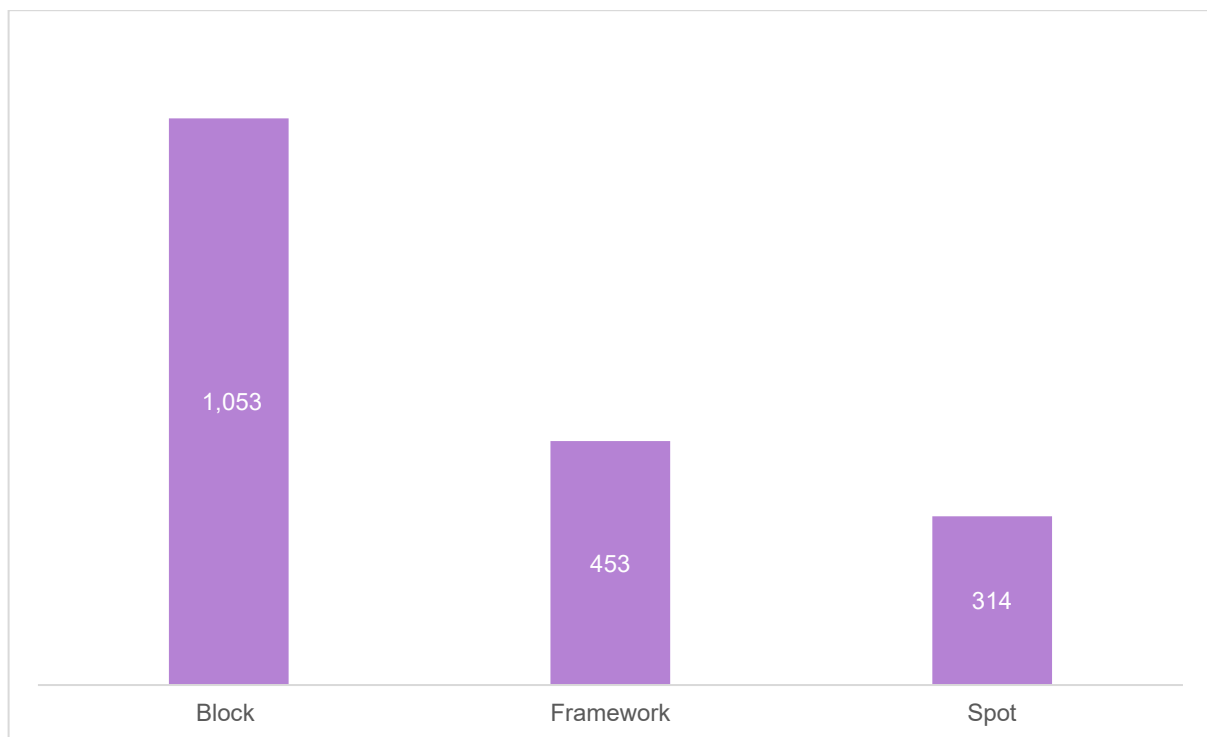


Figure 39. Average number of hours of homecare purchased per provider during the 2025 sample week by councils/HSC Trusts in the United Kingdom that only held framework, spot or block contracts

⁴⁵ Again, we cannot account for a provider at, say, a single location that delivered care in more than one local authority area.

Breakdown for UK councils/HSC Trusts

The table below shows the key information for each government region and devolved administration. There were three local authorities (that purchase from the independent sector) where we did not receive or have not used data on the hours purchased. We have estimated the missing information to calculate a total figure.

	2025				Since 2023
Government region/ administration	Lowest average	Highest average	Total hours (estimated)	Weighted average	% change in weighted average
East Midlands	£20.09	£29.75	257,318	£24.69	13%
East of England	£21.14	£30.29	301,811	£26.70	14%
Greater London	£17.74	£28.71	604,391	£21.87	15%
North East	£20.90	£29.24	134,093	£23.43	18%
North West	£20.62	£28.06	438,954	£23.71	11%
South East	£20.08	£29.15	359,680	£25.44	5%
South West	£24.21	£28.58	217,340	£26.83	10%
West Midlands	£19.65	£26.43	281,187	£23.42	14%
Yorkshire and The Humber	£24.33	£29.45	253,271	£25.94	15%
Wales	£23.61	£37.73	193,086	£27.14	12%
Scotland	£22.04	£30.86	351,181	£24.73	15%
Northern Ireland	£21.35	£22.33	191,436	£21.62	16%

Figure 40. Average prices paid per hour and the estimated total hours of homecare purchased in the government regions of England and the devolved administrations during the 2025 sample week

The following map shows the average hourly rates (where available) for individual local authorities/HSC Trusts in the United Kingdom.

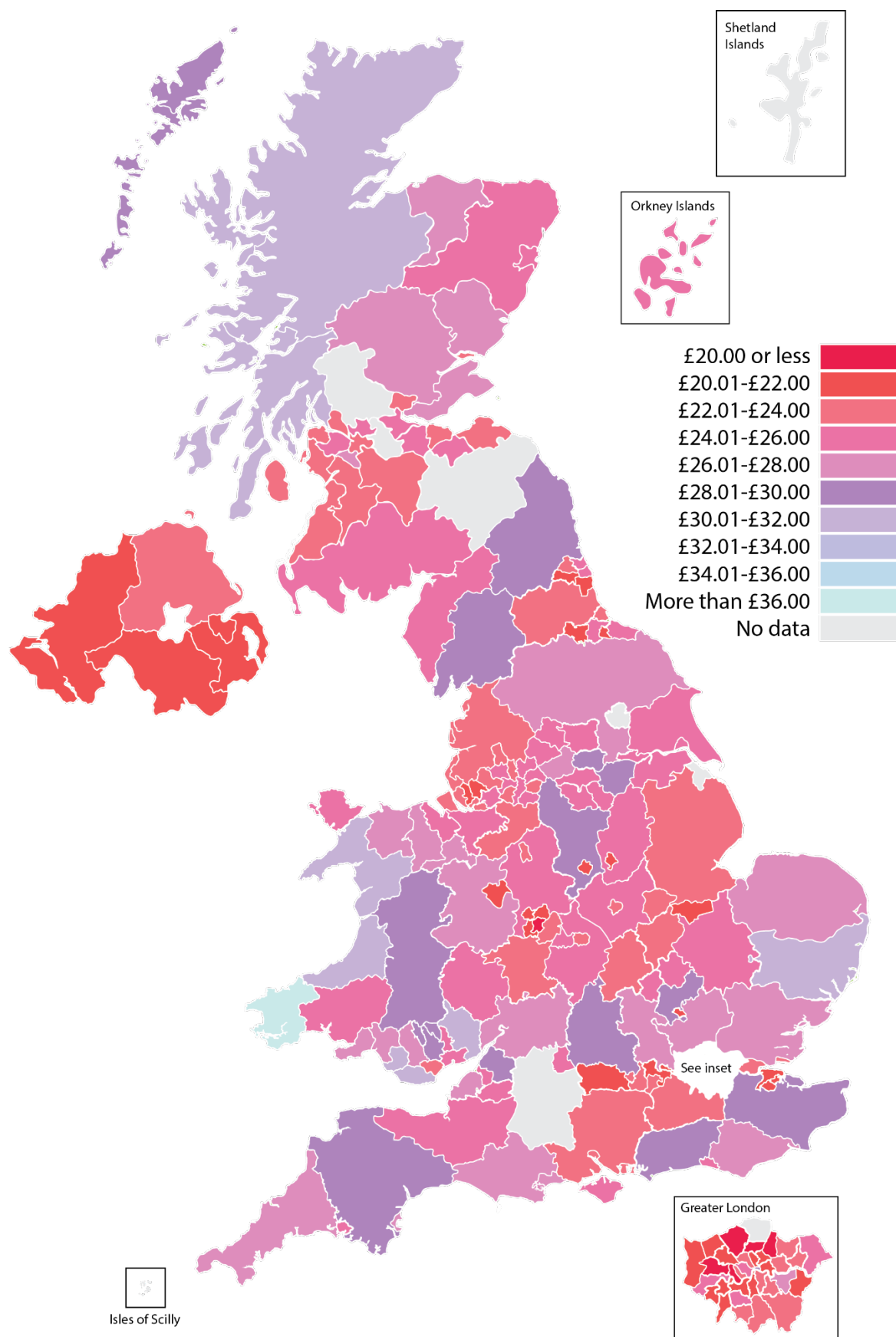


Figure 41. Map showing average hourly prices paid for homecare by councils/HSC Trusts in the United Kingdom during the 2025 sample week

We now present for each government region and devolved administration:

- Key facts for the region/administration.
- A graph of the individual average rates (where green bars are at, or above, the respective Minimum Price and red bars are below the value of careworker costs, while we colour those in between in orange).
- Individual council/HSC Trust rates and hours for the 2025 sample week, and the percentage change in the average price from the 2023 FOI request.
- Explanations of the data provided and any limitations.
- Percentage change in hours between the 2024 and 2025 sample weeks for individual councils/HSC Trusts.
- Average number of hours of homecare purchased per provider by individual councils/HSC Trusts.
- Average spend per person aged 65 years and over for individual councils/HSC Trusts.

On the graphs, we only show councils/HSC Trusts that provided the relevant data.

East Midlands

Key facts

10

councils purchase homecare from the independent and voluntary sector

£24.69

per hour weighted average, the 6th lowest in the government regions / devolved administrations of the UK

0%

of councils paid the Homecare Association's Minimum Price for England of £32.14 per hour

20%

of councils paid below the value of careworker costs in the Minimum Price of £22.71 per hour

3%

increase in the total hours of homecare purchased from the 2024 sample week

30%

of councils reported a drop in the hours purchased from the 2024 sample week

60%

of councils purchased, on average, no more than 500 hours per provider in the 2025 sample week

£407

spent on average per person aged 65 years and over receiving homecare in the 2025 sample week

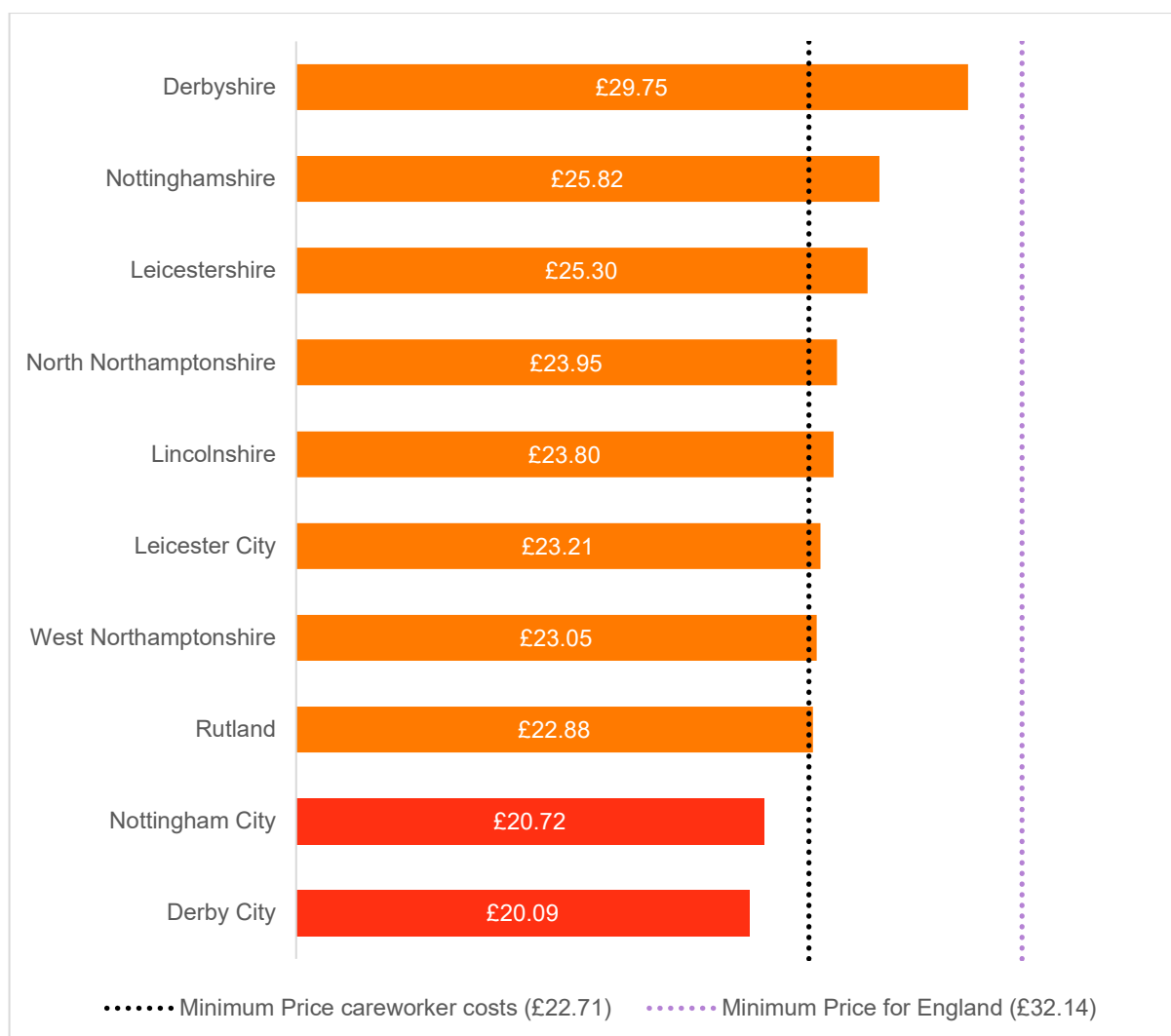


Figure 42. Average hourly prices paid for homecare by councils in the East Midlands during the 2025 sample week

	2025				Since 2023
Council	Lowest price	Highest price	Hours	Average price	% change in average price
Derby City	£18.73	£22.28	19,283	£20.09	2%
Derbyshire	£22.01 +	£22.01 +	51,489	£29.75	21%
Leicester City	£22.58	£23.66	35,681	£23.21	17%
Leicestershire	£19.15	£32.71	31,273	£25.30	12%
Lincolnshire	£20.70	£27.80	22,888	£23.80	9%
North Northamptonshire	£18.50	£33.00	18,079	£23.95	21%
Nottingham City	£20.72	£20.72	28,894	£20.72	4%
Nottinghamshire	£22.21	£29.18	32,902	£25.82	16%
Rutland	£22.88	£22.88	2,140	£22.88	4%
West Northamptonshire	£18.50	£33.09	14,690	£23.05	11%

Figure 43. Prices paid per hour and the hours of homecare purchased in the East Midlands during the 2025 sample week, compared with the 2023 sample week

Notes

- For the FOI questions on fee rates, Derby City referred us to its Adult Social Care Fees and Charges 2025/26 paper.⁴⁶ We have therefore set the council's average at its proposed weekday hourly rate.
- Derbyshire includes a separate travel payment per visit ranging between £3.50 and £6.80. The council did not, therefore, specify its true lowest and highest rates.
- Nottinghamshire could not report on supported living hours for the 2025 and 2024 sample weeks.

⁴⁶ [Adult Social Care Fees and Charges 2025/26 – Derby City Council](#)

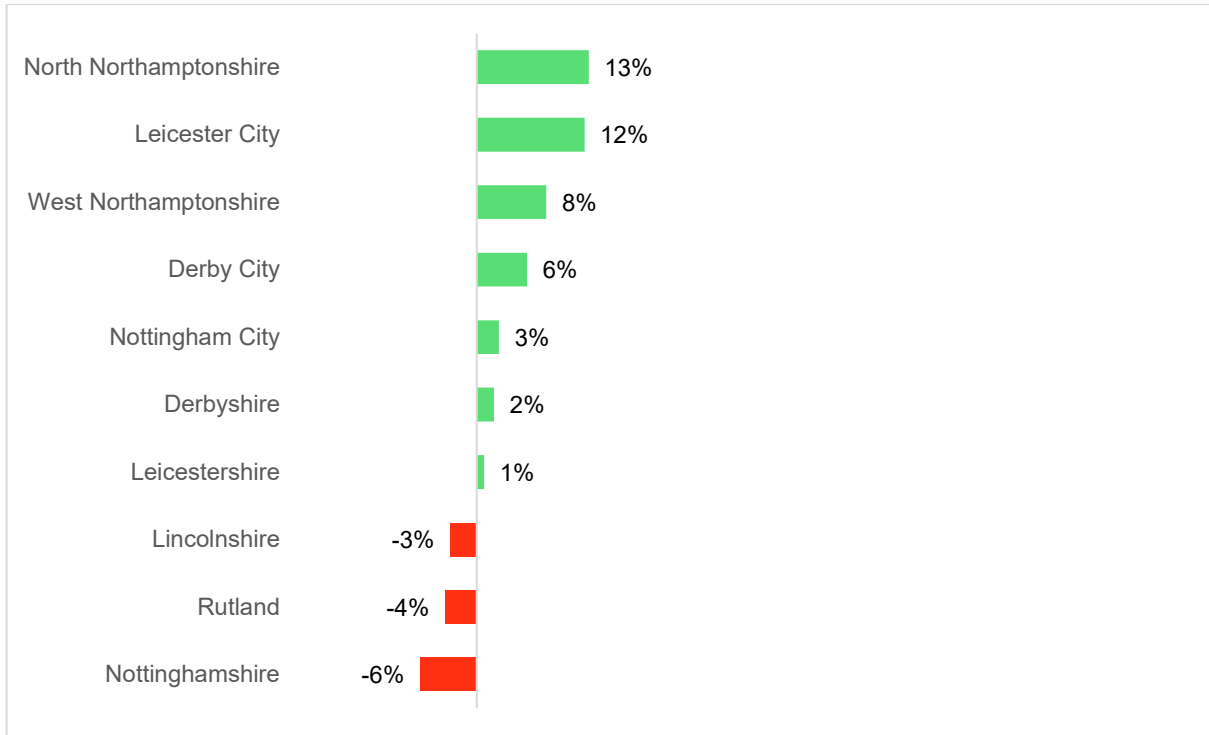


Figure 44. Percentage change in the hours of homecare purchased by councils in the East Midlands between the sample weeks of 2024 and 2025

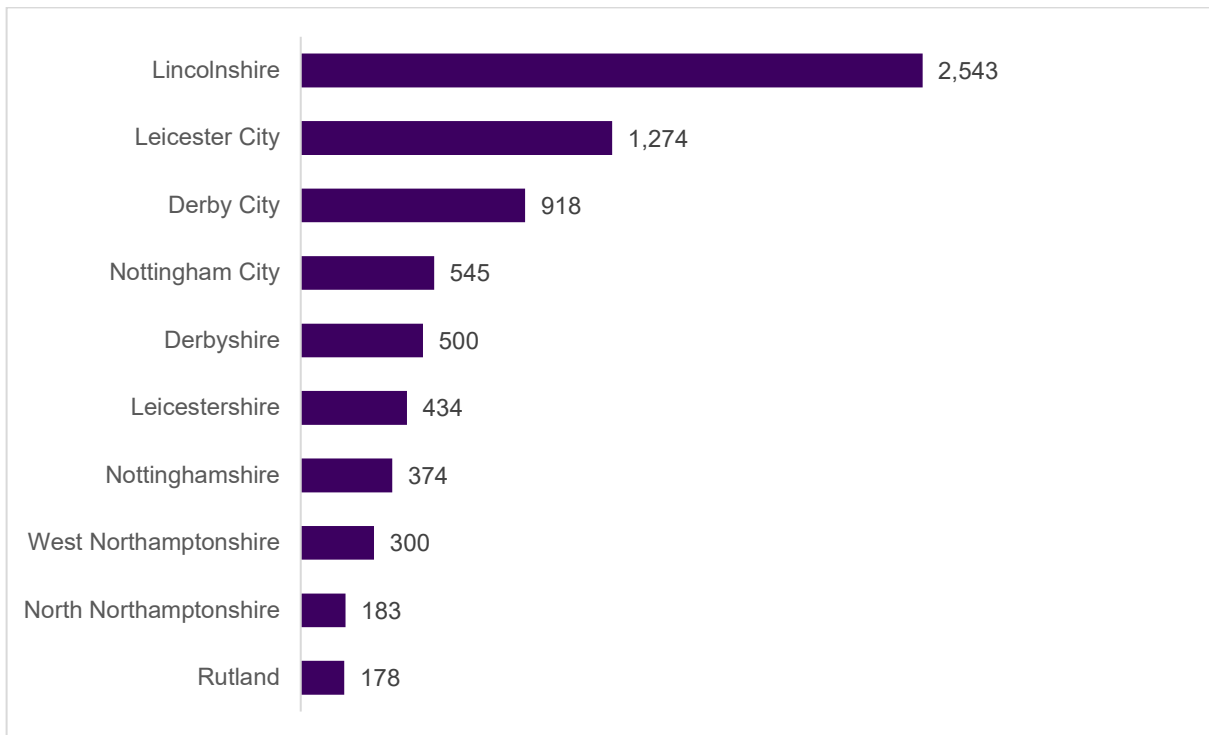


Figure 45. Average number of hours of homecare purchased per provider by councils in the East Midlands during the 2025 sample week



Figure 46. Average spend per person aged 65 years and over receiving homecare purchased by councils in the East Midlands during the 2025 sample week

East of England

Key facts

11

councils purchase homecare from the independent and voluntary sector

£26.70

per hour weighted average, the 3rd highest in the government regions / devolved administrations of the UK

0%

of councils paid the Homecare Association's Minimum Price for England of £32.14 per hour

18%

of councils paid below the value of careworker costs in the Minimum Price of £22.71 per hour

1%

increase in the total hours of homecare purchased from the 2024 sample week

45%

of councils reported a drop in the hours purchased from the 2024 sample week

73%

of councils purchased, on average, no more than 500 hours per provider in the 2025 sample week

£364

spent on average per person aged 65 years and over receiving homecare in the 2025 sample week

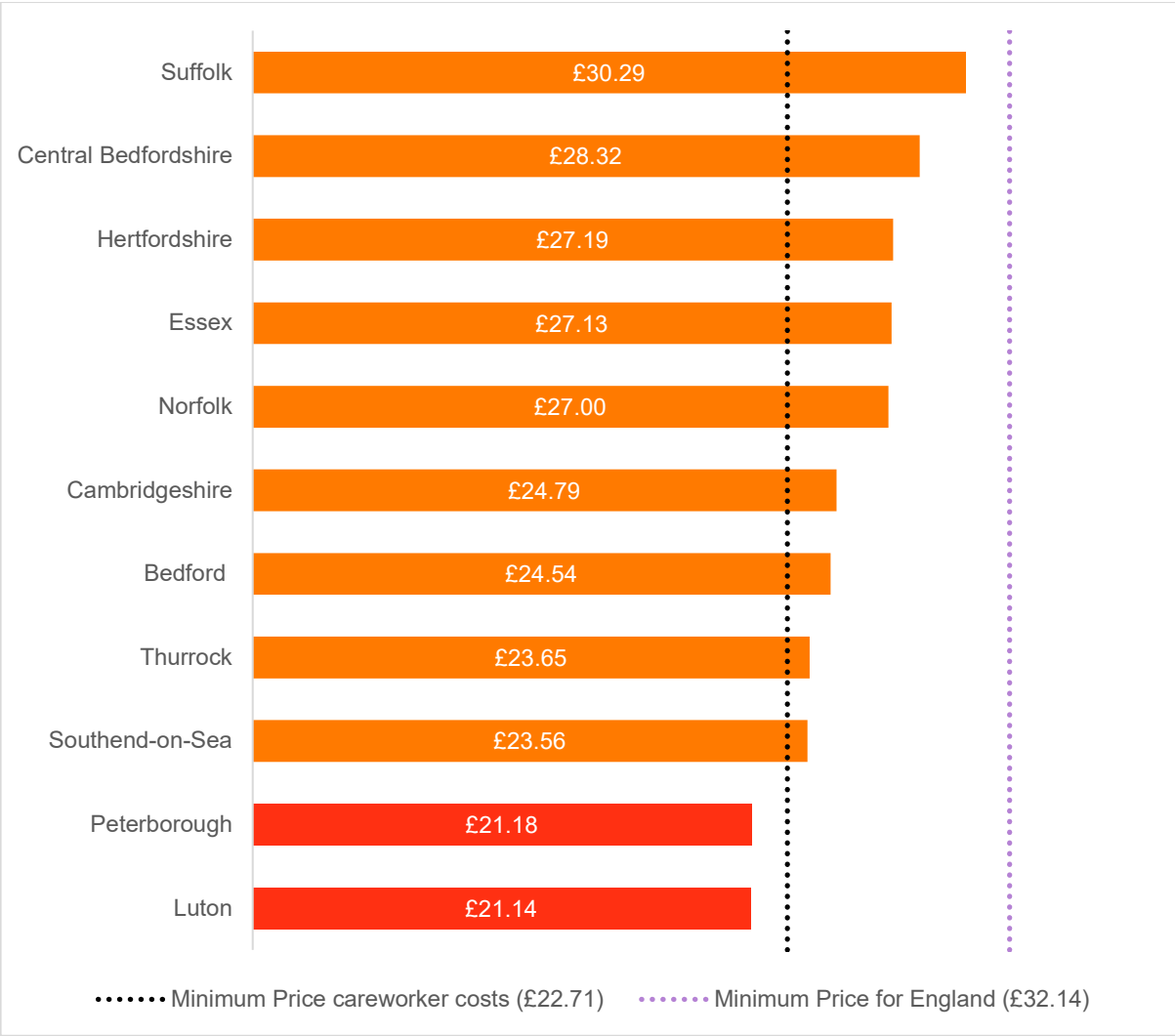


Figure 47. Average hourly prices paid for homecare by councils in the East of England during the 2025 sample week

	2025				Since 2023
Council	Lowest price	Highest price	Hours	Average price	% change in average price
Bedford	£12.24	£40.44	12,448	£24.54	6%
Cambridgeshire	£20.29	£24.98	25,513	£24.79	13%
Central Bedfordshire	£18.00	£96.00	13,924	£28.32	6%
Essex	£12.68	£38.88	78,021	£27.13	17%
Hertfordshire	£23.43	£38.04	39,782	£27.19	0.3%
Luton	£20.72	£21.40	10,715	£21.14	10%
Norfolk	£27.00	£27.00	40,031	£27.00	13%
Peterborough	£18.71	£32.00	10,424	£21.18	21%
Southend-on-Sea	£23.56	£23.56	12,820	£23.56	6%
Suffolk	£26.28	£34.80	48,687	£30.29	27%
Thurrock	£16.32	£25.34	9,446	£23.65	31%

Figure 48. Prices paid per hour and the hours of homecare purchased in the East of England during the 2025 sample week, compared with the 2023 sample week

Notes

- Essex provided a total spend for April 2025. We have estimated the spend for a week.
- Norfolk said £27 is its hourly rate for 2025-26. The council added: “We are unable to share the lowest, highest and average as these are individually negotiated with providers for specific circumstances and so are commercially sensitive.”

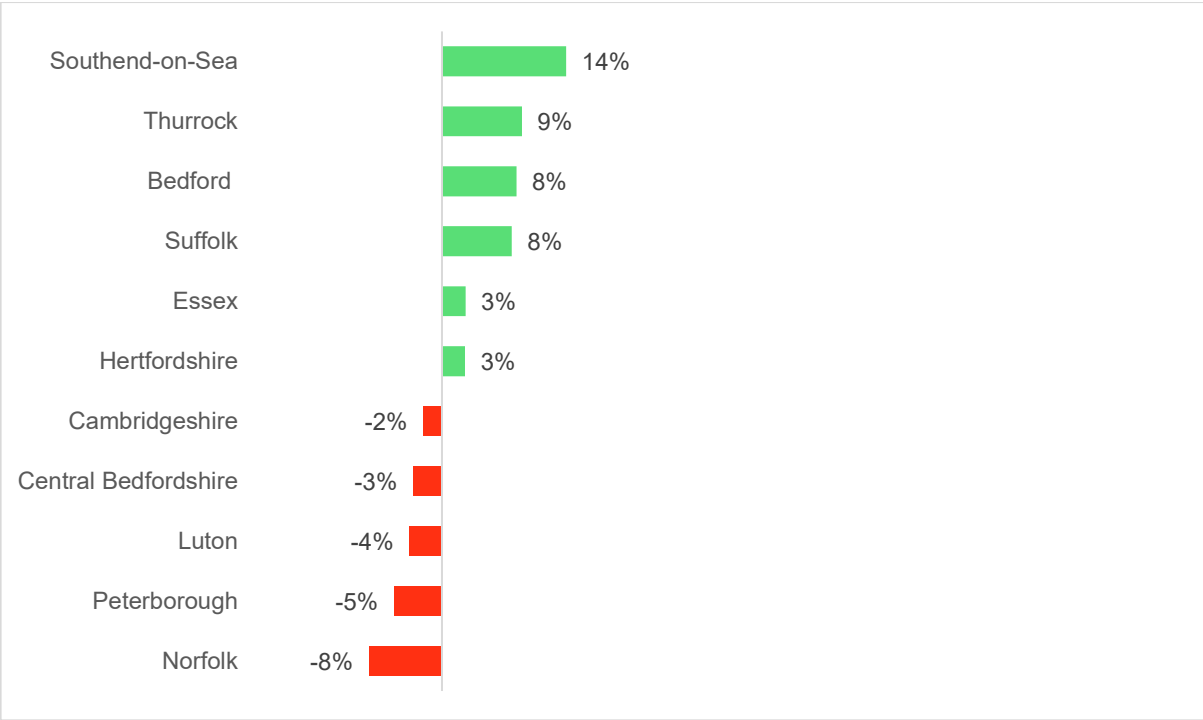


Figure 49. Percentage change in the hours of homecare purchased by councils in the East of England between the sample weeks of 2024 and 2025

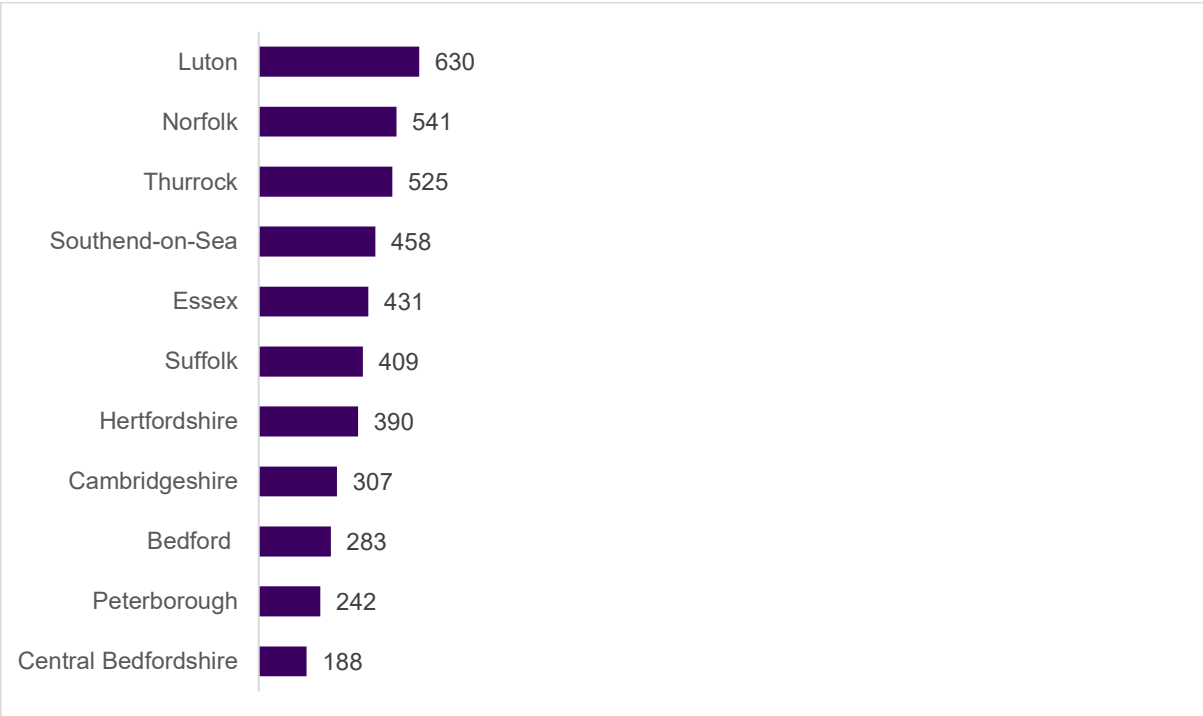


Figure 50. Average number of hours of homecare purchased per provider by councils in the East of England during the 2025 sample week



Figure 51. Average spend per person aged 65 years and over receiving homecare purchased by councils in the East of England during the 2025 sample week

Greater London

Key facts

33

councils purchase homecare from the independent and voluntary sector (32 responses included in our analysis)

£21.87

per hour weighted average, the 2nd lowest in the government regions / devolved administrations of the UK

0%

of councils paid the Homecare Association's Minimum Price for England of £32.14 per hour

59%

of councils paid below the value of careworker costs in the Minimum Price of £22.71 per hour

7%

increase in the total hours of homecare purchased from the 2024 sample week

32%

of councils reported a drop in the hours purchased from the 2024 sample week

48%

of councils purchased, on average, no more than 500 hours per provider in the 2025 sample week

£385

spent on average per person aged 65 years and over receiving homecare in the 2025 sample week

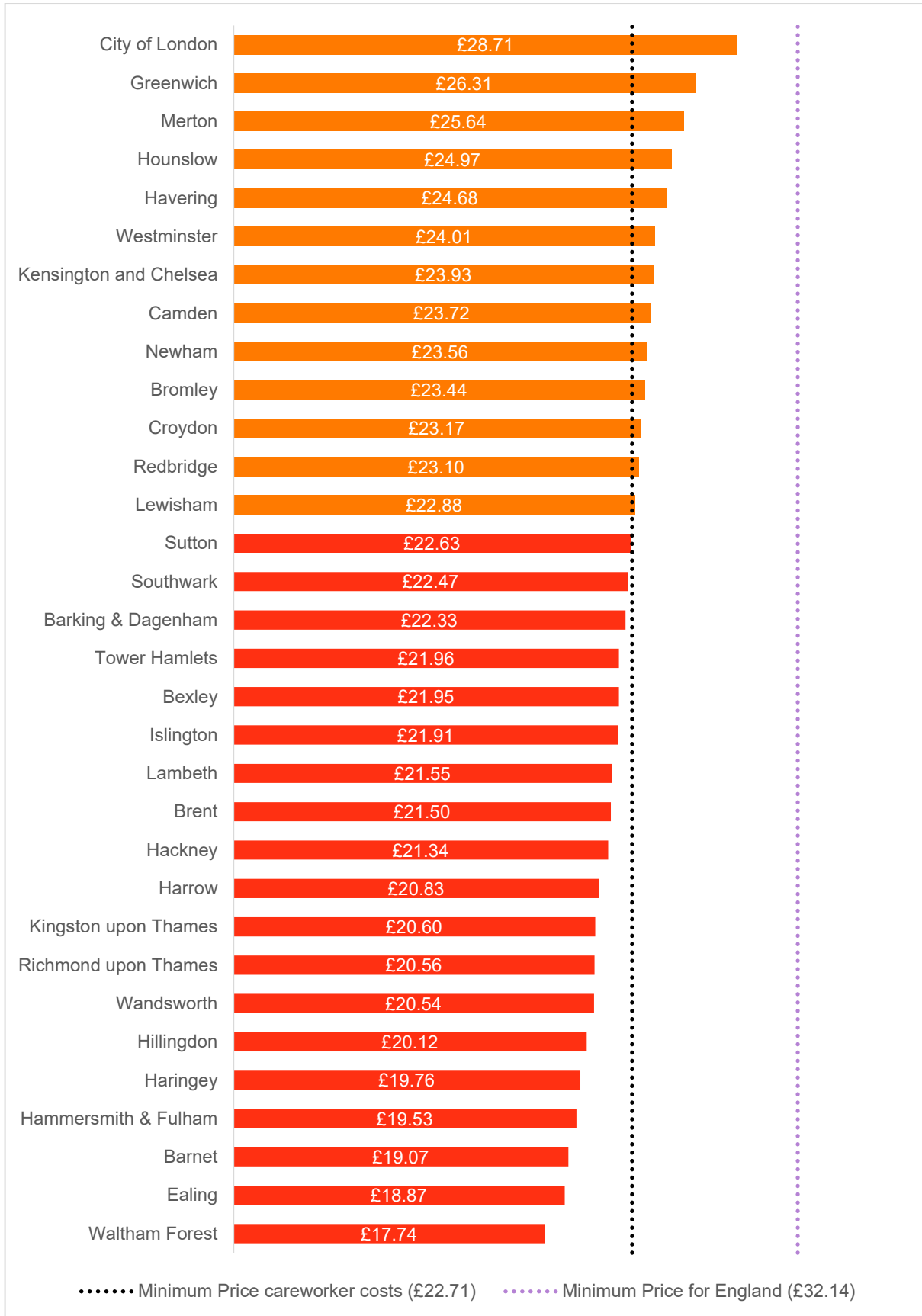


Figure 52. Average hourly prices paid for homecare by councils in Greater London during the 2025 sample week

	2025				Since 2023
Council	Lowest price	Highest price	Hours	Average price	% change in average price
Barking & Dagenham	£16.00	£42.00	10,719	£22.33	9%
Barnet	£17.89	£26.42	32,654	£19.07	1%
Bexley	£21.16	£22.56	19,747	£21.95	18%
Brent	£19.27	£22.50	26,097	£21.50	16%
Bromley	£19.90	£28.27	21,753	£23.44	26%
Camden	£17.54	£67.70	17,591	£23.72	17%
City of London	£28.51	£28.94	360	£28.71	15%
Croydon	£18.32	£39.92	20,086	£23.17	21%
Ealing	£18.44	£22.76	27,981	£18.87	18%
Enfield	Response too late	Response too late	Response too late	Response too late	-
Greenwich	£15.00	£85.52	16,472	£26.31	37%
Hackney	£17.68	£25.00	37,397	£21.34	13%
Hammersmith & Fulham	£18.55	£26.21	18,259	£19.53	4%
Haringey	£10.21	£21.88	17,292	£19.76	7%
Harrow	£17.80	£24.70	20,778	£20.83	25%
Havering	£24.65	£39.09	13,128	£24.68	13%
Hillingdon	£16.15	£23.12	12,845	£20.12	14%
Hounslow	£14.49	£25.16	13,297	£24.97	18%
Islington	£10.98	£54.75	14,195	£21.91	14%
Kensington and Chelsea	£19.06	£32.02	9,881	£23.93	18%
Kingston upon Thames	£18.63	£25.68	10,621	£20.60	14%

Lambeth	£19.44	£23.88	22,370	£21.55	14%
Lewisham	£16.76	£40.78	15,070	£22.88	40%
Merton	£16.50	£26.06	6,956	£25.64	20%
Newham	£23.56	£23.56	26,813	£23.56	16%
Redbridge	£23.10	£23.10	15,955	£23.10	10%
Richmond upon Thames	£17.05	£30.23	7,240	£20.56	7%
Southwark	£16.72	£23.31	22,505	£22.47	16%
Sutton	£18.76	£39.50	11,548	£22.63	20%
Tower Hamlets	Exemption	Exemption	43,583	£21.96	5%
Waltham Forest	£15.00	£21.53	16,741	£17.74	6%
Wandsworth	£15.60	£35.00	15,684	£20.54	15%
Westminster	£18.10	£28.50	20,459	£24.01	20%

Figure 53. Prices paid per hour and the hours of homecare purchased in Greater London during the 2025 sample week, compared with the 2023 sample week

Notes

- Enfield was the only UK public organisation that failed to respond to our Freedom of Information request in time to be included in our analysis. The council repeatedly did not reply to our correspondence on the request, despite sending multiple emails to its FOI team and two further emails to the Director of Adult Social Services (DASS).
- Brent did not hold information on hours purchased in the 2024 sample week. Croydon could not provide accurate information on the total spend and number of providers for the 2025 sample week (because of delays in providers submitting invoices). We have estimated its total spend figure.
- We have also estimated the total spend for Harrow (unable to provide the information) and Tower Hamlets (whose information was over a six-week period). We considered the total spend for both Islington and Lambeth to be inaccurate, so we have estimated the figures for both councils. Tower Hamlets also exempted the lowest and highest rates as being commercially sensitive.

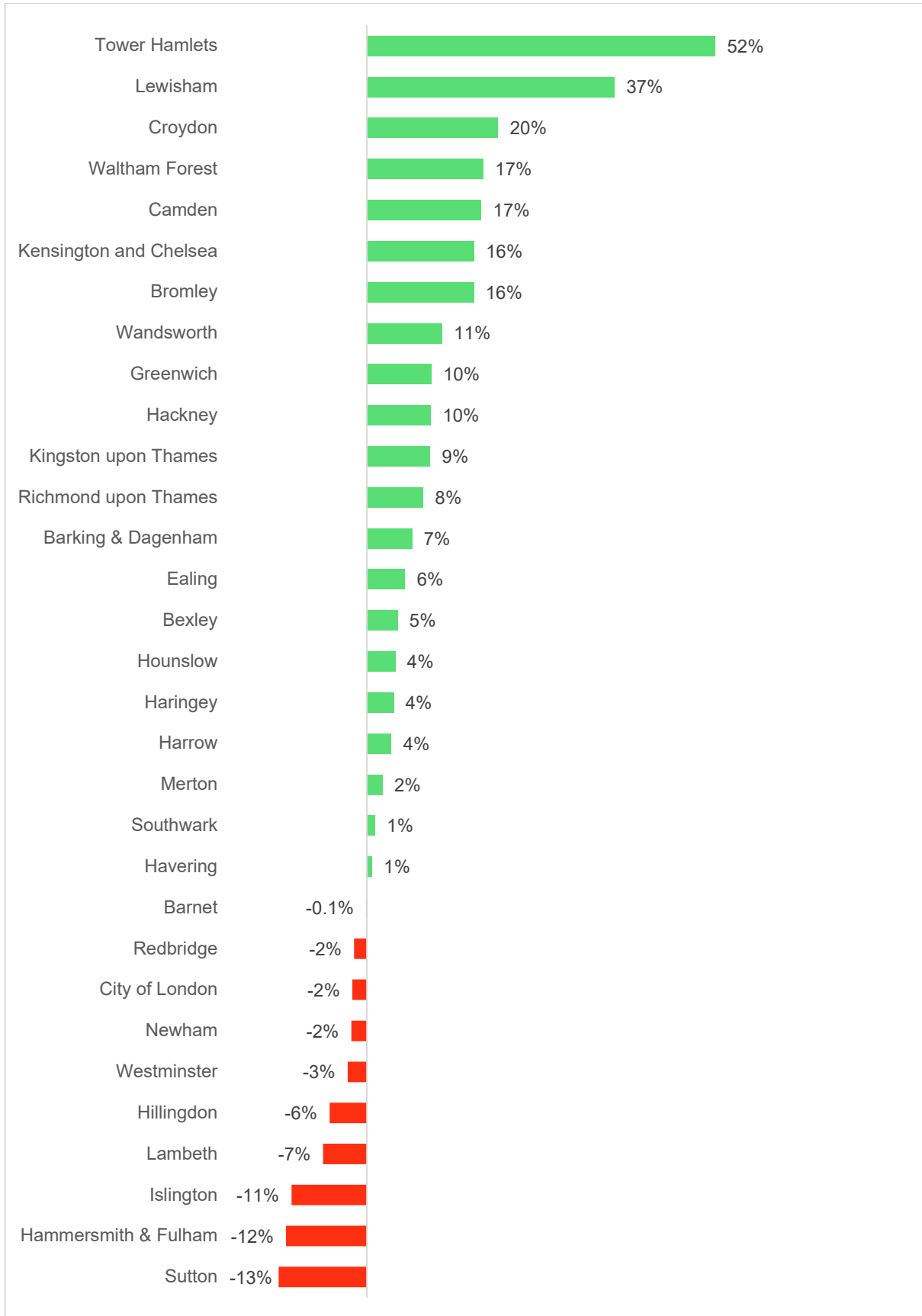


Figure 54. Percentage change in the hours of homecare purchased by councils in Greater London between the sample weeks of 2024 and 2025

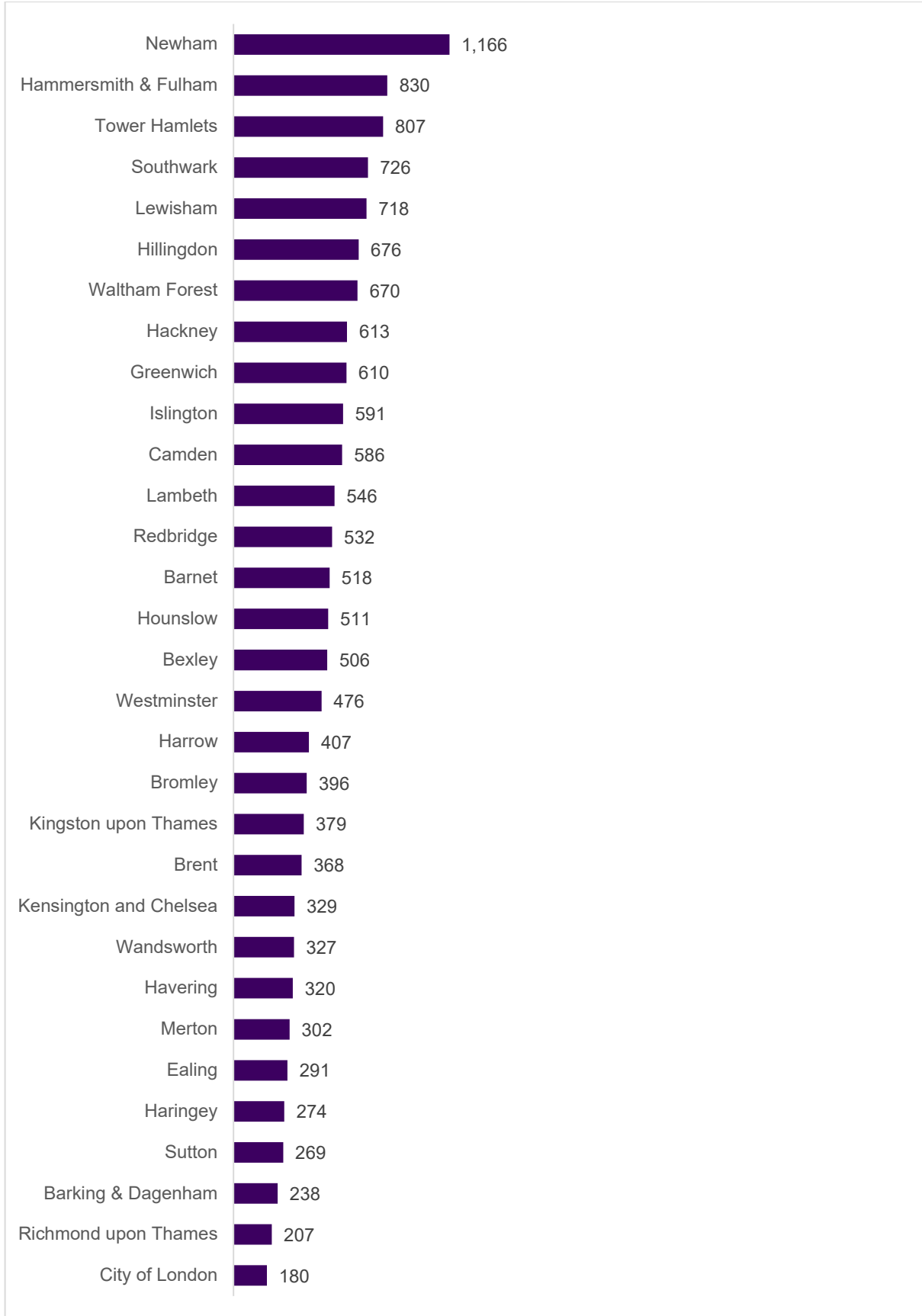


Figure 55. Average number of hours of homecare purchased per provider by councils in Greater London during the 2025 sample week

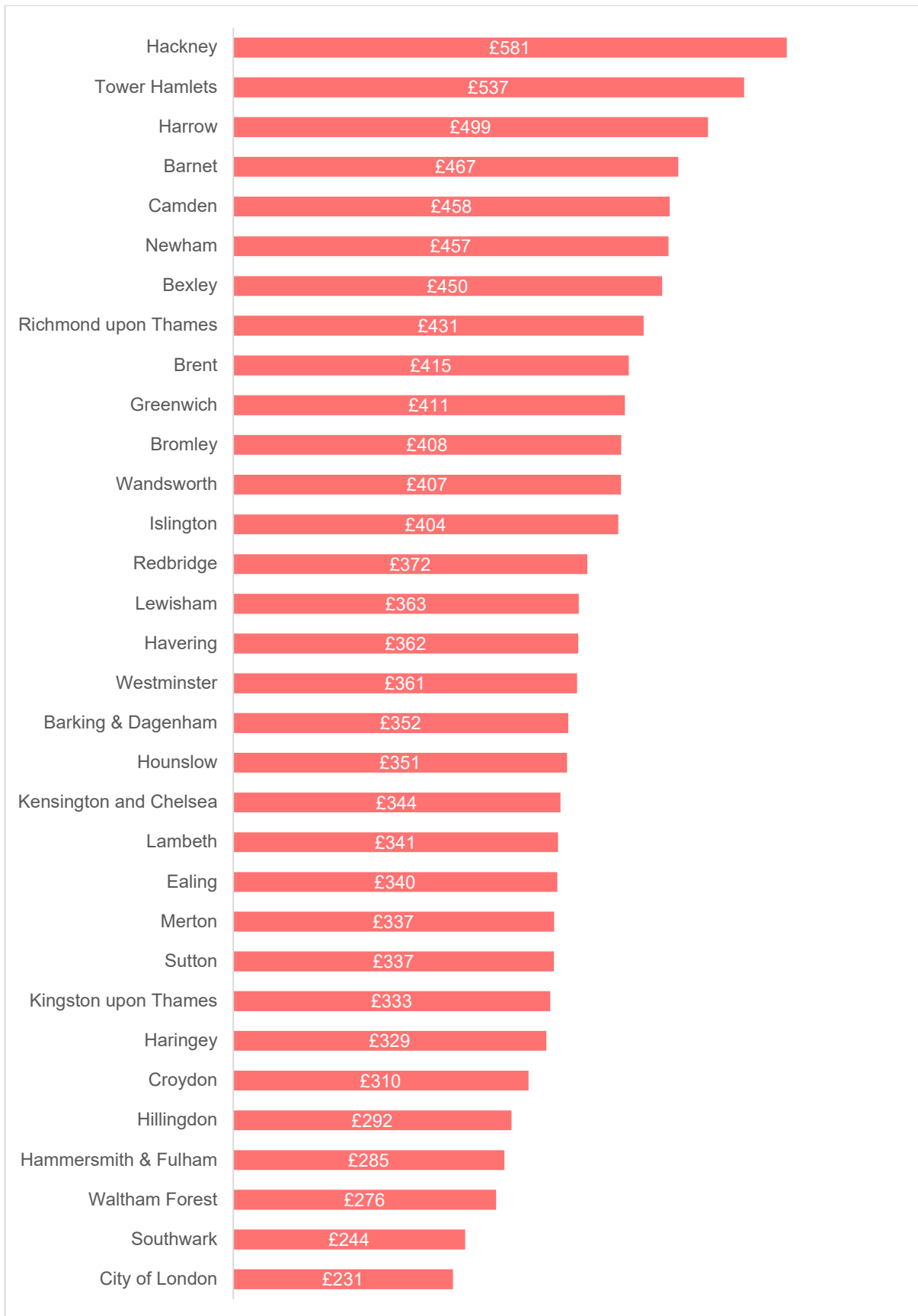


Figure 56. Average spend per person aged 65 years and over receiving homecare purchased by councils in Greater London during the 2025 sample week

North East

Key facts

12

councils purchase homecare from the independent and voluntary sector

£23.43

per hour weighted average, the 4th lowest in the government regions / devolved administrations of the UK

0%

of councils paid the Homecare Association's Minimum Price for England of £32.14 per hour

42%

of councils paid below the value of careworker costs in the Minimum Price of £22.71 per hour

1%

increase in the total hours of homecare purchased from the 2024 sample week

67%

of councils reported a drop in the hours purchased from the 2024 sample week

58%

of councils purchased, on average, no more than 500 hours per provider in the 2025 sample week

£292

spent on average per person aged 65 years and over receiving homecare in the 2025 sample week

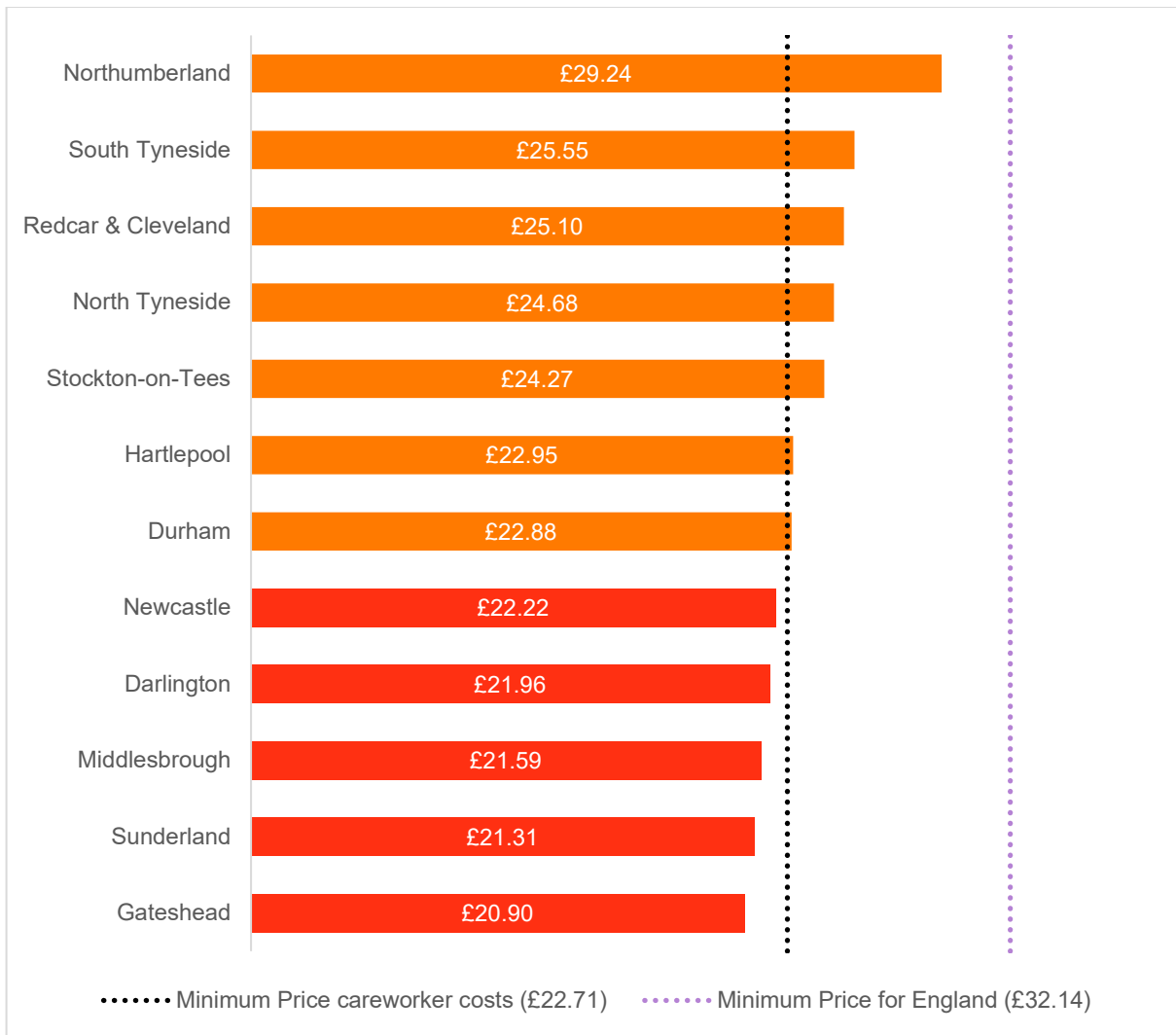


Figure 57. Average hourly prices paid for homecare by councils in the North East during the 2025 sample week

	2025				Since 2023
Council	Lowest price	Highest price	Hours	Average price	% change in average price
Darlington	£19.91	£33.57	6,087	£21.96	23%
Durham	£12.00	£32.28	29,954	£22.88	21%
Gateshead	£18.70	£35.28	17,368	£20.90	23%
Hartlepool	£21.73	£32.72	3,624	£22.95	6%
Middlesbrough	£17.12	£26.66	7,210	£21.59	6%
Newcastle	£15.50	£33.00	9,843	£22.22	13%
North Tyneside	£22.37	£27.02	9,164	£24.68	28%
Northumberland	£23.44	£54.47	14,157	£29.24	26%
Redcar & Cleveland	£20.76	£25.24	6,646	£25.10	24%
South Tyneside	£23.28	£25.78	8,567	£25.55	18%
Stockton-on-Tees	£22.71	£25.83	6,424	£24.27	25%
Sunderland	£17.87	£34.91	15,049	£21.31	12%

Figure 58. Prices paid per hour and the hours of homecare purchased in the North East during the 2025 sample week, compared with the 2023 sample week

Notes

- Gateshead admitted its total spend may not be the full cost as ‘there could be delays with providers returning remittances’. Therefore, we have estimated the true figure from other data.
- North Tyneside did not hold an average rate, saying the council is ‘not required to create data to answer an FOI.’ Again, we have estimated this rate.

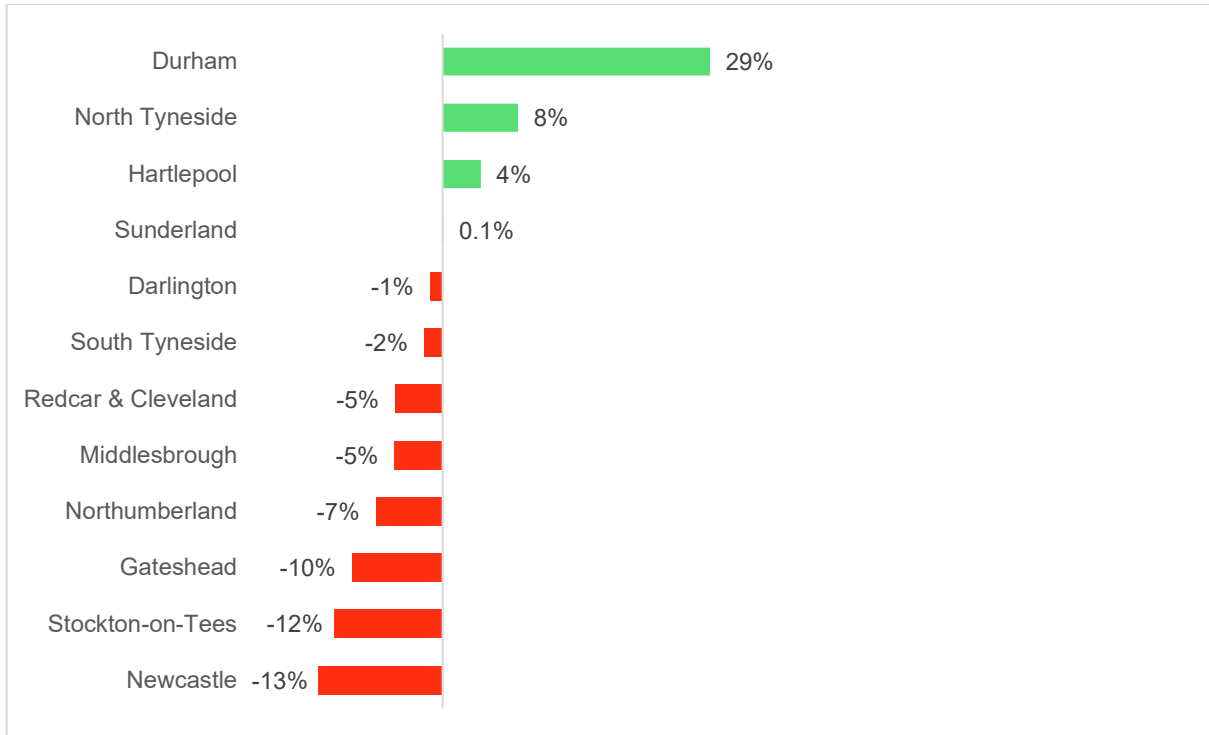


Figure 59. Percentage change in the hours of homecare purchased by councils in the North East between the sample weeks of 2024 and 2025

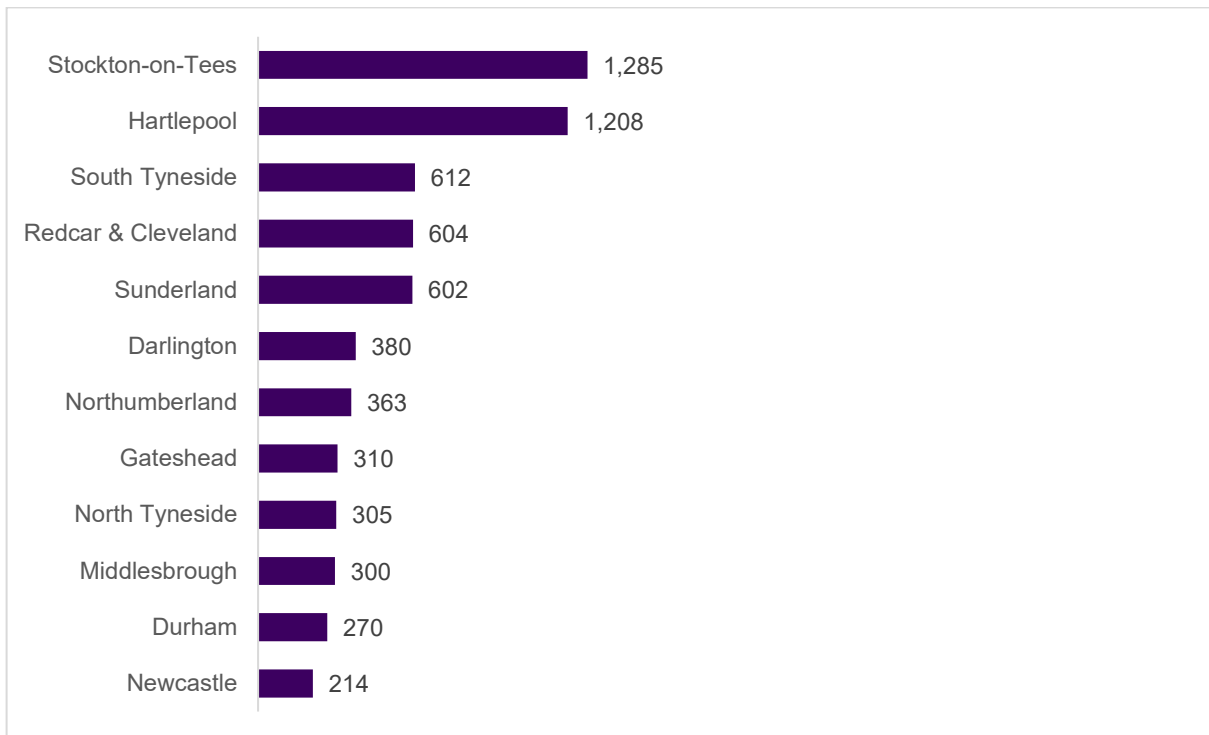


Figure 60. Average number of hours of homecare purchased per provider by councils in the North East during the 2025 sample week

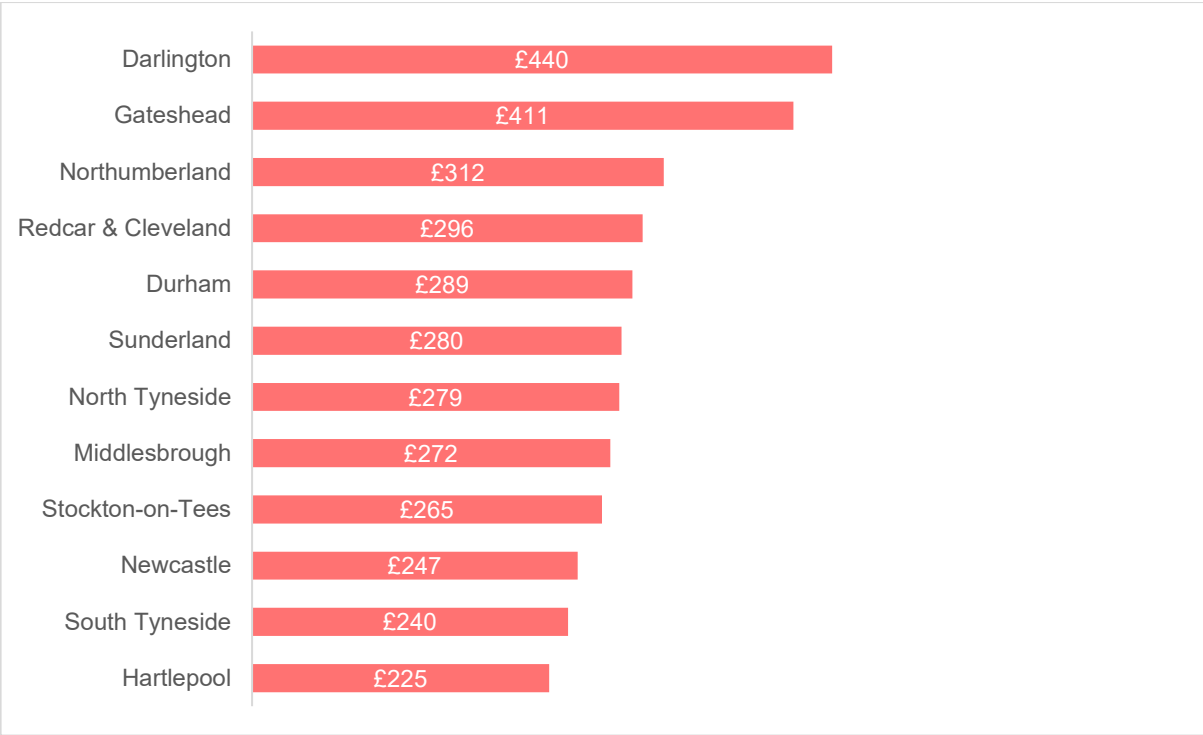


Figure 61. Average spend per person aged 65 years and over receiving homecare purchased by councils in the North East during the 2025 sample week

North West

Key facts

24

councils purchase homecare from the independent and voluntary sector

£23.71

per hour weighted average, the 5th lowest in the government regions / devolved administrations of the UK

0%

of councils paid the Homecare Association's Minimum Price for England of £32.14 per hour

21%

of councils paid below the value of careworker costs in the Minimum Price of £22.71 per hour

3%

increase in the total hours of homecare purchased from the 2024 sample week

22%

of councils reported a drop in the hours purchased from the 2024 sample week

46%

of councils purchased, on average, no more than 500 hours per provider in the 2025 sample week

£341

spent on average per person aged 65 years and over receiving homecare in the 2025 sample week



Figure 62. Average hourly prices paid for homecare by councils in the North West during the 2025 sample week

	2025				Since 2023
Council	Lowest price	Highest price	Hours	Average price	% change in average price
Blackburn with Darwen	£22.98	£22.98	10,150	£22.98	18%
Blackpool	£21.69	£22.25	10,404	£22.25	18%
Bolton	£24.91	£74.61	14,650	£24.91	19%
Bury	£23.45	£27.69	9,087	£23.45	12%
Cheshire East	£23.24	£38.95	18,508	£23.91	13%
Cheshire West and Chester	£18.28	£54.96	7,434	£25.15	22%
Cumberland	£18.71	£32.62	13,408	£25.25	14%
Halton	£22.87	£22.87	4,450	£22.87	60%
Knowsley	£9.04	£37.80	14,069	£20.62	4%
Lancashire	£23.56	£35.20	105,774	£23.56	-1%
Liverpool	£21.50	£22.92	33,474	£22.76	12%
Manchester	£22.82	£29.05	22,924	£24.88	24%
Oldham	£24.04	£24.04	8,215	£24.04	16%
Rochdale	£24.05	£24.05	14,185	£24.05	15%
Salford	£20.22	£25.80	13,209	£25.79	20%
Sefton	£23.42	£35.00	19,393	£23.42	31%
St Helens	£17.69	£26.40	16,103	£21.34	2%
Stockport	£24.80	£24.80	16,717	£24.80	15%
Tameside	£15.52	£37.19	14,180	£23.74	17%
Trafford	£18.49	£57.60	14,784	£22.70	14%
Warrington	£23.84	£29.50	11,116	£25.73	8%

Westmorland & Furness	£25.04	£32.70	12,547	£28.06	19%
Wigan	£22.96	£22.96	13,286	£22.96	18%
Wirral	£22.70	£22.70	20,887	£22.70	2%

Figure 63. Prices paid per hour and the hours of homecare purchased in the North West during the 2025 sample week, compared with the 2023 sample week

Notes

- Bolton stated an average rate of £30.50 per hour, but added it pays most providers at the standard rate of £24.91 per hour (the difference is due to 18% of packages being double-handed). We have used the latter rate for better comparison with previous years. In addition, the council admitted some providers may not have submitted data on hours purchased for the 2025 sample week, so we have estimated this.
- For the lowest, highest and average rates, Bury referred to a page on its website.⁴⁷ We have set the average at its standard rate. The council also could not break down the data on the number of people receiving homecare by age, so we have estimated for those aged 65 years and over.
- Knowsley's lowest rate was its supported accommodation sleep-in rate.
- Liverpool did not hold information on the average rate, so we have estimated.
- Manchester did not hold easily accessible information on the total spend, so we have estimated.
- Tameside said it paid its supported accommodation providers an hourly rate during the 2024 sample week but now pay at a unit rate (hence not included in the hours purchased for the 2025 sample week). Therefore, for consistency, we have not used the 2024 sample week hours in our analysis.

⁴⁷ [Adult Social Care fee rates - Bury Council](#)

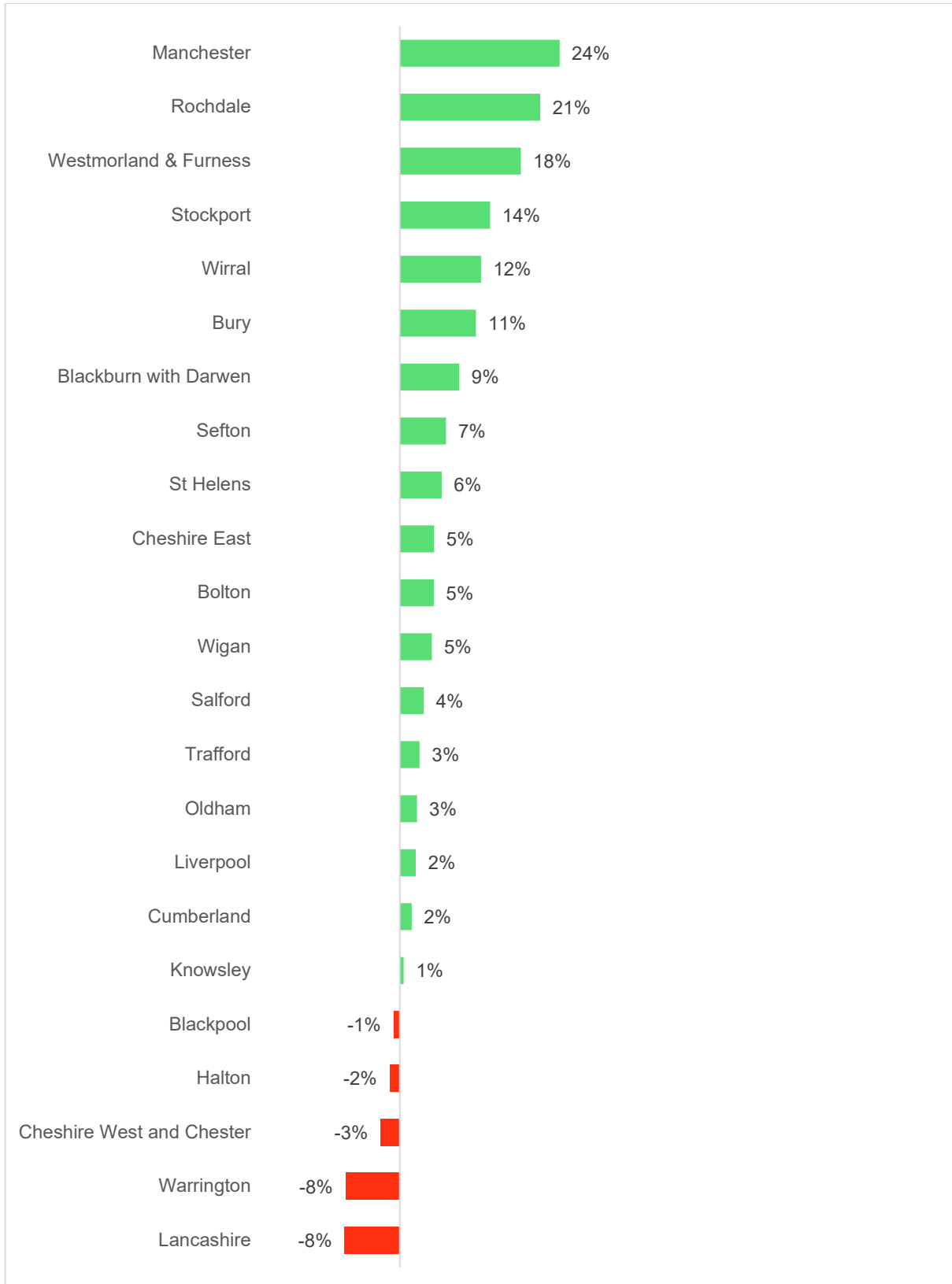


Figure 64. Percentage change in the hours of homecare purchased by councils in the North West between the sample weeks of 2024 and 2025

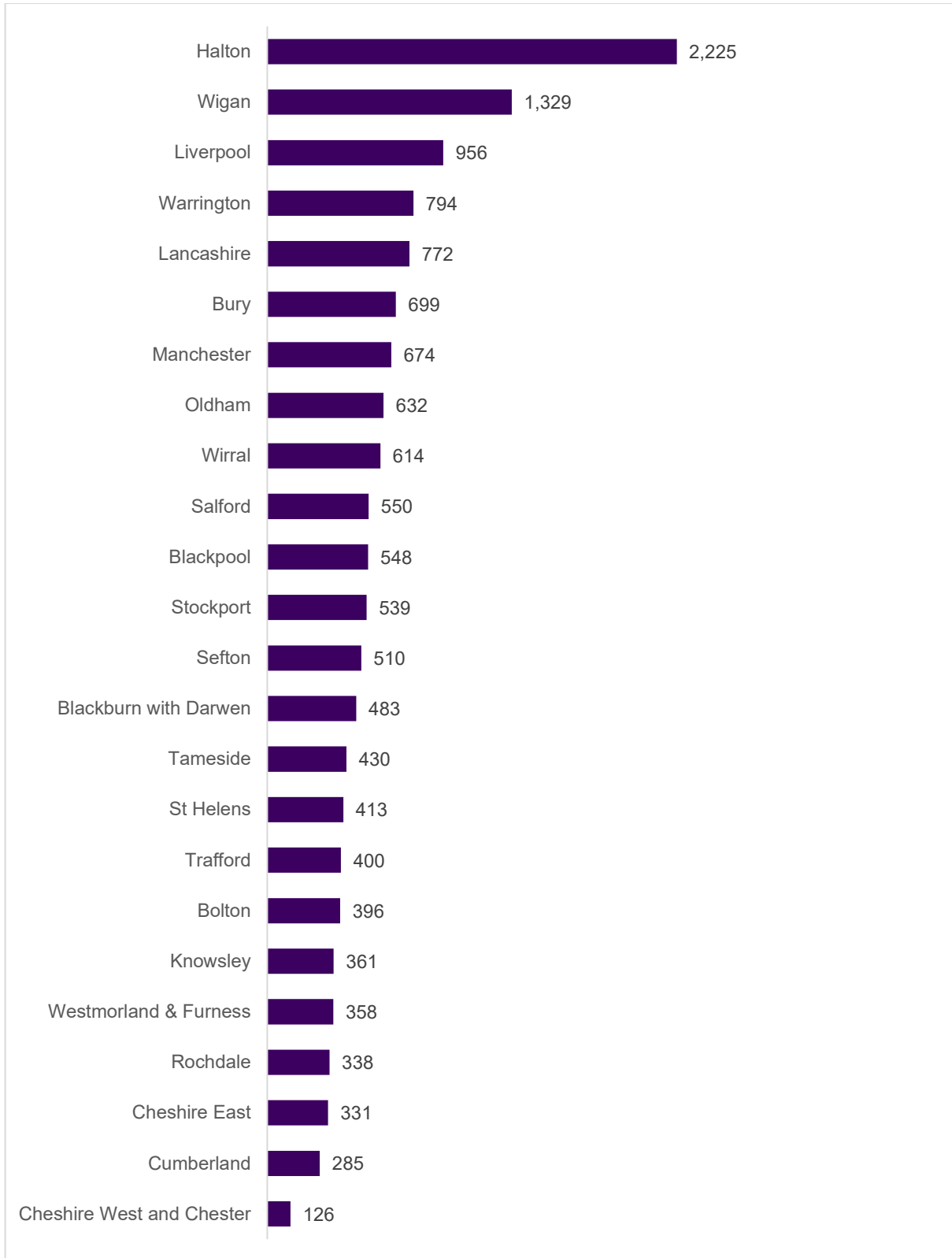


Figure 65. Average number of hours of homecare purchased per provider by councils in the North West during the 2025 sample week



Figure 66. Average spend per person aged 65 years and over receiving homecare purchased by councils in the North West during the 2025 sample week

South East

Key facts

19

councils purchase homecare from the independent and voluntary sector

£25.44

per hour weighted average, the 5th highest in the government regions / devolved administrations of the UK

0%

of councils paid the Homecare Association's Minimum Price for England of £32.14 per hour

32%

of councils paid below the value of careworker costs in the Minimum Price of £22.71 per hour

3%

increase in the total hours of homecare purchased from the 2024 sample week

24%

of councils reported a drop in the hours purchased from the 2024 sample week

94%

of councils purchased, on average, no more than 500 hours per provider in the 2025 sample week

£381

spent on average per person aged 65 years and over receiving homecare in the 2025 sample week

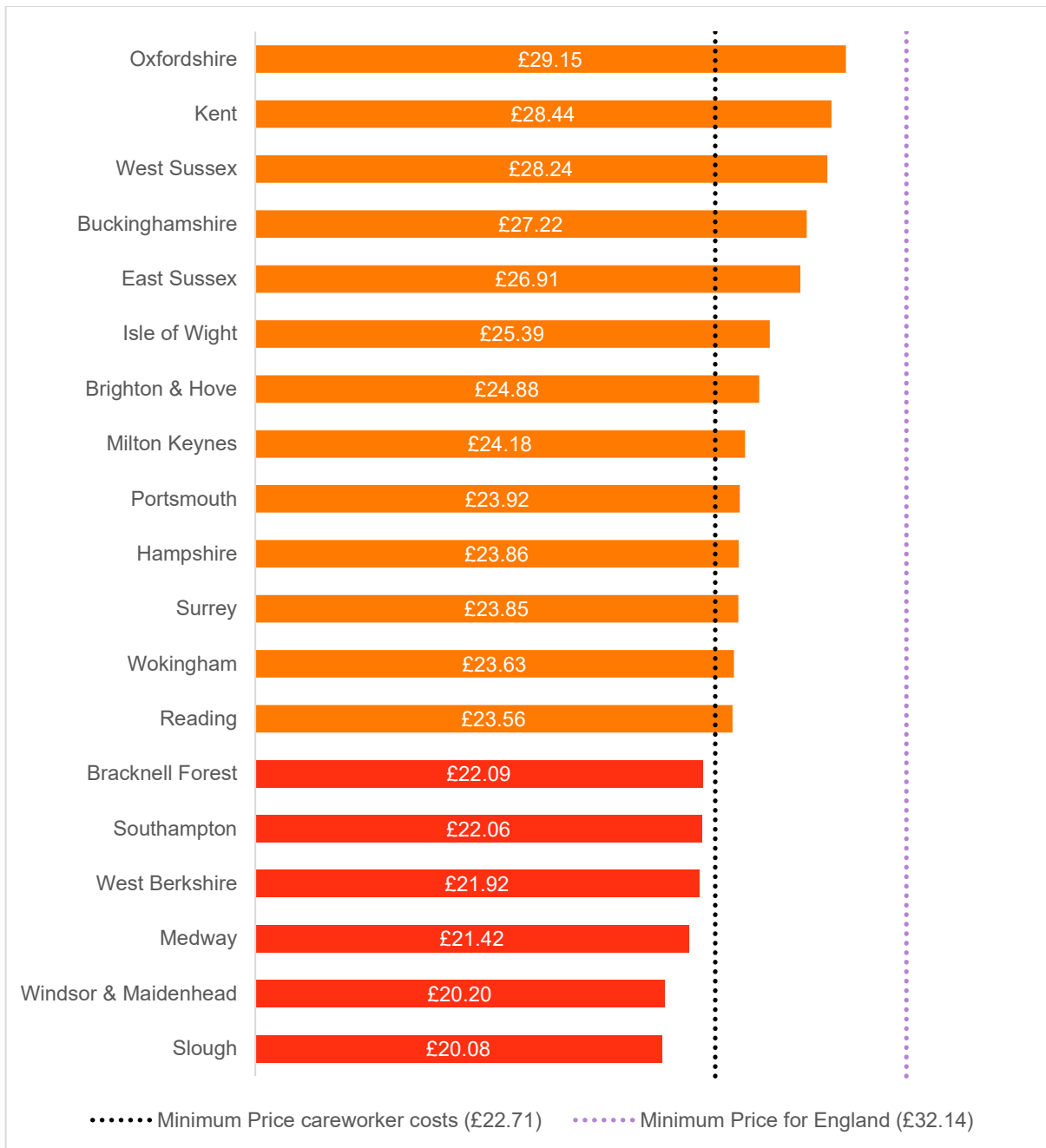


Figure 67. Average hourly prices paid for homecare by councils in the South East during the 2025 sample week

	2025				Since 2023
Council	Lowest price	Highest price	Hours	Average price	% change in average price
Bracknell Forest	£22.09	£22.09	845	£22.09	7%
Brighton & Hove	£19.15	£30.45	8,405	£24.88	14%
Buckinghamshire	£25.20	£32.38	20,055	£27.22	16%
East Sussex	£24.96	£37.40	28,033	£26.91	12%
Hampshire	£19.37	£64.80	50,253	£23.86	-3%
Isle of Wight	£15.36	£25.44	7,925	£25.39	13%
Kent	Exemption	Exemption	51,722	£28.44	4%
Medway	£19.44	£33.84	9,568	£21.42	11%
Milton Keynes	£22.79	£25.72	9,880	£24.18	11%
Oxfordshire	£15.66	£46.29	28,057	£29.15	15%
Portsmouth	£20.52	£24.40	9,327	£23.92	-10%
Reading	£23.56	£23.56	6,703	£23.56	10%
Slough	£14.66	Not used	9,199	£20.08	11%
Southampton	£16.67	£34.00	15,499	£22.06	6%
Surrey	£20.45	£26.29	53,772	£23.85	-0.3%
West Berkshire	£19.07	£35.21	7,369	£21.92	-7%
West Sussex	£22.20	£38.10	30,000	£28.24	6%
Windsor & Maidenhead	£17.95	£28.16	5,475	£20.20	-1%
Wokingham	£21.56	£25.00	7,595	£23.63	14%

Figure 68. Prices paid per hour and the hours of homecare purchased in the South East during the 2025 sample week, compared with the 2023 sample week

Notes

- Kent exempted its lowest and highest rates, claiming these were personal information.
- Oxfordshire's figures on hours purchased during the 2025 and 2024 sample weeks were underestimates, as it recorded some packages weekly (rather than by hour).
- Portsmouth could not provide a total spend figure, so we have estimated from other data. Further, the average prices of Portsmouth and West Berkshire have dropped markedly since 2023. When questioned on this, both councils confirmed their 2025 averages were correct.
- In our view, Slough's highest rate seemed implausible, so we have not used this in the analysis.
- West Sussex exempted the 2024 sample week hours, as the cost of compliance was too high (information not easily accessible). We accepted its answer on the number of people aged 65 years and over receiving homecare - however, we acknowledge the council's point that it will not include those who may not yet been invoiced/processed.
- Windsor & Maidenhead did not hold information on the 2024 sample week hours purchased and the number of homecare providers.

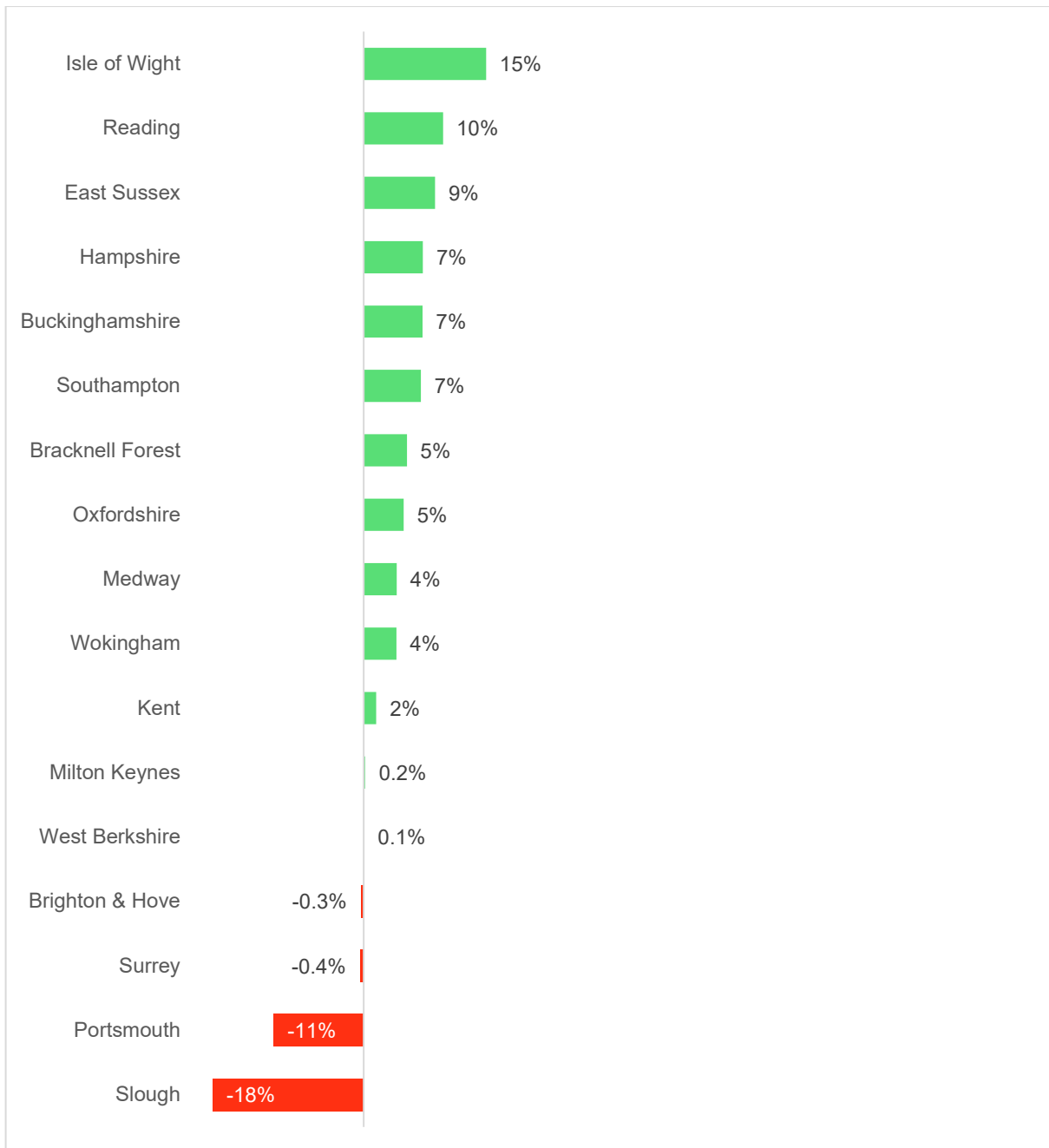


Figure 69. Percentage change in the hours of homecare purchased by councils in the South East between the sample weeks of 2024 and 2025

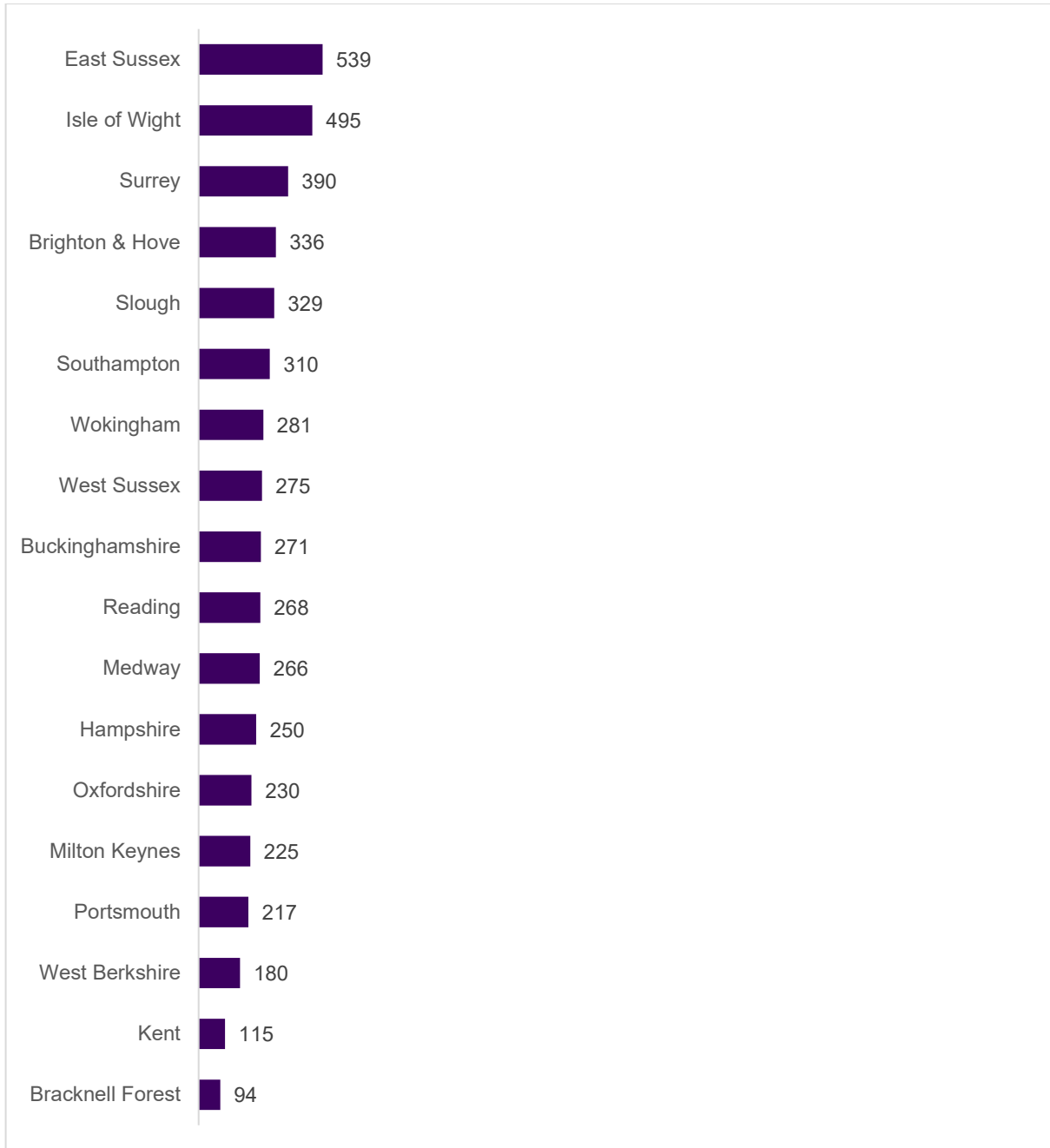


Figure 70. Average number of hours of homecare purchased per provider by councils in the South East during the 2025 sample week

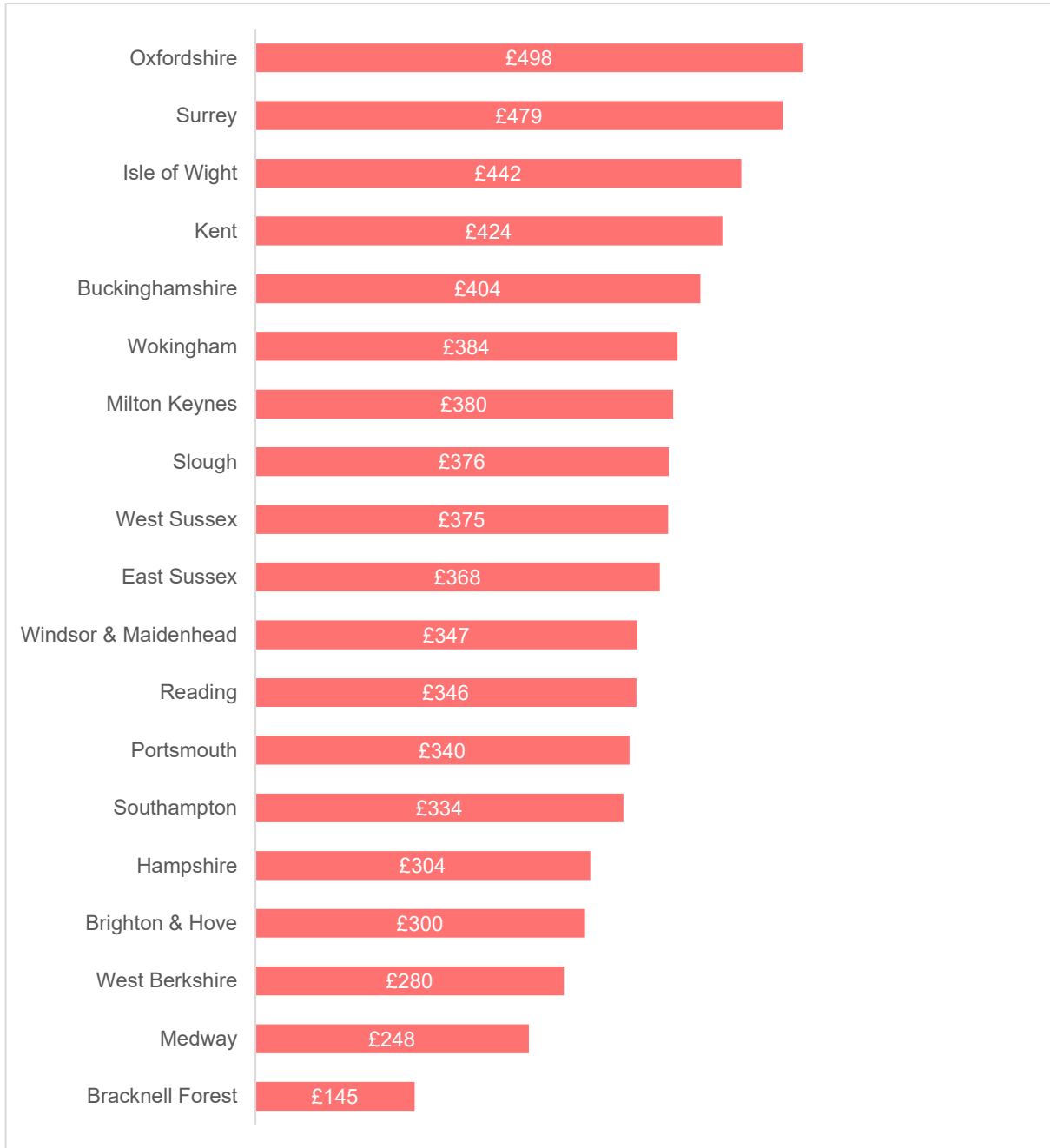


Figure 71. Average spend per person aged 65 years and over receiving homecare purchased by councils in the South East during the 2025 sample week

South West

Key facts

14 councils purchase homecare from the independent and voluntary sector	£26.83 per hour weighted average, the 2nd highest in the government regions / devolved administrations of the UK
0% of councils paid the Homecare Association's Minimum Price for England of £32.14 per hour	0% of councils paid below the value of careworker costs in the Minimum Price of £22.71 per hour
2% increase in the total hours of homecare purchased from the 2024 sample week	36% of councils reported a drop in the hours purchased from the 2024 sample week
92% of councils purchased, on average, no more than 500 hours per provider in the 2025 sample week	£388 spent on average per person aged 65 years and over receiving homecare in the 2025 sample week

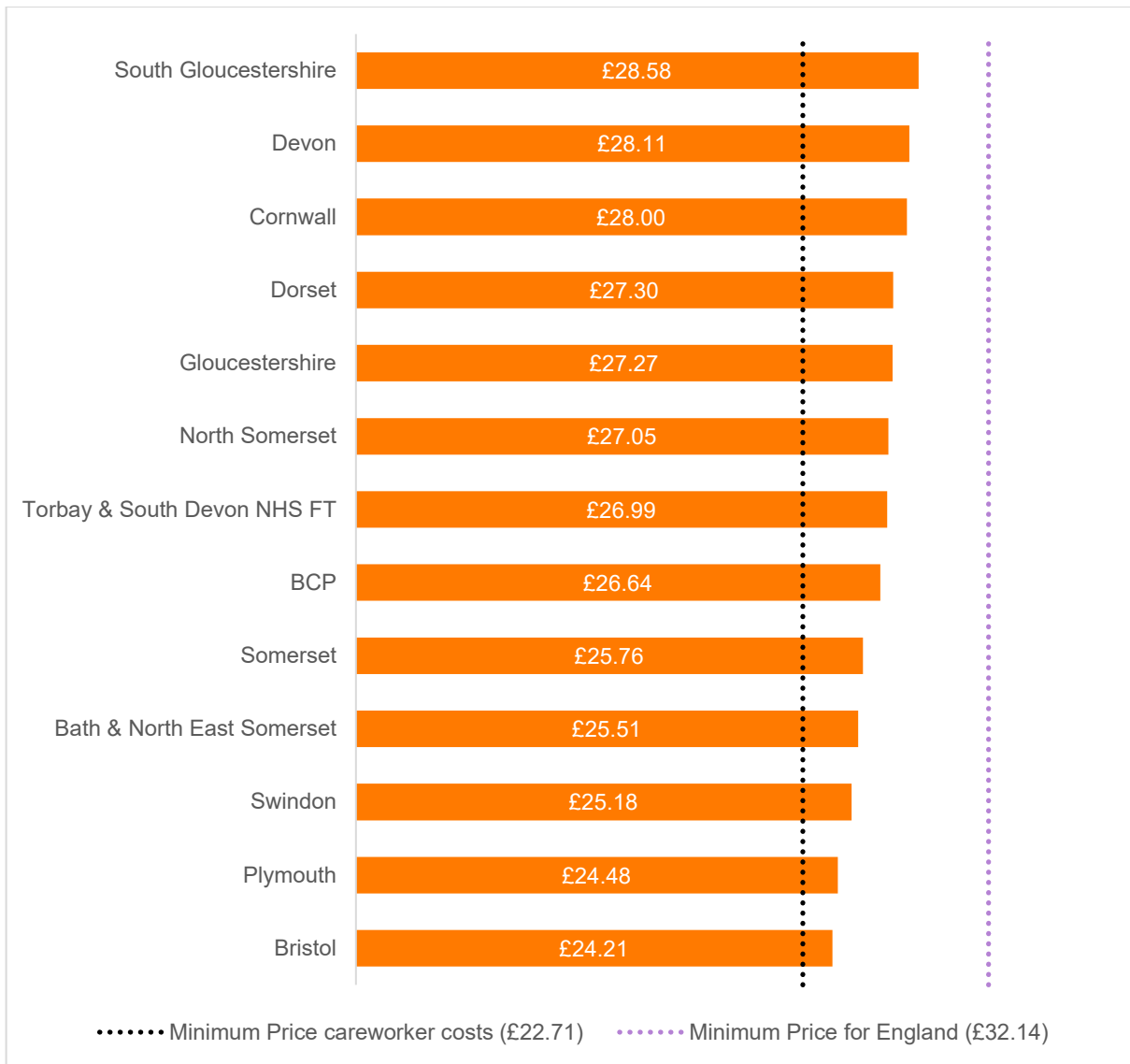


Figure 72. Average hourly prices paid for homecare by councils in the South West during the 2025 sample week

	2025				Since 2023
Council	Lowest price	Highest price	Hours	Average price	% change in average price
Bath & North East Somerset	£25.26	£29.75	7,156	£25.51	-0.4%
BCP	£13.32	£54.00	20,422	£26.64	11%
Bristol	£17.45	£40.11	17,726	£24.21	5%
Cornwall	£14.19	£41.73	26,635	£28.00	17%
Devon	£21.72	£29.96	23,521	£28.11	4%
Dorset	£22.00	£47.61	15,019	£27.30	15%
Gloucestershire	£26.05	£31.79	24,751	£27.27	3%
Isles of Scilly	Not held	Not held	Not held	Not held	-
North Somerset	£22.59	£67.00	9,054	£27.05	6%
Plymouth	£19.90	£24.55	10,006	£24.48	11%
Somerset	£25.00	£43.44	18,341	£25.76	9%
South Gloucestershire	£25.00	£31.08	21,400	£28.58	30%
Swindon	£23.56	£26.80	10,545	£25.18	12%
Torbay & South Devon NHS FT	£20.90	£68.24	11,811	£26.99	11%
Torbay (council)	Not held	Not held	Not held	Not held	-
Wiltshire	£29.60	£30.79	954	Not held	-

Figure 73. Prices paid per hour and the hours of homecare purchased in the South West during the 2025 sample week, compared with the 2023 sample week

Notes

- The Isles of Scilly provided in-house homecare only, so did not hold the information. However, the council told us its hourly charge for homecare in 2025-26 was £26.16.

- Torbay Council also did not hold the information, as Torbay & South Devon NHS Foundation Trust (FT) was responsible for homecare in its area (as shown in the table above).
- Wiltshire did not hold an average hourly rate, as 85% of homecare purchased was less than an hour per visit. We also have not used the council's answer on the number of providers, which did not seem to coincide with its other data. This council's reported hours purchased in the 2024 and 2025 sample weeks were surprisingly low, hence the percentage increase shown in the graph below is an anomaly.

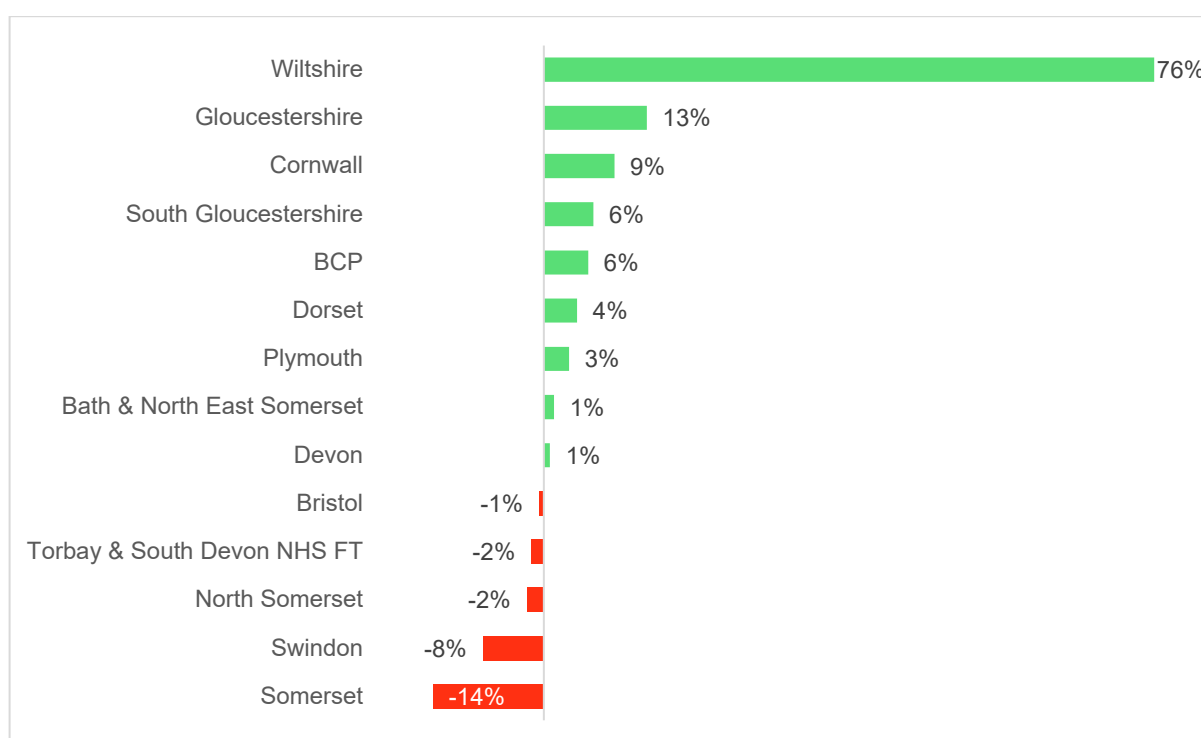


Figure 74. Percentage change in the hours of homecare purchased by councils in the South West between the sample weeks of 2024 and 2025

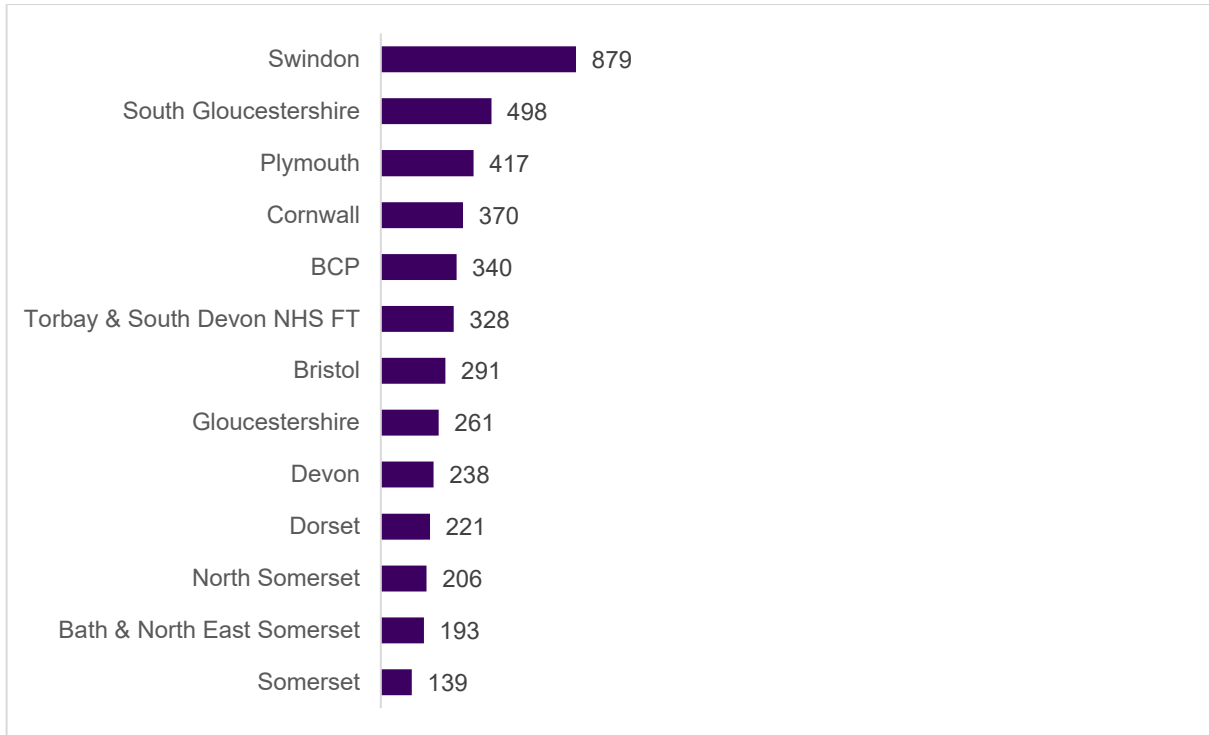


Figure 75. Average number of hours of homecare purchased per provider by councils in the South West during the 2025 sample week

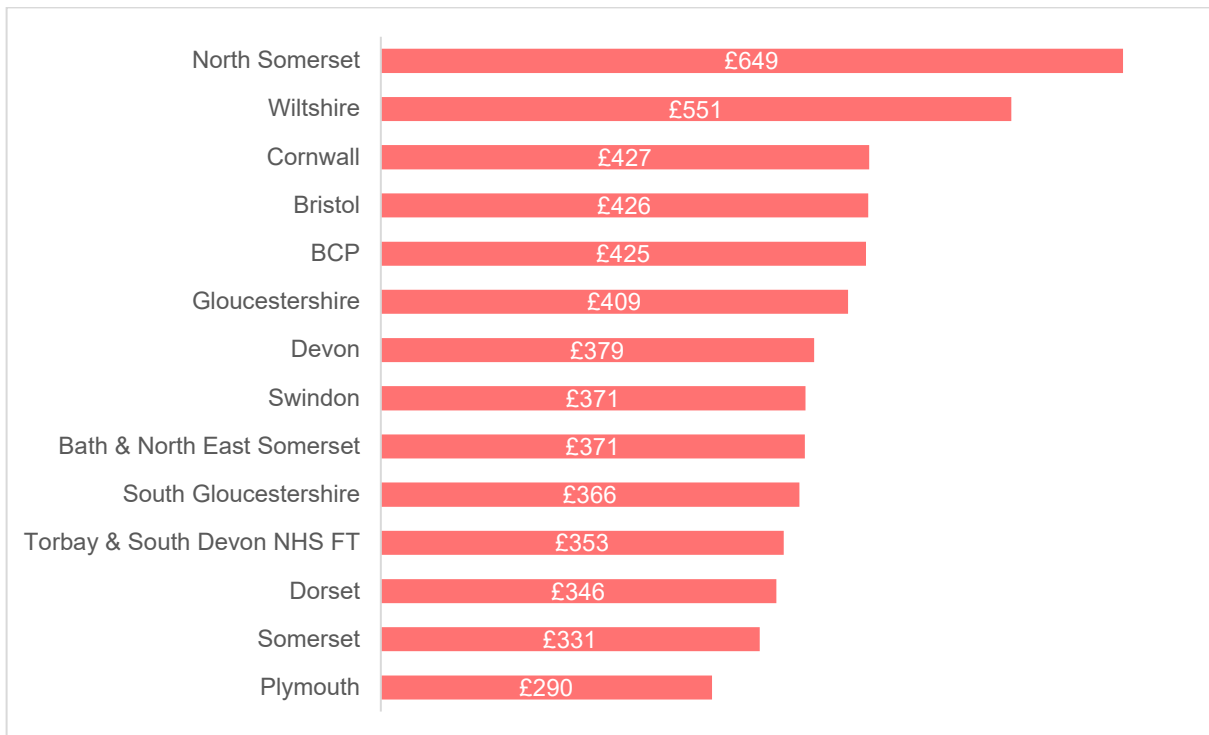


Figure 76. Average spend per person aged 65 years and over receiving homecare purchased by councils in the South West during the 2025 sample week

West Midlands

Key facts

14 councils purchase homecare from the independent and voluntary sector	£23.42 per hour weighted average, the 3rd lowest in the government regions / devolved administrations of the UK
0% of councils paid the Homecare Association's Minimum Price for England of £32.14 per hour	43% of councils paid below the value of careworker costs in the Minimum Price of £22.71 per hour
4% increase in the total hours of homecare purchased from the 2024 sample week	21% of councils reported a drop in the hours purchased from the 2024 sample week
69% of councils purchased, on average, no more than 500 hours per provider in the 2025 sample week	£344 spent on average per person aged 65 years and over receiving homecare in the 2025 sample week

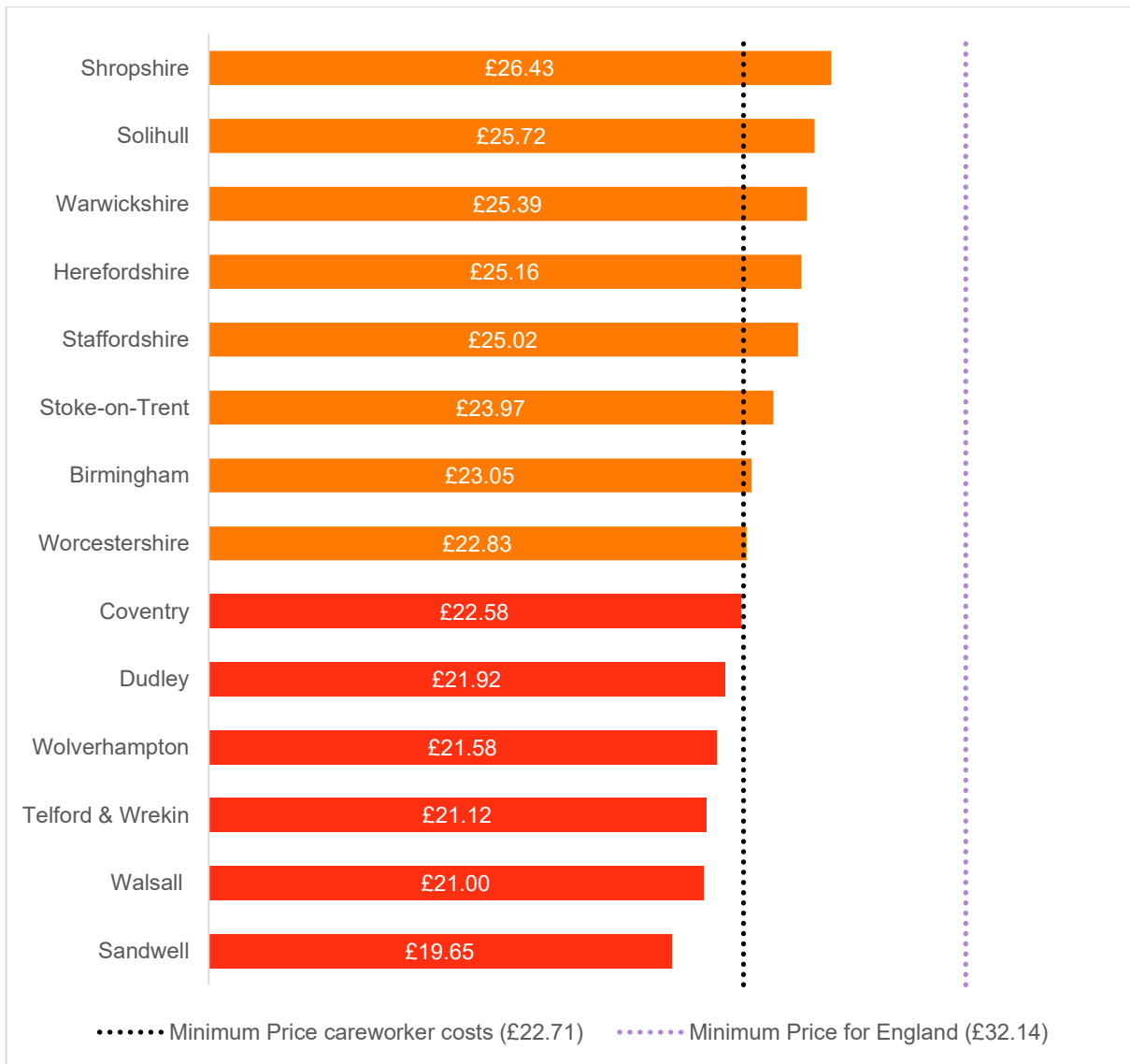


Figure 77. Average hourly prices paid for homecare by councils in the West Midlands during the 2025 sample week

	2025				Since 2023
Council	Lowest price	Highest price	Hours	Average price	% change in average price
Birmingham	£12.60	£46.70	43,351	£23.05	30%
Coventry	£21.62	£24.43	11,002	£22.58	13%
Dudley	£21.92	£21.92	23,213	£21.92	11%
Herefordshire	£25.16	£28.92	7,263	£25.16	8%
Sandwell	£19.64	£23.80	19,364	£19.65	13%
Shropshire	£18.03	£54.33	21,512	£26.43	13%
Solihull	£24.44	£33.84	12,110	£25.72	8%
Staffordshire	£14.51	£28.22	44,352	£25.02	14%
Stoke-on-Trent	£23.97	£23.97	16,270	£23.97	8%
Telford & Wrekin	£18.60	£38.74	10,494	£21.12	6%
Walsall	£21.00	£36.00	19,702	£21.00	28%
Warwickshire	£13.48	£32.16	27,939	£25.39	14%
Wolverhampton	£21.08	£21.64	16,488	£21.58	15%
Worcestershire	£18.69	£49.14	8,128	£22.83	3%

Figure 78. Prices paid per hour and the hours of homecare purchased in the West Midlands during the 2025 sample week, compared with the 2023 sample week

Notes

- Sandwell told us it uplifted its standard hourly rate from 1 April 2025 to £21.24. At the time of the request, the council had yet to implement the new rate (due to agreeing contract variations with providers).
- Wolverhampton exempted the question on the number of providers, as the cost of compliance was too high (information not easily accessible).

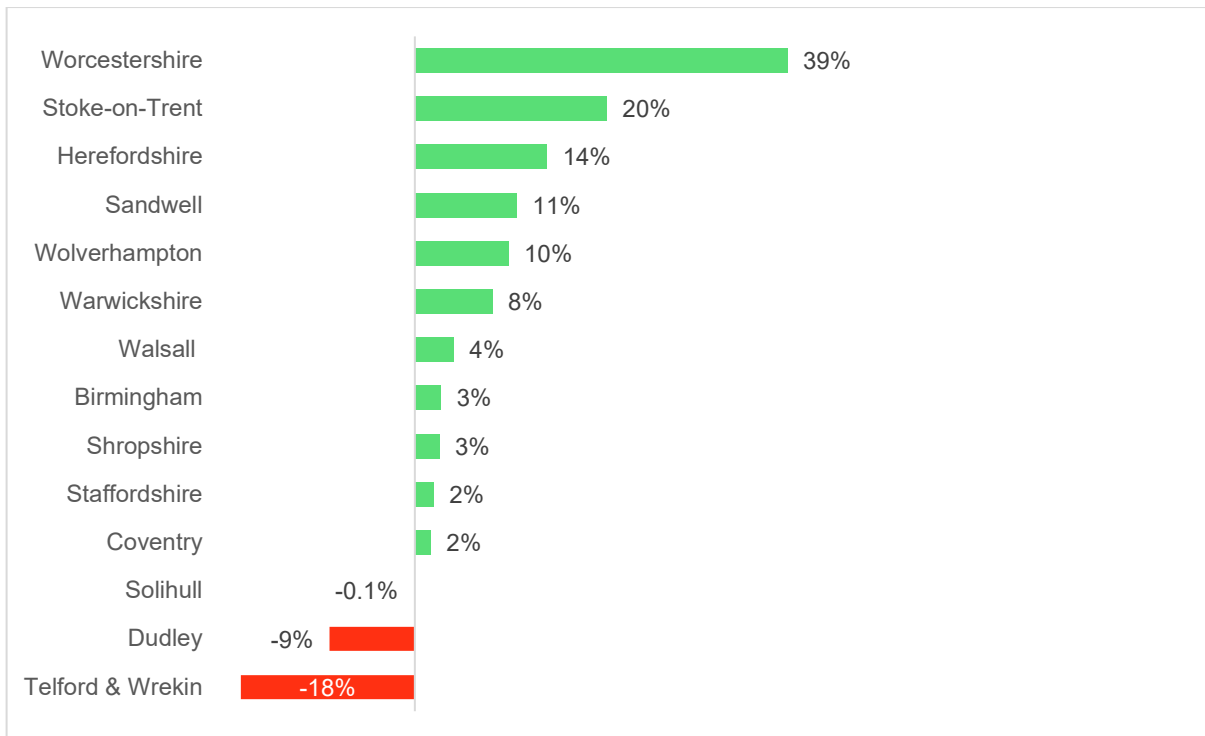


Figure 79. Percentage change in the hours of homecare purchased by councils in the West Midlands between the sample weeks of 2024 and 2025

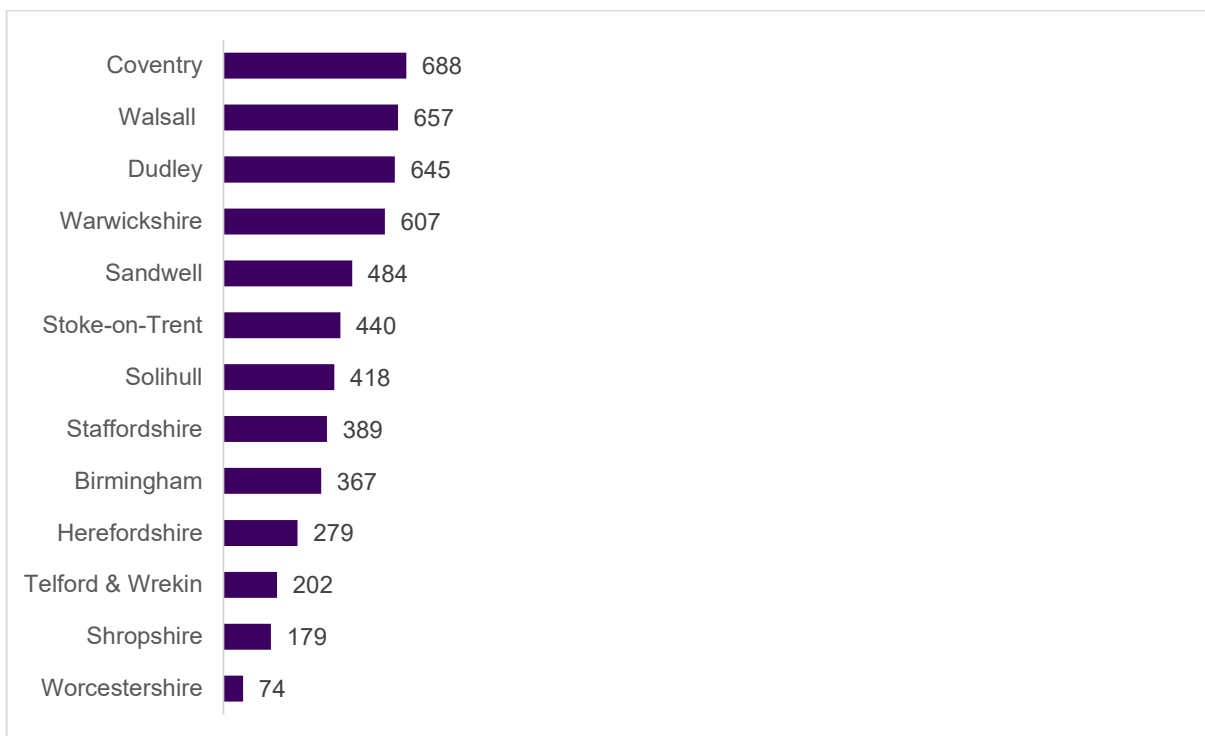


Figure 80. Average number of hours of homecare purchased per provider by councils in the West Midlands during the 2025 sample week

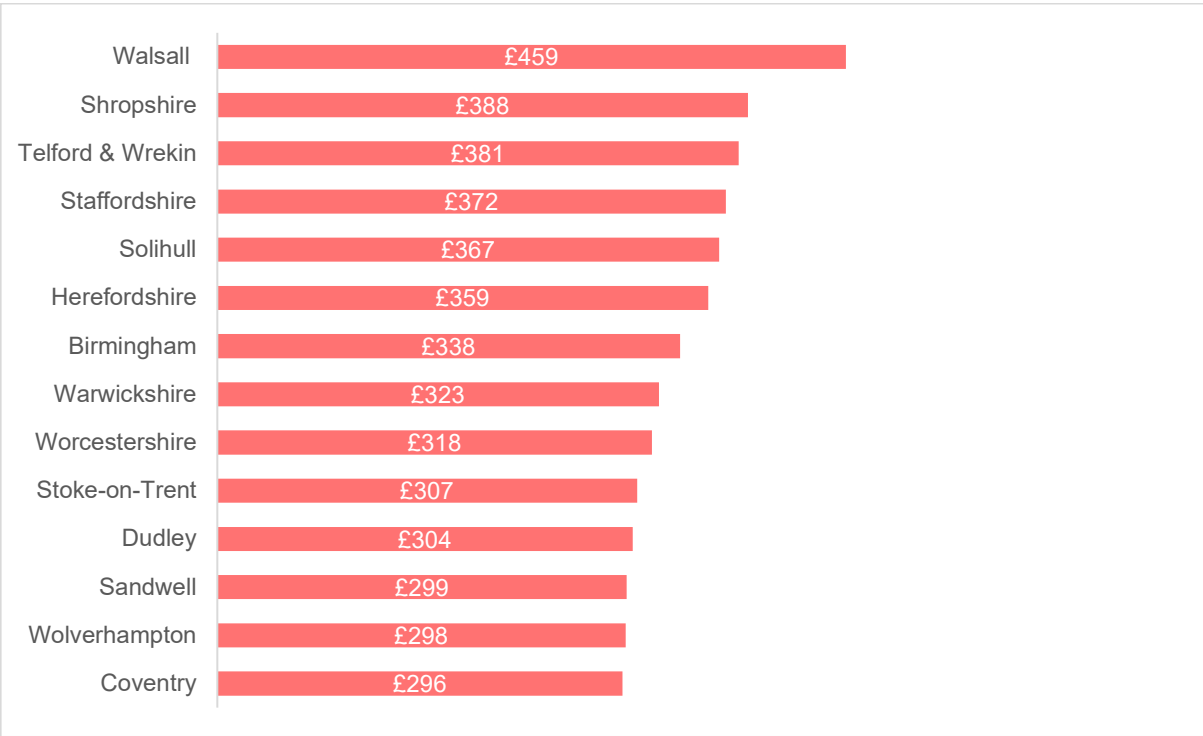


Figure 81. Average spend per person aged 65 years and over receiving homecare purchased by councils in the West Midlands during the 2025 sample week

Yorkshire & The Humber

Key facts

14 councils purchase homecare from the independent and voluntary sector	£25.94 per hour weighted average, the 4th highest in the government regions / devolved administrations of the UK
0% of councils paid the Homecare Association's Minimum Price for England of £32.14 per hour	0% of councils paid below the value of careworker costs in the Minimum Price of £22.71 per hour
2% increase in the total hours of homecare purchased from the 2024 sample week	21% of councils reported a drop in the hours purchased from the 2024 sample week
71% of councils purchased, on average, no more than 500 hours per provider in the 2025 sample week	£385 spent on average per person aged 65 years and over receiving homecare in the 2025 sample week

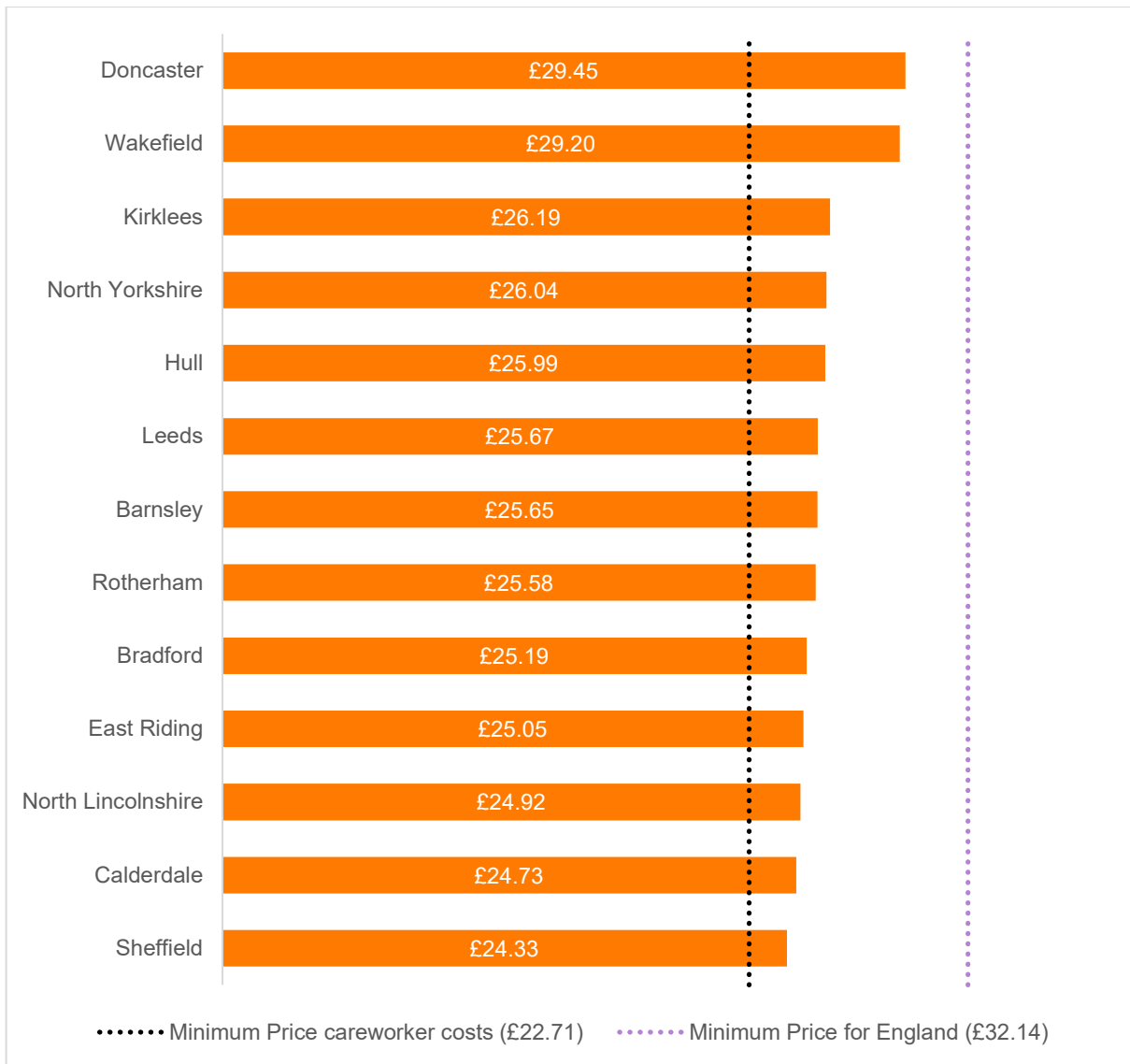


Figure 82. Average hourly prices paid for homecare by councils in Yorkshire and The Humber during the 2025 sample week

	2025				Since 2023
Council	Lowest price	Highest price	Hours	Average price	% change in average price
Barnsley	£22.93	£32.84	17,334	£25.65	18%
Bradford	£8.48	£97.21	28,844	£25.19	18%
Calderdale	£21.89	£25.46	11,243	£24.73	14%
Doncaster	£26.00	£29.48	13,299	£29.45	20%
East Riding	£21.60	£35.36	17,258	£25.05	8%
Hull	£22.20	£39.29	9,532	£25.99	14%
Kirklees	£25.62	£30.88	15,859	£26.19	12%
Leeds	£22.30	£30.13	26,319	£25.67	13%
North East Lincolnshire	Not held	Not held	Not held	Not held	-
North Lincolnshire	£19.90	£85.68	7,199	£24.92	18%
North Yorkshire	£18.68	£44.95	26,028	£26.04	-6%
Rotherham	£22.91	£26.04	16,209	£25.58	14%
Sheffield	£24.33	£24.33	33,053	£24.33	15%
Wakefield	£23.61	£34.78	23,070	£29.20	22%
York	Exemption	Exemption	8,024	Exemption	-

Figure 83. Prices paid per hour and the hours of homecare purchased in Yorkshire and The Humber during the 2025 sample week, compared with the 2023 sample week

Notes

- East Riding told us that, at the time of the request, the council had not uplifted its rates for 2025-26 (Cabinet was making this decision in June 2025).

- North East Lincolnshire did not hold the information and suggested contacting NHS Humber and North Yorkshire ICB directly (we include these data in the NHS section below).
- North Yorkshire's average rate has noticeably dropped since 2023. When questioned on this, the council said it was confident in its 2025 answer.
- York exempted the lowest, highest and average fee rates, as well as the total spend, on commercial interest grounds. Unfortunately, the council took 55 working days to respond to the request, meaning there was insufficient further time to seek an internal review of the information it failed to provide.

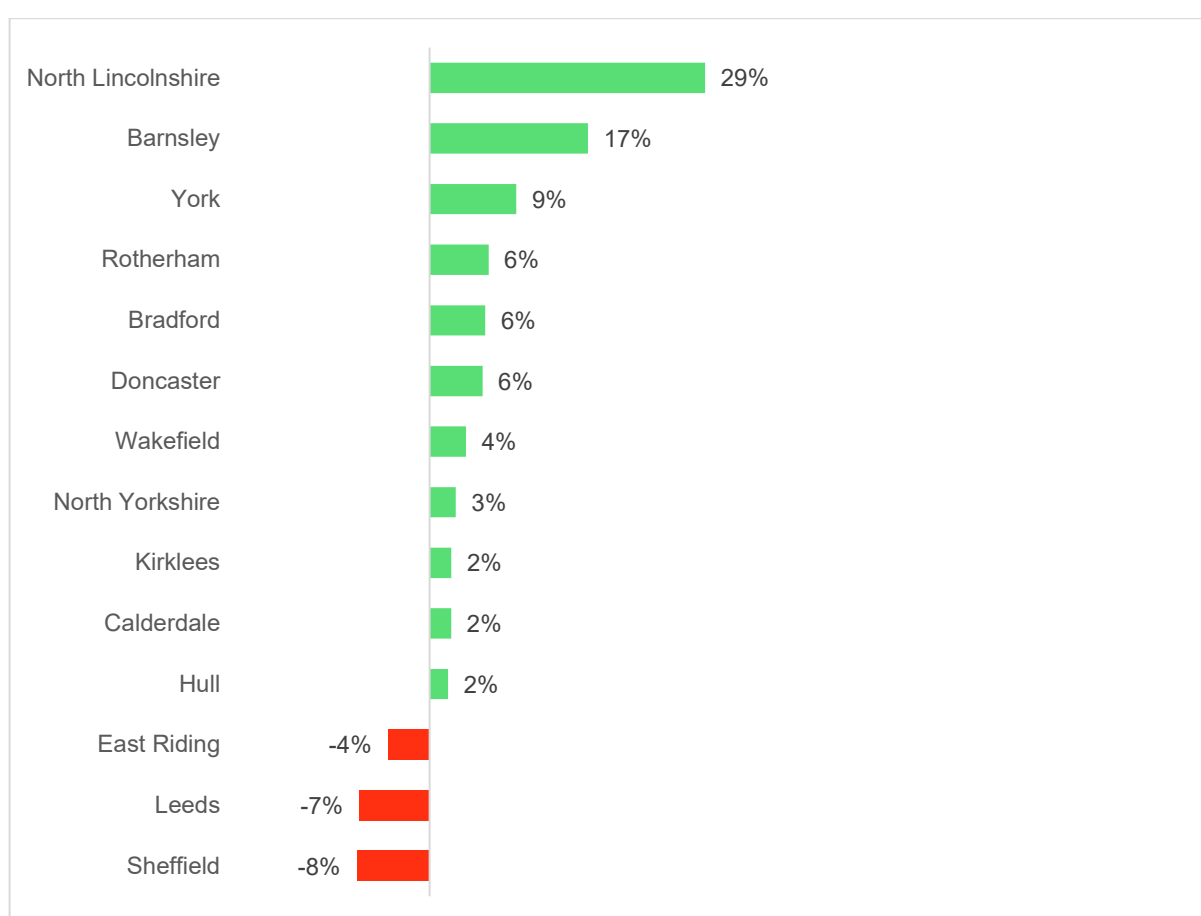


Figure 84. Percentage change in the hours of homecare purchased by councils in Yorkshire and The Humber between the sample weeks of 2024 and 2025

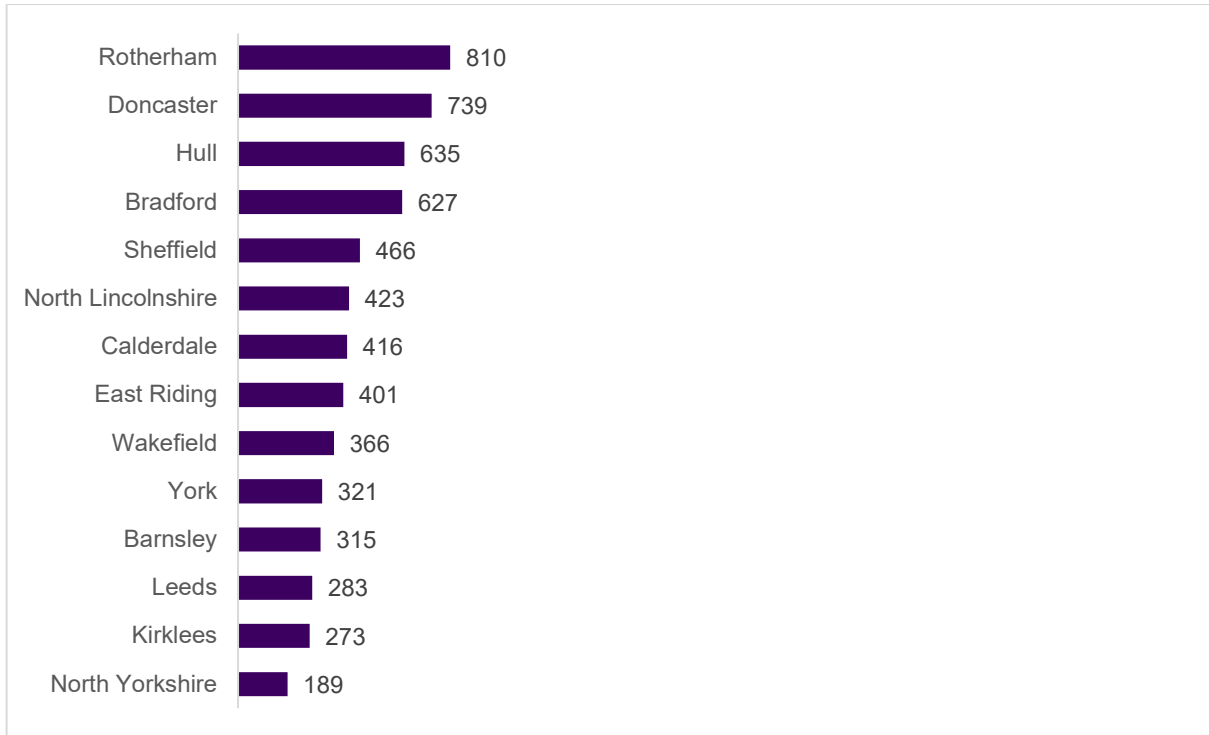


Figure 85. Average number of hours of homecare purchased per provider by councils in Yorkshire and The Humber during the 2025 sample week



Figure 86. Average spend per person aged 65 years and over receiving homecare purchased by councils in Yorkshire and The Humber during the 2025 sample week

Wales

Key facts

22

councils purchase homecare from the independent and voluntary sector

£27.14

per hour weighted average, the highest in the government regions / devolved administrations of the UK

5%

of councils paid the Homecare Association's Minimum Price for Wales of £33.90 per hour

5%

of councils paid below the value of careworker costs in the Minimum Price of £24.40 per hour

8%

increase in the total hours of homecare purchased from the 2024 sample week

10%

of councils reported a drop in the hours purchased from the 2024 sample week

59%

of councils purchased, on average, no more than 500 hours per provider in the 2025 sample week

£387

spent on average per person aged 65 years and over receiving homecare in the 2025 sample week

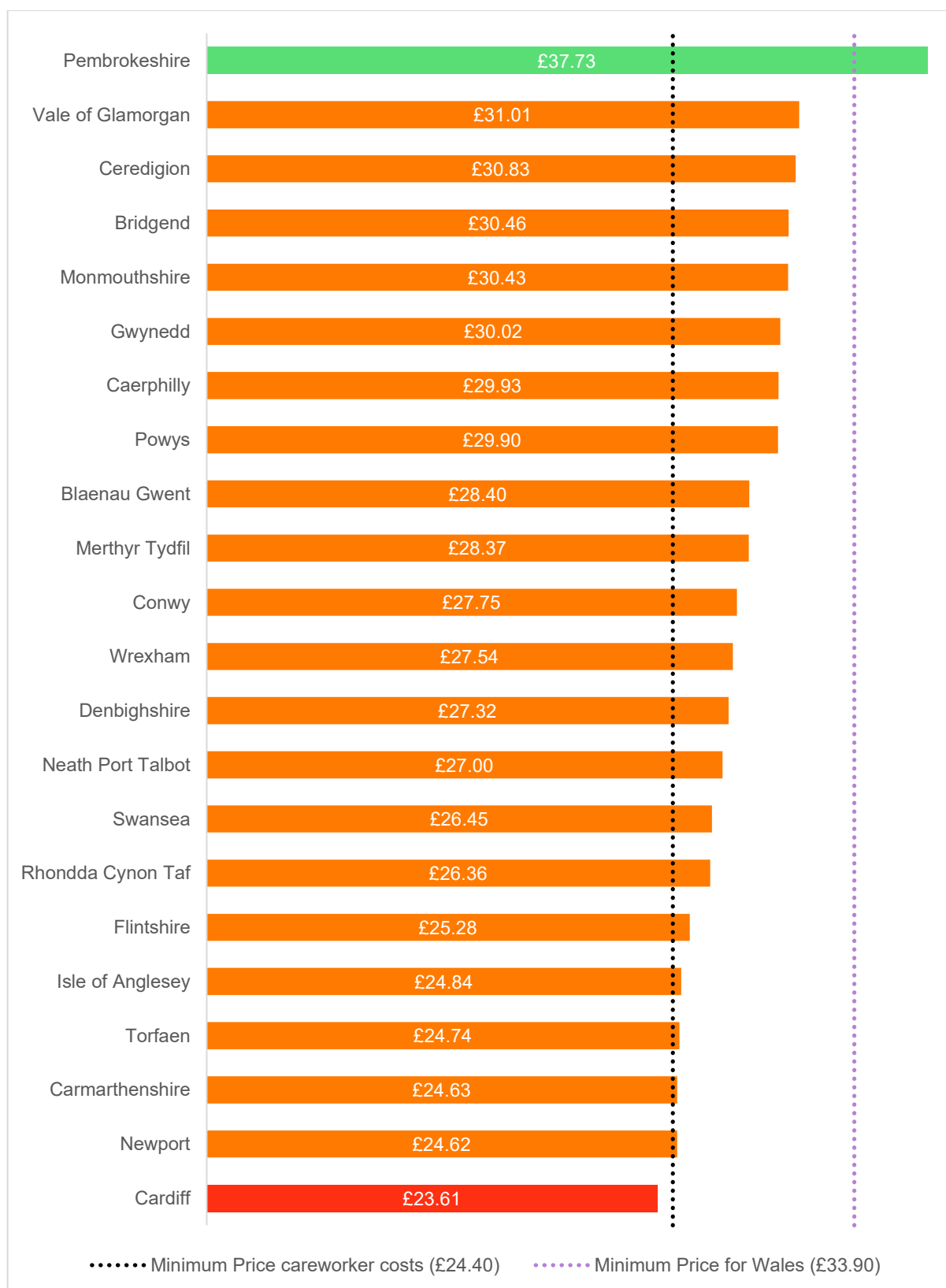


Figure 87. Average hourly prices paid for homecare by councils in Wales during the 2025 sample week

	2025				Since 2023
Council	Lowest price	Highest price	Hours	Average price	% change in average price
Blaenau Gwent	£27.32	£31.26	4,500	£28.40	17%
Bridgend	£29.27	£30.90	6,653	£30.46	24%
Caerphilly	£27.00	£30.88	5,620	£29.93	19%
Cardiff	£22.00	£36.76	35,050	£23.61	4%
Carmarthenshire	£21.06	£32.92	8,283	£24.63	-
Ceredigion	£30.83	£30.83	3,723	£30.83	34%
Conwy	£27.60	£35.84	7,815	£27.75	17%
Denbighshire	£21.90	£30.87	4,011	£27.32	9%
Flintshire	£22.21	£30.00	7,815	£25.28	14%
Gwynedd	£25.20	£45.95	5,049	£30.02	23%
Isle of Anglesey	£23.64	£26.52	3,749	£24.84	19%
Merthyr Tydfil	£24.87	£31.60	3,892	£28.37	27%
Monmouthshire	£24.00	£34.00	5,288	£30.43	20%
Neath Port Talbot	£27.00	£27.00	8,485	£27.00	13%
Newport	£24.00	£27.80	11,848	£24.62	17%
Pembrokeshire	£32.46	£43.85	6,244	£37.73	18%
Powys	Exemption	Exemption	8,706	£29.90	24%
Rhondda Cynon Taf	£23.54	£28.64	14,863	£26.36	21%
Swansea	£24.92	£34.68	14,207	£26.45	10%
Torfaen	£24.74	£24.74	8,502	£24.74	15%
Vale of Glamorgan	£21.94	£32.65	12,621	£31.01	13%

Wrexham	£25.00	£32.00	6,162	£27.54	19%
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Figure 88. Prices paid per hour and the hours of homecare purchased in Wales during the 2025 sample week, compared with the 2023 sample week

Notes

- Carmarthenshire's 2023 average rate seemed unusually high compared with the respective 2025 figure, so we have not used this in our analysis.
- Denbighshire could not break down the hours purchased in the 2024 sample week by age (following a change in system). Therefore, we have estimated a figure for homecare delivered to people aged 65 years and over.
- Flintshire exempted the 2025 and 2024 hours purchased as the cost of compliance was too high (information not available in a reportable format). We have estimated the 2025 hours using other data.
- Merthyr Tydfil did not hold information on the number of people aged 65 years and over receiving homecare.
- Powys exempted the lowest and highest hourly rates on commercial interest grounds. Its information on the total spend was also inaccurate, so we have estimated the actual figure.
- Swansea provided data on the hours purchased in 2025 and 2024, as well as the total spend, over a 4-week period - so we have estimated weekly figures. The council also exempted information on the number of people receiving services (cost of compliance too high) as the council does not routinely report on the age of such individuals.

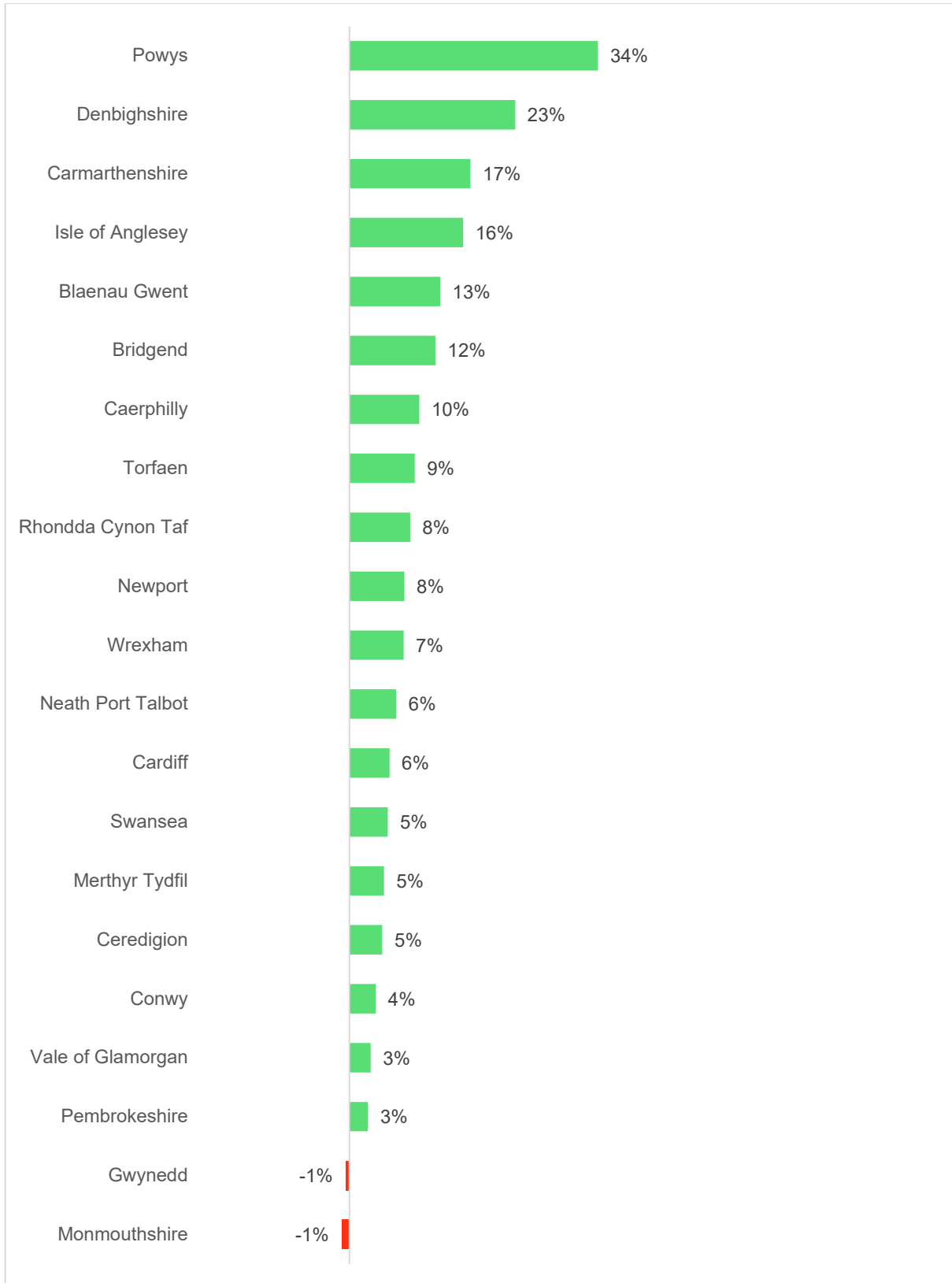


Figure 89. Percentage change in the hours of homecare purchased by councils in Wales between the sample weeks of 2024 and 2025

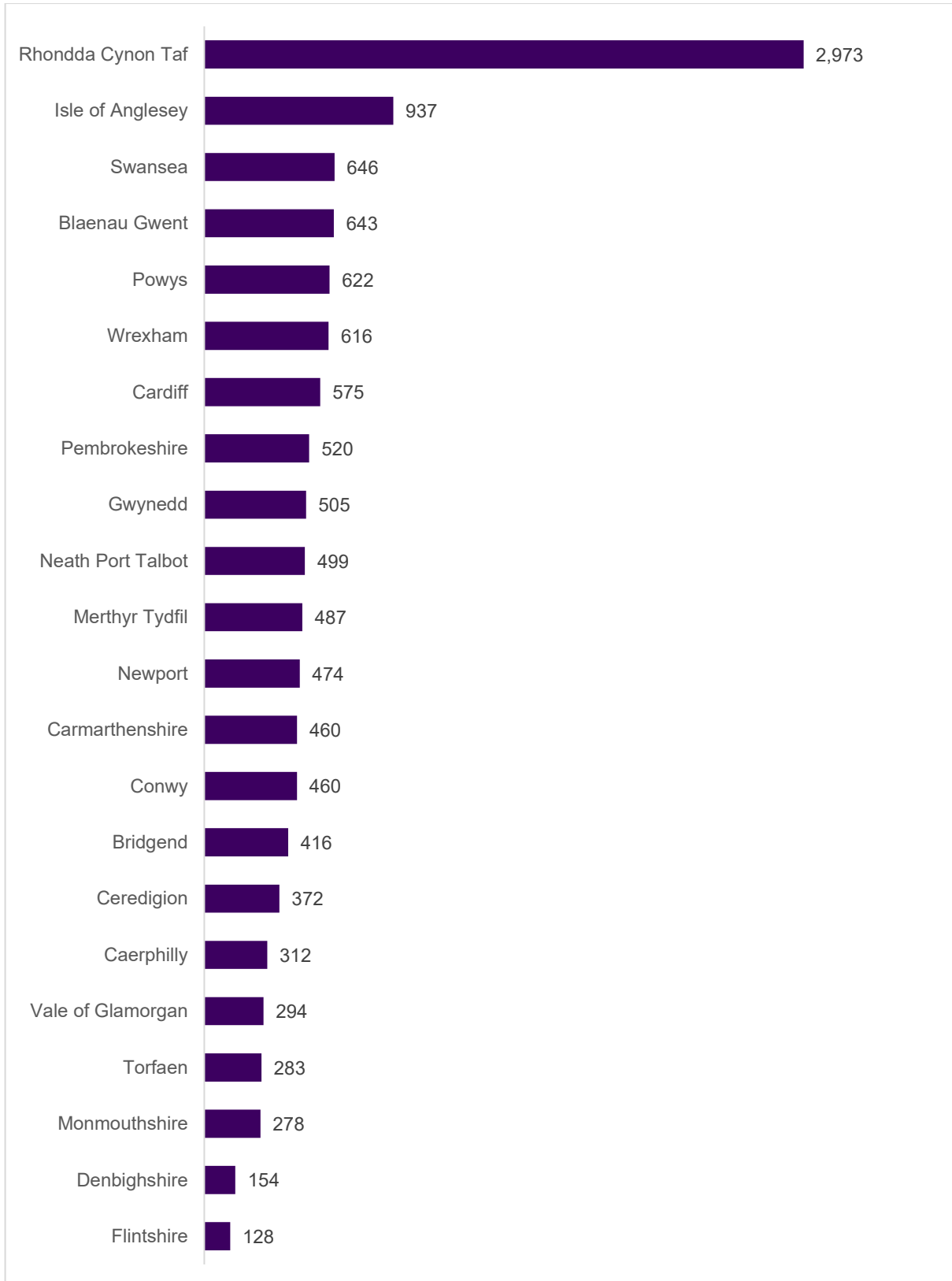


Figure 90. Average number of hours of homecare purchased per provider by councils in Wales during the 2025 sample week

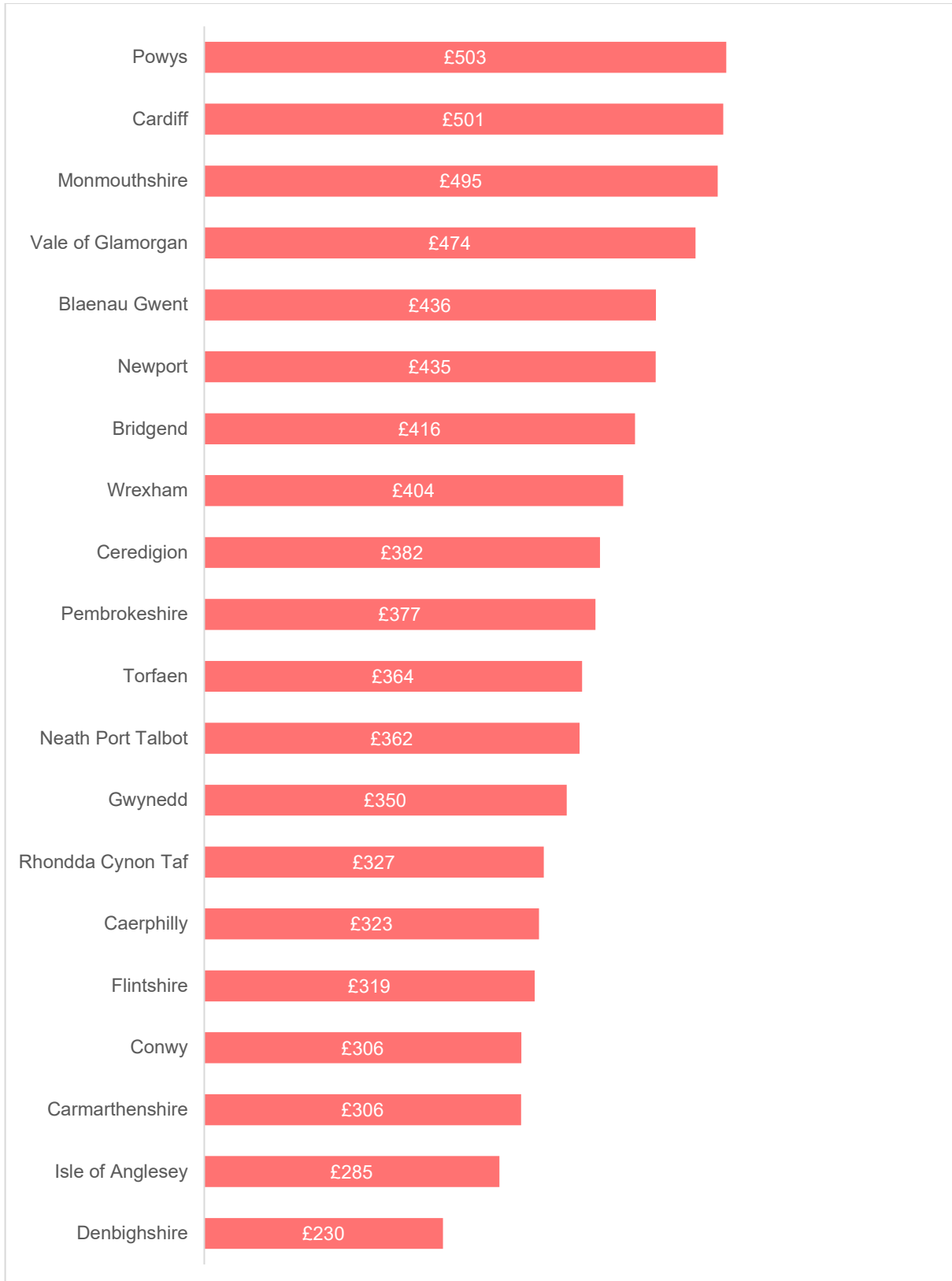


Figure 91. Average spend per person aged 65 years and over receiving homecare purchased by councils in Wales during the 2025 sample week

Scotland

Key facts

31

councils purchase homecare from the independent and voluntary sector

£24.73

per hour weighted average, the 6th highest in the government regions / devolved administrations of the UK

0%

of councils paid the Homecare Association's Minimum Price for Scotland of £32.88 per hour

29%

of councils paid below the value of careworker costs in the Minimum Price of £23.42 per hour

3%

increase in the total hours of homecare purchased from the 2024 sample week

31%

of councils reported a drop in the hours purchased from the 2024 sample week

48%

of councils purchased, on average, no more than 500 hours per provider in the 2025 sample week

£327

spent on average per person aged 65 years and over receiving homecare in the 2025 sample week

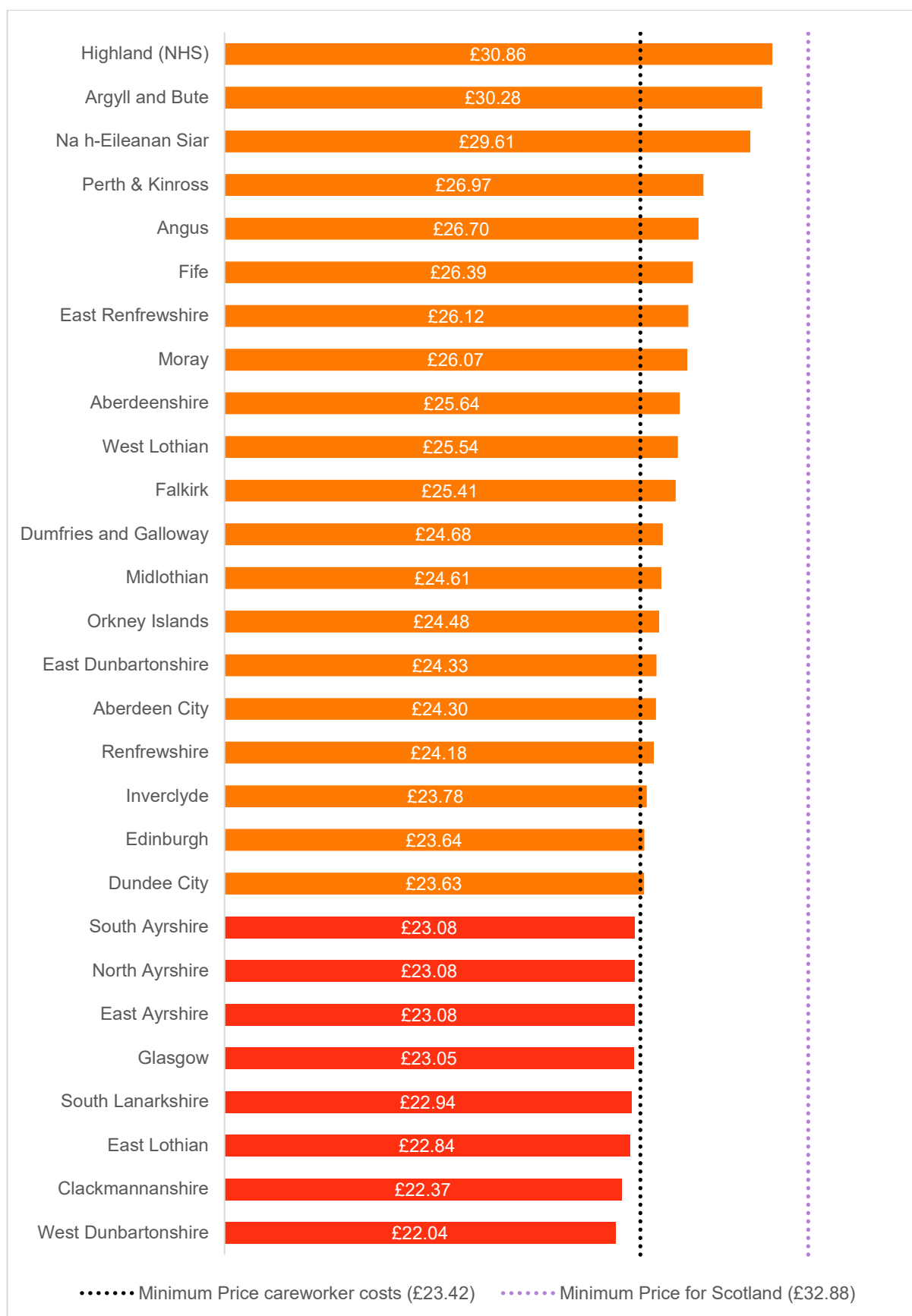


Figure 92. Average hourly prices paid for homecare by councils in Scotland during the 2025 sample week

	2025				Since 2023
Council	Lowest price	Highest price	Hours	Average price	% change in average price
Aberdeen City	£24.30	£24.30	852	£24.30	13%
Aberdeenshire	£22.00	£26.68	12,764	£25.64	14%
Angus	£25.40	£43.40	9,380	£26.70	17%
Argyll and Bute	£27.76	£32.44	8,377	£30.28	37%
Clackmannanshire	Exemption	Exemption	7,141	£22.37	14%
Dumfries and Galloway	£20.63	£32.54	14,236	£24.68	15%
Dundee City	£23.63	£23.63	15,500	£23.63	13%
East Ayrshire	£23.08	£23.08	413	£23.08	16%
East Dunbartonshire	£20.43	£31.22	10,455	£24.33	6%
East Lothian	£20.26	£25.63	6,371	£22.84	15%
East Renfrewshire	£15.86	£40.27	6,546	£26.12	14%
Edinburgh	£18.42	£34.53	56,079	£23.64	12%
Falkirk	£20.87	£26.60	17,334	£25.41	13%
Fife	£23.28	£29.50	17,401	£26.39	25%
Glasgow	£19.83	£30.64	21,244	£23.05	11%
Highland (NHS)	£26.10	£32.45	8,786	£30.86	23%
Inverclyde	£23.41	£23.88	4,023	£23.78	14%
Midlothian	£21.29	£25.96	8,907	£24.61	23%
Moray	Exemption	Exemption	4,506	£26.07	27%
Na h-Eileanan Siar	£27.81	£32.20	30	£29.61	12%
North Ayrshire	£23.08	£23.08	1,152	£23.08	15%

North Lanarkshire	Not held	Not held	Not held	Not held	-
Orkney Islands	£22.00	£26.95	172	£24.48	6%
Perth & Kinross	£25.27	£34.00	10,884	£26.97	16%
Renfrewshire	£23.90	£79.10	15,335	£24.18	15%
Scottish Borders	Exemption	Exemption	8,102	Exemption	-
Shetland Islands	Not held	Not held	Not held	Not held	-
South Ayrshire	£23.08	£23.08	5,952	£23.08	15%
South Lanarkshire	£22.94	£22.94	29,526	£22.94	14%
Stirling	Exemption	Exemption	Not used	Exemption	-
West Dunbartonshire	£20.89	£31.79	2,035	£22.04	17%
West Lothian	£25.54	£25.54	25,021	£25.54	21%

Figure 93. Prices paid per hour and the hours of homecare purchased in Scotland during the 2025 sample week, compared with the 2023 sample week

Notes

- Aberdeen City told us: “There is one annual block-funded contract with a consortium of homecare providers for all care and support at home services in Aberdeen.” As a result, the consortium would hold the level of detail we requested, not the council. Nevertheless, Aberdeen City provided some information specific to its involvement. The council provided data on the 2024 sample week hours, but not the corresponding data for 2025. However, we felt this was the data for 2025 and so have treated it as such. The council also did not answer the question about the number of homecare providers.
- Clackmannanshire exempted the lowest, highest and average fee rates, as well as information on the type of contracts held, on commercial interest grounds. We have estimated the average rate using other data.
- East Ayrshire’s information on the number of people aged 65 years and over receiving homecare seemed too low, so we have not used in our analysis.
- Glasgow’s 2025 and 2024 sample week hours related to non-Self-Directed Support (SDS) only. We have estimated the true figure for 2025 and not used

the information for 2024. The council's answer on the number of providers then did not coincide with the new 2025 hours, so we have also not used this.

- The Highland Council recommended we send the request to NHS Highland, which is responsible for adult social care. Because of the way homecare is commissioned in Scotland, we include these figures here, rather than in the NHS section of this report (and thus treat NHS Highland as an 'authority').
- Inverclyde's total spend figure was very low (when compared with its average rate and hours purchased), so we have estimated.
- Moray exempted the lowest and highest rates as being commercially sensitive. The council could also only provide a total spend for the full 2024-25 year, so we have estimated a figure for the 2025 sample week.
- Na h-Eileanan Siar's information on the 2024 sample week hours and number receiving homecare was not available. As the council commissioned such a low quantity of homecare hours, we have also not used its figure on the number of providers.
- North Lanarkshire could not answer the first five questions in our request, as it did not operate an hourly rate.
- Orkney Islands did not hold information on the number of providers.
- Scottish Borders exempted the lowest, highest and average rates on commercial interest grounds. The council admitted its total spend may not include all provider invoices, so we have not used this figure.
- Shetland Islands provided all services in-house and did not commission from external providers.
- Stirling also did not disclose information on fee rates, as well as that on the total spend, believing these were commercially sensitive. The council's data on the 2025 hours was for all adults (not people aged 65 and over) and may change as some providers were late with their returns. We have, therefore, not used this figure. The council's information on the number of providers was for the 2024 sample week - but we have used this figure in our analysis, as we concluded the change between the two reference periods would likely only be small.

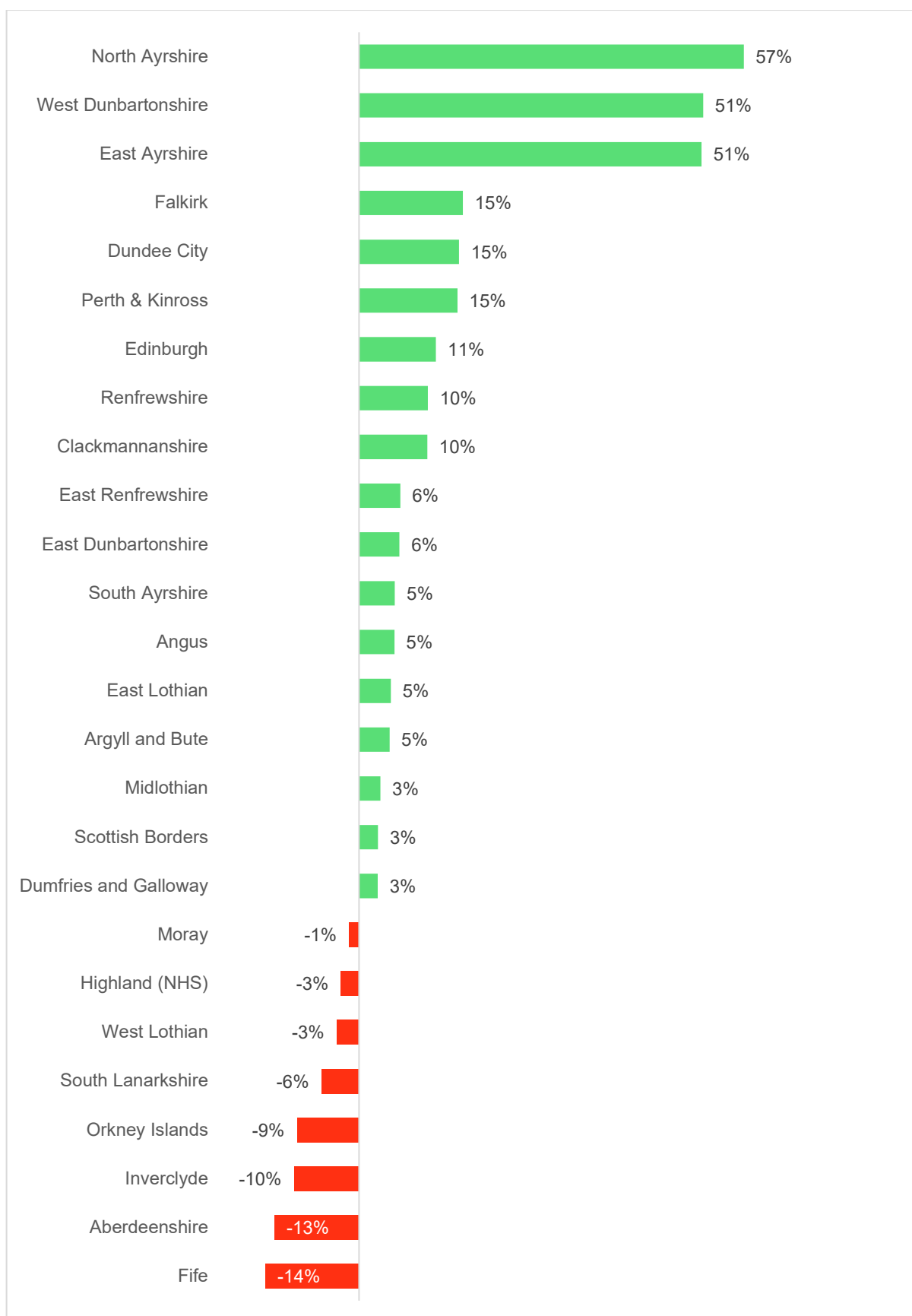


Figure 94. Percentage change in the hours of homecare purchased by councils in Scotland between the sample weeks of 2024 and 2025

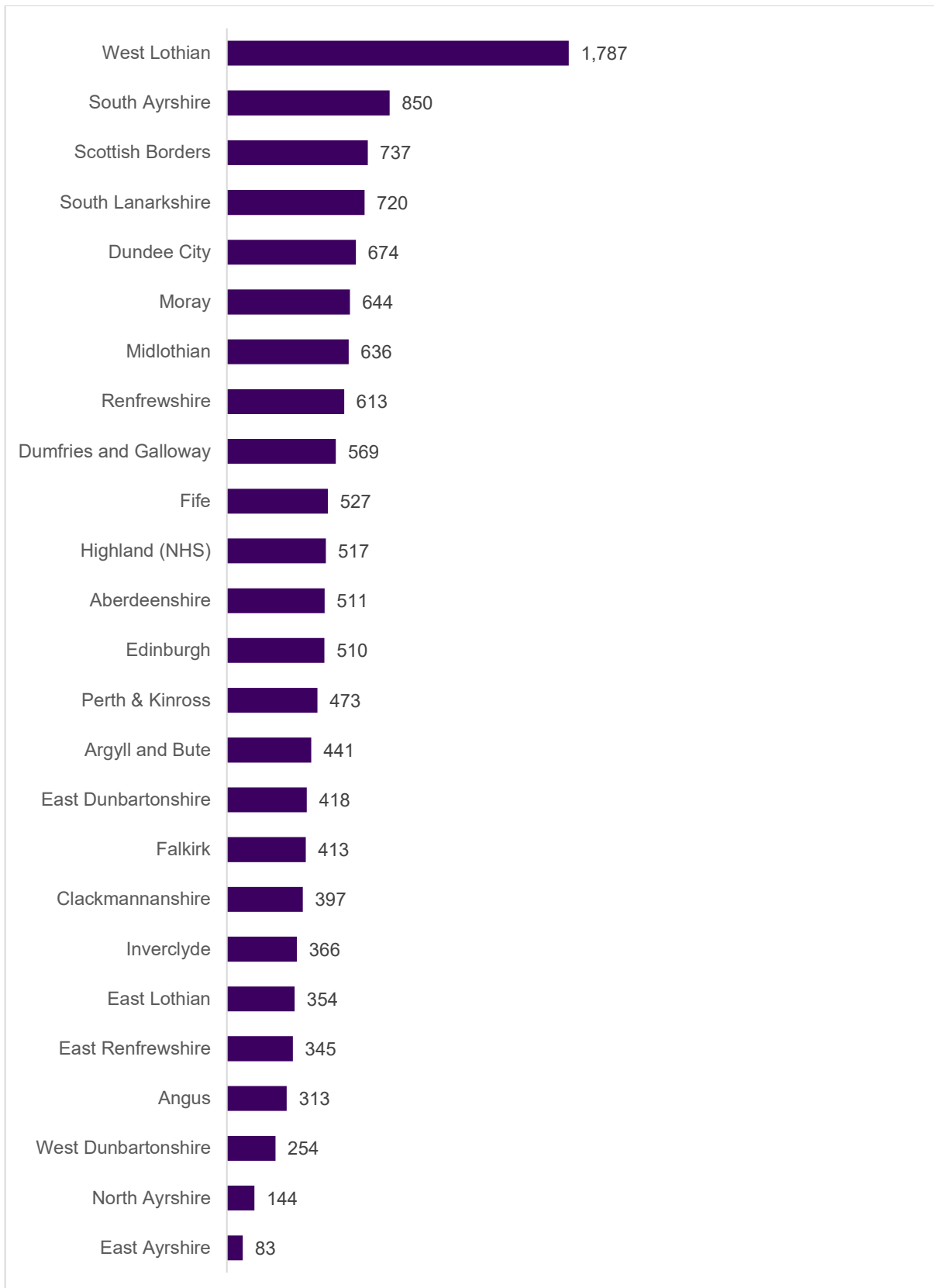


Figure 95. Average number of hours of homecare purchased per provider by councils in Scotland during the 2025 sample week

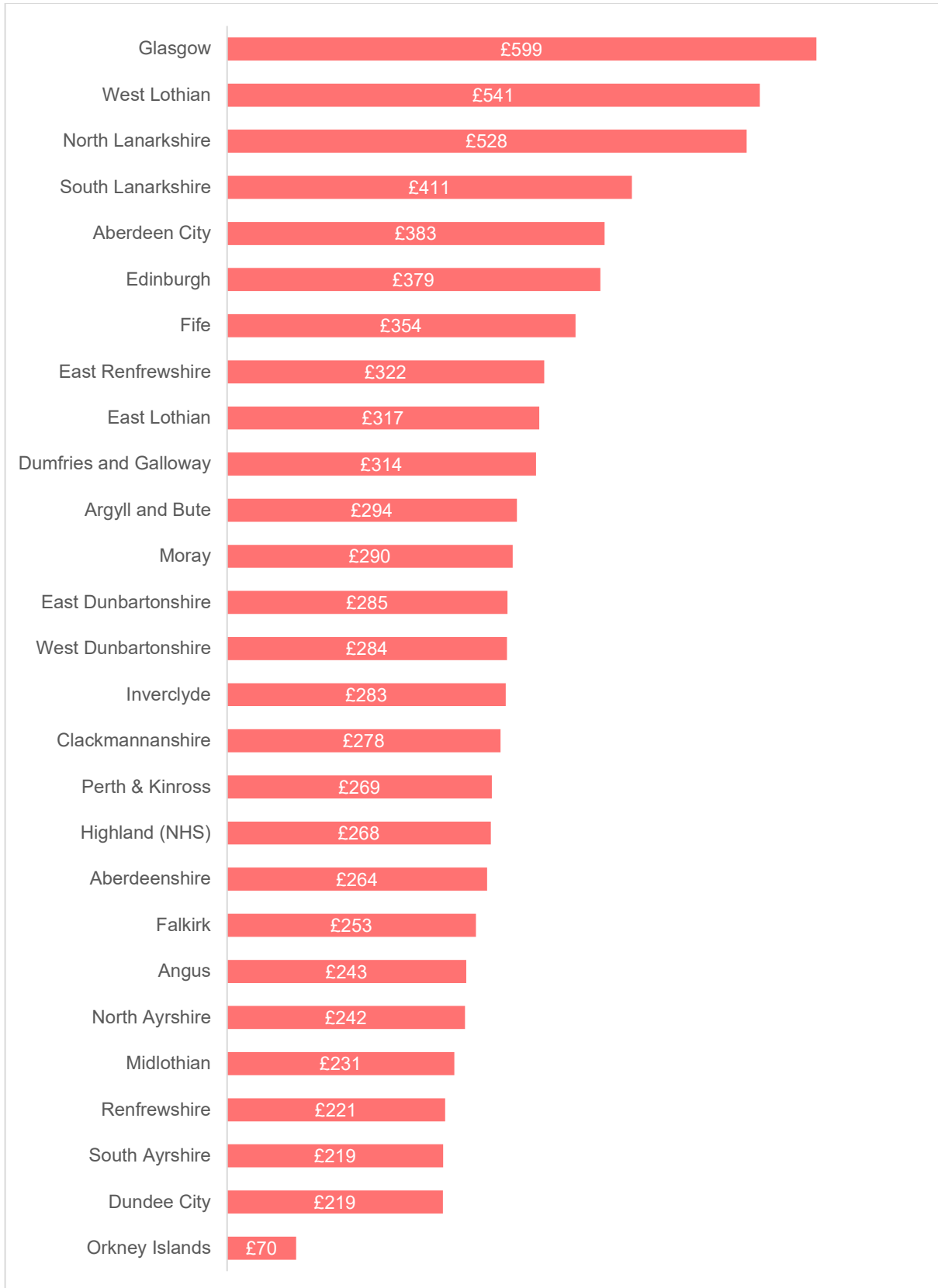


Figure 96. Average spend per person aged 65 years and over receiving homecare purchased by councils in Scotland during the 2025 sample week

Northern Ireland

Key facts

5

HSC Trusts purchase homecare from the independent and voluntary sector

£21.62

per hour weighted average, the lowest in the government regions / devolved administrations of the UK

0%

of HSC Trusts paid the Homecare Association's Minimum Price for Northern Ireland of £32.84 per hour

100%

of HSC Trusts paid below the value of careworker costs in the Minimum Price of £23.41 per hour

2%

increase in the total hours of homecare purchased from the 2024 sample week

40%

of HSC Trusts reported a drop in the hours purchased from the 2024 sample week

0%

of HSC Trusts purchased, on average, no more than 500 hours per provider in the 2025 sample week

£263

spent on average per person aged 65 years and over receiving homecare in the 2025 sample week



Figure 97. Average hourly prices paid for homecare by HSC Trusts in Northern Ireland during the 2025 sample week

	2025				Since 2023
HSC Trust	Lowest price	Highest price	Hours	Average price	% change in average price
Belfast	£21.35	£27.64	36,202	£21.54	19%
Northern	£21.35	£28.74	45,041	£22.33	16%
South Eastern	£21.35	£21.35	54,005	£21.35	11%
Southern	£21.35	£21.35	30,931	£21.35	18%
Western	£21.35	£21.35	25,257	£21.35	18%

Figure 98. Prices paid per hour and the hours of homecare purchased in Northern Ireland during the 2025 sample week, compared with the 2023 sample week

Notes

- Northern HSC Trust’s total spend data was for a four-week period, and so we have estimated for the 2025 sample week. The Trust also estimated the number of people aged 65 years and over receiving homecare, which we thought was inaccurate - therefore, we have produced our own estimate.

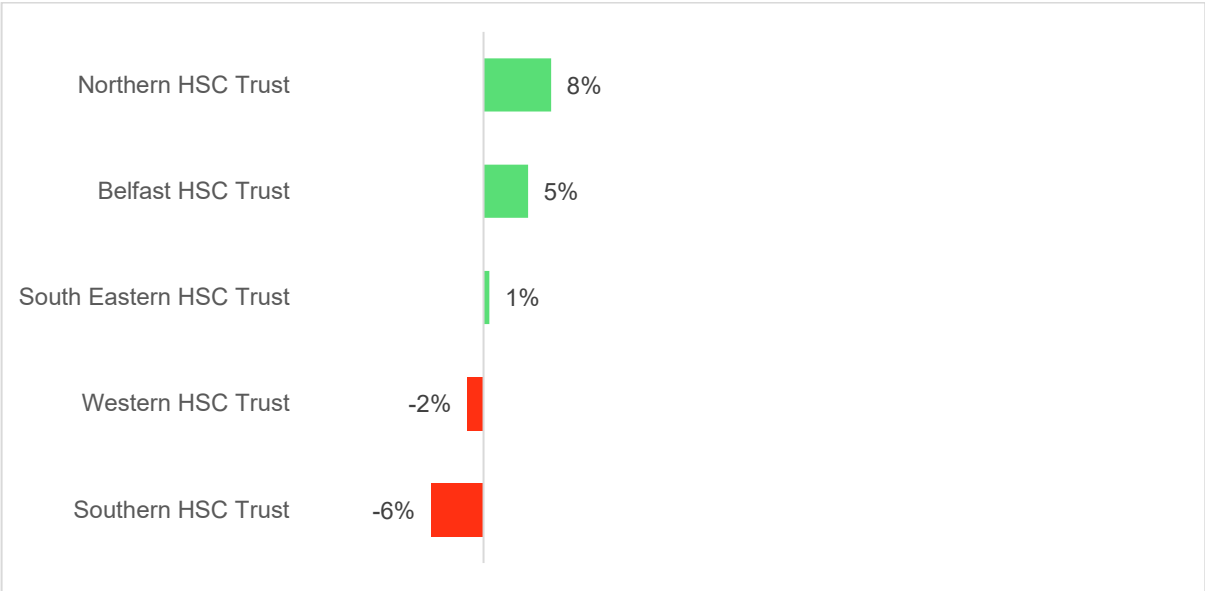


Figure 99. Percentage change in the hours of homecare purchased by HSC Trusts in Northern Ireland between the sample weeks of 2024 and 2025

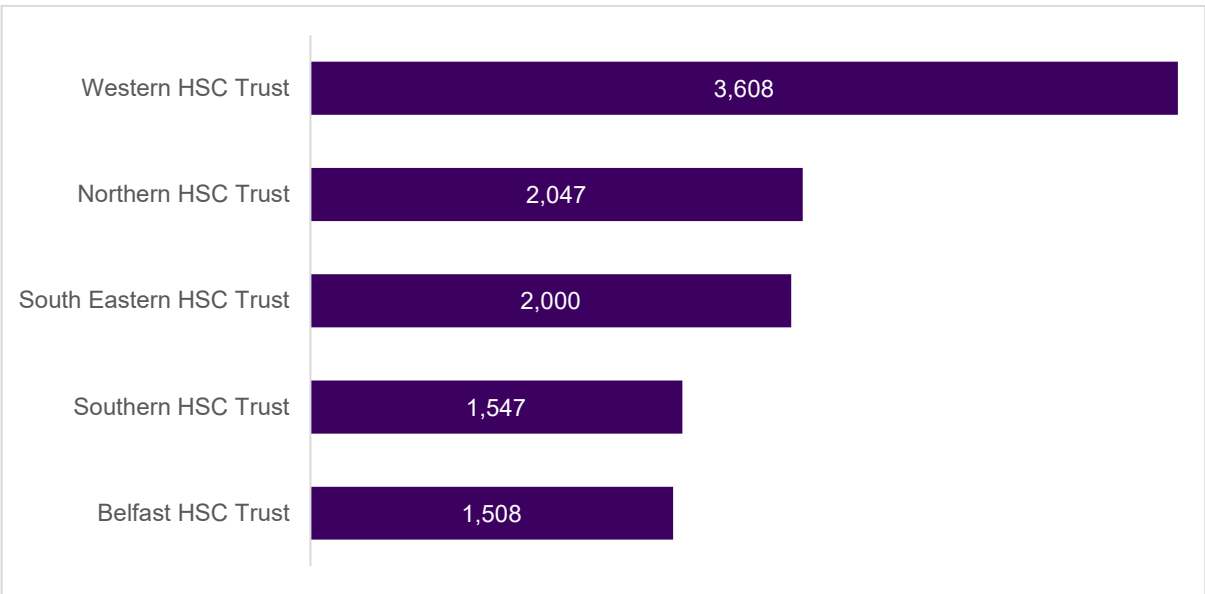


Figure 100. Average number of hours of homecare purchased per provider by HSC Trusts in Northern Ireland during the 2025 sample week



Figure 101. Average spend per person aged 65 years and over receiving homecare purchased by HSC Trusts in Northern Ireland during the 2025 sample week

Breakdown for NHS bodies in England and Wales

We also sent Freedom of Information requests to NHS bodies, namely Integrated Care Boards (ICBs) in England, Local Health Boards (LHBs) in Wales using the operational name of University Health Board (UHB) or Teaching Health Board (THB) and regional NHS Boards in Scotland.

In Scotland, Highland is the only area with a lead agency model⁴⁸, meaning NHS Highland is responsible for adult social care (see above) and the Highland Council for children's services. All other areas use an Integrated Joint Board to plan health and social care services in the body corporate model. Therefore, other than Highland, the regional NHS Boards did not provide (or hold the information on) homecare services.

The table below summarises the key information for the NHS in England and Wales. We do not include estimates of the total hours purchased in each region (as there were too many missing data points). We also do not show weighted averages for NHS London and NHS North West because of insufficient data.

	2025				Since 2023
NHS region/administration	Number of commissioning ICBs/LHBs	Lowest average	Highest average	Weighted average	% change in weighted average
NHS East of England	6	£21.23	£27.06	£24.32	6%
NHS London	5	£19.71	£24.89	-	-
NHS Midlands	11	£21.02	£25.48	£24.71	14%
NHS North East and Yorkshire	4	£22.80	£27.04	£24.23	9%
NHS North West	3	£23.28	£23.28	-	-
NHS South East	6	£27.63	£29.01	£28.27	13%
NHS South West	6	£22.65	£29.65	£25.36	0.4%
NHS Wales	7	£26.10	£27.99	£26.82	26%

Figure 102. Average prices paid per hour in the NHS regions of England and by the NHS in Wales during the 2025 sample week, compared with the 2023 sample week

⁴⁸ [Health and Social Care Scotland | About Integration](#)

We now present for each NHS region in England and NHS Wales (where sufficient data is available):

- A graph of the individual average rates (where green bars are at, or above, the respective Minimum Price and red bars are below the value of careworker costs, while we colour those in between in orange).
- Individual health body rates and hours for the 2025 sample week, and the percentage change in the average price from the 2023 FOI request.
- Explanations of the data provided and any limitations.
- Average spend per person aged 65 years and over for individual health bodies.

On the graphs, we only show health bodies that provided the relevant data.

Two ICBs, South Yorkshire ICB and West Yorkshire ICB, split their responses by area, and we felt it was best not to pool the information together into an ICB-level response. Thus, we treated each area as a separate ‘health body’ for ease of analysis.

This NHS area breakdown was more common in our Homecare Deficit 2023 report, following the transition from Clinical Commissioning Groups (CCGs) to ICBs. Where necessary and if possible, we have computed a 2023 weighted average from the areas within a specific ICB to compare with the 2025 ICB figure or based the 2023 average on only one area when no further information was available.

For simplicity, we refer to NHS regions in England as, for example, NHS East of England, rather than using its full name (in this case, NHS England - East of England).

NHS East of England



Figure 103. Average hourly prices paid for homecare by health bodies in NHS East of England during the 2025 sample week

	2025				Since 2023
Health body	Lowest price	Highest price	Hours	Average price	% change in average price
Bedfordshire, Luton and Milton Keynes ICB	£18.00	£35.00	6,836	£23.00	6%
Cambridgeshire & Peterborough ICB	£12.21	£35.29	6,831	£21.23	0.05%
Hertfordshire and West Essex ICB	£20.00	£28.57	1,340	£22.76	-1%
Mid and South Essex ICB	Not held	Not held	Not held	Not held	-
Norfolk and Waveney ICB	£17.18	£33.60	11,751	£27.06	-
Suffolk and North East Essex ICB	Exemption	Exemption	Not held	Exemption	-

Figure 104. Prices paid per hour and the hours of homecare purchased in NHS East of England during the 2025 sample week, compared with the 2023 sample week

Notes

- Bedfordshire, Luton and Milton Keynes ICB exempted the hours purchased in the 2025 and 2024 sample weeks, as well as the number of providers (cost of compliance too high). We have estimated the 2025 hours using other data. The ICB's fee rates were also approximate figures.
- Hertfordshire and West Essex ICB provided confusing information on the total spend and the number of people aged 65 years and over receiving homecare - we have estimated the former and not used its figure for the latter.
- Mid and South Essex ICB could only report on the total spend, number of people receiving services and type of contracts with providers.
- Norfolk and Waveney ICB told us that not all care packages had the number of hours recorded against them 'in an available manner'. Therefore, we have estimated the 2025 hours and not used the ICB's 2024 hours figure.
- Suffolk and North East Essex ICB exempted all the financial information we asked for on commercial interest grounds and could not report on the hours questions and the number of providers.

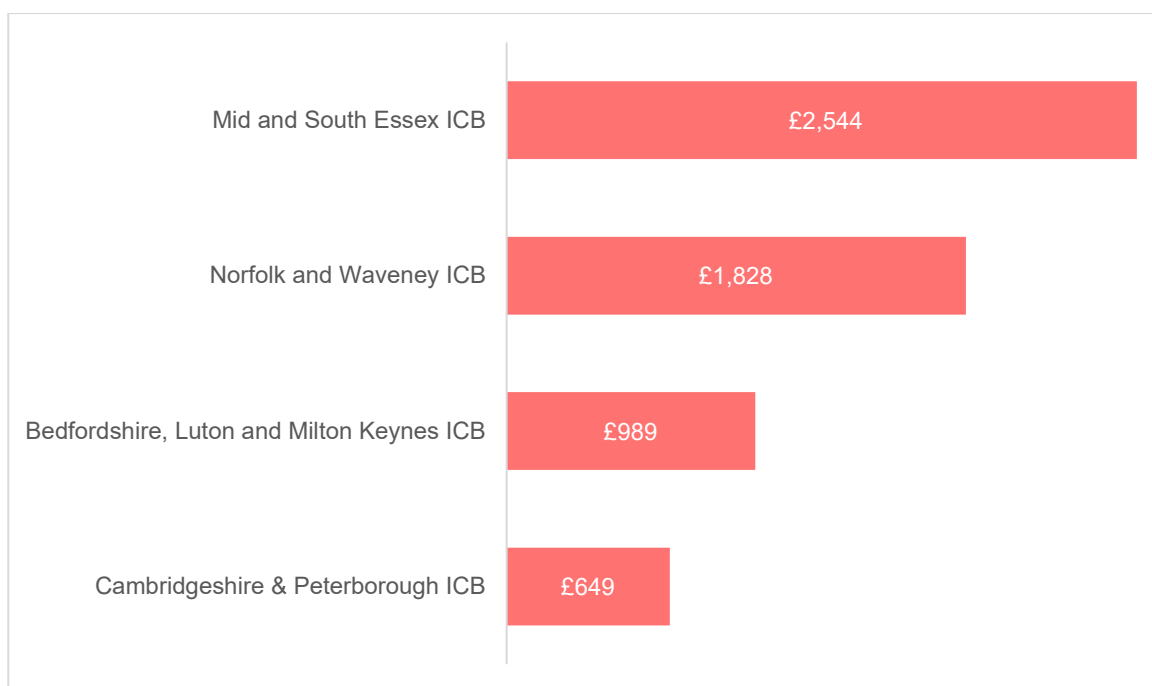


Figure 105. Average spend per person aged 65 years and over receiving homecare purchased by health bodies in NHS East of England during the 2025 sample week

NHS London

Because of a lack of information received, we do not present any graphs for NHS London.

	2025				Since 2023
Health body	Lowest price	Highest price	Hours	Average price	% change in average price
North Central London ICB	Not held	Not held	Not held	Not held	-
North East London ICB	£21.96	£40.64	Exemption	£24.89	-
North West London ICB	£15.62	£36.73	40,925	£19.71	9%
South East London ICB	Exemption	Exemption	Exemption	Exemption	-
South West London ICB	£21.96	£40.64	Exemption	£24.89	-

Figure 106. Prices paid per hour and the hours of homecare purchased in NHS London during the 2025 sample week, compared with the 2023 sample week

Notes

- North Central London ICB did not hold the information to the level of detail required for the first five questions of the request (on hourly rates and hours purchased in the 2025 and 2024 sample weeks). We also did not use its figure on the number of homecare recipients aged 65 years and over, which seemed too low.
- Both North East London ICB and South West London ICB exempted all the information requested on homecare services (cost of compliance too high). They provided London's Any Qualified Provider (AQP) hourly rates, which we include in the table above; however, we acknowledge these were not their true rates.
- South East London ICB exempted the entire request for the same reason.

NHS Midlands

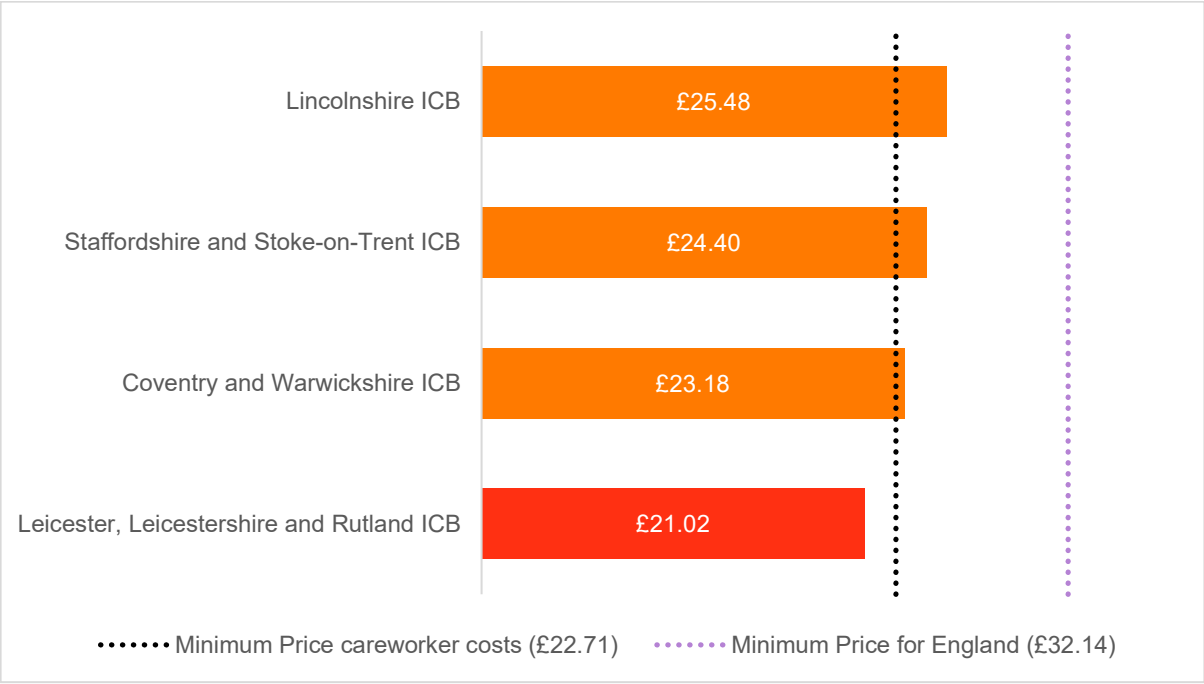


Figure 107. Average hourly prices paid for homecare by health bodies in NHS Midlands during the 2025 sample week

	2025				Since 2023
Health body	Lowest price	Highest price	Hours	Average price	% change in average price
Birmingham and Solihull ICB	Exemption	Exemption	Exemption	Exemption	-
Black Country ICB	Exemption	Exemption	Exemption	Exemption	-
Coventry and Warwickshire ICB	£21.03	£32.16	425	£23.18	12%
Derby and Derbyshire ICB	£22.47	£25.84	Exemption	Exemption	-
Herefordshire and Worcestershire ICB	Exemption	Exemption	Exemption	Exemption	-
Leicester, Leicestershire and Rutland ICB	£20.00	£21.96	Not held	£21.02	14%
Lincolnshire ICB	£14.00	£29.59	5,745	£25.48	6%
Northamptonshire ICB	Exemption	Exemption	Exemption	Exemption	-
Nottingham and Nottinghamshire ICB	£23.18	£28.11	Not held	Not held	-
Shropshire, Telford and Wrekin ICB	Not held	Not held	Not held	Not held	-
Staffordshire and Stoke-on-Trent ICB	£7.99	£39.50	11,937	£24.40	2%

Figure 108. Prices paid per hour and the hours of homecare purchased in NHS Midlands during the 2025 sample week, compared with the 2023 sample week

Notes

- Birmingham and Solihull ICB exempted the questions on hourly rates, hours purchased in the 2025 and 2024 sample weeks and the number of providers (cost of compliance too high).
- For the same reason, Black Country ICB exempted all our questions on homecare services, other than that on the type of contracts with providers.
- Coventry and Warwickshire ICB provided an annual total spend figure - we have estimated for the 2025 sample week.

- Derby and Derbyshire ICB exempted the first five questions of the request (again, because of cost of compliance). But the ICB provided the AQP hourly rates, from which we have set its lowest and highest prices.
- Herefordshire and Worcestershire ICB exempted all questions on homecare, except the total spend (which was for an irregular timeframe, so we estimated for a week). However, the ICB told us a new system will go live in October 2025 that will allow them to report on hourly rates from 2026-27.
- Leicester, Leicestershire and Rutland ICB did not hold data on the hours purchased in either sample week. We also did not use its total spend figure, which did not correspond with what we specifically requested.
- Northamptonshire ICB exempted the questions on the hourly rates, hours purchased and the total spend (cost of compliance).
- Nottingham and Nottinghamshire ICB did not hold the average rate, as well as the hours purchased in the 2025 and 2024 sample weeks.
- Shropshire, Telford and Wrekin ICB did not hold information on the lowest, highest and average rates, and 2025 and 2024 weekly hours purchased.
- Staffordshire and Stoke-on-Trent ICB acknowledged it could only provide information for 'patients included in the 'Care at Home' category where the hourly rate and number of hours are recorded'.

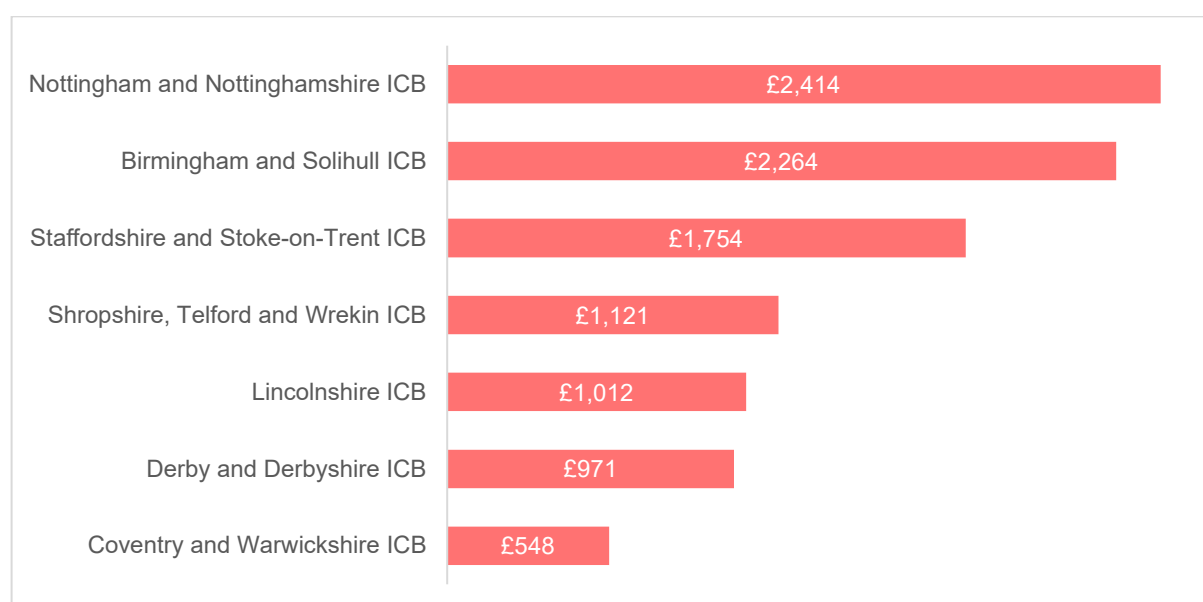


Figure 109. Average spend per person aged 65 years and over receiving homecare purchased by health bodies in NHS Midlands during the 2025 sample week

NHS North East and Yorkshire



Figure 110. Average hourly prices paid for homecare by health bodies in NHS North East and Yorkshire during the 2025 sample week

	2025				Since 2023
Health body	Lowest price	Highest price	Hours	Average price	% change in average price
Humber and North Yorkshire ICB	£20.75	£35.00	7,005	£22.80	7%
North East and North Cumbria ICB	£19.06	£28.01	21,587	£23.07	-
South Yorkshire ICB - Barnsley	£21.32	£28.47	7,806	£25.49	9%
South Yorkshire ICB - Doncaster	£20.00	£30.91	4,149	£27.04	16%
South Yorkshire ICB - Rotherham	£21.96	£28.00	4,124	£25.26	16%
South Yorkshire ICB - Sheffield	£24.81	Not held	Not held	Not held	-
West Yorkshire ICB - Bradford District and Craven	£25.28	£33.05	Exemption	£25.67	-
West Yorkshire ICB - Calderdale	£24.28	£25.46	Exemption	Not provided	-
West Yorkshire ICB - Kirklees	£24.17	£26.69	3,327	£25.90	12%
West Yorkshire ICB - Leeds	£23.91	£33.17	5,830	£24.35	7%
West Yorkshire ICB - Wakefield	£24.48	£32.91	5,432	£24.81	4%

Figure 111. Prices paid per hour and the hours of homecare purchased in NHS North East and Yorkshire during the 2025 sample week, compared with the 2023 sample week

Notes

- Humber and North Yorkshire ICB said it operated from six geographical places/Health and Care Partnerships. The ICB's response related to North East Lincolnshire.
- North East and North Cumbria ICB's rates for 2025-26 were not available at the time of the request. The ICB also did not hold information on the hours purchased in the 2025 and 2024 sample weeks (we have estimated the former from other data), and the type of contracts with providers.

- South Yorkshire ICB - Barnsley also could not provide information on the hours purchased. Again, we have estimated for the 2025 sample week.
- Because of system limitations, South Yorkshire ICB - Sheffield could only state its lowest rate, total spend and type of contracts held.
- West Yorkshire ICB - Bradford District and Craven exempted both questions on the hours purchased and total spend (cost of compliance too high).
- West Yorkshire ICB - Calderdale did not provide an average rate, and exempted the hours purchased in both sample weeks (cost of compliance). Its total spend was a monthly figure, so we estimated for a week.
- West Yorkshire ICB - Leeds provided information on the hours questions, which were only for care packages that began during the two sample weeks. Thus, we have estimated the total 2025 hours and not used its 2024 figure.
- West Yorkshire ICB - Wakefield exempted the 2025 and 2024 hours, and the number of people aged 65 years and over receiving homecare (cost of compliance). Again, we have estimated the 2025 hours using other data.

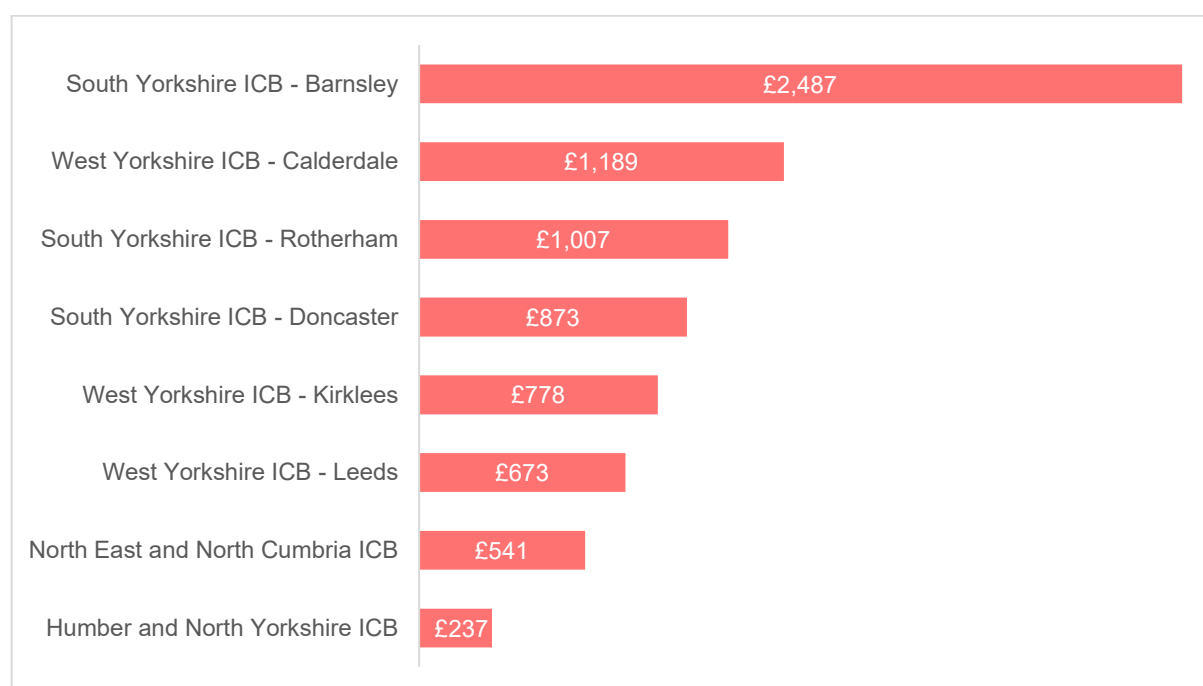


Figure 112. Average spend per person aged 65 years and over receiving homecare purchased by health bodies in NHS North East and Yorkshire during the 2025 sample week

NHS North West

	2025				Since 2023
Health body	Lowest price	Highest price	Hours	Average price	% change in average price
Cheshire and Merseyside ICB	Not held	Not held	Not held	Not held	-
Greater Manchester ICB	Not held	Not held	Not held	Not held	-
Lancashire and South Cumbria ICB	£14.00	£56.00	25,306	£23.28	9%

Figure 113. Prices paid per hour and the hours of homecare purchased in NHS North West during the 2025 sample week, compared with the 2023 sample week

Notes

- Neither Cheshire and Merseyside ICB nor Greater Manchester ICB held information on the lowest, highest and average rates, as well as the hours purchased in the 2025 and 2024 sample weeks.

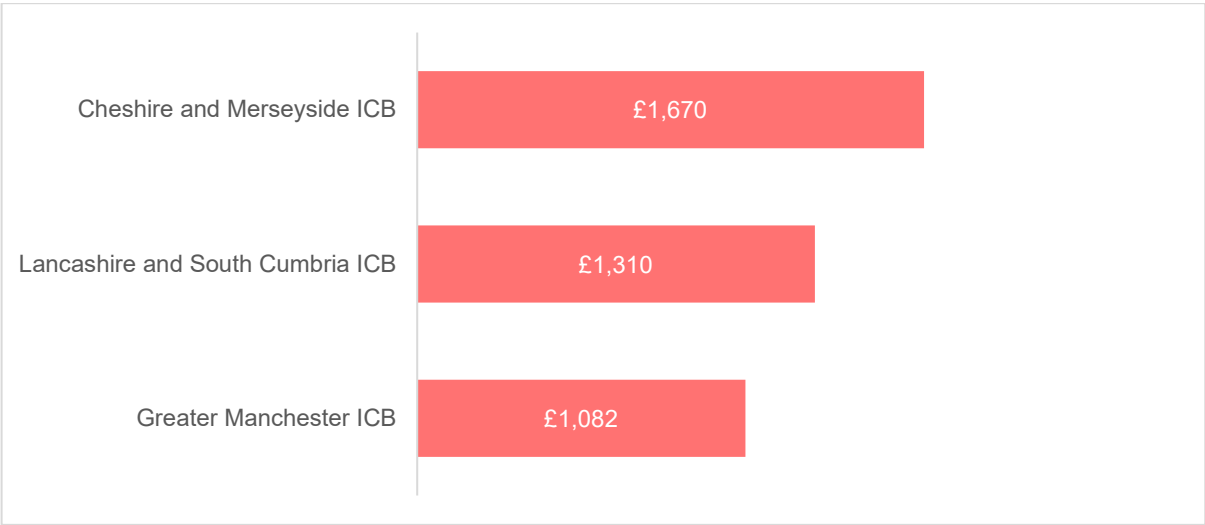


Figure 114. Average spend per person aged 65 years and over receiving homecare purchased by health bodies in NHS North West during the 2025 sample week

NHS South East

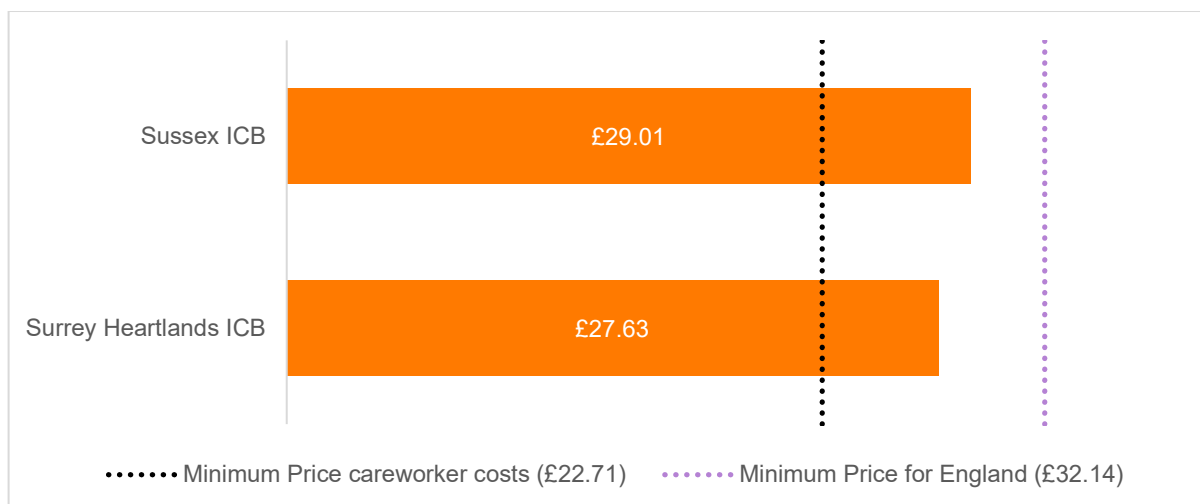


Figure 115. Average hourly prices paid for homecare by health bodies in NHS South East during the 2025 sample week

Health body	2025				Since 2023
	Lowest price	Highest price	Hours	Average price	% change in average price
Buckinghamshire, Oxfordshire and Berkshire West ICB	Exemption	Exemption	Exemption	Exemption	-
Frimley ICB	Exemption	Exemption	Not held	Exemption	-
Hampshire and Isle of Wight ICB	Exemption	Exemption	Exemption	Exemption	-
Kent and Medway ICB	£14.91	£66.67	Not held	Not held	-
Surrey Heartlands ICB	£19.12	£55.38	10,925	£27.63	-
Sussex ICB	£12.14	£39.54	9,339	£29.01	14%

Figure 116. Prices paid per hour and the hours of homecare purchased in NHS South East during the 2025 sample week, compared with the 2023 sample week

Notes

- Both Buckinghamshire, Oxfordshire and Berkshire West ICB, and Hampshire and Isle of Wight ICB exempted the lowest, highest and average rates, as well as the hours purchased in the 2025 and 2024 sample weeks, because of the cost of compliance being too high. Hampshire and Isle of Wight ICB also exempted information on the number of providers and people aged 65 years and over receiving homecare for the same reason.
- Frimley ICB exempted the three questions on rates (cost of compliance) and did not hold data on the hours purchased in either sample week.
- Kent and Medway ICB split its response into North Kent and East/West Kent, but we could pool all the information together into one response. The ICB could not calculate an average price (as its databases recorded weekly care package rates) or report on the hours purchased.
- Surrey Heartlands ICB initially placed an exemption on the rates and hours questions (cost of compliance). However, the ICB offered to provide the data from a sample size of records that it could examine within the ‘appropriate limit’ (as referenced in Section 12 of the Freedom of Information Act 2000). In our analysis, we have used the data from this sample as reported, but accept this could be an incomplete picture.

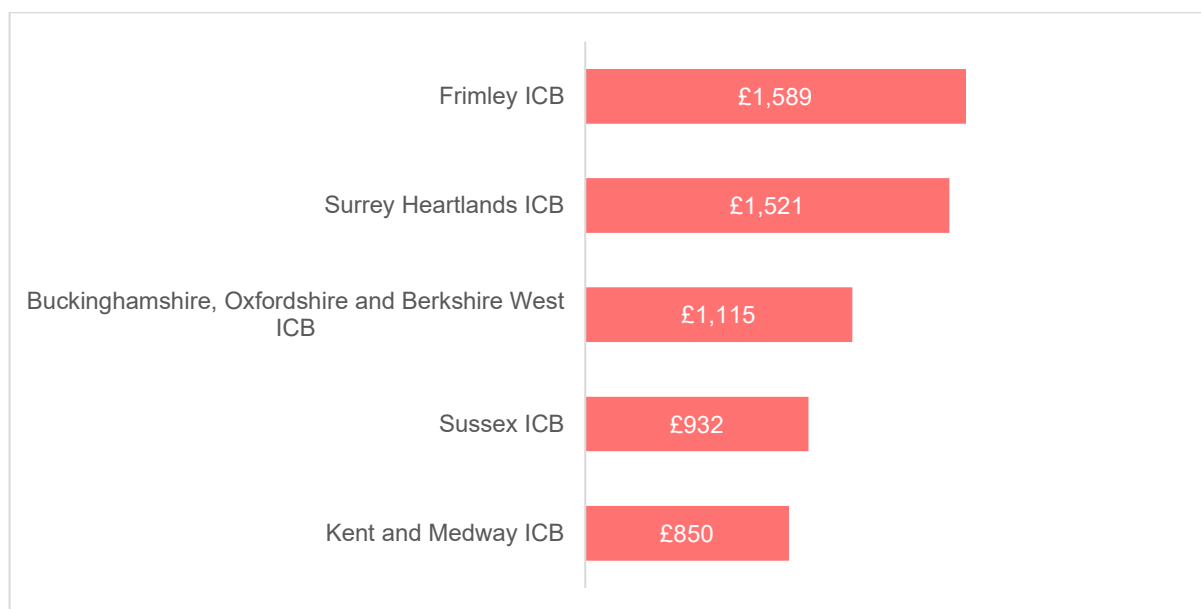


Figure 117. Average spend per person aged 65 years and over receiving homecare purchased by health bodies in NHS South East during the 2025 sample week

NHS South West



Figure 118. Average hourly prices paid for homecare by health bodies in NHS South West during the 2025 sample week

Notes

- Bath and North East Somerset, Swindon and Wiltshire ICB provided an average rate which was extremely high. After we challenged the answer, the ICB said: “The ICB confirm that the figures provided in the original response are correct.” However, we remained unconvinced and have not used this in our analysis. The health body also did not hold information on the hours purchased in the 2025 and 2024 sample weeks.
- Gloucestershire ICB did not hold any of the information requested and suggested we contact Gloucestershire County Council (see the local government section of the report for these data).

	2025				Since 2023
Health body	Lowest price	Highest price	Hours	Average price	% change in average price
Bath and North East Somerset, Swindon and Wiltshire ICB	£17.95	£92.91	Not held	Not used	-
Bristol, North Somerset and South Gloucestershire ICB	£17.93	£67.06	2,900	£28.79	9%
Cornwall and Isles Of Scilly ICB	£27.21	£35.74	4,739	£27.47	13%
Devon ICB	£10.41	£56.80	7,045	£22.65	-0.2%
Dorset ICB	£21.90	£29.00	8,649	£23.26	-
Gloucestershire ICB	Not held	Not held	Not held	Not held	-
Somerset ICB	£24.49	£32.69	4,037	£29.65	12%

Figure 119. Prices paid per hour and the hours of homecare purchased in NHS South West during the 2025 sample week, compared with the 2023 sample week

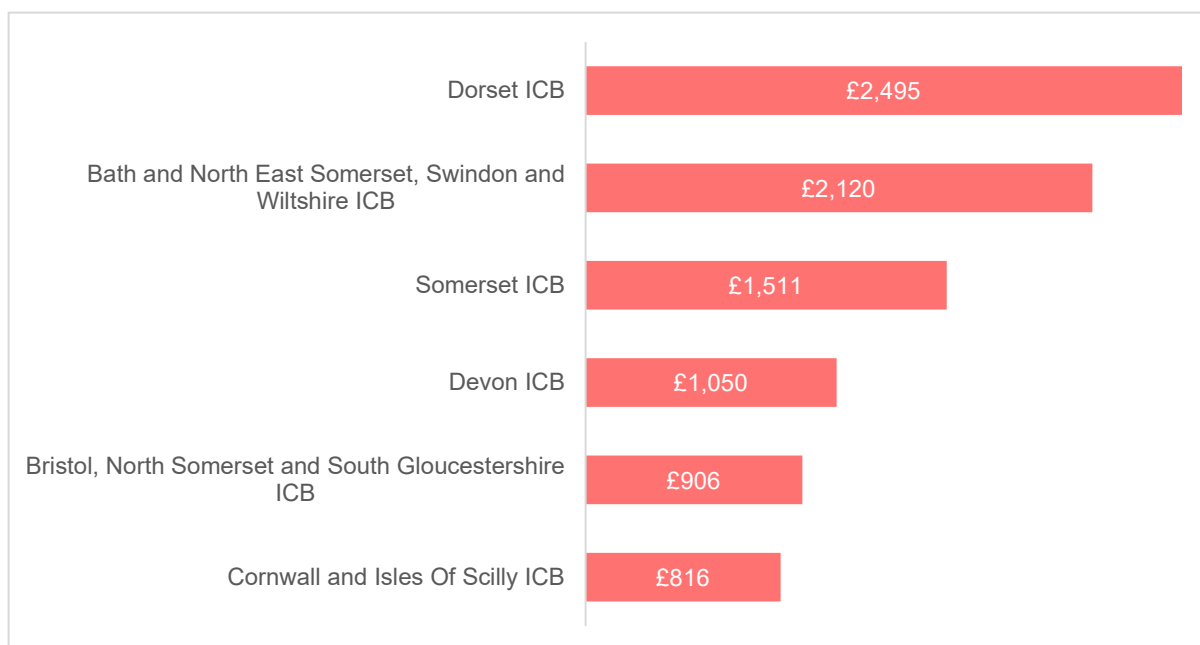


Figure 120. Average spend per person aged 65 years and over receiving homecare purchased by health bodies in NHS South West during the 2025 sample week

NHS Wales



Figure 121. Average hourly prices paid for homecare by health bodies in NHS Wales during the 2025 sample week

Notes

- Neither Cardiff and Vale UHB nor Cwm Taf Morgannwg UHB held information on the lowest, highest, and average rates, as well as the hours purchased in the 2025 and 2024 sample weeks. Cwm Taf Morgannwg UHB also told us it did not report on homecare packages by age, so could not state the number of recipients aged 65 years and over.
- In its response, Powys THB said: “The breakdown of the categories requested 65+ are not routinely reported... The information provided is based on the total expenditure for adult homecare.” We have included its figures in the table below (highlighted in red) for illustrative purposes. However, we have excluded most of its data from our analysis, apart from the number of care recipients (which was for people aged 65+) and the type of contracts with providers (the THB only has spot contracts). The health body also exempted the 2024 hours purchased (cost of compliance).

	2025				Since 2023
Health body	Lowest price	Highest price	Hours	Average price	% change in average price
Aneurin Bevan UHB	£21.66	£30.93	6,222	£26.66	30%
Betsi Cadwaladr UHB	£22.00	£32.58	965	£26.90	17%
Cardiff and Vale UHB	Not held	Not held	Not held	Not held	-
Cwm Taf Morgannwg UHB	Not held	Not held	Not held	Not held	-
Hywel Dda UHB	£20.56	£34.40	791	£26.10	23%
Powys THB	£25.00	£113.80	1,503	£32.60	-
Swansea Bay UHB	£17.50	£44.99	1,236	£27.99	24%

Figure 122. Prices paid per hour and the hours of homecare purchased in NHS Wales during the 2025 sample week, compared with the 2023 sample week

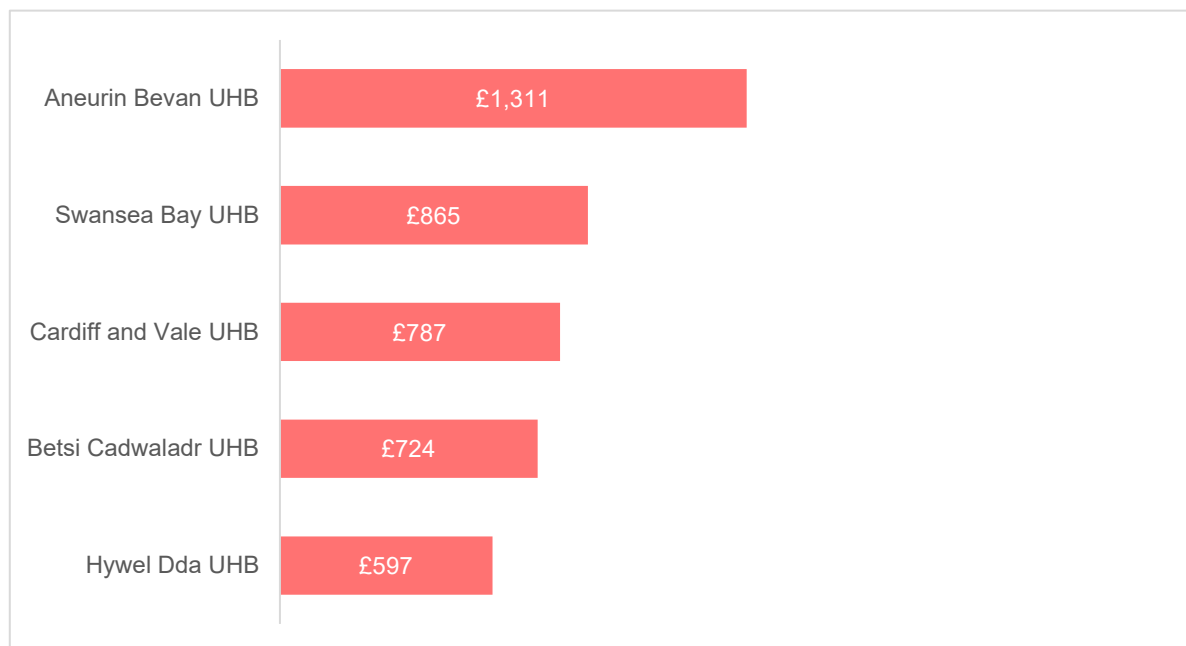


Figure 123. Average spend per person aged 65 years and over receiving homecare purchased by health bodies in NHS Wales during the 2025 sample week

Appendices

Appendix 1. Method and responses

Freedom of Information request

The Homecare Association contacted every local authority, HSC Trust, ICB, Local Health Board and regional NHS Board across the United Kingdom that commissioned homecare for older people (aged 65 years and over) with a request for information using the Freedom of Information Act 2000 and the Freedom of Information (Scotland) Act 2002 accordingly.

We asked each public organisation to provide the following information in relation to a seven-day 'Reference Period' (or 'sample week') which included Monday 14 April 2025:

- (a) The **lowest** rate per hour paid to any individual homecare provider during the Reference Period, expressed in pounds and pence per hour.
- (b) The **highest** rate per hour paid to any individual homecare provider during the Reference Period, expressed in pounds and pence per hour.
- (c) The **average** ('arithmetic mean') rate per hour paid to **all** homecare providers for all homecare services purchased during the Reference Period, expressed in pounds and pence per hour.
- (d) The **total hours** of homecare purchased from **all** homecare providers during the Reference Period (i.e. any period of seven consecutive days that included Monday 14 April **2025**).
- (e) The **total hours** of homecare purchased from **all** homecare providers during a seven-day period that included Monday 15 April **2024** (i.e. the figure that provided a like-for-like comparison with item (d), above, for the previous year).
- (f) Your organisation's **total spend** on homecare services purchased from **all** homecare providers during the Reference Period.
- (g) The **total number** of homecare providers that delivered the total hours of homecare purchased during the Reference Period (as specified in item (d) above).
- (h) The **total number** of people aged 65 years and over who received homecare services from homecare providers during the Reference Period.
- (i) A brief description of the **type of contracts** currently held with homecare providers (i.e. whether they were block contracts, lead provider contracts, framework contracts, spot contracts, etc.).

NB. We asked two further questions on direct payments that we have not analysed as part of this report.

Our request repeated questions (a)-(f) from previous Freedom of Information exercises to enable comparison, while other questions were fresh additions. We chose the week in April to allow public organisations reasonable time to have implemented price increases for the National Living Wage, which came into effect on 1 April 2025.

As guidance to select the correct data sample in answer to the questions on homecare services (shown above), we asked each organisation to **include**:

- Homecare delivered by independent and voluntary sector homecare providers (that are registered by a national statutory regulator).
- Services delivered to adults aged 65 years and over.
- Services that are primarily designed to provide personal care and support, including prompting people to undertake such activities for themselves.
- The care element (only) of services delivered in 'extra care housing' or 'supported living' schemes (i.e. excluding any payment for providing housing or housing services).

The request asked each organisation to **exclude**:

- Services provided to adults under the age of 65 years.
- Services that are charged by reference to a unit price, other than a price per hour (or part thereof).
- Any payments made directly to people in lieu of the provision of services by the public organisation (e.g. a direct payment).
- Services provided by any 'in-house' homecare team, where the workforce is employed by the public organisation.

In case of doubt, we advised organisations to apply a 'common-sense' interpretation to the request.

Analysis

Excluding those that did not purchase homecare from the independent and voluntary sector, 263 public organisations responded to the Freedom of Information request. This does not include Enfield Council that failed to respond in time to be included in our analysis. Ultimately, the number of responses was higher than the number of requests sent since South Yorkshire ICB and West Yorkshire ICB split their responses by area.

Sometimes, we received two of the total spend, average price and the number of 2025 hours in a specific response. Here, the Homecare Association could estimate a missing figure using the formula (or a variant thereof):

$$\textit{Total spend} = \textit{Average price} \times \textit{Number of 2025 hours}$$

We have noted where we did this in the relevant local government/NHS regional sections of the report.

We mostly analysed the data supplied by each organisation as reported in its response. The Homecare Association challenged an organisation where any data seemed ‘suspect’ (i.e. outside the expected range). This often led to the response being corrected.

However, occasionally, we thought it was necessary to either exclude data that appeared to be erroneous or change a response to a question (if an organisation could not answer the question as intended or had made an obvious mistake).

A ‘weighted average’ for a government/NHS region or UK administration accounted for the different volumes of care that each individual organisation in that region or administration purchased. We computed a weighted average, W , using the formula:

$$W = \frac{\sum_{i=1}^n \omega_i X_i}{\sum_{i=1}^n \omega_i}$$

In our case, ω_i was the number of hours purchased by organisation i in the 2025 sample week, X_i was the average price for organisation i and n was the number of organisations in the region or administration included in the calculation.

The Homecare Association is as confident as possible that the weighted average prices in this report provide a representative picture of reality.

Speed of response

For all organisations (including those that did not purchase homecare from external providers but excluding Enfield that did not reply in time), the average (mean) response time to the request was 20 working days.

71% of organisations responded no later than 20 working days, as specified in Freedom of Information legislation, with 42% doing so in the final working week of this limit.

After the statutory time period expired, we made one or multiple follow-up requests to organisations that had not replied. Indeed, 82 organisations replied after the 20-working day limit (again excluding Enfield).

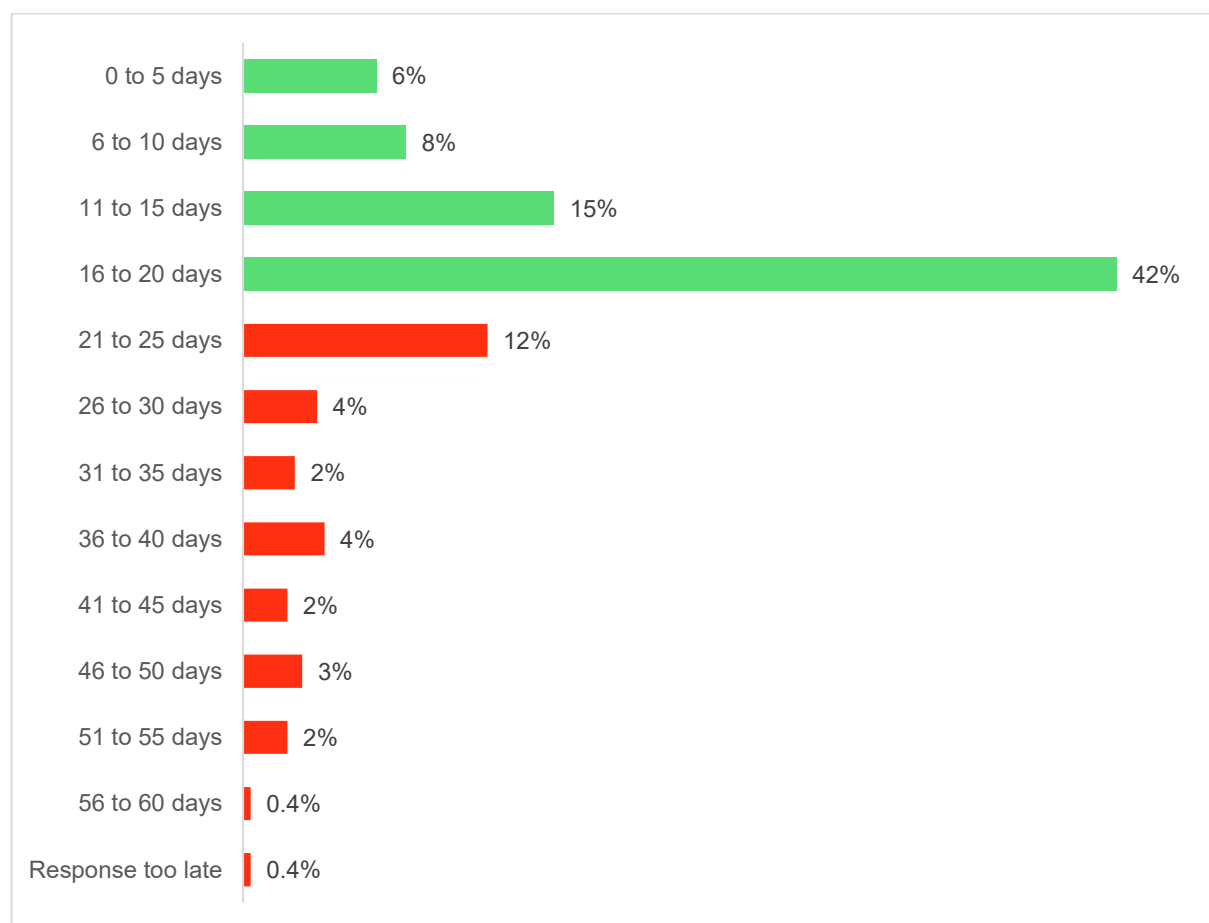


Figure 124. Overall percentage of responses to the 2025 Freedom of Information request by time of response (in working days)

When breaking this data down, 84% of NHS bodies replied within 20 working days, compared to only 66% for councils/HSC Trusts.

The Homecare Association acknowledges with thanks all those public organisations that supplied information promptly.

Appendix 2. Organisations that did not purchase homecare from the independent and voluntary sector

The following public organisations did not buy external homecare services. This includes those who did not hold any of the information.

Councils/HSC Trusts

- Highland (NHS Highland was responsible for services)
- Isles of Scilly
- North East Lincolnshire
- Shetland Islands
- Torbay (Torbay & South Devon NHS FT was responsible for services).

NHS bodies

- Gloucestershire ICB
- NHS Ayrshire & Arran
- NHS Borders
- NHS Dumfries & Galloway
- NHS Fife
- NHS Forth Valley
- NHS Grampian
- NHS Greater Glasgow and Clyde
- NHS Lanarkshire
- NHS Lothian
- NHS Orkney
- NHS Shetland
- NHS Tayside
- NHS Western Isles.

Appendix 3. Councils/HSC Trusts in the United Kingdom that paid less than careworker costs from the Minimum Price for Homecare

The following shows all councils/HSC Trusts whose hourly average price was lower than the value of careworker costs in the Minimum Price for the respective nation.

We present the information in order by the average price, starting with the worst offender.

For councils only, the table also notes whether the organisation has adopted UNISON's Ethical Care Charter and the 2025 political governance of the council, based on our own research and using the Open Council Data UK website.

NB. Please see the specific region sections of this report for notes on the average prices for Clackmannanshire, Derby City and Sandwell.

Council/HSC Trust	Region	Average price	Adopted Care Charter	Political governance
Waltham Forest	Greater London	£17.74	No	Labour
Ealing	Greater London	£18.87	No	Labour
Barnet	Greater London	£19.07	No	Labour
Hammersmith & Fulham	Greater London	£19.53	Yes	Labour
Sandwell	West Midlands	£19.65	No	Labour
Haringey	Greater London	£19.76	Yes	Labour
Slough	South East	£20.08	No	Conservative (minority)
Derby City	East Midlands	£20.09	No	Labour (minority)
Hillingdon	Greater London	£20.12	No	Conservative
Windsor & Maidenhead	South East	£20.20	No	Liberal Democrats-led coalition
Wandsworth	Greater London	£20.54	No	Labour
Richmond upon Thames	Greater London	£20.56	No	Liberal Democrats
Kingston upon Thames	Greater London	£20.60	No	Liberal Democrats
Knowsley	North West	£20.62	Yes	Labour

Nottingham City	East Midlands	£20.72	Yes	Labour
Harrow	Greater London	£20.83	No	Conservative
Gateshead	North East	£20.90	Yes	Labour
Walsall	West Midlands	£21.00	No	Conservative
Telford & Wrekin	West Midlands	£21.12	No	Labour
Luton	East of England	£21.14	No	Labour
Peterborough	East of England	£21.18	No	Labour-led coalition
Sunderland	North East	£21.31	No	Labour
Hackney	Greater London	£21.34	Yes	Labour
St Helens	North West	£21.34	No	Labour
South Eastern HSC Trust	Northern Ireland	£21.35	N/A	N/A
Southern HSC Trust	Northern Ireland	£21.35	N/A	N/A
Western HSC Trust	Northern Ireland	£21.35	N/A	N/A
Medway	South East	£21.42	No	Labour
Brent	Greater London	£21.50	No	Labour
Belfast HSC Trust	Northern Ireland	£21.54	N/A	N/A
Lambeth	Greater London	£21.55	No	Labour
Wolverhampton	West Midlands	£21.58	No	Labour
Middlesbrough	North East	£21.59	No	Labour
Islington	Greater London	£21.91	Yes	Labour
Dudley	West Midlands	£21.92	No	Conservative (minority)
West Berkshire	South East	£21.92	No	Liberal Democrats
Bexley	Greater London	£21.95	No	Conservative
Darlington	North East	£21.96	No	Labour-led coalition

Tower Hamlets	Greater London	£21.96	Yes	Other
West Dunbartonshire	Scotland	£22.04	No	Labour (minority)
Southampton	South East	£22.06	Yes	Labour
Bracknell Forest	South East	£22.09	No	Labour (minority)
Newcastle	North East	£22.22	No	Labour (minority)
Blackpool	North West	£22.25	No	Labour
Barking & Dagenham	Greater London	£22.33	Yes	Labour
Northern HSC Trust	Northern Ireland	£22.33	N/A	N/A
Clackmannanshire	Scotland	£22.37	No	SNP (minority)
Southwark	Greater London	£22.47	Yes	Labour
Coventry	West Midlands	£22.58	No	Labour
Sutton	Greater London	£22.63	No	Liberal Democrats
Trafford	North West	£22.70	Yes	Labour
Wirral	North West	£22.70	Yes	Labour (minority)
East Lothian	Scotland	£22.84	No	Labour (minority)
South Lanarkshire	Scotland	£22.94	Yes	Labour-led coalition
Glasgow	Scotland	£23.05	No	SNP (minority)
East Ayrshire	Scotland	£23.08	Yes	SNP (minority)
North Ayrshire	Scotland	£23.08	Yes	SNP (minority)
South Ayrshire	Scotland	£23.08	No	Other
Cardiff	Wales	£23.61	No	Labour

Figure 125. Councils/HSC Trusts in the United Kingdom whose average hourly price paid for homecare during the 2025 sample week was below the value of careworker costs

Appendix 4. Health bodies in England and Wales that paid less than careworker costs from the Minimum Price for Homecare

There were four health bodies (all in England) whose hourly average rate was not enough to cover careworker costs in the Minimum Price.

Health body	Region	Average price
North West London ICB	NHS London	£19.71
Leicester, Leicestershire and Rutland ICB	NHS Midlands	£21.02
Cambridgeshire & Peterborough ICB	NHS East of England	£21.23
Devon ICB	NHS South West	£22.65

Figure 126. Health bodies in England and Wales whose average hourly price paid for homecare during the 2025 sample week was below the value of careworker costs

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Shaping homecare together

Homecare Association

Mercury House
117 Waterloo Road
London
SE1 8UL

020 8661 8188

enquiries@homecareassociation.org.uk

homecareassociation.org.uk



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