bring

STATE OF SEARCH 2026 | ANNUAL VERTICAL REPORT

Healthcare and Aged Care

Who wins search, AI Overviews and the map pack in Australia, and where the openings are for providers in 2027.

79%
of sampled care SERPs show an AI Overview

40%
of AI Overview citations go to government sites

15 of 20
provider domains show no paid search keywords

Aged care | Retirement living | Private hospitals | Allied health | GP groups

Data: Semrush AU, November 2026. Published by Bring Digital Performance, Melbourne. bring.au

EXECUTIVE SUMMARY

Care is now searched through an AI layer and a map.

We pulled November 2026 Semrush data for 73 core healthcare and aged care queries, 24 results pages, 26 domains and 12 months of organic history. Five findings matter to anyone running marketing for a provider.

366,770
monthly searches across 73 core care queries

19 of 24
sampled results pages carry a Google AI Overview

17 of 24
sampled results pages carry a local map pack

28 of 70
AI Overview citations point to government sites

+66%
Opal HealthCare modelled organic visits, Oct 2025 to Oct 2026

27
paid keywords across 20 provider domains

The five findings

- AI Overviews sit on 79% of the care queries we sampled. They cover nine in ten aged care queries but only one of three GP queries.
- Government owns the answer layer. 40% of AI Overview citations went to .gov.au sites, and myagedcare.gov.au alone took 12 of 70. Providers get cited mainly when the question is about choosing a place.
- Support at Home rewrote the vocabulary. Interest in "home care packages" fell from an index of 1.00 to 0.36 in 12 months. "Support at home provider" rose from 0.23 to 0.81.
- Paid search is close to empty. 15 of 20 provider domains show no paid keywords in Semrush, while the same providers' organic traffic is valued at $1.23 million a month.
- The leaders pulled away. Opal HealthCare (+66%), Retire Australia (+64%) and Benetas (+58%) grew modelled organic visits. Bolton Clarke (-1%) and Healthscope (-3%) went backwards.

WHAT THIS MEANS

The providers who win 2027 will publish prices, answer reform questions in plain English, run a properly managed Google Business Profile for every site, and buy the provider-selection searches nobody else is bidding on.

1. THE CATEGORY

Growth is at home, not in beds.

293,000
people in home care at 30 June 2025, up 307% since 2017

204,000
people in residential care (permanent or respite)

839,000
people used home support in 2024 to 25

Source: GEN Aged Care Data, People using aged care fact sheet 2025. Permanent residential care grew 9.9% over the same eight years while per capita use among people 65 and over fell 10%.

Three structural changes

- 1 November 2025: the new Aged Care Act 2024 and the Support at Home program started. Support at Home replaced the Home Care Packages Program and Short-Term Restorative Care. The Commonwealth Home Support Program moves across no earlier than 1 July 2027 (health.gov.au).
- Private hospital ownership churn: Healthscope went into receivership on 26 May 2025. In September 2026 a Calvary-led consortium won control, with Calvary to run 14 of the 25 remaining hospitals, Healthe Care 6, Acurio Health 3 and KnG Group 2. Completion was expected by 30 November (The Real Estate Source, 14 September 2026).
- Advertising rules in allied health and general practice: AHPRA guidance is blunt: "Advertising must not use testimonials or purported testimonials" about clinical care, and advertisers must remove them from pages they control, including social pages.

Who holds search attention

Player type	Example	Modelled organic visits/mo	Ranking keywords
Government	myagedcare.gov.au	297,391	337,413
GP and allied directory	hotdoc.com.au	811,597	419,595
GP and allied directory	healthengine.com.au	525,389	506,910
Private hospital group	svph.org.au	158,591	49,869
Aged care provider	opalhealthcare.com.au	121,652	21,534
Aged care directory	agedcareguide.com.au	40,623	81,417
Retirement directory	villages.com.au	30,657	65,925

INSIGHT

myagedcare.gov.au pulls roughly half as many modelled organic visits as the 12 largest aged care provider sites in our sample combined (297,391 vs 608,215). Providers are not competing with each other first. They are competing with the government's explainer pages.

2. DEMAND

Where the 366,770 monthly searches go.

Core query set: 73 non-branded and navigational care queries across five sub-categories. Agency-side and jobs queries are excluded.

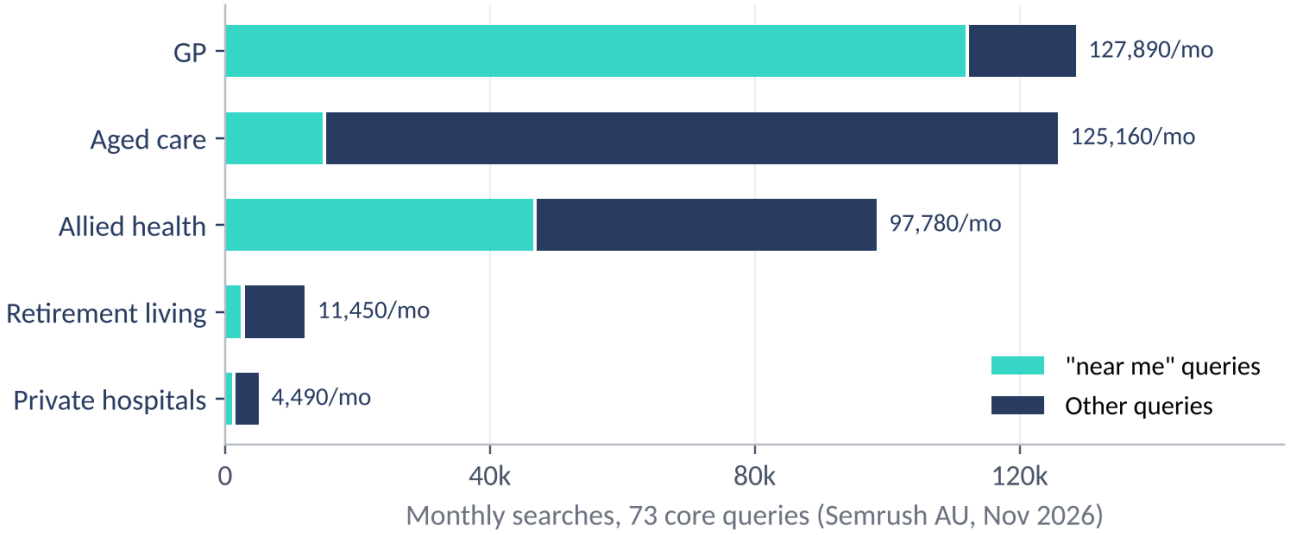


Figure 1. Monthly searches by sub-category, split by "near me" share. Source: Semrush AU, November 2026.

Sub-category	Monthly volume	"Near me" share	Highest CPC query
GP	127,890	87.4%	doctor near me, $2.21
Aged care	125,160 (75,660 excl. "my aged care")	11.8%	home care package providers, $8.23
Allied health	97,780	47.6%	psychologist near me, $4.16
Retirement living	11,450	21.0%	retirement village, $3.22
Private hospitals	4,490	22.7%	private health insurance hospital cover, $20.67

- GP demand is almost entirely local: "gp near me" alone is 60,500 searches a month.
- Aged care demand is research-led. The top questions are about money and process: "what can i spend my aged care package on" (720/mo), "what is the maximum means tested fee for aged care" (390), "how to apply for placement in aged care" (260).
- Cost terms are easy to rank for: aged care fees KD 26, RAD aged care KD 18, retirement village fees KD 10, deferred management fee KD 13 (Semrush keyword difficulty, 0 to 100).

3. BUYER LANGUAGE

The reform changed the words families type.

Support at Home replaced Home Care Packages on 1 November 2025. Search behaviour has followed, slowly, and most provider pages have not.

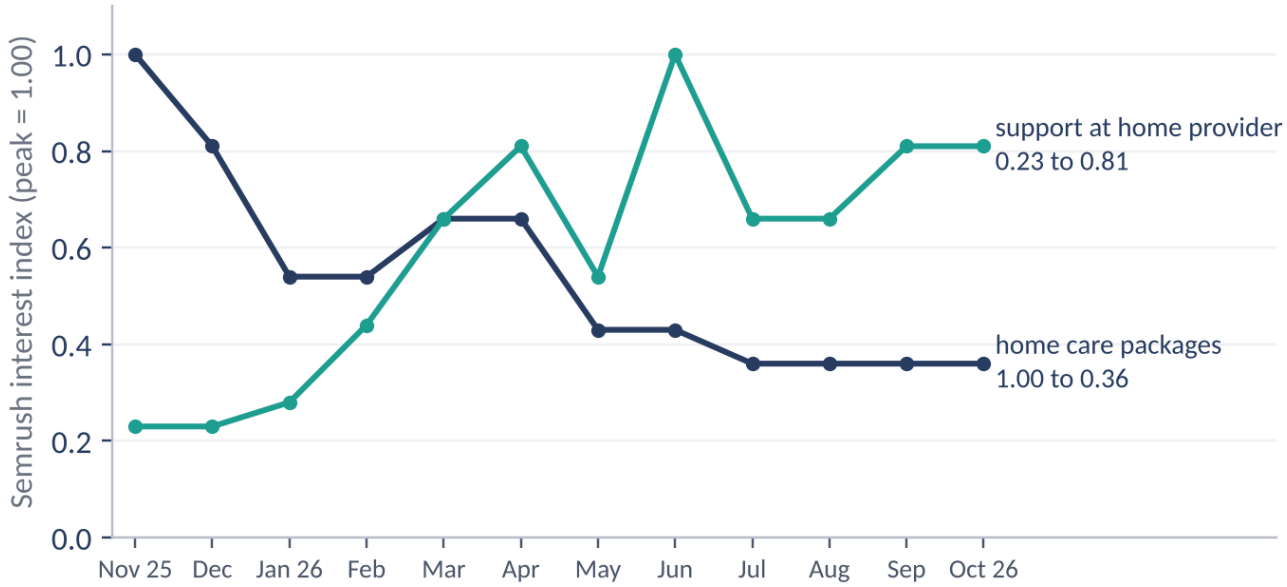


Figure 2. Semrush 12-month interest index (each keyword's peak month = 1.00). Source: Semrush AU, November 2026.

Provider-selection query	Monthly volume	CPC	Difficulty
home care package providers	1,300	$8.23	43
support at home provider	320	$6.85	41
support at home providers	210	$6.85	40
home care near me	1,000	$4.53	21
respite care near me	1,000	$3.69	23
support at home classifications	390	$1.12	11

OPPORTUNITY

The most expensive aged care searches are provider-selection searches, and interest in "support at home provider" more than tripled across the year. Pages still titled for Home Care Packages are losing relevance every month. In our page review, one leading provider's home care page still led with "Transitioning from Home Care Packages" in its main heading a year after the change.

4. THE RESULTS PAGE

AI Overviews and map packs now sit above the blue links.

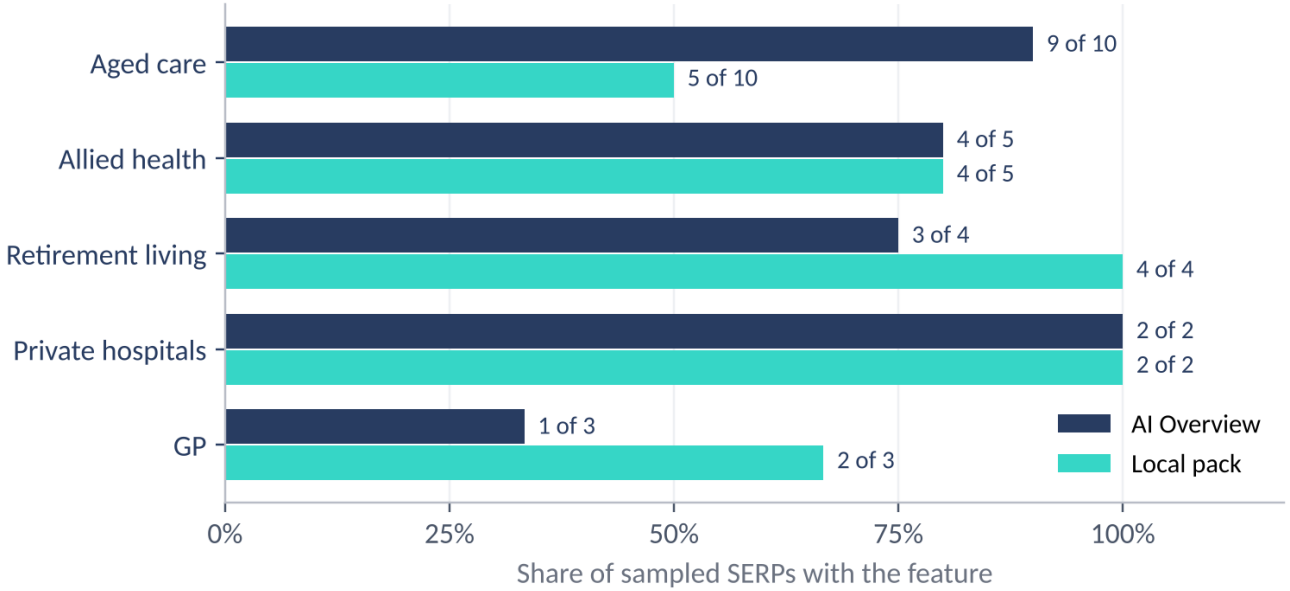


Figure 3. Share of 24 sampled results pages with an AI Overview and a local pack, by sub-category. Source: Semrush AU SERP features, November 2026.

79%
of sampled SERPs carry an AI Overview (19 of 24)

71%
carry a local pack (17 of 24)

12
carry both, stacked above the first organic result

- By volume the picture shifts: the 19 AI Overview SERPs hold 52.9% of the 219,000 sampled monthly searches, because "gp near me" and "medical centre near me" show no AI Overview.
- Local packs appeared on all four retirement living SERPs we sampled and cover 79% of sampled search volume.
- Half of the ten "near me" queries also carried an AI Overview, including "nursing homes near me" and "physio near me".

Google's position: "There are no additional requirements to appear in AI Overviews or AI Mode, nor other special optimizations necessary." A page must be indexed and eligible for a snippet, and structured data should match visible text (Google Search Central). AI Mode is live in Australia, and early testers asked queries nearly three times the length of traditional searches (Marketing Mag).

5. AI CITATIONS

Who Google's AI quotes when Australians ask about care.

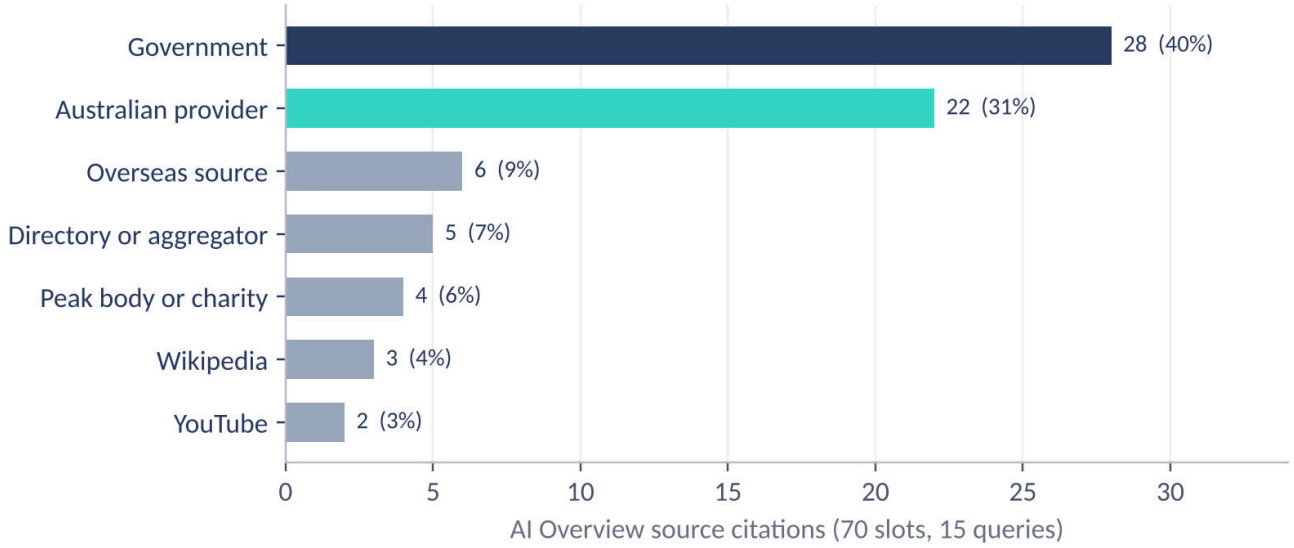


Figure 4. AI Overview source citations by source type: 70 citation slots across 15 queries. Source: Semrush AU, November 2026.

Query	AI Overview sources (in order)
home care packages	myagedcare.gov.au (x4), health.gov.au
nursing homes near me	myagedcare.gov.au, Opal HealthCare, Bupa Aged Care, Regis, Estia Health
residential aged care	myagedcare.gov.au, Amana Living, Bethanie, Brightwater, Juniper
respite care	myagedcare.gov.au, Carer Gateway, healthdirect, CareAbout, Aged Care Guide
private hospitals near me	Ramsay Health Care, Healthscope, Greenslopes Private, YouTube, Northern Private
podiatrist near me	flawlessfeet.com (UK, x2), Royal College of Podiatry (UK, x2), Guy's and St Thomas' NHS (UK)

THE PODIATRY PROBLEM

Australians search "podiatrist near me" 8,100 times a month. When we checked, every source in Google's AI Overview for that search was British. No Australian clinic, association or health site was cited. That is what an empty answer layer looks like, and it can be filled.

6. WHO IS WINNING

The big residential operators pulled away in 2026.

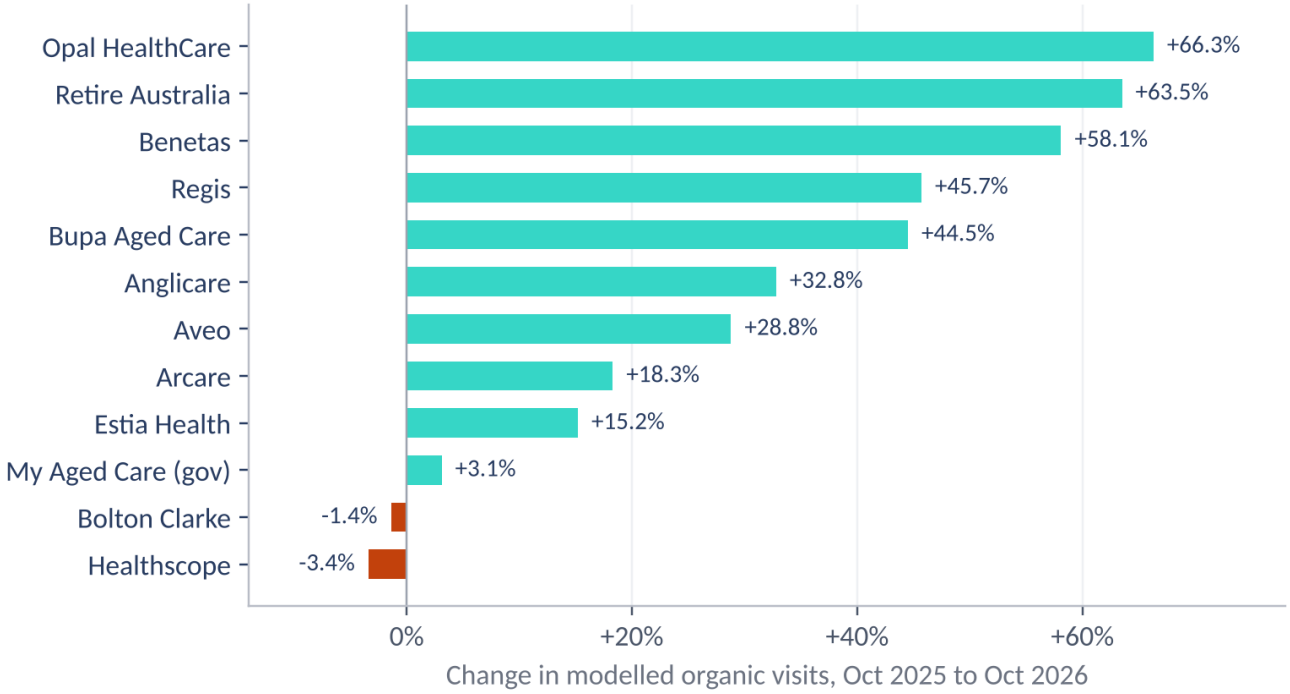


Figure 5. Change in modelled organic visits, October 2025 vs October 2026. Source: Semrush AU rank history.

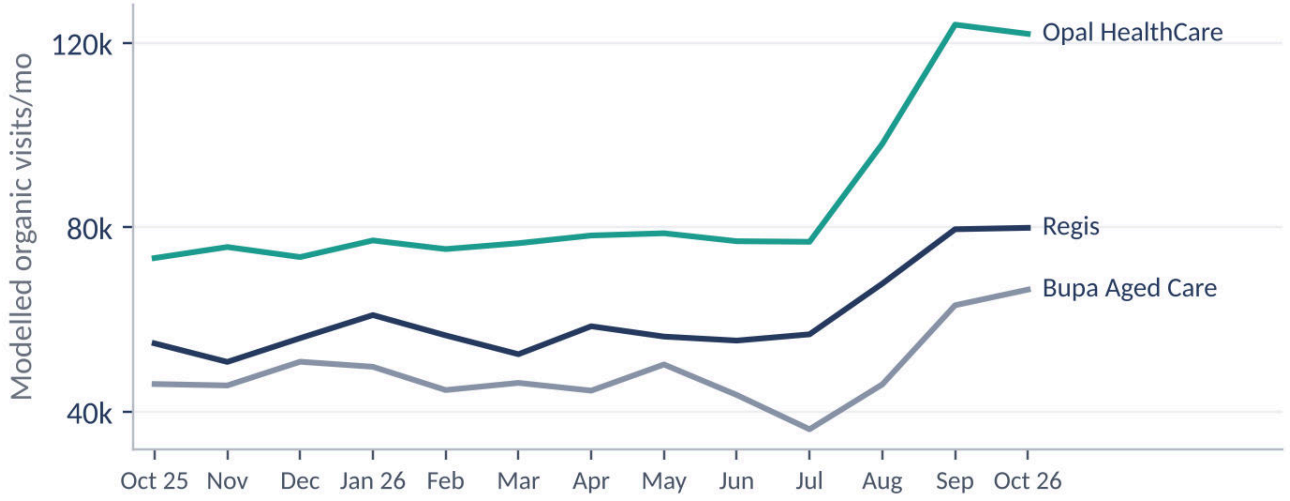


Figure 6. Modelled organic visits per month, October 2025 to October 2026. Most of the 2026 gain landed in August and September. Source: Semrush AU.

Reading the winners

- Opal HealthCare grew from 73,335 to 121,966 modelled organic visits and appears in the local pack and the AI Overview for "nursing homes near me". It ranks for more local pack keywords (5,332) than any other aged care provider we tracked.
- Retire Australia (+63.5%) is the retirement living standout, and its local pack URLs point at individual community pages.
- Benetas (+58.1%) grew from a small base, helped by home care pages that publish Support at Home funding levels in dollars.
- Healthscope peaked at 77,131 modelled visits in June 2026 and fell to 52,405 by October, as the business was split for sale.

DATA HEALTH WARNING

Ranking keyword counts dropped sharply across almost every provider between February and October 2026 while traffic rose (Opal 44,075 to 21,687 keywords; Estia 24,684 to 12,866). The drop is simultaneous across unrelated sites, which points to measurement, not lost visibility. Judge 2026 performance on traffic, conversions and AI Overview presence, not keyword counts.

A note on earlier figures

Bring's April 2026 aged care report used Similarweb total visits for the 12 months to March 2026 and showed Benetas and Regis declining. This report uses Semrush modelled organic visits for October 2025 to October 2026, which show both growing. Different tools, different metrics, different windows. Both are directional. Neither is a site's own analytics.

7. PAID SEARCH

An almost empty auction.

15 of 20
provider domains with no paid keywords in Semrush AU

27
paid keywords across all 20 provider domains combined

$1.23m
monthly value of the same providers' organic traffic at ad prices

Commercial query	Monthly volume	CPC	Advertisers recorded
aged care near me	9,900	$2.36	None
home care packages	3,600	$2.61	None
support at home	3,600	$3.04	None
retirement villages near me	2,400	$2.45	None
private hospital	1,600	$6.02	None
psychologist near me	8,100	$4.16	None

- The providers with any paid footprint: Anglicare (11 keywords), Aveo (9), HammondCare (4), Bupa Aged Care (2), Regis (1).
- CPCs on provider-selection terms (up to $8.23) are modest next to the value of an aged care or retirement living client.

CAVEAT

Semrush samples Australian paid results less thoroughly than organic. "No advertisers recorded" means Semrush did not capture any, not that nobody bids. Check Google Ads Transparency Center for your own competitive set before planning budget. The direction still holds: paid is underused relative to the demand.

8. SUB-CATEGORY SNAPSHOTS

Five markets, five different games.

Sub-category	What wins search	Biggest gap
Aged care	Government explainers on process queries; provider homepages on "near me" and "residential aged care"	Provider-selection and price pages for Support at Home
Retirement living	Local packs on 4 of 4 SERPs; directories (villages.com.au, 65,925 keywords) and community pages	Fee transparency: DMF and exit fees (KD 10 to 13)
Private hospitals	Hospital homepages in local packs and AI Overviews; group sites rank for brand	Migration protection for 25 hospitals changing operator
Allied health	healthdirect, registration boards and Wikipedia on definitions; clinics in local packs	Being the Australian source AI Overviews cite
GP groups	Map packs and directories (HotDoc 811,597, HealthEngine 525,389 visits/mo)	Owning bookings through the clinic site and GBP, not only directories

What the leaders' pages do (and don't)

We reviewed the main conversion pages of five category leaders on 6 November 2026 (a sixth blocked automated access).

- Pricing: only one of five showed any dollar figures, and those were government funding levels, not the provider's own prices.
- Phone: three of five either left the phone number off the page or kept it in the footer.
- Social proof: none showed reviews or ratings on the page. One showed a single anonymous testimonial.
- Terminology: one major home care page still headlined Home Care Packages a year after Support at Home began.

INSIGHT

Cost is what families search for, and it is the one thing leading pages won't say. The first provider in each region to publish clear, indexable prices will own those searches and the AI answers built from them.

9. WHAT CHANGES IN 2027

Six forces to plan around.

Support at Home, year two	Provider choice becomes the battleground as families compare services, care management fees and contributions.
CHSP transition	Moves to the new program no earlier than 1 July 2027 (health.gov.au), creating a second wave of "what happens to my services" searches.
Hospital rebrands	25 Healthscope hospitals are moving to four operators. Every domain change is an SEO migration with real downside if mishandled.
AI Mode and longer queries	Situational questions (cost for a pensioner couple, dementia respite in a named suburb) reward specific, well-structured answers.
Advertising compliance	AHPRA's testimonial rules push allied health and GP marketing toward expertise, pricing and practitioner credentials.
Directory power	HotDoc and HealthEngine hold over 1.3 million modelled organic visits a month between them. Clinics need the map pack and their own booking path.

10. THE OPPORTUNITY SURFACE

Eight plays, ranked.

#	Play	The gap (evidence)	The move
1	**Own Support at Home provider selection**	Provider-selection searches carry the top aged care CPCs ($8.23, $6.85), and government owns the explainers.	Service pages with real prices, care management fees, classification explainers (390/mo, KD 11) and a switching guide.
2	**Publish the price**	Cost queries are low difficulty (KD 10 to 26). One of five leaders shows any dollar figures.	RAD and DAP calculators, an aged care fees explainer, retirement village DMF and exit fee worked examples.
3	**Location pages plus GBP**	Local packs on all retirement SERPs; providers took 4 of 5 AI Overview slots on "nursing homes near me".	One strong page per home or village (Star Rating, fees, photos, waitlist status) tied to a tracked GBP.
4	**Take the empty paid auction**	15 of 20 providers show no paid keywords.	Tight campaigns on provider-selection and near-me terms, after checking Ads Transparency Center.
5	**Protect hospital migrations**	25 hospitals changing operator; Healthscope traffic down 32% from its June peak.	Redirect maps, GBP updates, specialist directory continuity, post-move monitoring.
6	**Be the Australian answer in allied health**	"podiatrist near me" AI Overview cites only UK sources.	AHPRA-compliant explainers by named practitioners, with schema that matches the page.
7	**GP clinics: win the map, keep the booking**	87% of GP demand is "near me"; the two biggest GP queries show no AI Overview.	GBP completeness, review velocity, bulk billing and new-patient status, direct booking links.
8	**Build the entity layer**	myagedcare.gov.au holds 12 of 70 AI Overview citations.	Organisation and LocalBusiness schema, practitioner pages, peak body and trade press citations.

WHERE TO START

If you can only do one thing this quarter: publish an indexable price and fee page for every service and site, in plain English, with the dates and figures right. It answers the most-searched questions in the category, it is what AI Overviews look for, and almost nobody has done it.

11. A 90-DAY PLAN

What a provider marketing team can do in the next quarter.

Days 1 to 30

- Audit every service page for old Home Care Packages terminology and fix titles, headings and FAQs.
- Check Google Business Profile completeness for every site: categories, hours, photos, services, booking link.
- Pull your own Search Console data for cost and provider-selection queries.

Days 31 to 60

- Publish price and fee pages, starting with your highest-enquiry service.
- Launch a small paid test on provider-selection and near-me terms.
- Add Organisation and LocalBusiness schema that matches visible text.

Days 61 to 90

- Re-check which of your pages appear in AI Overviews for your top 20 queries.
- Build location pages for every home, village or clinic that lacks one.
- Set a quarterly re-test of AI Overview and AI engine citations as a leading indicator.

Method

All search figures are Semrush AU database, pulled 6 November 2026: keyword volume, CPC and difficulty for 84 queries (73 used in the core demand set); SERP features for 24 queries; AI Overview sources for the 15 of those where Semrush listed them; domain metrics for 26 domains; and monthly organic history for 12 domains from October 2025 to October 2026. Organic visits are Semrush modelled estimates, not site analytics. AI Overview results vary by user, location and time, so treat the citation mix as a snapshot. Company names are used to describe public search data only.

SOURCES

Where every number comes from.

- Semrush, AU database (keyword overview, SERP organic results with features, domain overview, rank history), pulled 6 November 2026.
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- Bring Digital Performance, The 2026 SEO Visibility Map for Australian Aged Care (April 2026), referenced for the Similarweb comparison only.

This report supersedes Bring's earlier aged care articles published in 2023, 2024 and 2025.

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See where your brand sits.

This report maps the category. A Category Intelligence Report maps you: your demand, your share of it, the competitors taking the rest, your AI Overview and AI engine citations, your map pack position, and a ranked list of the pages and campaigns that would move the number. Built for your brand, free.

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Figures are modelled estimates from Semrush (AU database) unless another source is named. Modelled organic visits are not total site visits. Company names are used to describe public search data and imply no endorsement or relationship.