

In partnership with **A**Cairneagle

## **CHILDCARE** UK MARKET REPORT

SIXTEENTH EDITION

## Potential for growth makes Childcare an attractive market for investors - but will coronavirus stop it in its tracks?

The sixteenth edition of LaingBuisson's Childcare UK market report, written by leading education management consultancy, Cairneagle Associates, is essential reading for anyone involved in this historically fast-growing sector. This not only includes investors but also advisors to the sector and providers.

A key question in the current climate is how much the sector will be impacted by Coronavirus. The report, launched in late March 2020, looks at the early months of the pandemic and forecasts that effect it will have on nurseries and other pre-school childcare provision.

Nevertheless, the childcare market has continued potential for positive growth. A Cairneagle Associates/NMT survey of operators undertaken for the report found that 72% of providers expect further growth, the only question being whether it will be as strong as in previous years.

Now valued at £6.7 billion the UK childcare market has enjoyed two decades of growth at around 7% per year, driven to a large extent by increased maternal participation in the workforce making childcare a 'must have' rather than a luxury.

The UK childcare market has also benefited from increased government support, in particular in recent years the 30-hour free childcare entitlement. The Department for Education



2019.

Strong growth and a socially responsible profile have made this market attractive for investors and with the market still being highly fragmented, there are still benefits to be gained from consolidation. It also holds the possibility of accretive earnings per share since nurseries are usually worth more in a group than as discreet entities, and there is the chance of outperforming the market by making better commercial decisions.

estimates that almost 330,000 children benefited from this in

This important report provides a crucial update on the current position of the highly dynamic UK childcare market and its key emerging trends.

### Who is the report for

- Independent nursery providers
- Local authority providers
- Policy makers Banks

- Private equity investors Lawyers
  - Management consultants
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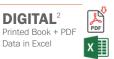
#### What the report covers

Market Politics and regulation Payors **Major providers** Investors Staffing **Market Potential** 

Appendices Glossary Key Legislation Regulators Trade bodies Commissioning bodies Financial Appendix

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healthcare market data to the UK Government ONS

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## UK HEALTHCARE MARKET REVIEW THIRTY-FIRST EDITION

In 2017 the UK's total expenditure on healthcare was £197 billion, up almost 3% on the 2016 total of £192 billion. Almost 80% of this expenditure is accounted for by public spending, but LaingBuisson figures demonstrate how the independent sector. whether as a provider of services directly to private payers or as a partner to local authority and public health services in delivering health and social care services, continues to play a vital role in our healthcare economy.

New for this latest edition, the Review looks in more detail at UK healthcare spending benchmarked against international comparators from the EU, G7 and OECD in the context of trends in global healthcare. As chosen provider of data on the UK independent healthcare sector to the Office for National

Statistics, LaingBuisson contributes market data that is in turn submitted to the OECD, WHO and Eurostat who combine it with their international datasets to benchmark UK spending against other nations.

This makes LaingBuisson's UK Healthcare Market Review vital reading not only for those independent providers but also commissioners, advisors and investors in the sector



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