

A BRIDGEHEAD SOCIAL CARE REPORT • JULY 2023

SOCIAL MEDIA POWER LIST 2023

TOP 20 LARGE CARE HOME GROUPS

Ranked on social media reach, engagement and content quality



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ABOUT BRIDGEHEAD SOCIAL CARE

A division of Bridgehead Communications, Bridgehead Social Care is a specialist marketing, public relations, and political communications consultancy focused exclusively on the adult social care sector.

Our expert team includes former national print and broadcast journalists as well as senior policy advisers with an in-depth understanding of the adult social care landscape.

Our clients and the services they require are broad. They include care bodies looking to rebrand or market themselves more effectively; providers seeking to raise the profile of their care service provision through both digital and traditional media; those seeking to navigate a hostile media environment; as well as individuals and organisations looking to have their voice and opinions heard among key sector decision makers.

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Yours faithfully,

William Walter,
Managing Director,
Bridgehead Communications



Our core services include:



Marketing
& Content
Production



Profile
Promotion



Crisis
Communication
& Reputation
Management



Regulatory
& Political
Engagement



Campaign
Management

2. OVERVIEW AND KEY FINDINGS

Social media is an increasingly important mechanism to support stakeholder engagement in the social care sector.

In this, the second in a series of reports, we examine the use and applications of social media in the adult social care sector. Using carehome.co.uk's list of [Top 20 Large Care Home Groups 2023](#), we construct a 'power list' of runners and riders among some of the leading care groups and each of their respective homes. We examine how they use social media, what platforms they use, for what, and how effective they are at growing their audiences.

But, to lay the groundwork in our understanding, it's important to first understand the social media platforms themselves. We look at five of the most popular and relevant social media platforms to the adult social care sector: Facebook, LinkedIn, Instagram, Twitter, and TikTok. We explore which are growing in influence and which are not. We also research the age demographics of their users.

We then use this information to identify the most appropriate platforms for common applications of social media for the sector, from domestic and overseas recruitment to community and stakeholder engagement.

After analysing our results, we turn our attention to the relative merits of group verses individual care home social media accounts to help you determine which is likely to be most effective for your group or home's needs.

KEY FINDINGS

Since 2018, and of the five social media channels analysed in this study, **LinkedIn** and **Facebook** have enjoyed the largest growth in terms of user numbers

TikTok has seen the **largest proportional increase** in its volume of users.

Facebook has the **largest number of users** across all age ranges apart from those aged 13-17 and those aged 25-34.

TikTok is likely to play an **increasingly significant** role in the adult social care's social media strategy over the next two decades.

KEY FINDINGS

The groups and their respective care homes had a combined total of **1,479,802** followers across the five platforms.

Bupa and its care homes accounted for over **25 per cent (377,828)** of the total follower count.

Excluding Bupa's follower count, the groups and their respective homes had a combined total of **1,150,348**.

Excluding Bupa, **Facebook** followers accounted for **61 per cent** of the remaining group and home accounts.

Excluding Bupa, **Barchester Healthcare (231,874)** and **Anchor (177,732)** were clear outliers in the combined group and home rankings.

Barchester Healthcare has a significant LinkedIn following (**50,570**), which it uses to showcase group and staff achievement as well as for recruitment.

Anchor has the largest Twitter following (**63,017**).

Marham House Care Home tops the individual homes leader board due to its large Tik Tok following (**30,800**).

Barchester Healthcare also tops the individual group leader board with **70,893** followers across its Facebook, Instagram, and LinkedIn accounts.

3. INTRODUCTION

Social Media in Social Care

Effective engagement between care groups and their respective stakeholders is important to their successful operation and function.

However, as [The Guardian observed in 2014](#), for various reasons the social care sector has historically been cautious with digital tools. This culture has now changed. Social media and its various platforms are becoming an increasingly important mechanism to support stakeholder engagement in the social care sector.

For example, as well as being a social networking platform, Facebook is a popular business development and marketing tool through which care groups and their homes can showcase the quality of their service offering, activities, and events to both existing and prospective care-receivers and their families.

Facebook, alongside platforms such as LinkedIn and TikTok, are proving an invaluable resource to help care groups address the significant recruitment challenges they face, particularly in the post-COVID environment. Used effectively, social media is helping groups to connect directly with applicants from the UK and overseas, driving up application rates, reducing their dependency on agency staff, and lowering costs.

Social media is also a useful tool for boosting staff morale as it can promote staff development and achievement. This, in turn, supports recruitment by promoting the opportunities for development that groups offer and highlights their understanding of the importance of employee recognition to prospective employees.

Social media platforms, particularly Twitter, Facebook, and LinkedIn, are also proving to be invaluable campaigning tools to allow care groups and those working within the sector to raise awareness of challenges affecting the industry among policymakers, the media, and the public. The role of social media in amplifying the sector's voice became particularly apparent during the pandemic. Since then, it has allowed the industry to highlight other issues, including the recruitment crisis and rising operating costs to key audiences.

The role of social media in amplifying the sector's voice became particularly apparent during the pandemic.

Return on investment

Robust evidence quantifying the positive return on investment of social media in the social care sector is limited. Despite this, we can draw some insight from the findings of research into social media's applications in the healthcare sector.

One [US study published in 2014](#), for example, concluded that healthcare organisations were able to significantly increase their visibility and brand recognition using social media.

Of those consumers surveyed for the study, 57 per cent felt that a brand's presence on social media positively influenced their choice to use that organisation's services. Similarly, 12.5 per cent of the healthcare organisations surveyed reported that they had attracted new patients through social media.

Given the subsequent growth in UK-based users of social media platforms (Chart 1) it seems reasonable to assume that the dividends from the effective use of social media have also multiplied.

Users by platform

To use social media effectively in the adult social care sector, understanding how many users each platform has, as well as the demographics of those users, is crucial.

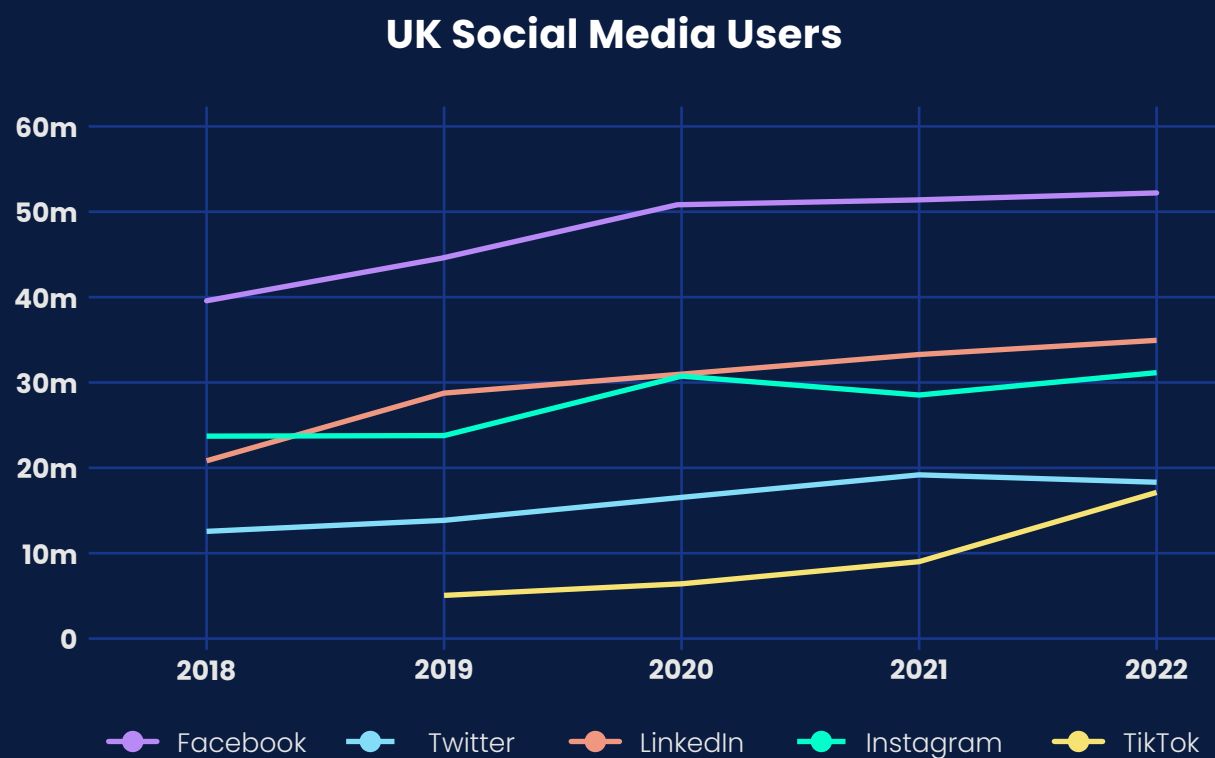


Chart 1

Chart 1¹ shows the growth in the number of UK users for the five most commonly used social media platforms in the social care sector. It shows how, since 2018, LinkedIn and Facebook have enjoyed the largest growth in terms of user numbers, with LinkedIn acquiring an additional 13,900,000 users and Facebook 12,465,200 over the past five years. This equates to an increase of 66 per cent and 31 per cent respectively.

Facebook's growth comes despite a common misperception of the platform being outdated and used predominantly by older generations, although it should be noted that the platform's growth rate has slowed since 2020.

However, with a user growth rate of 246 per cent in users since 2019, TikTok – the newest entrant to the social media market – has seen growth by far the largest proportional increase in its volume of users (12,100,100 users).

Since 2018, LinkedIn and Facebook have enjoyed the largest growth in terms of user numbers

The chart reveals how, since 2018, LinkedIn (34.9 million) has usurped Instagram (31.2 million) to become the second-highest ranked in terms of its number of UK users.

Twitter's user base has increased since 2018, hitting a peak in 2021 of 19.05 million users.

However, this figure has fallen to 18.4 million in 2022. It's predicted that the platform will have lost one million users globally by 2025². The impact of Elon Musk's takeover and new direction remains to be seen.

Also of interest is the relative growth volatility of Instagram users. While, overall, the platform's number of users has increased from 2018 to 2022, the platform has seen periods of decline in its user numbers.

Perhaps most significant is the emergence of video sharing platform, TikTok, which launched in the UK in 2017 and now boasts 17.5 million users. From 2021–2022 the platform saw a 32 per cent increase in its number of users – more than any other platform.

With a user growth rate of 246 per cent in users since 2019, TikTok – the newest entrant to the social media market – has seen growth by far the largest proportional increase in its volume of users

1 Sources: Facebook ([NapoleonCat, The Last Hurdle](#)), Twitter ([Rose McGrory, The Last Hurdle, CyberCrew, Statista](#)), Instagram ([NapoleonCat, The Last Hurdle](#)), LinkedIn ([Napoleon Cat, The Last Hurdle](#)), TikTok ([Net Imperative, Statista, Digimind](#)).

2 [InsiderIntelligence](#)

UK Users by age group per platform (2022)

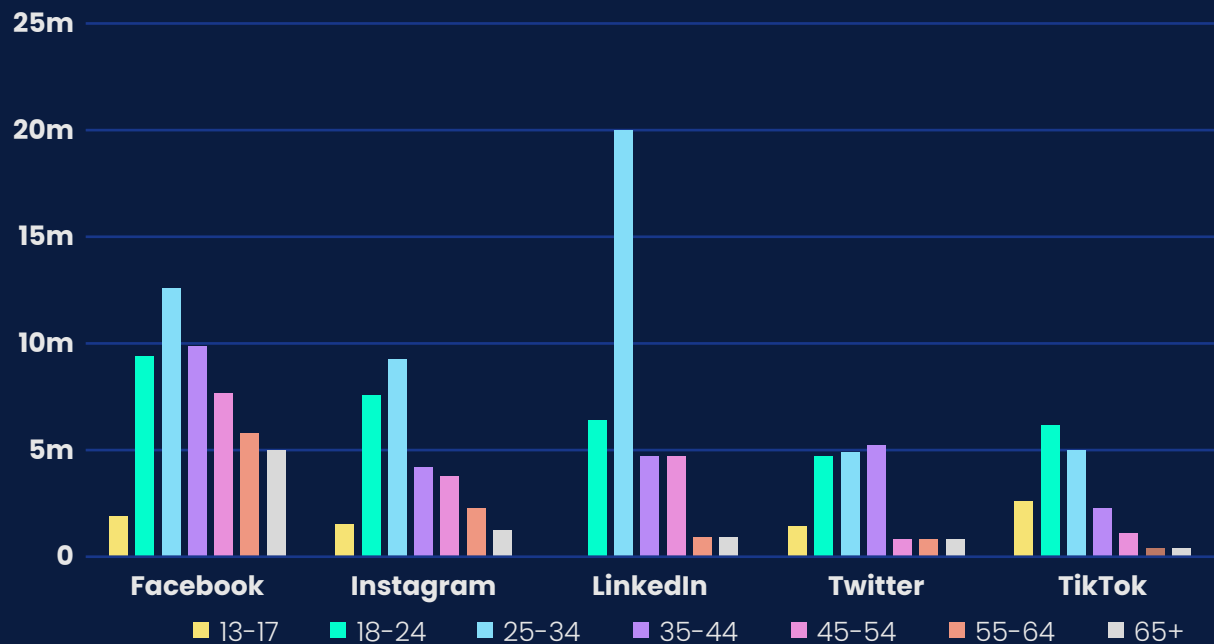


Chart 2

Demographics

But it is not just the size of the prospective audience that informs the relevant applications of the various social media platforms. Other factors, particularly age are also key. Chart 2 breaks down each platform's UK user base by age grouping³.

Chart 2 shows how Facebook has the largest number of users across all age ranges apart from those aged 13-17 and those aged 25-34. It also dominates the over 65 user base with over four times the number users (5,000,000) compared to its next closest rival in that age category, Instagram (1,138,800). Despite its popularity with older demographics, the platform still enjoys a significant audience among younger people. Like LinkedIn and Instagram, Facebook's largest user base is among those aged between 25-34.

This reflects the widespread use of the internet via the smartphone among this age group. LinkedIn's proportion of users aged 25-34 is significantly higher than the other platforms reflecting its popularity among young professionals.

Facebook and Instagram both share a similar age distribution among their users. Both owned by Mark Zuckerberg's Meta, this could in part be a reflection of interconnectivity between the two platforms and the comparative ease with which users can setup sister accounts.



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³ Compiled using various data sources. Facebook, Instagram, and LinkedIn were populated using December 2022 user data from [NapoleonCat](#). In the case of LinkedIn, all those aged over 55 were grouped in one category. To overcome this, we divided the userbase evenly over the 55-64 and 65+ groupings to give readers a rough indication of likely demographic. Similarly, in the case of Twitter and TikTok, specific UK user data by age group is unavailable. Instead, the share of each platform's global userbase by age grouping (Twitter: [BusinessofApps](#) 2022, TikTok: [BusinessofApps](#) 2021) were applied to the total number of UK users (Twitter: [Statista](#) January 2022, TikTok: [DigiMind](#) 2022). However, as with LinkedIn, inconsistencies in age groupings existed. Where these occurred the user numbers were divided evenly across the corresponding groups.

TikTok's recent launch is reflected in its younger user profile. Its largest share of users are those aged 13–17 years old, of which there are over 2.5m users in the UK. As these users become older the platform's relevance to the adult social care sector, particularly from a recruitment perspective will become even more significant. This suggests a clear opportunity for those social care providers looking to get ahead of their competitors, particularly in terms of recruitment, by establishing and developing their presence on the platform early.

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The applications of social media in adult social care

Recruitment

With the social care sector facing a chronic skills shortage, care providers are turning to more innovative tools to drive recruitment and reduce their reliance on agency staff. Facebook and LinkedIn are currently at the leading edge of this effort.

Facebook is most often used to recruit for more junior care positions. The platform offers several advantages. It often boasts high levels of engagement among communities local to care homes, as reflected in its user demographics explored in chart 2. Secondly, the platform's sophisticated advertising interface allows care homes to target recruitment ads accurately, whether it be locally, regionally, nationally, or even internationally.

Increasingly, as recruitment via social media becomes more sophisticated, care groups and their homes are creating dedicated '[care group or home name] – jobs' accounts for their recruitment campaigns. These are easy to access and readily appear in search results.

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As recruitment via social media becomes more sophisticated, care groups and their homes are creating dedicated '[care group or home name] – jobs' accounts for their recruitment campaigns.

Right at Home Mid Hampshire offers a good example of the use of social media as a method of recruitment. The use of the hashtags #CareGivers and #BeHappy, and its posting in a social care recruitment group, has boosted the post's exposure and engagement among a relevant audience.

LinkedIn is traditionally used by care providers to recruit for more senior roles. The online professional network enables employers to post roles via the platform's dedicated jobs portal through which applicants can apply for roles directly.

The sophisticated nature of the platform offers recruiters a more precise means of targeting candidates; the ability to showcase their care group and homes; and engage with passive candidates. Premium features also allow InMail messaging as well as information on who has viewed job ads. The Easy Apply function, used in [this advert](#) by *The Good Care Company* for a Care Manager role, also makes it easier to drive up application rates.

Recruitment is not exclusive to Facebook and LinkedIn. The use of Instagram hashtags such as #adultsocialcarejobs are also being used by care homes and recruiters to connect with younger audiences to promote vacancies.

Awareness and Marketing

Social media is also a powerful marketing tool through which care groups and their homes can build awareness of the positive work they do and the services they provide. This is particularly useful for engaging local communities, prospective residents, their families, and job applicants. This can be achieved by sharing [positive stories about staff, events taking place](#), new additions to your home's facilities or projects your home has been involved in.

Facebook is often the most effective social media platform for sharing these stories as it allows for more lengthy personable posts.

Similarly, and as previously discussed, TikTok is an emerging platform being used to attract new staff and advertise care vacancies among younger people.

HC-One is [a great example](#) of a care group pioneering the use of TikTok for recruitment.



TikTok is an emerging platform being used to attract new staff and advertise care vacancies among younger people.

[Facebook Neighbourhoods](#), piloted in parts of the US and Canada last year and predicted to come to the UK, allows people over the age of 18 to share their interests and characteristics with those in their local neighbourhoods, including community groups. The service offers user recommendations based in their local community tailored to their needs. The new service will potentially offer care homes a new portal to reach prospective residents and their families.

Ultimately, Facebook, LinkedIn, Twitter, Instagram, and TikTok can all be used to market care groups and their homes, but key considerations are marketing objectives, target audience and brand identity.

Interaction and Enquiries

Social media platforms also enable prospective employees, residents, and their families to correspond directly with homes with any questions or queries they may have. Facebook, LinkedIn, Twitter, Instagram, and TikTok allow followers or interested parties to directly message accounts.

Be warned, though, these features can be a double-edged sword. Failure to monitor and respond in a timely manner to incoming queries can have a detrimental impact on your brand and reputation.

Policy Engagement and Campaigning

The adult social care sector is an ever-evolving industry that is being forced to embrace the advent of new technologies while also facing significant challenges such as Covid-19 and the current energy crisis.

The effective use of social media is giving the industry a platform to campaign on key issues that it previously has not had. Platforms like Twitter allow for far-reaching posts that enable care groups to engage in sector discussions with policymakers and journalists like never before.

Hashtags and handles mean care groups and their leaders can participate in conversations with key influencers in real-time.

While the level of background noise and online chatter has undoubtedly increased, there is little doubt that, used effectively, social media has given corners of the sector a voice that they never had before.

They are also able to hear perspectives from other quarters of the industry that they may have otherwise been oblivious to.

This can only be a positive contribution towards debate and decision-making. This [Twitter poll](#) by *Politics Polls*, for example, demonstrates a crude example of the bridge between care groups, the public, and Westminster surrounding the social care debate. A more effective example can be observed by viewing the latest [#socialcare](#) tweets on Twitter.



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4. RESULTS AND ANALYSIS

In the third of a series of reports we seek to examine the use and applications of social media in the adult social care sector.

Using carehome.co.uk’s [Top 20 Large Care Home Groups 2023](#) list, we collated the number of followers for each care group and their respective homes on each of the five major social media platforms: Facebook, Instagram, Twitter, LinkedIn and TikTok. All figures are as of August 2023.

Followers by Platform

Our analysis found that in total, across all five platforms, the groups and their respective care homes had a combined total of 1,479,802 followers.

Chart 3 breaks these followers down by platform.

It reveals that 50 per cent (773,812) were made up of Facebook followers, 31 per cent (471,709) were from LinkedIn, eight per cent (125,034) from Twitter, eight per cent (117,762) from TikTok, and two per cent (29,219) from Instagram.

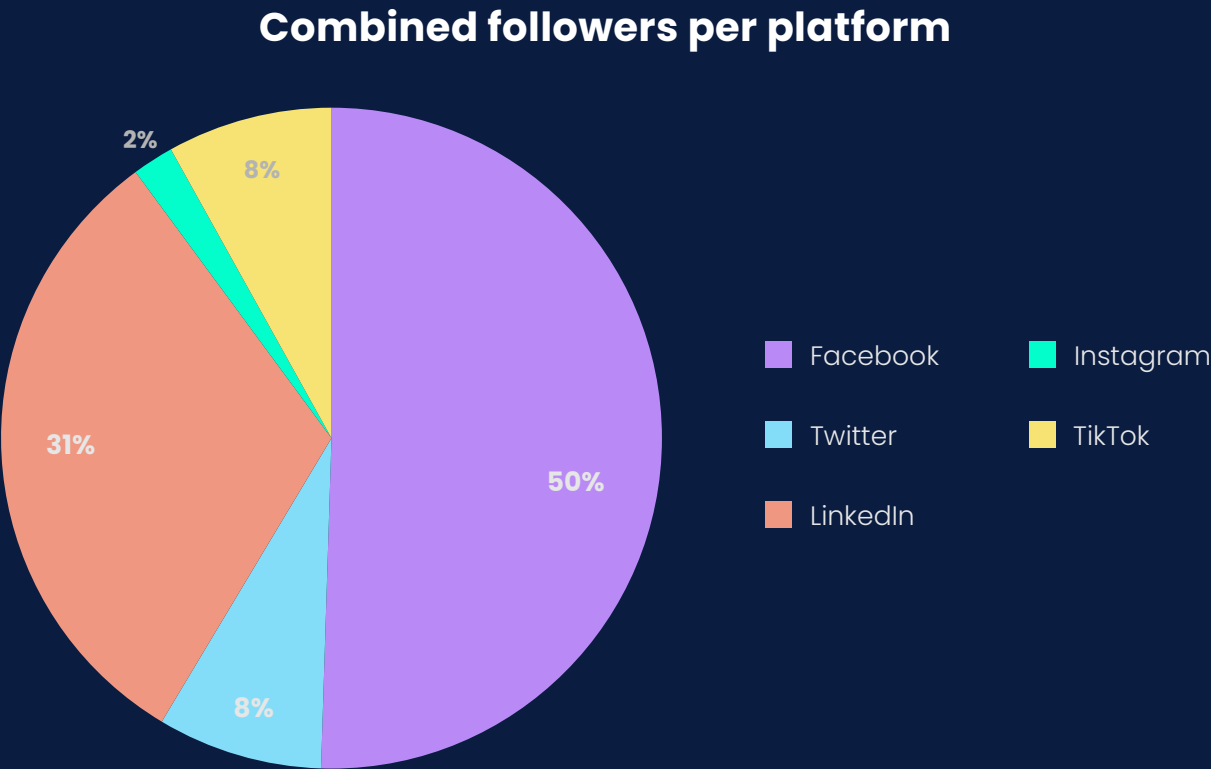


Chart 3

However, closer analysis reveals that the results are heavily skewed by the social media audiences of Bupa. Bupa is a national health provider of services for health insurance, dental care and care homes.

It's care home sector only represents a small part of the wider group's service offering, hence the disparity between its large social media following, especially its LinkedIn following.

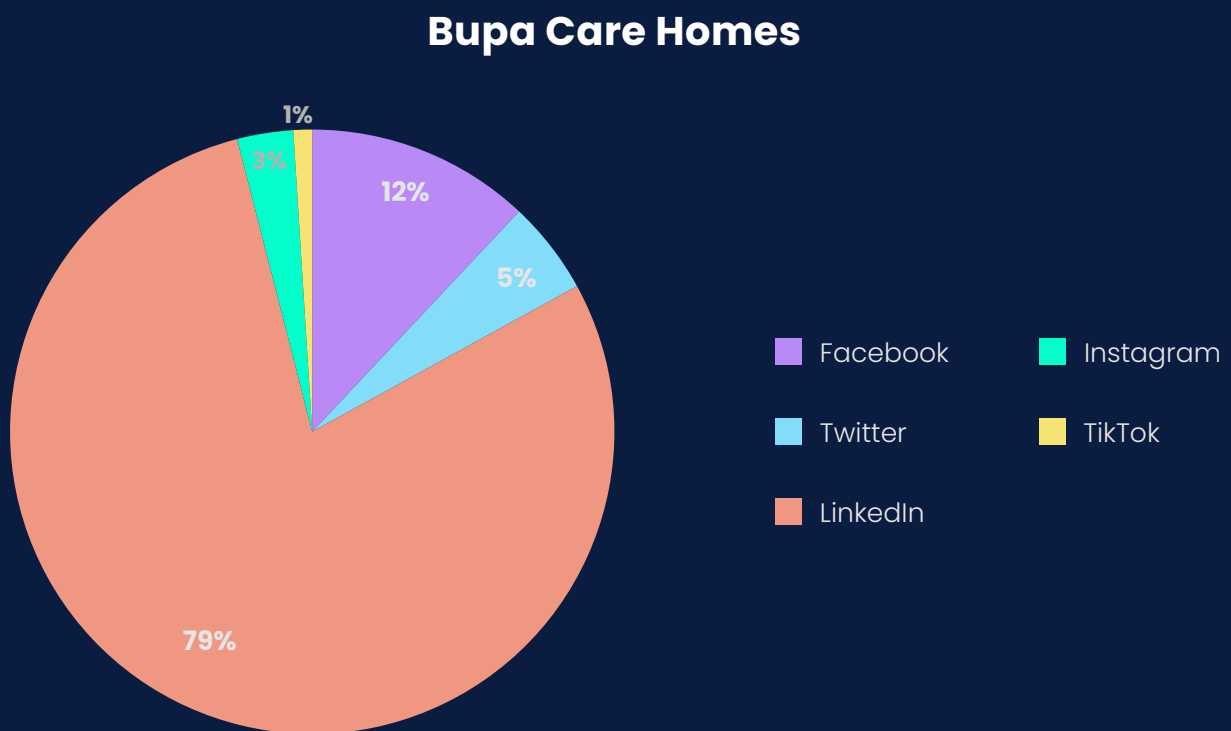


Chart 4

Chart 4 breaks the social media following of Bupa and its respective homes down by platform. It shows the dominant role LinkedIn plays for Bupa's social media strategy. With 259,000 followers, the platform is used to post regular updates from across all of Bupa's health services. This involves uploading interviews with the team's executives and other inspirational figures in the sector as well as exciting achievement updates from Bupa's large network of staff.

Also of interest is Bupa's large number of Facebook followers (88,374). The group has its own Facebook page with 40,932 followers, as well as the majority of its 120 care homes having their own individual pages. Its group Facebook page is used in a similar way to its LinkedIn platform: promoting activities undertaken by their homes, aiding recruitment, and supporting fundraising initiatives.

Bupa and its care homes accounted for just over 25 per cent (377,828) of the total follower count. Excluding them from the group follower count reveals a very different picture in terms of user breakdown by platform. However, the group's individual homes accounts in the individual home graph have remained, as the group's national health services audience did not affect these.

Chart 5 shows that Facebook accounts for by far the largest proportion of followers (61 per cent – 696,078) among the remaining care groups and their homes. LinkedIn accounts for 18 per cent (211,709), a 13 per cent drop as Bupa is excluded.

Tik Tok accounts for 10 per cent (117,208), whilst Twitter accounts for 9 per cent (106,935).

Bupa and its care homes accounted for over 25 per cent (370,552) of the total follower count.

Instagram has the lowest share of followers, with 2 per cent (18,419).

The dominance of Facebook is unsurprising given the relative size of its userbase, the age profile of its users, combined with the platform's suitability for sharing personal, more in depth posts featuring multiple images.

Combined followers per platform* (excluding Bupa)

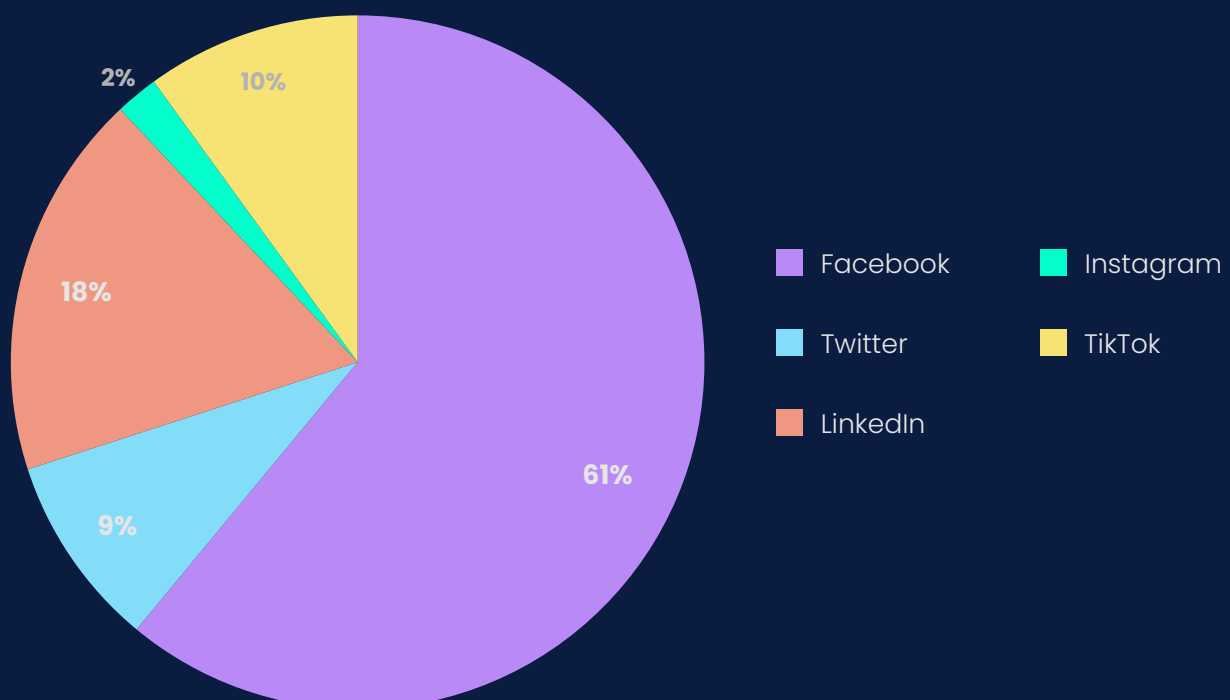


Chart 5

Top 20 Large Care Home Groups (2023): Rankings by Group and Home Accounts Combined

Chart 6 below aggregates the social media following of each care group and their respective homes by social media platform (excluding Bupa).

It shows that Barchester Healthcare (231,874) and, to a lesser extent, Anchor (177,732) are clear outliers. The former has almost double the combined follower count of third ranked Avery Healthcare Group (120,332).

Top 20 Large Care Home Groups (2023): Rankings by Group and Home Accounts Combined

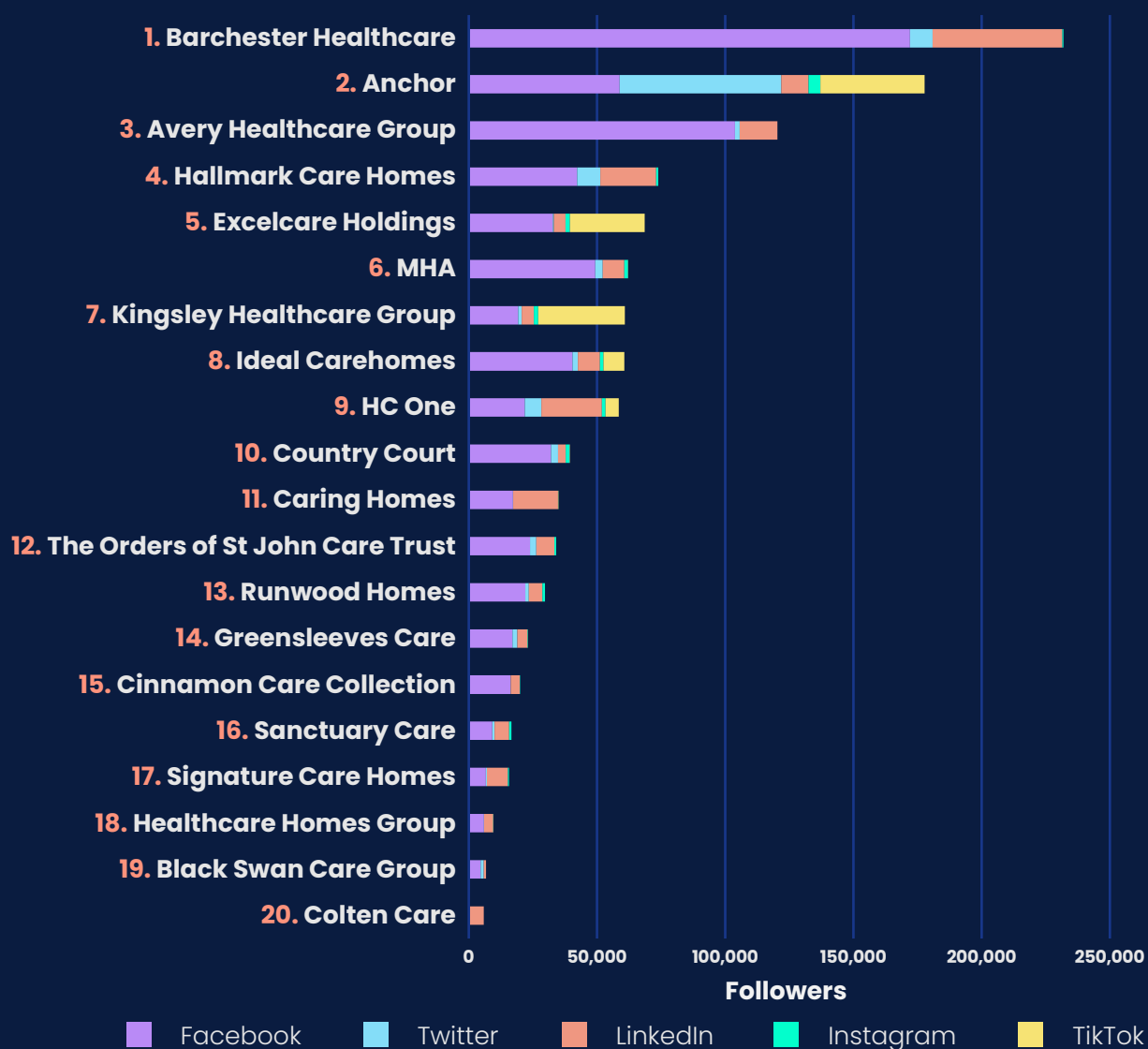


Chart 6

The chart again emphasises how Facebook is the social media platform of choice among both groups and their homes (further highlighted in chart 7).

Compared to its peers, Anchor has a notable Twitter following (63,017), this is made up of its group page as well as many of its homes having their own Twitter accounts, which many care groups do not have.

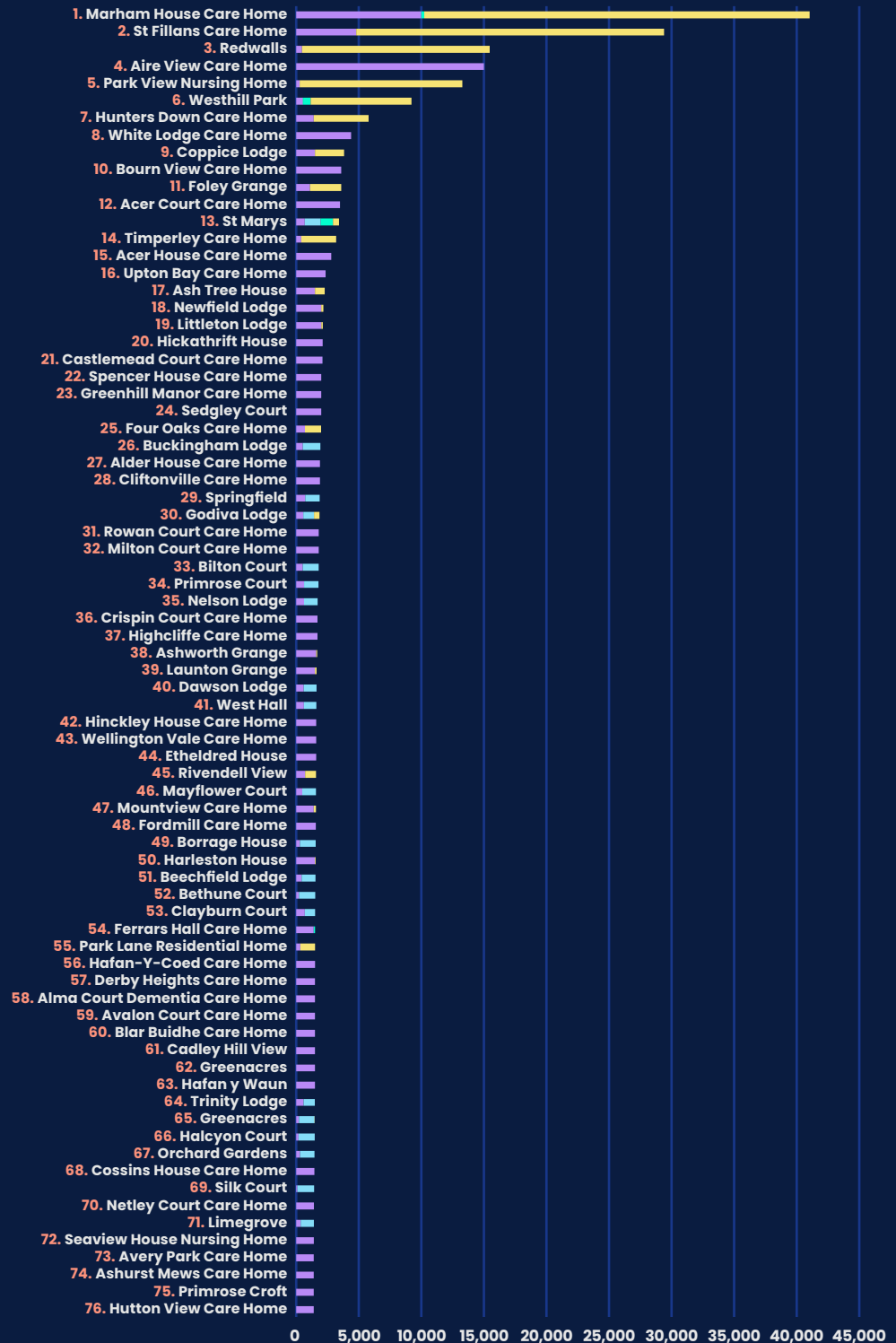
It uses both its group and individual Twitter pages to showcase group and staff achievement as well as for recruitment.

Barchester Healthcare has the largest Facebook following (172,039). Not only does its group's individual Facebook page have a large following (11,058), but they also have over 200 homes, who mostly all have their own Facebook accounts.

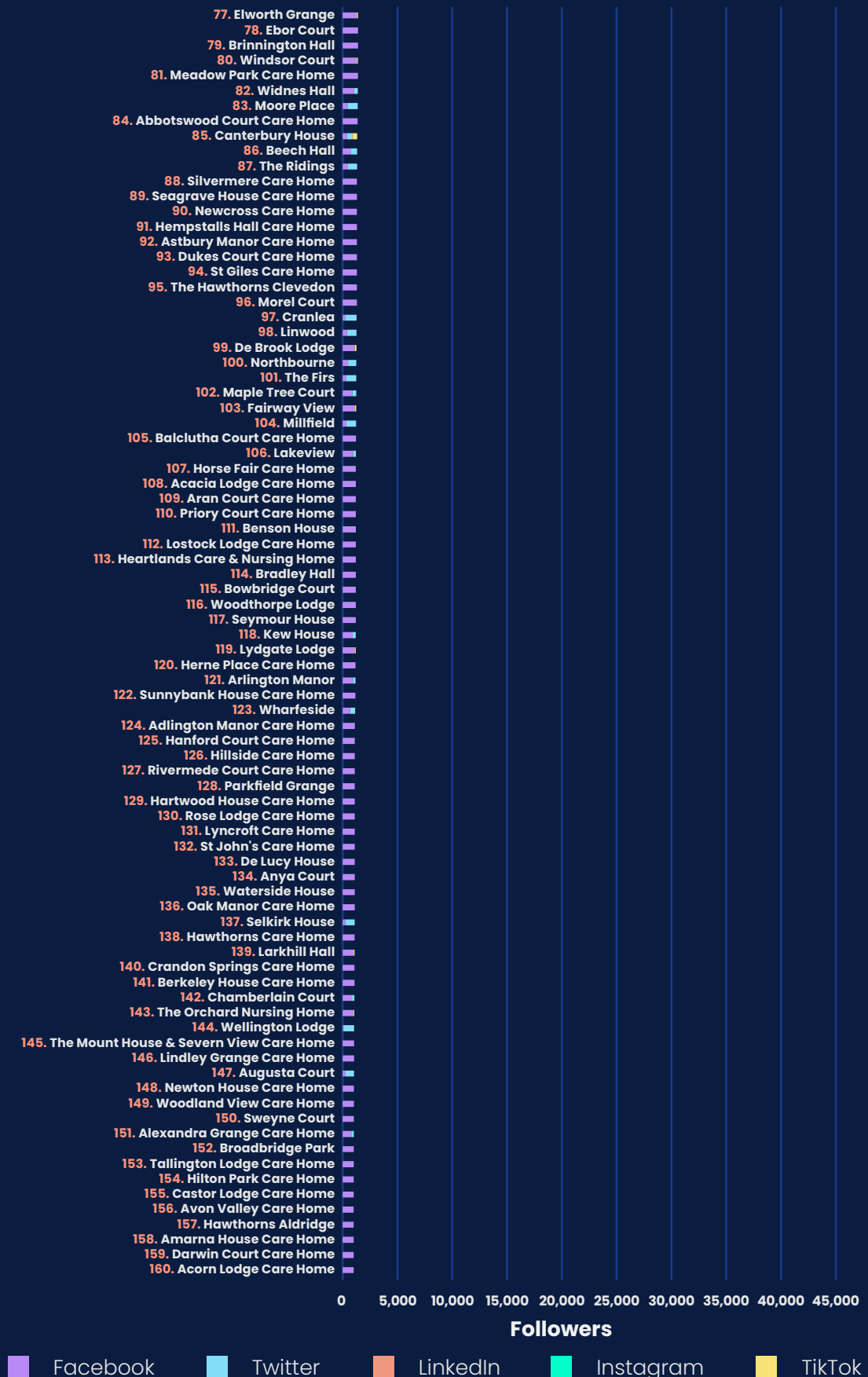
Anchor has the largest TikTok following (40,639), due to one of its homes, Markham House Care Home having a very large audience (30,800).

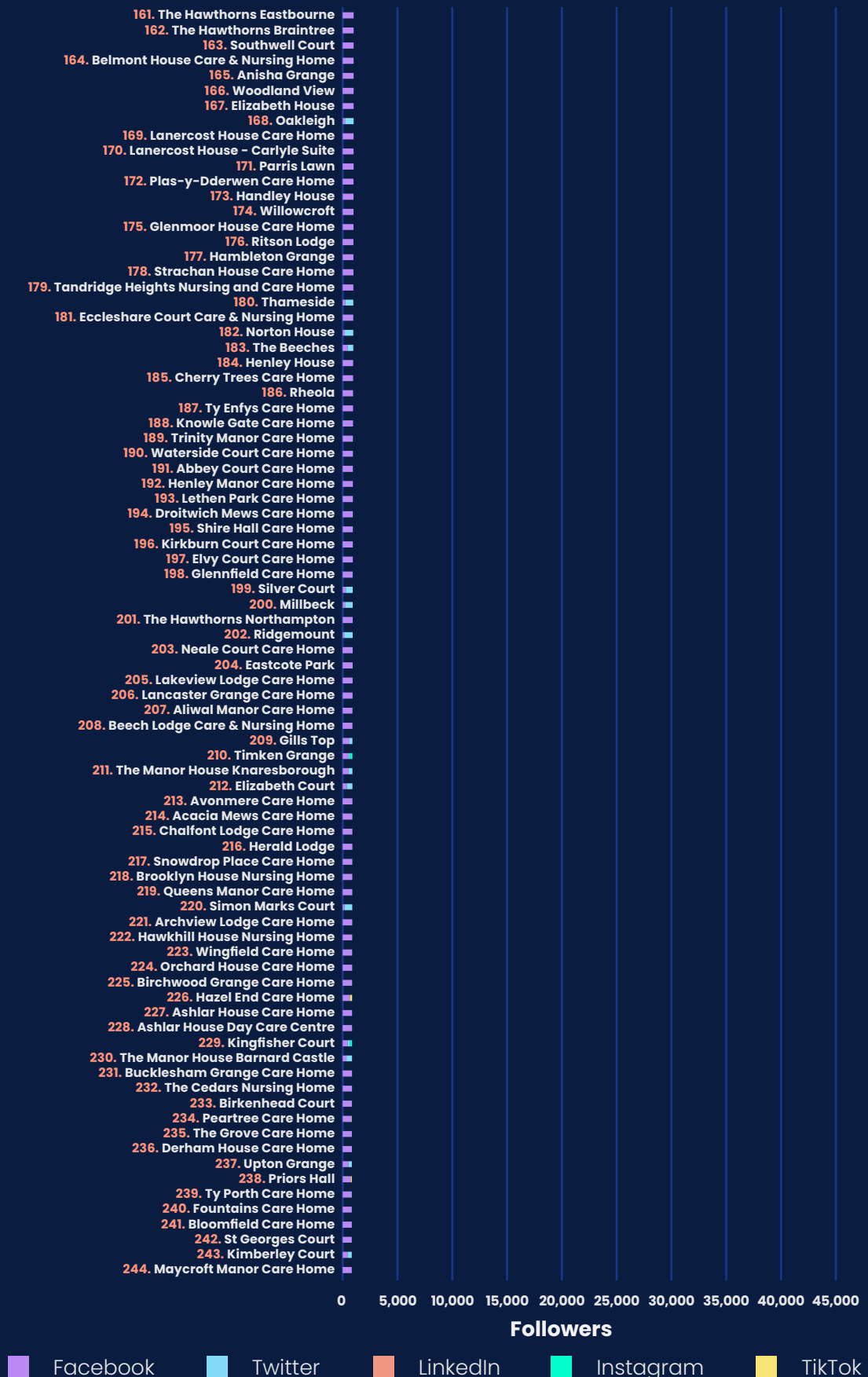
Also of interest is that the group Colten Care and their homes have a small presence on social media, although they do have a noteworthy LinkedIn following (5,415).

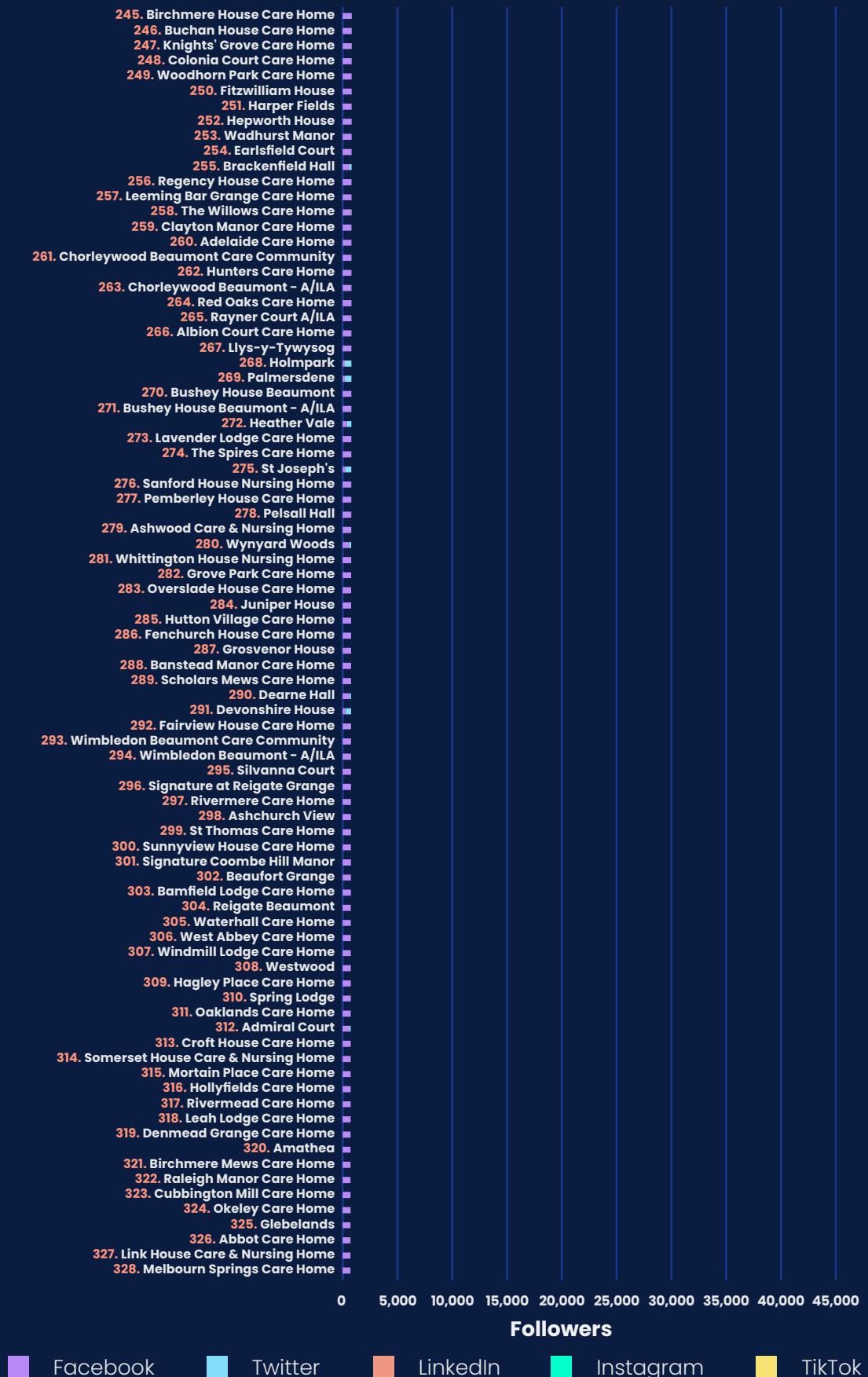
Top 20 Large Care Home Groups (2023): Individual care homes

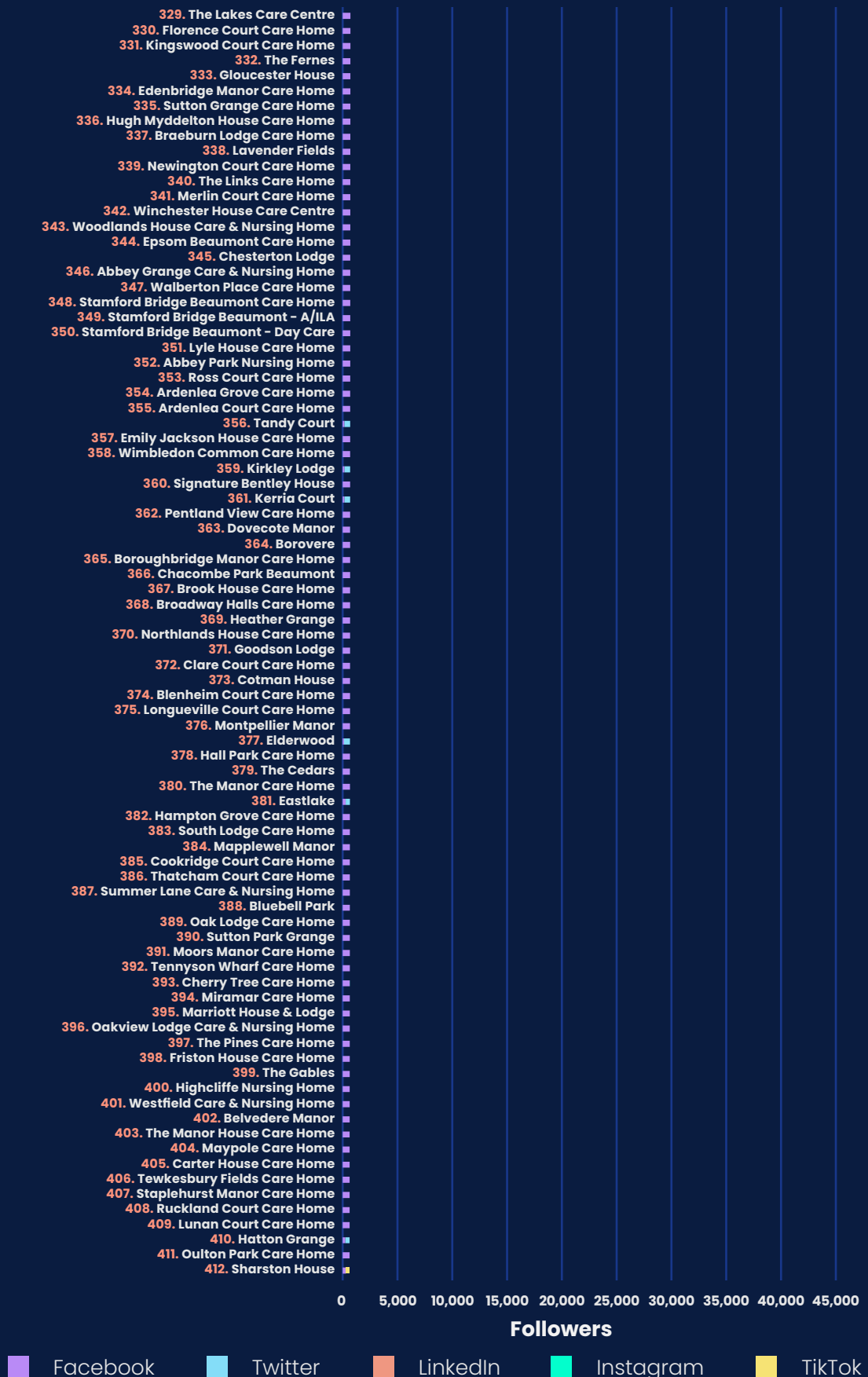


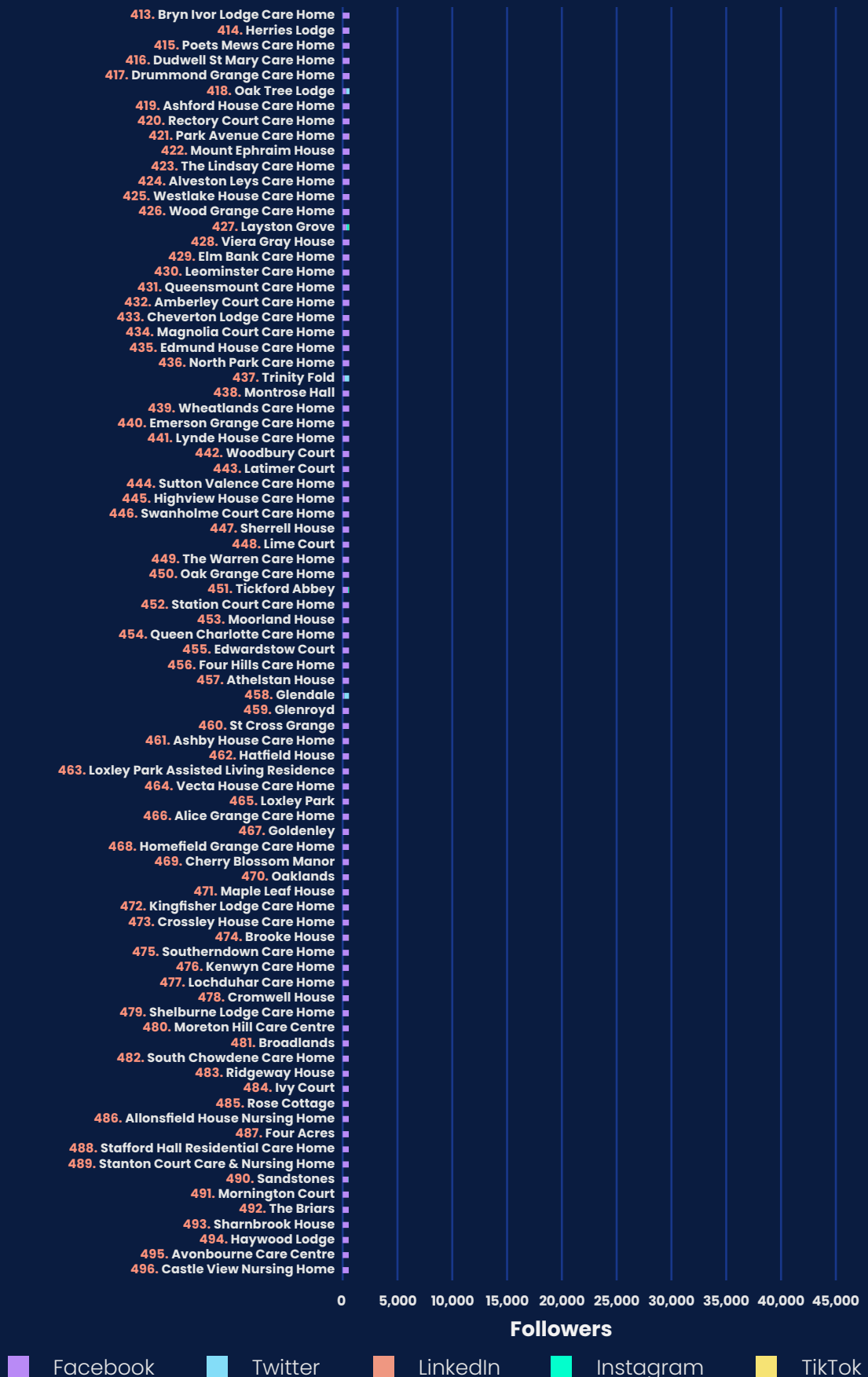
Facebook Twitter LinkedIn Instagram TikTok

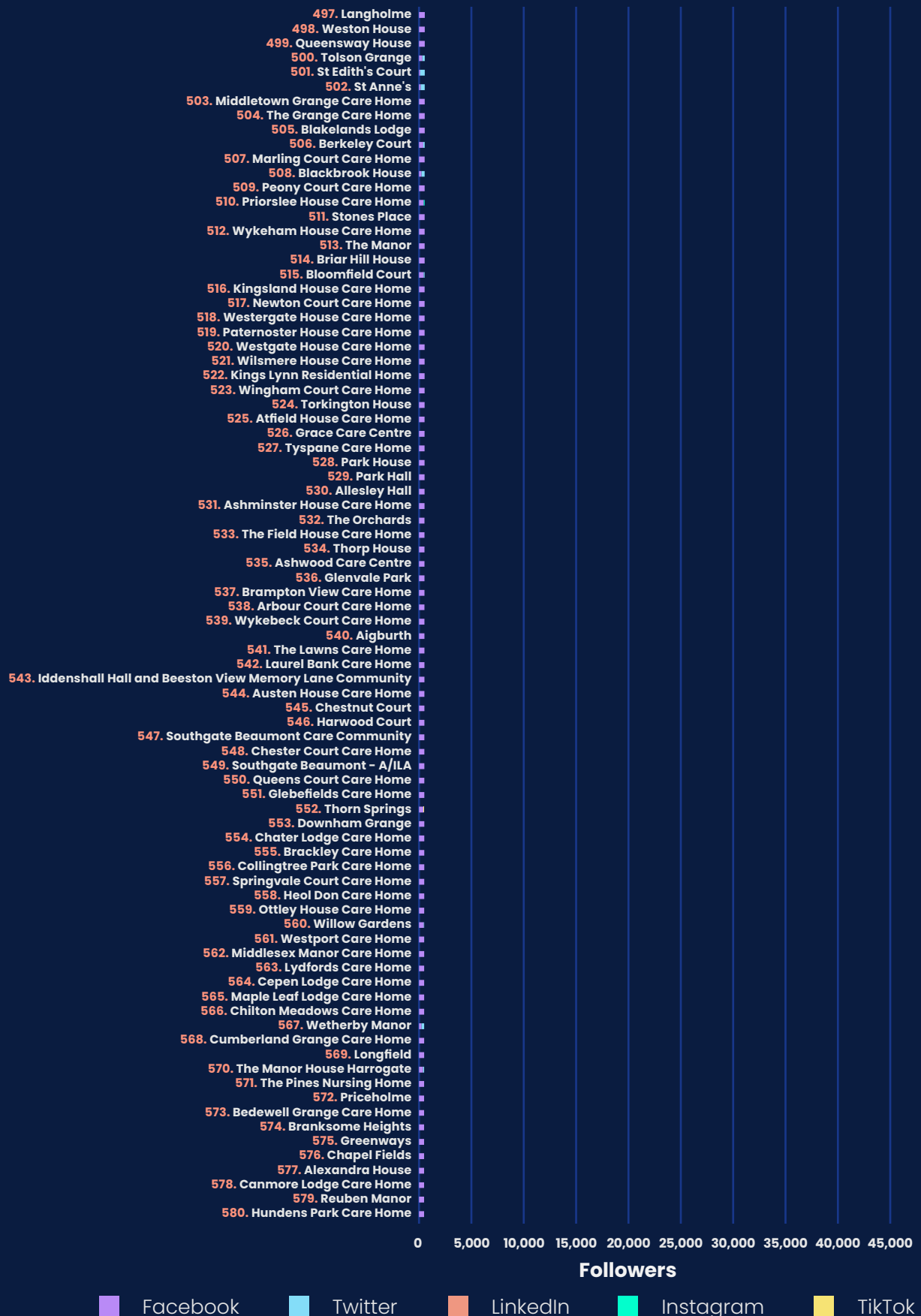


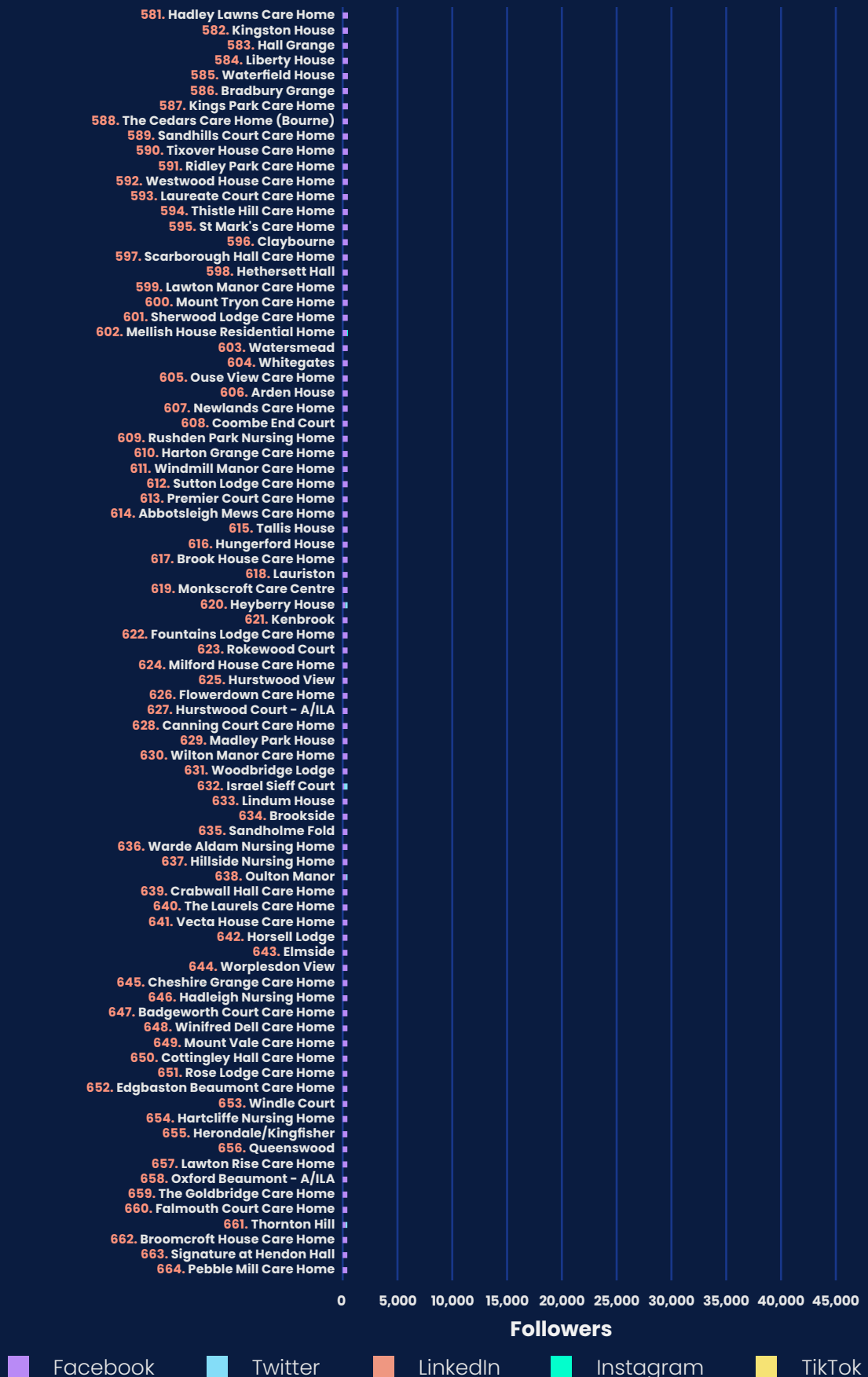


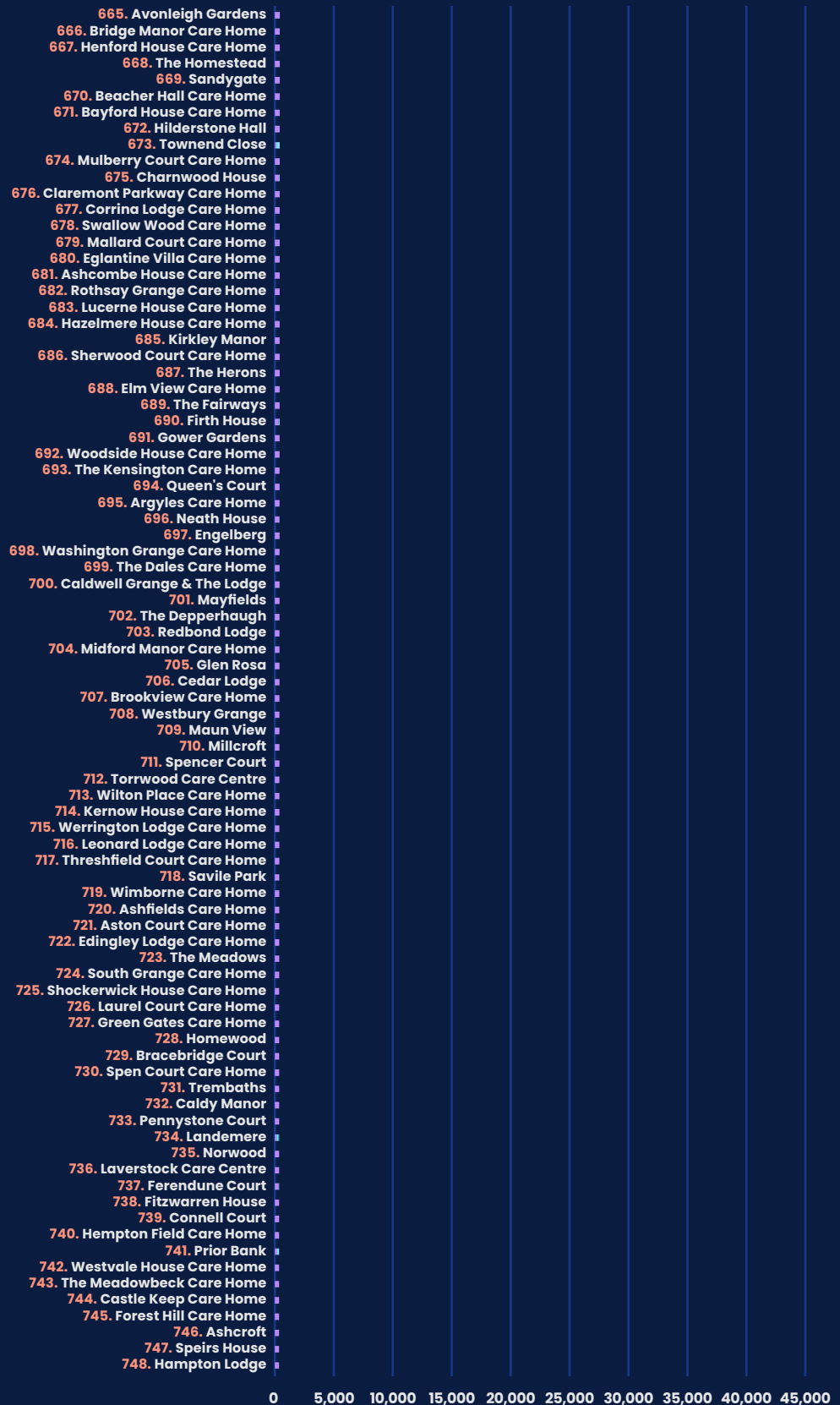




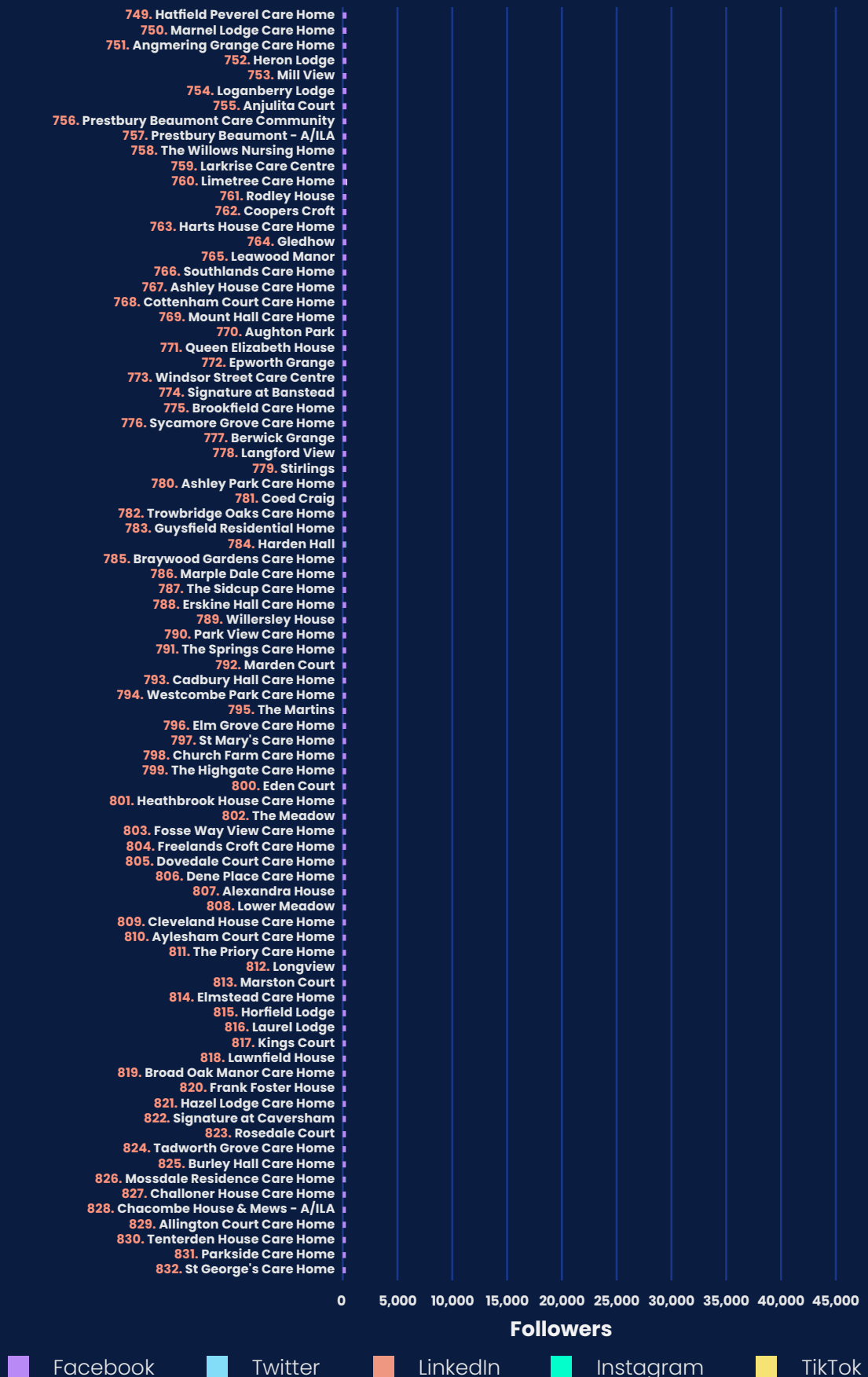


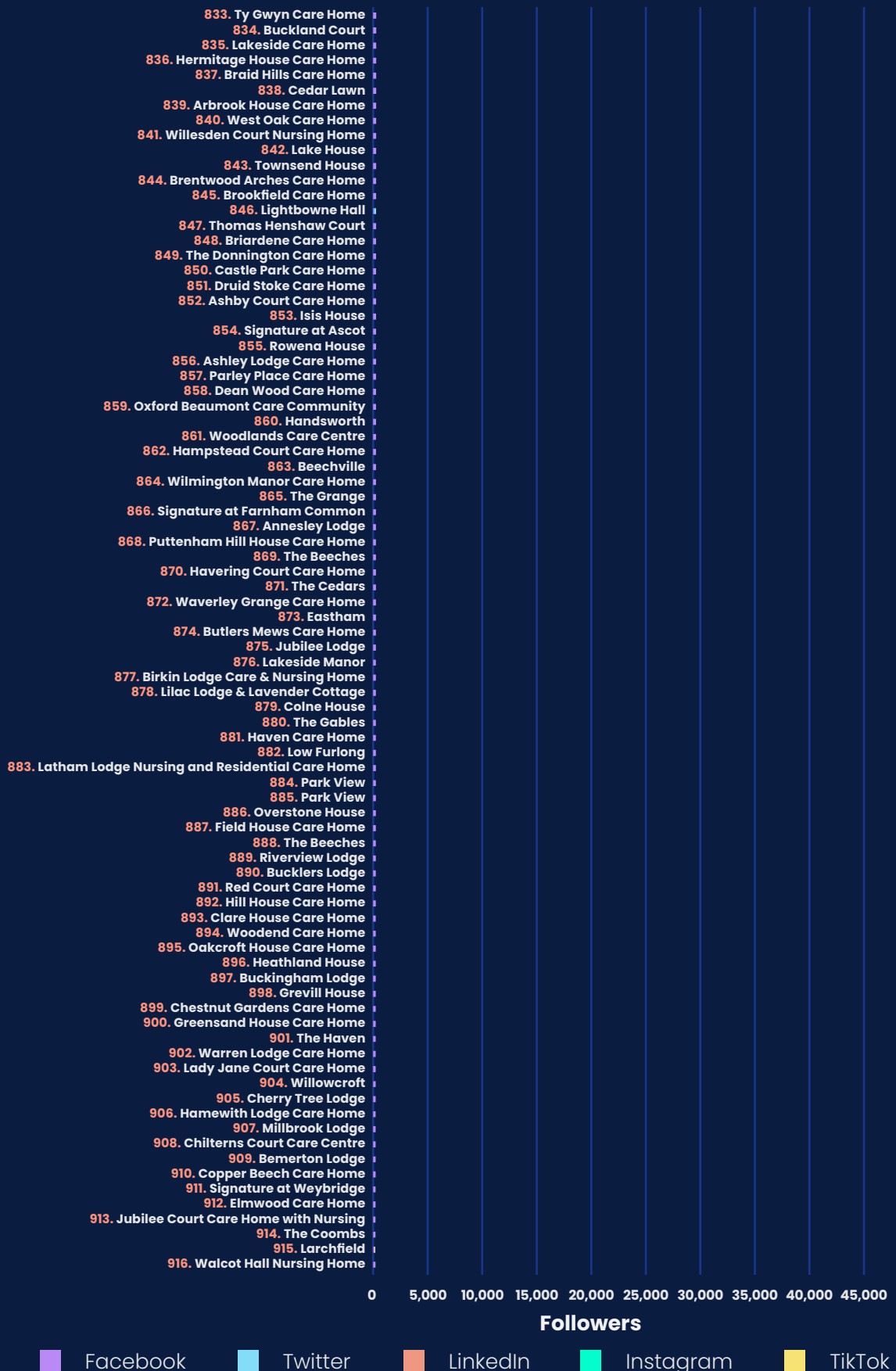


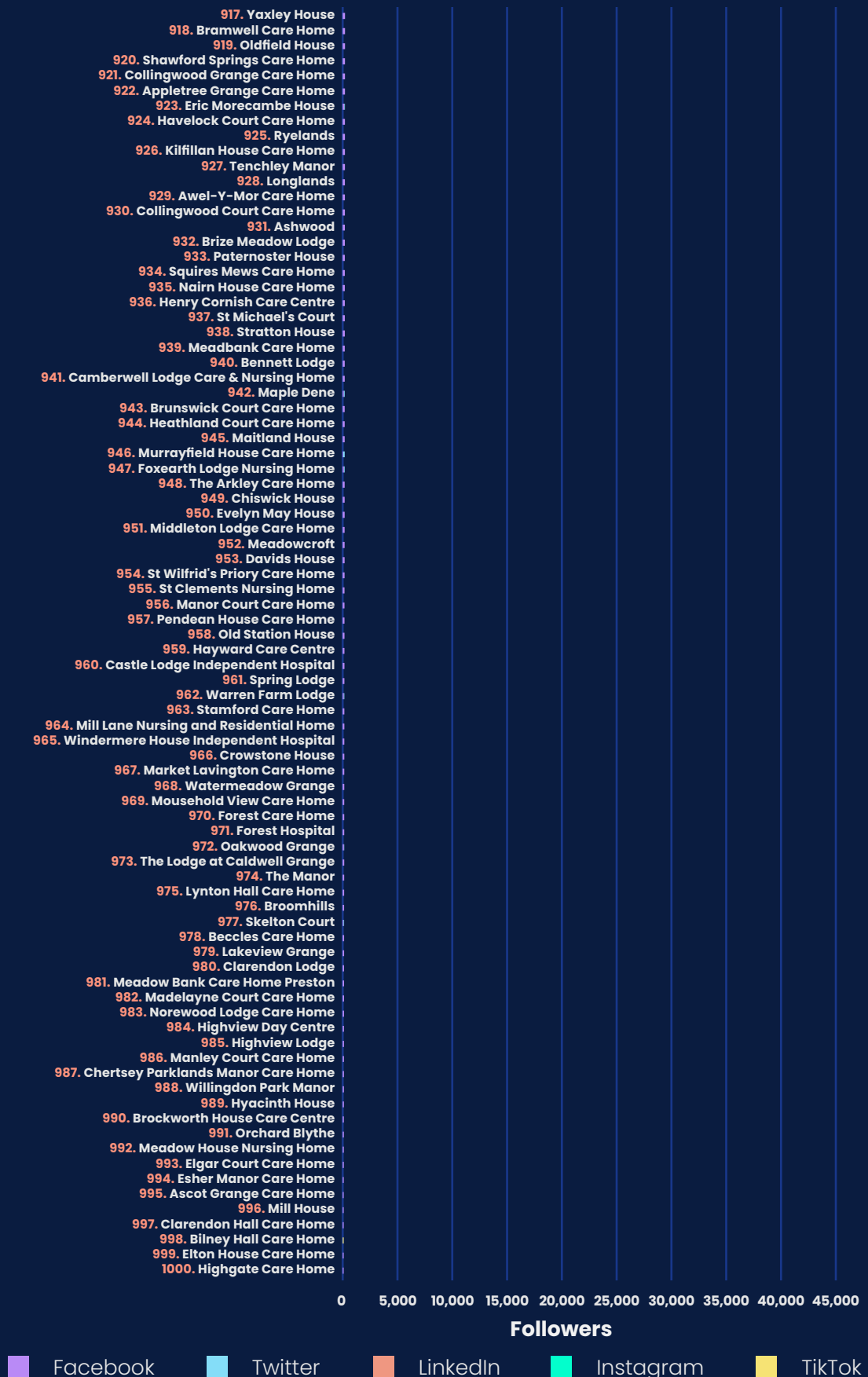


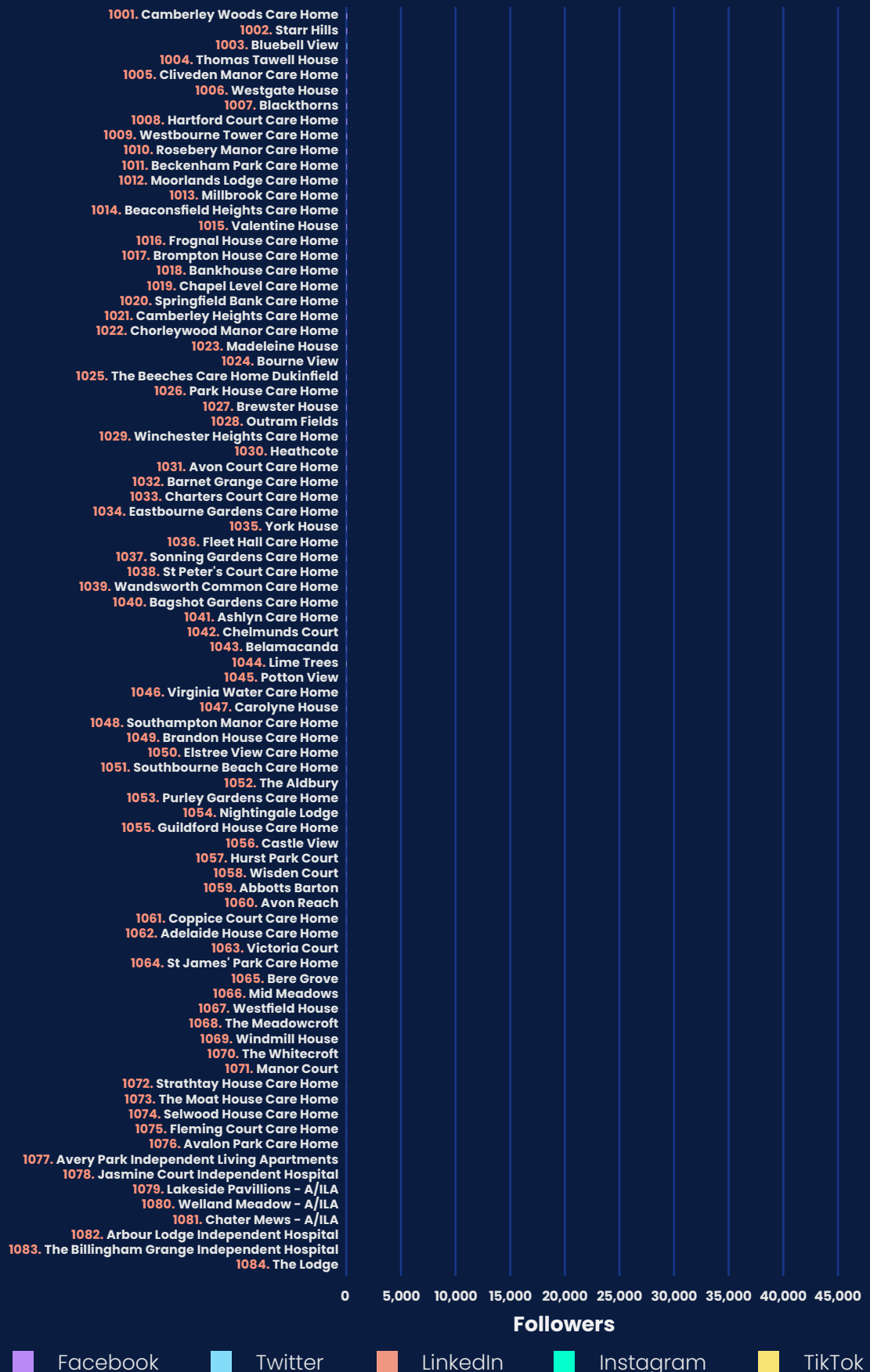


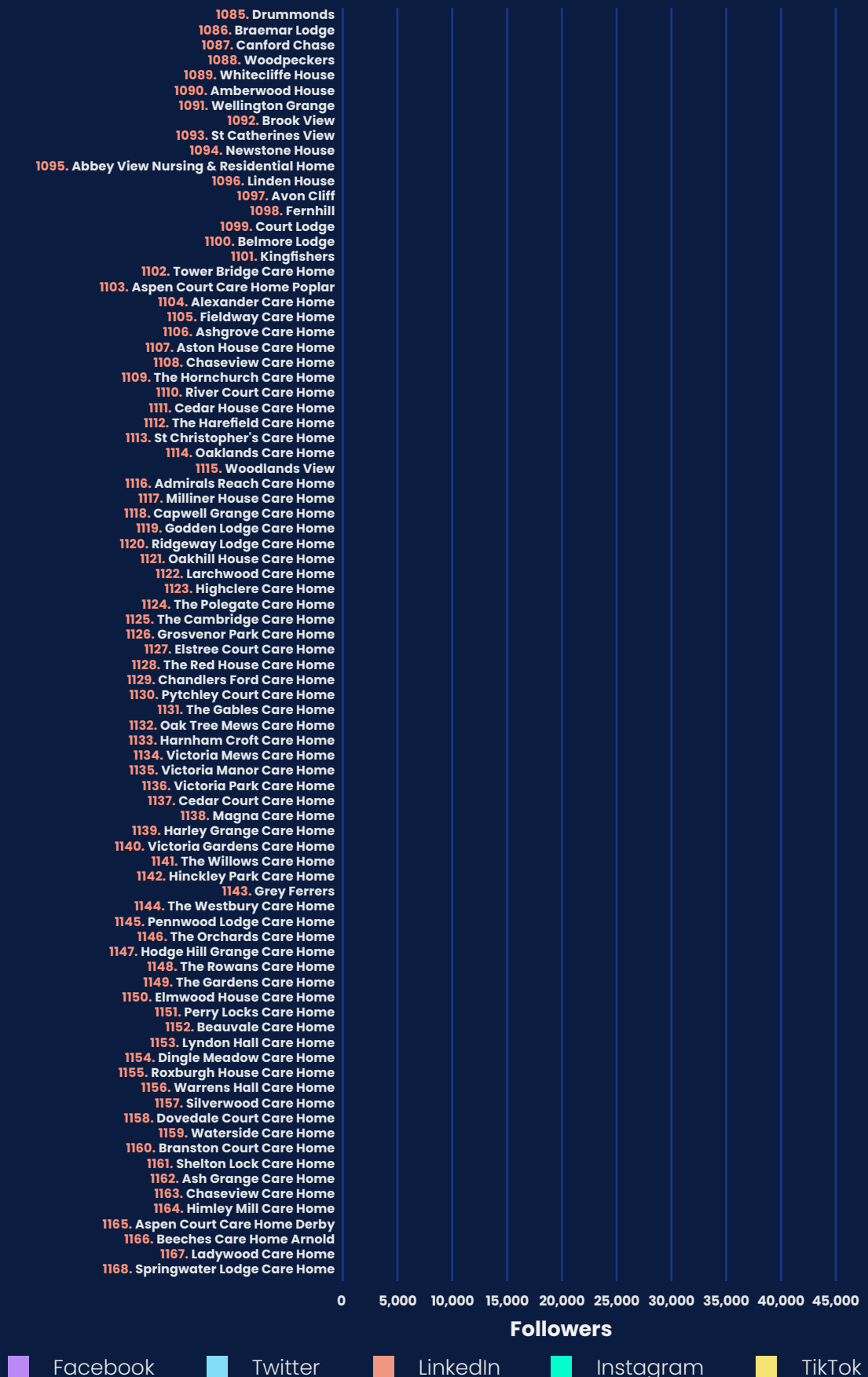
Facebook
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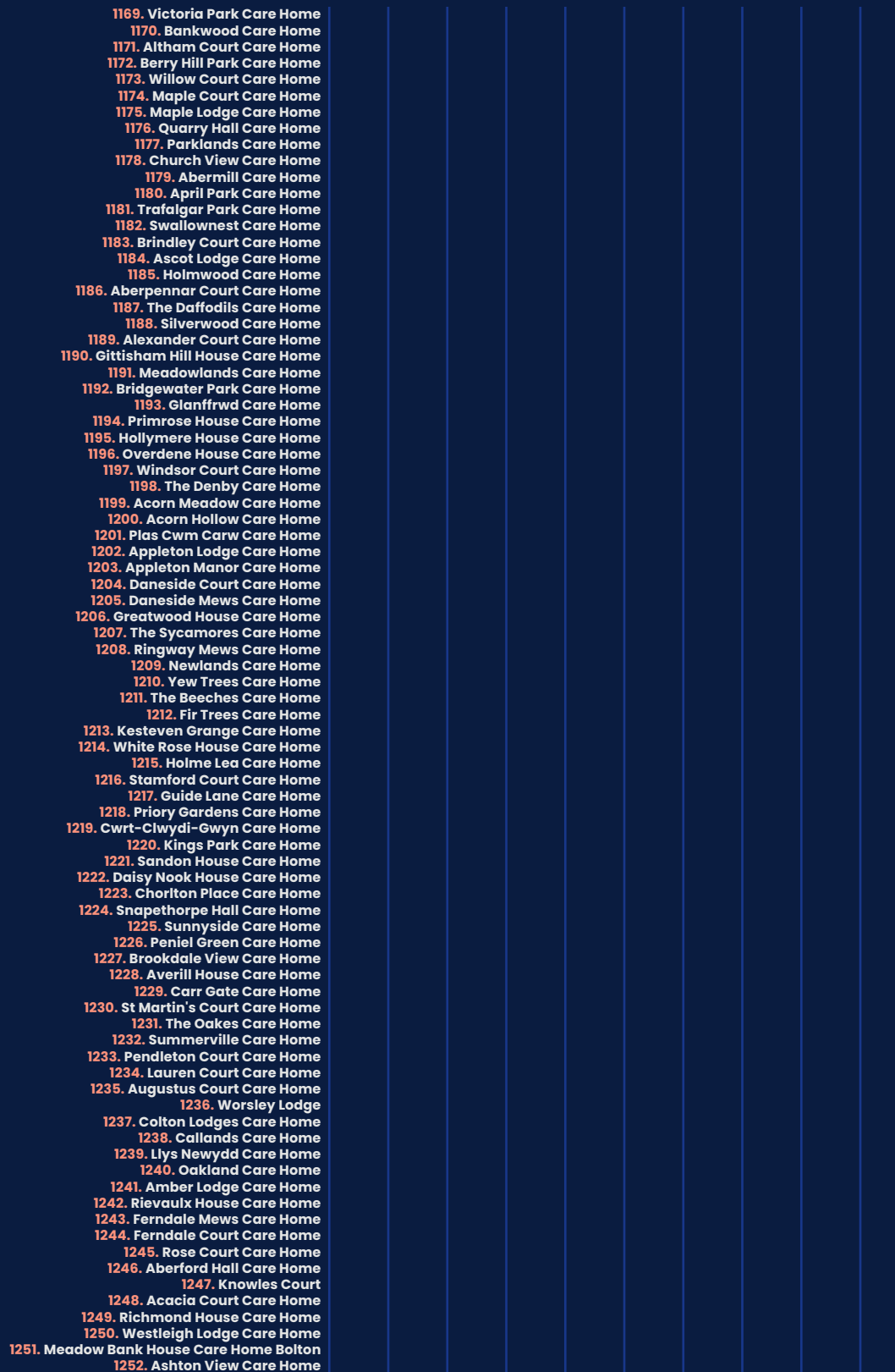








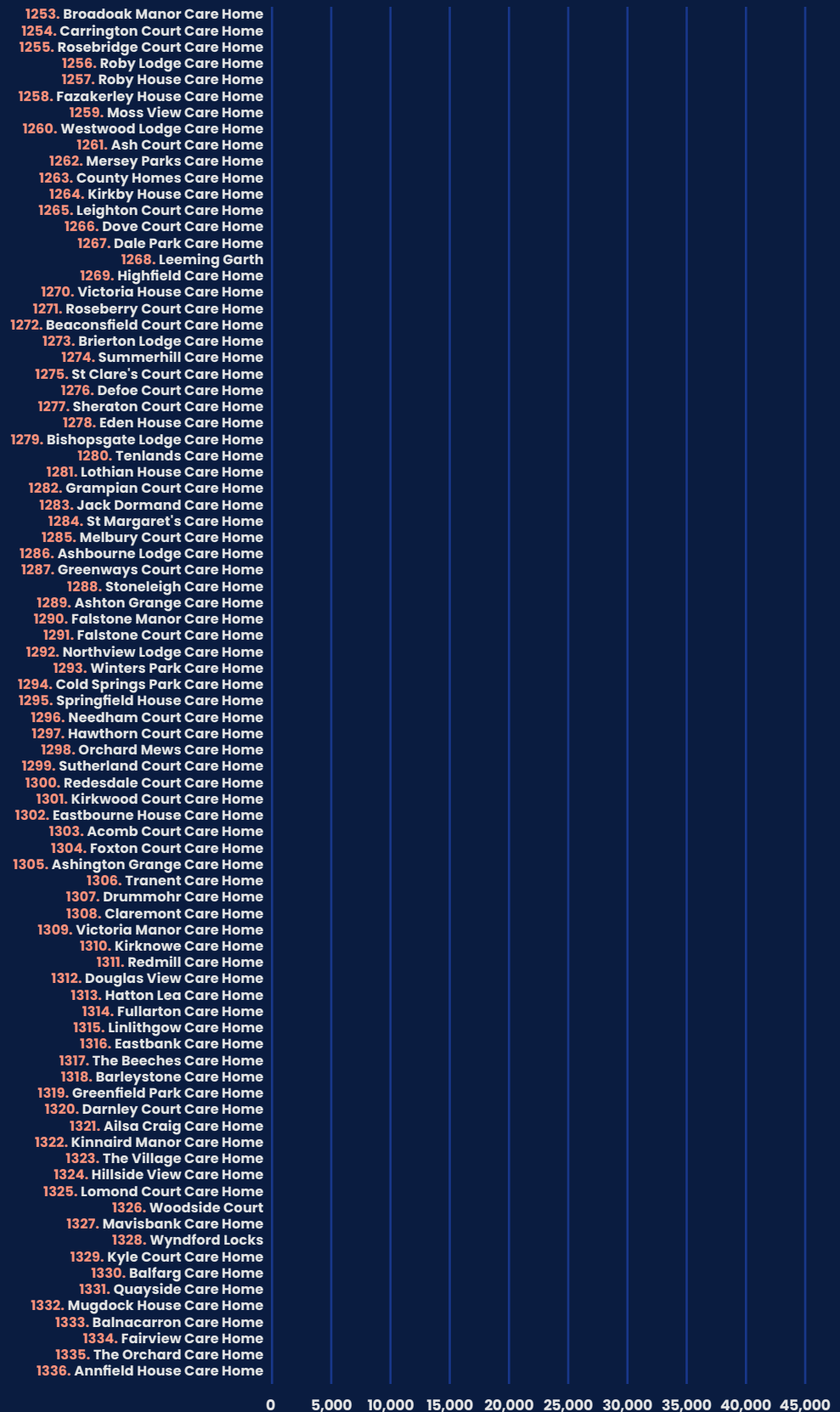




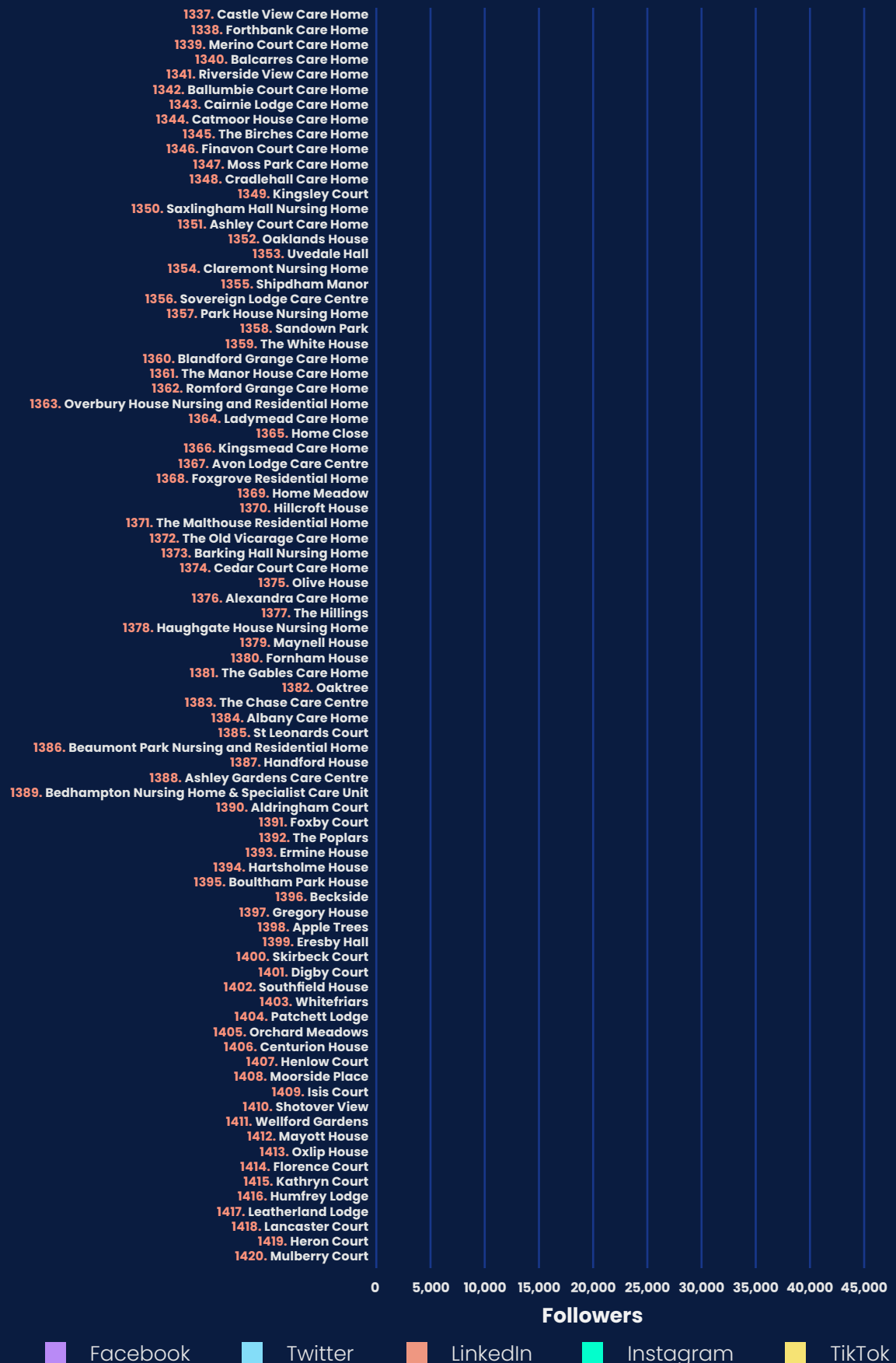
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Followers

Facebook Twitter LinkedIn Instagram TikTok



Facebook
Twitter
LinkedIn
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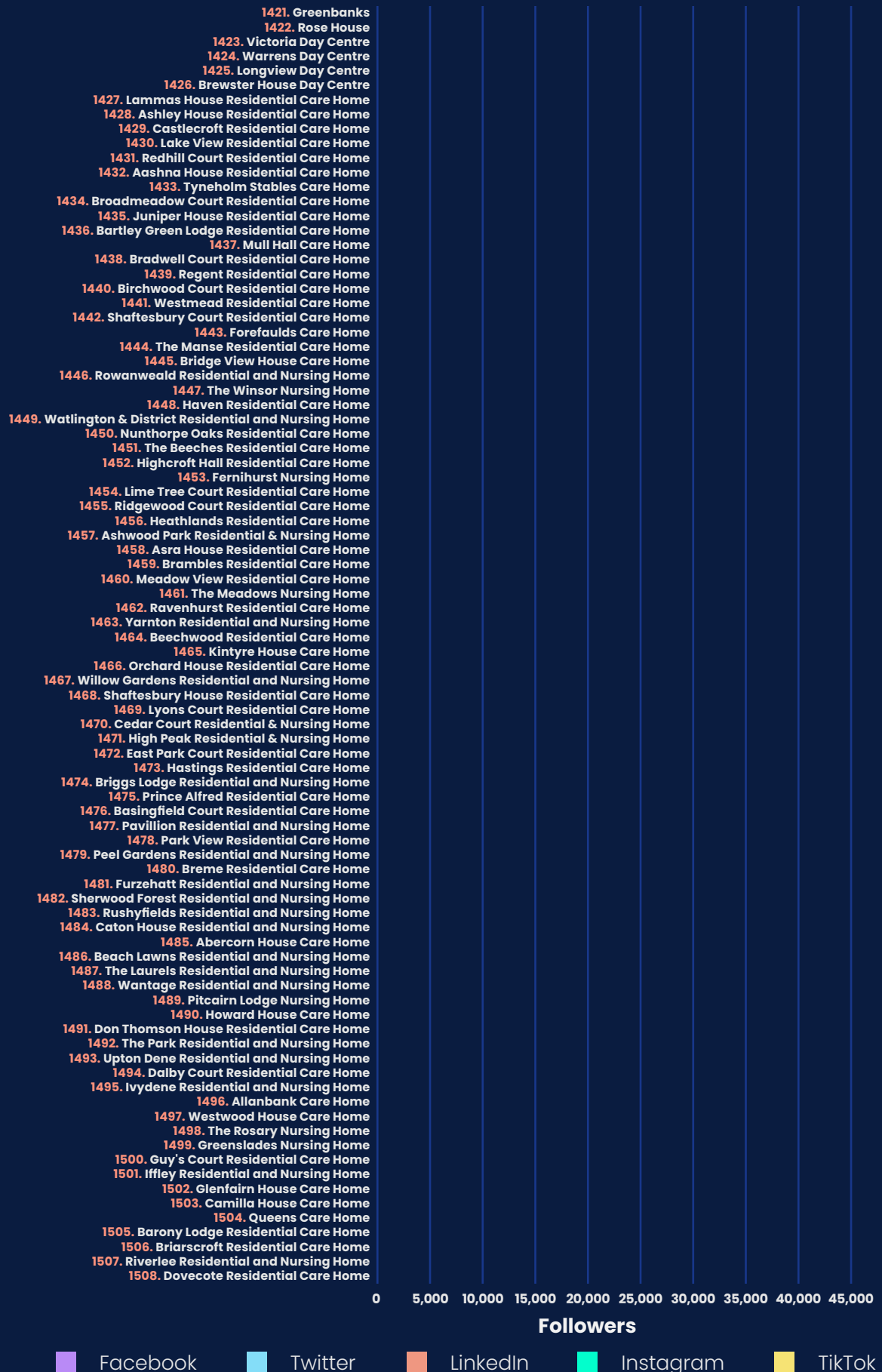


Chart 7

Chart 7 breaks our analysis down further by comparing social media accounts to those of individual homes.

Anchor's Marham House Care Home has 41,035 followers across its Facebook, Instagram and TikTok accounts. Most of these followers (30,800) are made up of TikTok followers. They post quite infrequently but each video gets thousands of views, often featuring their staff dressing up for events and activities with residents. The group has amassed over 640,000 likes across its posts.

Interestingly, most of the homes with the largest amount of followers are due to amassing lots of TikTok followings.

TikTok has been reported as having the highest social engagement per post. The likelihood of a random account with not many followers going viral is greater on TikTok than any other platform. Thus, it can be a great way for companies to reach much wider audiences.

Chart 7 also highlights that for most of the homes Facebook is the go-to social media platform of choice.

Also of interest is that none of Signature Care Home's individual homes have public Facebook accounts. Instead they have private member groups, limiting access to any who are not members.

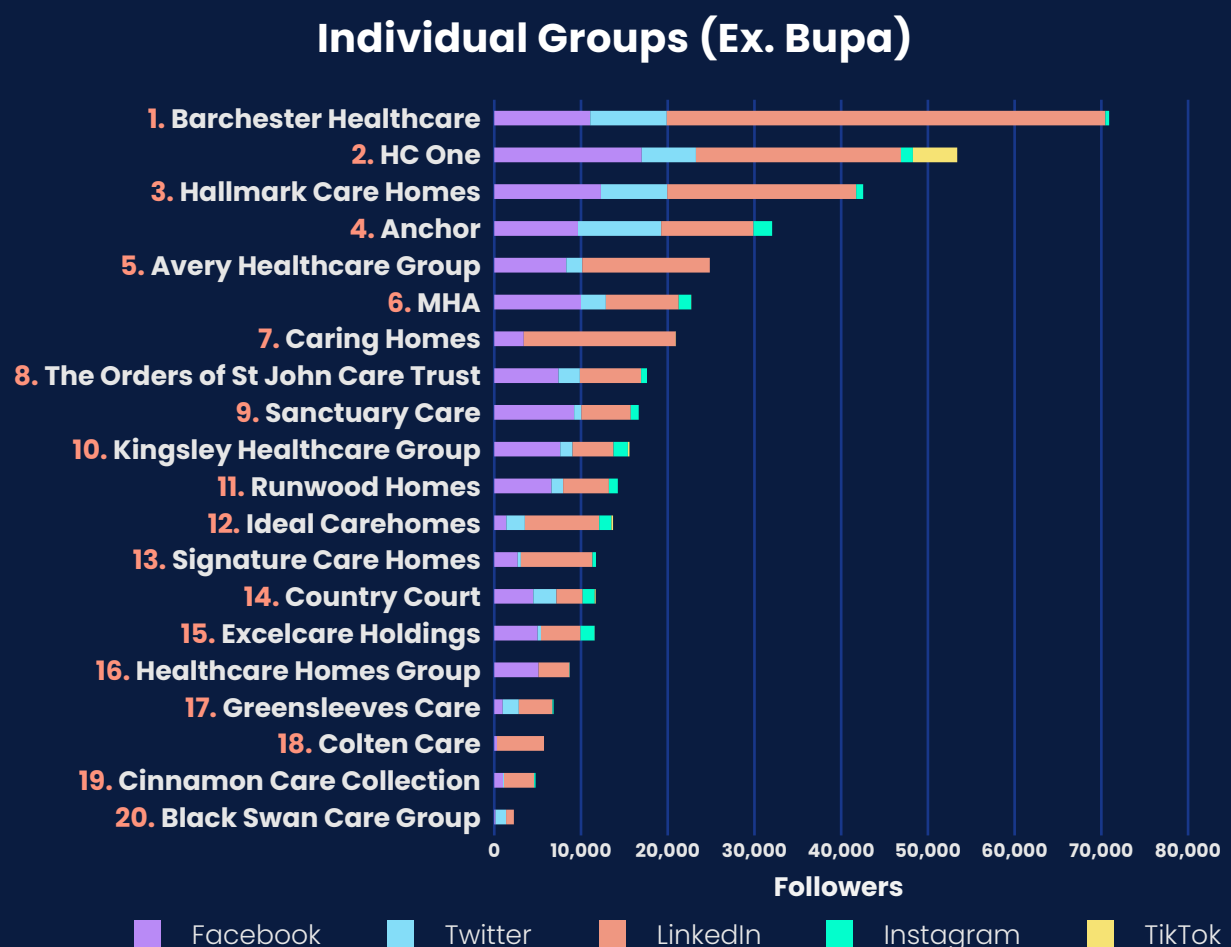


Chart 8

Chart 8 displays each care group's individual social media accounts, excluding Bupa.

Barchester Healthcare group tops the leader board with 70,893 followers across its Facebook, Twitter, LinkedIn and Instagram accounts. Its LinkedIn account alone boasts 50,570 followers. The group's sizeable LinkedIn following is due to regular posting, often daily. They post 'job of the week' updates, showcasing their job openings from across their homes.

Perhaps unsurprisingly, the ranking shows that group pages and accounts, rather than individual home accounts or pages, tend to yield more followers.

Unlike our two previous reports featuring small and mid-sized care home groups, TikTok has a much higher share of the follower ratio.

However, predominantly Charts 7 and 8 show that care homes tend to concentrate their efforts on one social media platform (typically Facebook) rather than spreading their resources across multiple platforms. This also makes sense given the comparative objectives between care homes and groups. Many of the individual homes, as can be seen from chart 7, have no social media presence at all.

Lakeview Grange, for example, enjoys around 128 followers on Facebook. Yet, its overarching group, Cinnamon Care Collection, has 1000 followers. A part of this differential can be accounted for by their relative potential audiences. Lakeview Grange has a much smaller potential audience compared to Cinnamon Care Collection.

This raises the question of whether the focus should be on promoting your group as a whole, or to risk dispersing your following amongst individual home accounts.

In the next section we outline what you need to consider when determining whether a one-size-fits-all group account or an array of individual and tailored home accounts will best suit your care group.

Care homes tend to concentrate their efforts on one social media platform (typically Facebook) rather than spreading their resources across multiple platforms.

5. GROUP ACCOUNTS VS. INDIVIDUAL HOME ACCOUNTS

The decision to use group social media accounts, individual home accounts, or a hybrid model is not as clear cut as you may think and is heavily influenced by the number of homes within your group as well as the dynamics between your homes. Below we set out some of the key factors to consider.

Dispersion

Operating several different accounts can slow your rate of audience growth as engagement on posts and follower numbers becomes dependent on the amount of effort individual managers and social media personnel put into each home's account.

Time

It is also a question of managing resources. If your social media presence will be managed by one individual on a part-time basis then single group accounts can be a more efficient use of their resources rather than having to switch between home accounts to publish individual, tailored content.

Consistency of Brand and Messaging

Having group accounts makes it easier to ensure consistency of brand and messaging, optimising the effectiveness of social media marketing campaigns.

Promotion

Importantly, operating as one group account allows you to promote positive stories and innovations as one cohesive brand, allowing each home to enjoy access to a wider user base, following, and access to a larger resource of positive news and events. This means that a home will benefit from the same exposure and followers as the others in your group. The risk, however, is that your larger potential audience becomes less targeted and less relevant to each individual home.

Benefits of Individual Accounts

More targeted and tailored

Individual group accounts offer care homes a degree of flexibility when publishing content tailored specifically to their target local audience. With a group-wide account, you would be publishing content that may be inappropriate to certain prospective customers.

Reduced reputational risk

While one overarching group account is good for brand awareness and promotion, there are risks that individual accounts can mitigate. Having one group account can increase the chance of your brand's reputation being negatively impacted by an incident that may otherwise be easier to contain with siloed social media accounts.

Your homes are unique

If your homes are scattered across the country, or indeed countries, and operate in local communities, then a more granular and bottom-up approach to running their social media is likely to produce better results. People may not want to consume everything your group has to offer, just what is relevant to them and their needs.

After all, it is those who run your homes on the ground who know this local community the best and will arguably be more aware of events that occur in it, as well as its needs. This knowledge is invaluable to ensuring that your individual homes remain connected to their communities, and localised accounts can ensure these connections are in real-time.

Offering advice

People enjoy personability, being able to contact who they need directly, and receiving a response quickly. A top-down approach to managing queries or complaints can appear as inauthentic, and it can slow down the process of dealing with them.

Having an individual account for each of your homes' identities can mean that people in their respective communities who use or wish to use your service can have their queries and concerns addressed in a more personal manner, improving the reputation of your homes in their communities. After all, these are their potential residents.

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Striking a balance

Often the most effective approach for care groups is to employ a hybrid model employing the use of both group and individual home accounts. It is important, though, to create a recognisable and uniform brand using your own logo but applying it equally and uniformly to all the respective homes with social media channels that you manage.

A good example of a group that uses this technique is Country Court. Country Court uses the same logo for each of the home's individual Facebook profile picture but enjoys the localism that having individual home accounts allows for through personalised cover photos of the home. The groups other social media all have a strong follower presence and continue to promote their logo clearly.

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