

CHILDREN'S CARE & SPECIAL EDUCATION SERVICES UK MARKET REPORT

SECOND EDITION



COVERING:
CHILDREN'S HOMES
FOSTER CARE
ADOPTION / LEAVING CARE &
OTHER SERVICES
SPECIAL EDUCATION
LATEST DATA & AUTHORITATIVE
LaingBuisson
COMMENTARY &
ANALYSIS

CHILDREN'S CARE & SPECIAL EDUCATION SERVICES

UK MARKET REPORT

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Children's care and special education services are a substantial sector of the economy, with spending across the UK worth close to £10 billion. Provided by local authorities and independent sector (private and voluntary) operators, this report presents the **latest market data and analysis** on these services, providing a **definitive independent commentary** on this important, and sometimes controversial area. It focuses on services where the independent sector has a core business interest - children's residential care homes, foster care, and special schools and colleges – but also assesses other children's services where voluntary organisations have a presence – adoption, leaving care, and care protection.

Government policy in specialist care and education of children is ever changing, and there has been a raft of new developments in recent times (including the Children and Families Act 2014) which have been brought in to improve the quality of outcomes for children in care and to support children and young people with high needs in their education and training. The current Conservative government's strategy is to firmly turnaround children's services which are performing poorly, push for wider innovation of delivery systems and practices to help raise the performance bar, and harmonise the care, education and health entitlements of children with special needs. At the same time, however, it is likely that budgets for children's services and special education will remain within a tight envelope going forward within this Parliament, as providers of services are challenged to do more with the same, or do more with less. LaingBuisson's new report examines the direction of latest policy developments, and particularly the implications for businesses operating within this environment.

This updated edition delivers **comprehensive data analysis** on the **demand** for children's care, and **need** for special education in schools and colleges. It includes **spending trends** by sector, based on public data which includes the latest 2014/15 actual local authority spending statistics for England. Where possible, LaingBuisson produces calendar year UK estimates for 2015, and a projection for 2016.

A strong focus of this revised edition is on the **independent sector market structure**, and included are: **detailed profiles** of all major providers and providers of interest with the children's care and special education space; **ranking tables** for providers of children's homes, fostering and special education; **profitability analysis** of the largest private operators; **analysis of balance sheet strength** for major providers; **consolidation trends** and list of **significant acquisitions** in the last 12-18 months; **profile of private equity concentration** in the sector including current investments, and a list of **key private equity deals** in recent years.

This report is essential reading for anyone working within children's care and special education - from providers to public sector commissioners, regulators, policy makers, investors and professionals within the advisory community.

Exclusive Tables & Figures include...

- Number of children in care (Looked after) in the UK 2010 & 2015, and number of care applications received by CAFCASS in England, 2009/10 & 2014/15
- Number of children looked after in foster care in the UK & penetration of the under 18s population, 2010-2015 (including data for England, Scotland, Wales and Northern Ireland)
- Local authority gross spending on foster care in England split by provider sector (Independent & Public), real growth and growth index, 2009/10-2014/15 & 2015/16 projection, & UK estimates 2013-2015 & 2016 projection
- Number of children looked after in residential care homes in the UK at 31 March, 2010-2015 (including estimates for England, Scotland, Wales and Northern Ireland)
- Children's home capacity (homes and places) by provider sector in England at 31 March, 2004-2015
- Local authority gross spending on children's residential homes in England 2009/10-2014/15 & 2015/16 projected, & UK estimates 2013-2015 & 2016 projection
- Number of children & young people (aged 16+) leaving care (no longer looked after) in England at 31 March, 2010-2015
- Local authority gross spending on leaving care support services for children and young people in England 2009/10-2014/15 & 2015/16 projected, & UK estimates 2013-2015
- Local authority gross spending on children's social work, commissioning and strategy, in England 2009/10-2014/15 & 2015/16 projected, & UK estimates 2013-2015 & 2016 projection
- Distribution of Ofsted quality ratings across children's homes, independent fostering agencies, and voluntary adoption agencies at 31 March, 2012-2015
- Number of pupils with Statements of Special Educational Needs (SEN) (Statements replaced by Education Health & Care plans (EHC) in April 2014) by school sector, 1995-2015
- Share (%) of special school places and special college places by region in England, autumn 2015
- Market value of special education schools & colleges in the UK, 2013-2015 & 2016 projection
- Top 20 Independent sector providers of children homes by number of homes, and Top 10 independent fostering providers by volume of placements at autumn 2015
- Leading providers of children's care and special education services in the UK by revenue, 2012-2015
- Profitability of leading providers of children's care and special education – EBITDAR & EBITDA margins, 2012-2015
- Deals in the children's care and special education space funded by private equity since the start of 2010
- Schedule of private equity investors in children's care and special education at autumn 2015



Executive Summary & Highlights

- + Overall value of children's care and special education services
- + Key trends and developments
- + Opportunities and challenges going forward

Overview of Children in Care

- + Demand trends over time
- + Indicators of outcomes over time
- + Government policy and challenges

Foster Care

- + Demand and supply trends
- + Spending and fee trends
- + Policy development and key issues going forward

Children's Homes

- + Demand and supply trends
- + Spending and fee trends
- + Policy development and key issues going forward

Adoption

- + Demand and supply trends
- + Spending and fee trends
- + Policy development and key issues going forward

Other Children's Services

- + Leaving care support: demand, spending and policy issues
- + Social work, commissioning and strategy: spending and policy issues
- + Other children's services: spending and policy issues

Quality & Regulation of Children's Care Services

- + Regulation overview and new inspection of children's homes
- + Trends in Ofsted quality ratings for children's care
- + Trends in quality ratings for local authority children's services and government impact

Special Education

- + Demand including sector and regional analysis
- + Funding trends and special school fees
- + Supply in independent special schools and colleges, including regional analysis
- + Quality and regulation of independent sector services

Independent Sector Market Structure

- + Types of providers in children's care and special education
- + Market rankings for children's homes, fostering and special education
- + Revenues, profitability, and balance sheet strength of major providers
- + Growth and consolidation trends
- + Private equity concentration and equity acquisitions
- + Detailed review of all major providers and providers of interest

Financial Appendix

- + Detailed analysis of the statutory accounts of major providers with comparative data for up to five years

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The healthcare experts

CHILDREN'S CARE & SPECIALIST EDUCATION SERVICES UK MARKET REPORT

SECOND EDITION

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