

LaingBuisson

CHILDREN'S NURSERIES UK MARKET REPORT

THIRTEENTH EDITION



COVERING:

KEY MARKET STATISTICS
CURRENT TRENDS ANALYSIS
MARKET FUTURES
CORPORATISATION TRENDS
IMPACT OF COALITION POLICY

The healthcare experts

CHILDREN'S NURSERIES

UK MARKET REPORT

THIRTEENTH EDITION



This report presents timely key statistics and expert analysis of past, present and future market trends in the children's daycare nurseries sector, the largest childcare market in the UK.

Based on a wide range of sources including LaingBuisson's 2014 survey of children's daycare nurseries, the report offers unique data on UK market values, covering capacity, occupancy, nursery fees and market spending, staffing pay rates, and corporate penetration.

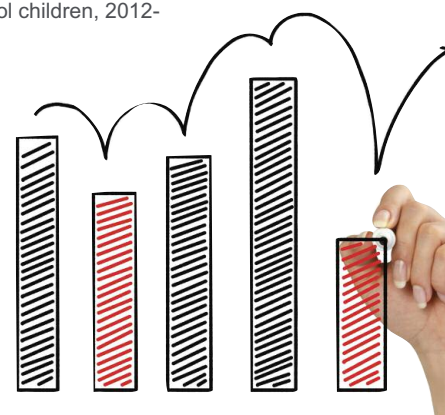
This thirteenth edition offers insight on nursery market prosperity now as the economy has turned a corner, and going forward, including the likely impact of demographic and economic nursery market drivers in the medium term, and providers' expectations of nursery demand in the future. It identifies new strategic developments and key business and structural activity trends in the nursery marketplace and assesses future prospects for nursery operators including the impact of the Coalition government's early years policies on demand for and supply of nursery care. Based on this market intelligence, LaingBuisson applies SWOT analysis to offer optimistic, neutral and pessimistic future scenarios in the report.

All market leaders in this rapidly changing industry are reported on and assessed in detail, including calculations of market shares and detailed chronology of all major acquisitions of nursery groups in the last 15 years. The report also presents specific key statistics for nursery groups covering capacity, attendance, occupancy, nursery fees and wage rates.

This report is essential business reading for all organisations involved in the provision of children's daycare services in the UK, including nursery businesses, investors, local authorities and childcare policymakers/planners, regulators, trade associations and market valuers.

Exclusive Tables & Figures include...

- Value (Market size) of UK children's nursery market by supply sector, 2013/14
- Real change (%) in UK market values (children's nurseries, GDP, & consumer spending) 2008-2013/14
- Value of the UK children's nursery sector at 2013/14 constant prices, 1990-2013/14
- Funding of UK children's nursery market by purchasing sector, 2013/14
- Capacity of UK children's nursery sector, January 2002 - mid 2014
- Attendance based occupancy rates, UK January 2002 - mid 2014
- Occupancy and vacancy rates, UK January 2002 - June 2014
- Vacancy rates and vacancy based occupancy rates, UK January 2002 - mid 2014
- Vacancy rates and vacancy based occupancy rates by UK region, mid 2014
- Breakdown of total children attending day nurseries per day by attendance pattern in mid 2014
- Average UK full-day nursery fees by sector, mid 2014
- Average UK full-day nursery fees by region, mid 2014
- Annual nursery fee inflation and economy inflation (RPI), 2001-2013/14
- Breakdown of UK nurseries and places, and market shares at mid 2014
- Nurseries & places operated by Top 40 UK major providers & market shares, at September 2014
- Revenue & profit/(loss) (EBITDAR, EBITDA, EBIT & Pre-tax profit/(loss)) of major nursery companies in the UK, 2012-2014
- Details of major children's nursery group transactions between 2001 and 2014
- Average hourly pay rates for nursery staff and wage inflation, UK, mid 2013 – mid 2014
- Average hourly pay rates for nursery managers and nursery nurses by region, mid 2014
- Annual nursery wage inflation and economy inflation (RPI), 2002-2014
- Employment rate for mothers with very young children (aged under 3 years), and female employment rate, UK 2003-2013
- Formal childcare usage, female employment rate, & female unemployment rate by region in England, 2013
- Parents reasons for choosing day nursery services for pre-school children, 2012-2013
- Expectations for business conditions over the next 12 months at mid 2014
- Penetration of specialised services across UK children's nurseries at mid 2014



Executive Summary & Highlights

- + Children's nursery market overview
- + Key economic & business trends
- + Market futures
- + Structure of the market
- + Review of government policy

UK Children's Nursery Services & Childcare

- + Demand drivers for nursery services and childcare - population, births and employment trends
- + Childcare choices and preferences including trends over time and main barriers

Nursery Sector Capacity & Attendance

- + Total UK capacity and attendance, growth trends and distribution of attendance
- + Growth/contraction in net capacity (new capacity less sector closures)
- + Attendance based occupancy trends
- + Nursery vacancies and vacancy based occupancy, including regional breakdown and occupancy for nursery groups

Price of Children's Nursery Care

- + Nursery fees for 2014 across sectors (private, third & public sectors & nursery groups)
- + Annual growth/change in nursery fees (price/fee inflation)

Value Of UK Children's Nursery Market & Market Funding

- + Total spending on children's daycare nursery services in UK
- + Value by sector - sole trader/partnerships, companies, third sector and public sector
- + Growth in UK children's nursery market spending over time
- + Funding by source - private individuals, companies, government (direct and indirect subsidy) and miscellaneous
- + Early years entitlement funding (2, 3 & 4 years) - average funding by local authority and yearly changes in funding

Industry Structure & Corporatisation

- + Current structure of the provider side of the market, key structural changes and breakdown of for-profit and not-for-profit providers
- + List of Top 40 major children's nursery groups by supply and market shares
- + Profitability of leading nursery providers, and detailed review of major nursery groups
- + Corporatisation trends - business conditions, consolidation and acquisition/merger activity
- + New development activity and investment
- + Key issues faced by nursery businesses, and nursery business strategies

Government Policy & Future Nursery Scenarios

- + Review of childcare and early years policy in the 1990s and 2000s (Conservatives and Labour)
- + Impact of Coalition policies on the UK children's nursery sector
- + Nursery market futures

Nursery Staffing & Pay Rates

- + Staffing levels by employee type (full-time, part-time & permanent, temporary)
- + Average pay rates by occupation type (manager, EYP, nursery nurse, nursery assistant and domestic), regional pay trends and nursery group pay rates
- + Annual wage inflation trends for the nursery sector

Financial Appendix

- + Detailed analysis of the statutory accounts of major providers

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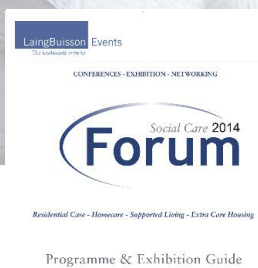


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The healthcare experts

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