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Transparency data

Largest national providers of private and voluntary social care (March 2024)

Updated 9 October 2024

Applies to England

Contents

This publication is available at https://www.gov.uk/government/publications/inspection-outcomes-of-the-largest-childrens-social-care-providers/largest-national-providers-of-private-and-voluntary-social-care-march-2024

Main findings

- The percentage of privately owned children's homes owned by the 10 largest private owners of children's homes fell from 30% in March 2023 to 26% in March 2024.
- The 22 largest companies owned 968 homes, which is 35% of all private children's homes, and 28% of all children's homes.
- Just 1 in 6 private children's homes (434, 16%) were owned by a single provider rather than part of the ownership chain of a larger company.
- Of the 276 privately owned independent fostering agencies (IFAs), 3 in 5 were single providers (164, 59%).
- Among the 112 privately owned IFAs that were part of a company ownership chain, the majority (75 IFAs) were owned by 6 large providers that offered 18,770 places in total.
- There are 2 companies appear on the list of largest providers of both children's homes and IFAs. These are Nutrius UK Topco Ltd and Compass Community Ltd.

Introduction

This release provides information about the ownership of children's homes and IFAs in England as at 31 March 2024. It includes information about the companies that own the largest number of children's homes or provide the largest number of fostering places through the IFAs they own.

According to the latest available Department for Education data (https://explore-education-statistics.service.gov.uk/find-statistics/children-looked-after-in-england-including-adoptions), there were 83,840 looked after children in England as at 31 March 2023. Of these, nearly 38,500 were in private or voluntary sector placements. According to our most recent statistics (https://www.gov.uk/government/statistics/childrens-social-care-in-england-2024/main-findings-childrens-social-care-in-england-2024), private and voluntary providers look after around 12,100 children– just under one third of 38,500 children in private or voluntary sector placement looked after.

From 28 April 2023, supported accommodation providers in England are required to register with Ofsted. Supported accommodation is for 16- and 17-year-old looked after children and care leavers, to enable them to live semi-independently. We have not included data on these providers in this year's release because initial provider registrations are ongoing, so we do not yet have a full picture. In future, this publication will include data on the largest national providers of supported accommodation.

All children’s homes

As at 31 March 2024, here were 3,491 children’s homes of all types actively operating in England, offering a total of 14,486 places for children. See our most recent statistics (https://www.gov.uk/government/statistics/childrens-social-care-in-england-2024/main-findings-childrens-social-care-in-england-2024) for further analysis. The number of homes has increased by 12%, from 3,119 in 2023, in line with last year’s statistics (https://www.gov.uk/government/statistics/childrens-social-care-data-in-england-2023/main-findings-childrens-social-care-in-england-2023).

Residential special schools (registered as a children’s home) had 55 homes with 1,402 places and secure children’s homes had 13 homes with 214 places. This paper focuses on private ownership of children’s homes as at 31 March 2024. We have excluded secure children’s homes, residential special schools registered as children’s homes and short-break-only children’s homes from this analysis.

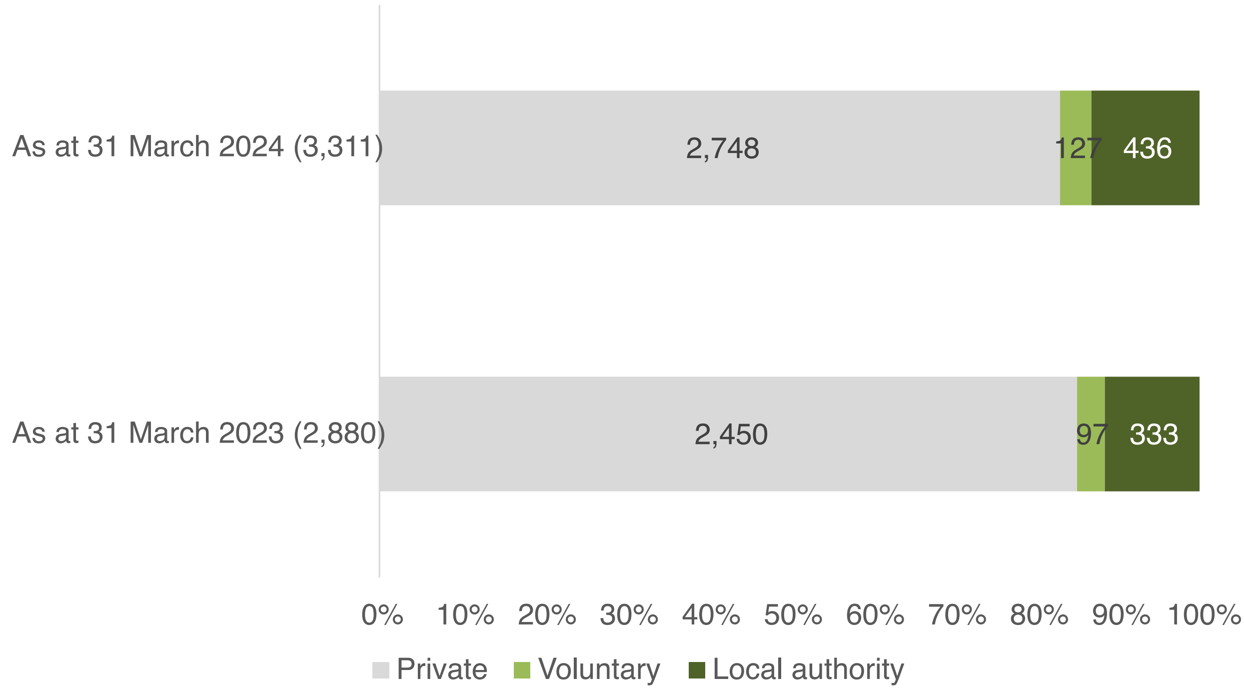
Children’s homes

More than 4 in 5 children’s homes were owned by private companies (2,748 homes, 83%), which accounted for 9,648 places (77%) of 12,458 places. Of the remaining 572 children’s homes, 436 (13%) with 2,088 places (17%), were owned by either the local authority (404 homes, 12%) or a voluntary organisation running services on behalf of the local authority (32 homes, 1%). For the purposes of this analysis, these 32 homes are considered together as local authority provisions. Voluntary organisations accounted for 127 homes (4%) and 669 places (5%). There were also 9 children’s homes run by health authorities, accounting for 53 places.

There was a rise in the number of private sector homes, from 2,450 in 2023 to 2,748 homes in 2024. This 12% increase is similarly in line with the 12% increase in all children’s homes; as a result, the proportion of homes owned by the private sector stayed relatively stable from 2023 to 2024.

The number of homes owned by the voluntary and local authority sectors increased by 31% from 2023 to 2024 (30 new voluntary homes and 103 new local authority homes).

Figure 1: Comparison of the sector breakdown of children’s homes as at 31 March 2024 and 31 March 2023



Excludes 9 health authority homes.
View data in an accessible format.

Ownership of private children's homes

We have data, extracted from Companies House, on the ownership of 2,738 of the 2,748 private children's homes. The remainder (10) are owned by individuals, not companies, and have been excluded from the following analysis.

As at 31 March 2024, a total of 392 private companies owned multiple homes – an 17% increase from 334 in 2023. The majority of these (309 companies) owned between 2 and 5 homes each. The company with the most homes, CareTech Holdings PLC (Amalfi Topco Ltd), owned 200.

Of these 2,738 privately owned children's homes, as at 31 March 2024:

- 434 (16%) were single providers
- 2,304 (84%) were owned by top companies as part of a chain, with at least 2 homes. Of those 2,304 homes, 968 (42%) were owned by 22 largest companies.

Overall, the top 10 largest companies accounted for 26% of all private children's homes, a fall from 30% in 2023. The largest of these, CareTech Holdings PLC, accounted for 7% of all private children's homes.

Table 1: Largest 22 providers of private children's homes as at 31 March 2024, compared with 31 March 2023

Position	Position change	Top company	Number of children's homes	Net change in number of homes	Places
1	Position unchanged	CareTech Holdings PLC (Almalfi Topco Ltd)	200	-7	660
2	Position unchanged	Keys Group Ltd (G Square Healthcare Private Equity LLP)	116	+2	440
3	Position unchanged	Aspris Holdco Ltd	81	-17	294
4	Increase from last year's position	HCS Group Ltd (Hexagon Care Services Ltd)	56	+5	204
5	Increase from last year's position	Compass Community Ltd	49	+11	251
6	Position unchanged	Esland Group Holdings Ltd	49	+2	113
7	Increase from last year's position	Homes2Inspire Ltd (The Shaw Trust Ltd)	43	+5	146
8	Decrease from last year's position	The Outcomes First Group	42	-19	205
9	New to largest	Care Today/Parallel Parents Ltd	40	Not previously in data as	143

Position	Position change	Top company	Number of children's homes	Net change in number of homes	Places
	provider's list			top company	
10	Decrease from last year's position	Range Topco Ltd	38	-6	127
11	Decrease from last year's position	Wordsworth Midco 1 Ltd	37	0	233
12	Position unchanged	Nutrius UK Topco Ltd	33	+1	137
13	Position unchanged	Ardenton UK Ltd	26	0	72
14	Increase from last year's position	Foundation Investment Partners Management LLP	23	+9	76
15	Decrease from last year's position	Reflexion Care Group Ltd	20	0	65
16	Decrease from last year's position	Meadows Care Holdco Ltd	20	0	64
17	Increase from last year's position	Your Chapter Holdings Ltd	18	+3	70
18	Decrease from last	Timeout Property Ltd	17	-1	31

Position	Position change	Top company	Number of children's homes	Net change in number of homes	Places
	year's position				
19	Decrease from last year's position	Ashridge Capital (Phoenix) Ltd Partnership	16	-1	40
20	Decrease from last year's position	Blue Mountain Homes Ltd	15	-2	50
21	Decrease from last year's position	First Blue Group Ltd	15	+1	36
22	New to largest list of providers	Life Change Holdings Ltd	14	No previous data	28

The 22 largest providers have decreased in homes by 1% in 2024, compared to 2023. The greatest increase within the largest providers has been for Compass Community Ltd, with an increase of 11 homes (29% increase), compared to 2023. Care Today/Parallel Parents Ltd are new to the list of largest providers, with 40 homes. Life Change Holdings Ltd is new overall, with 14 homes and 28 places. The 22 largest providers owned 968 homes (35% of all private children's homes) this year, compared to the top 22 owning 40% of all private children's homes last year.

Ownership of voluntary children's homes

As at 31 March 2024, 126 children's homes were owned by charities or not-for-profit organisations; together, these are known as voluntary organisations. One individually owned setting has been excluded from this analysis.

- 26 (21%) homes were owned by single providers
- 100 (79%) were owned as part of another top company with at least 2 homes
- 84 (67%) were owned by companies with 5 or more separate children's homes

Compared with the private sector, there were fewer large voluntary organisations in terms of number of homes. This year, 3 companies (Action for Children, Break and the Together Trust) had more than 10 homes each. This is an increase compared to last year, when only the Together Trust had more than 10 homes.

Table 2: The 5 largest providers of voluntary children's homes as at 31 March 2024

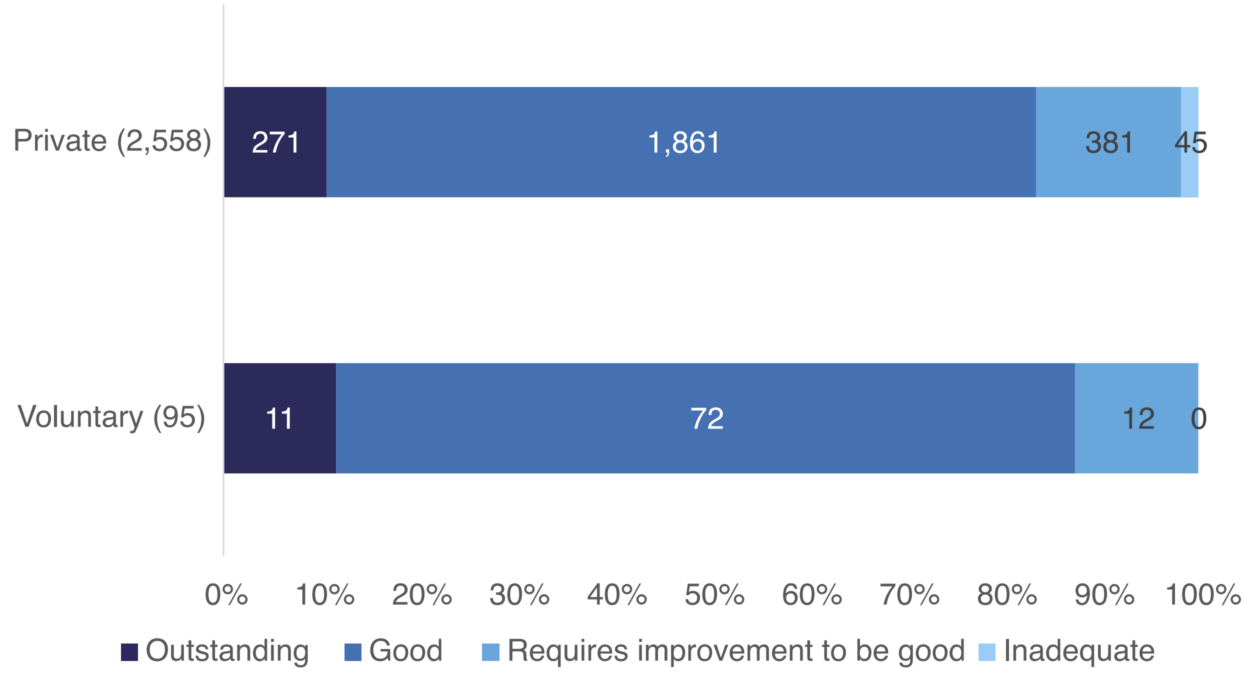
Position	Top company	Number of children's homes	Places
1	Action for Children	21	119
2	The Together Trust	11	49
3	Break	11	40
4	Barnado's	8	33
5	The Caldecott Foundation Ltd	7	42

Inspection outcomes for privately owned and voluntary children's homes

As at 31 March 2024, 83% of the 2,558 inspected private children's homes with judgements were rated good or outstanding. This is the same percentage as for children's homes of all types across all sectors that had inspection judgements (see 'Main findings: children's social care in England 2024' (https://www.gov.uk/government/statistics/childrens-social-care-in-england-2024/main-findings-childrens-social-care-in-england-2024)), and an increase from 79% in 2023.

As at 31 March 2024, 83 (87%) voluntary children's homes with judgements were judged to be good or outstanding, and 12 (13%) were graded requires improvement to be good from 95 inspected homes.

Figure 2: Grade profile of children's homes with inspection outcomes as at 31 March 2024, split by sector



View [data in an accessible format](#).

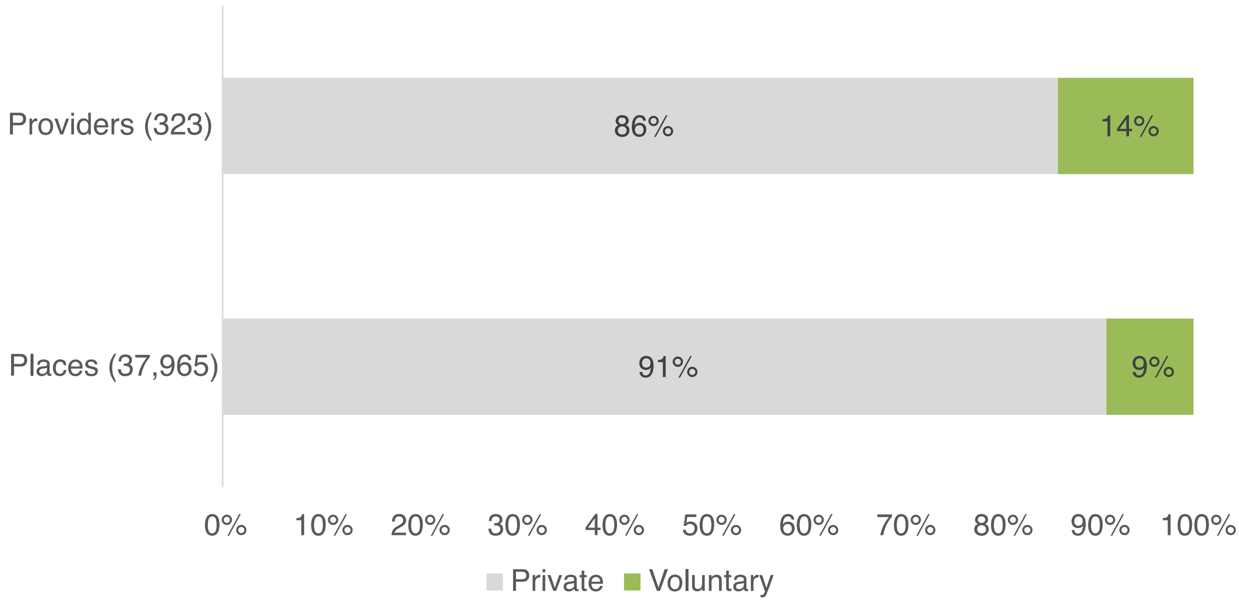
Independent fostering agencies

[Most children in care (68%) are in foster care (https://explore-education-statistics.service.gov.uk/find-statistics/children-looked-after-in-england-including-adoptions)](https://explore-education-statistics.service.gov.uk/find-statistics/children-looked-after-in-england-including-adoptions). This can be provided by either local authority fostering agencies or IFAs.

As at 31 March 2024, 323 IFAs were operating in England (excluding the 9 IFAs owned by trusts that operate on behalf of local authorities). This was not much higher than the number last year (319), with a net increase of 4 IFAs. The 323 IFAs offered a total of 37,965 fostering places for children.

Private or voluntary organisations can own IFAs, but the majority are privately owned (277 IFAs, 86%). As at 31 March 2024, the 277 private IFAs offered a total of 34,620 fostering places (91% of all IFA places). Voluntary organisations accounted for the remaining 46 IFAs (14%) and offered 3,345 places (9% of all IFA places).

Figure 3: Proportion of IFAs and IFA places provided by the private and voluntary sector



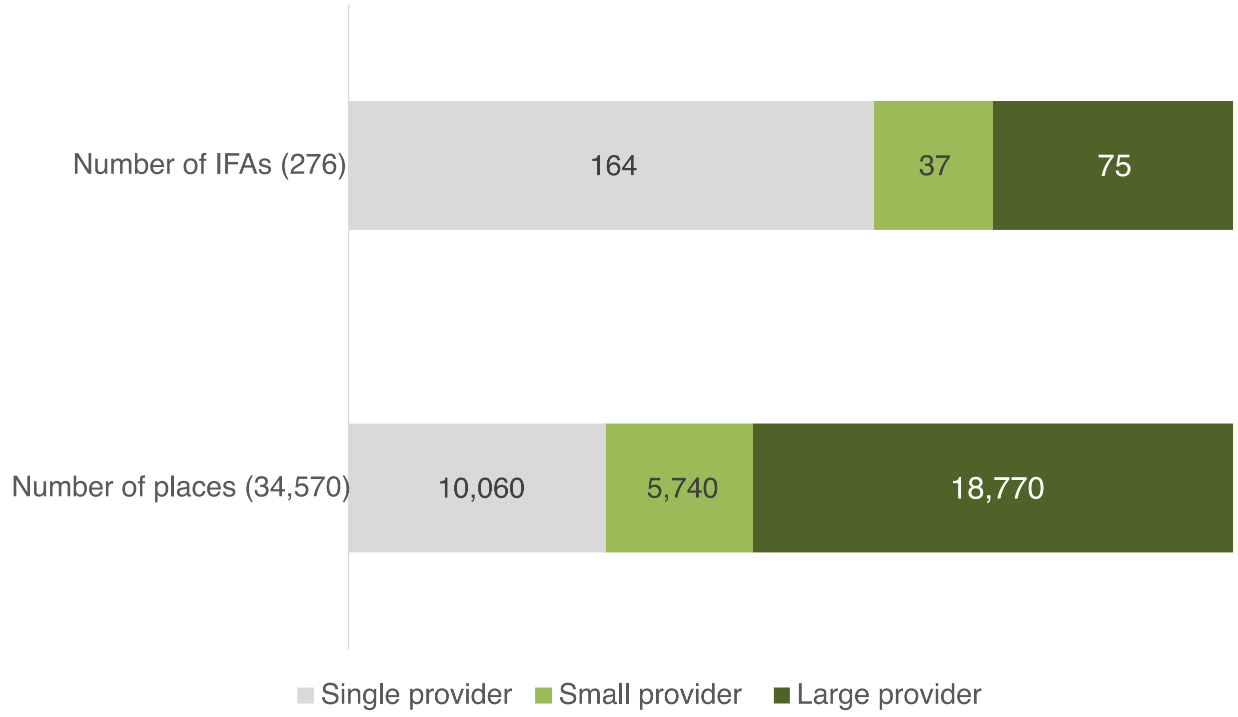
View data in an accessible format.

Ownership of private IFAs

We have extracted data from Companies House on the ownership of all the 277 privately owned IFAs. There was 1 agency owned by an individual. That agency, and the places it provided, have been excluded from this dataset.

As at 31 March 2024, a total of 18 private companies owned at least 2 IFAs, up from 14 in 2023. Of the 276 IFAs, 164 (59%) were single providers, 37 (13%) were owned by a total of 12 small providers (fewer than 1,000 places), and 75 (27%) were owned by a total of 6 large providers (more than 1,000 places).

Figure 4: Number of private IFAs and private IFA places as at 31 March 2024, by ownership type



Number of IFAs excludes 2 agencies for which there was no data available at Companies House.
View data in an accessible format.

Of the 6 largest providers, 3 offered a smaller number of places in 2024 than in 2023, mostly due to agencies closing. The National Fostering Group, which split from the Outcomes First Group since our last publication, is the largest provider of private IFA places.

Table 3: List of private IFA places as at 31 March 2024, compared with 31 March 2023

Position	Position change	Top company	Number of IFA places, 2024	Change in number of IFA places since 2023
1	Position unchanged	The National Fostering Group	5,740	-545
2	Position unchanged	Nutrius UK Topco Ltd	5,045	0
3	Position unchanged	Compass Community Ltd	3,135	-350
4	Position unchanged	Alderbury Holdings Ltd (Lindale Holdings Ltd)	2,445	+370

Position	Position change	Top company	Number of IFA places, 2024	Change in number of IFA places since 2023
5	New to the list of large providers	Midhurst Child Care Ltd	1,290	No data
6	Decrease from last year’s position	Capstone Eot Trustee Ltd	1,120	-170
7	Position unchanged	CareTech Holdings PLC (Amalfi Topco Ltd)	965	-50
8	Position unchanged	Swiis International Ltd	925	+90
9	Position unchanged	Sunbeam Fostering Agency Ltd	870	+45
10	New to the list of large providers	Care Today/Parallel Parents Ltd	675	No data
11	Decrease from last year’s position	Fusion Fostering Ltd	520	-15
12	New to the list of large providers	UK Fostering Ltd	395	-35
13	Decrease from last year’s position	Positive Aspirations Ltd	290	-5
14	New to the list of large providers	Apex Consolidation Entity Ltd	285	No data

Position	Position change	Top company	Number of IFA places, 2024	Change in number of IFA places since 2023
15	New to the list of large providers	The Hazel Project Ltd	280	No data
16	Decrease from last year's position	Futures For Children Ltd	195	+65
17	Decrease from last year's position	Young People At Heart Ltd	175	+15
18	New to the list of large providers	Flourish Fostering Ltd	165	No data

Inspection profile of the largest private providers of IFAs as at 31 March 2024

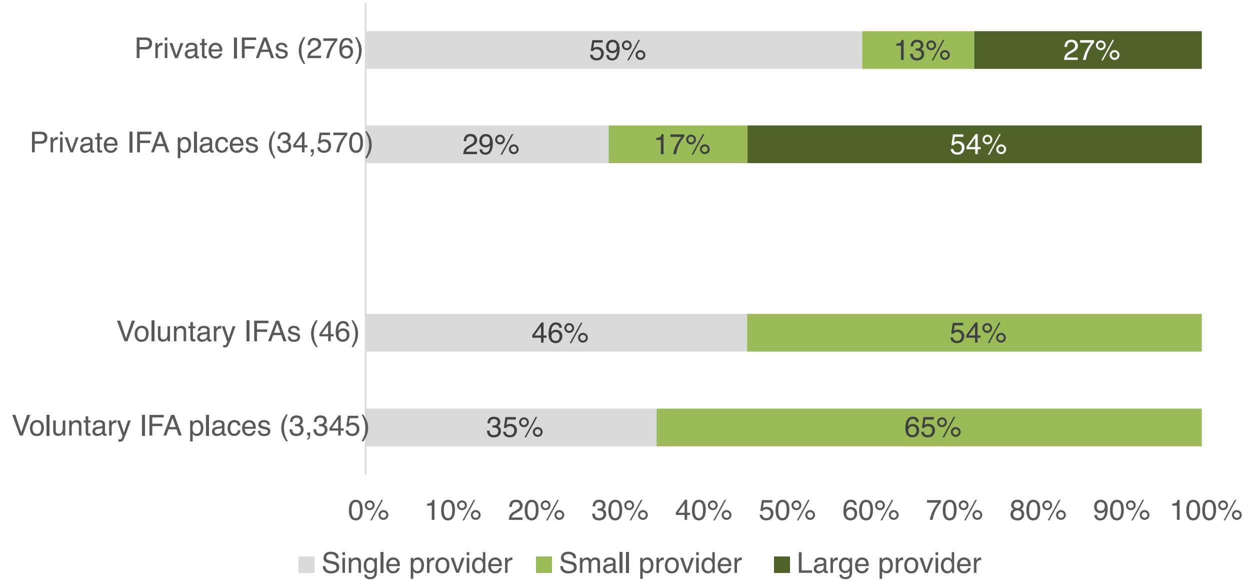
The proportion of good and outstanding private IFAs (96%) is comparable to the proportion for voluntary IFAs (98%). The largest private providers of IFAs account for 28% of good and outstanding judgements.

Ownership of voluntary IFAs

There were 46 voluntary IFAs, which had 3,345 places between them, a decrease of 490 places from 2023.

Of the 46 voluntary IFAs that were active as at 31 March 2024, 21 (46%) were single providers. The remaining 25 (54%) were within the ownership chains of 6 companies. All 6 of the voluntary companies that owned multiple IFAs offered fewer than 1,000 fostering places, so are considered small providers.

Figure 5: Proportion of IFAs and IFA places provided by voluntary and private IFAs, by ownership type



Number of private IFAs excludes 2 agencies for which there was no data available at Companies House.
View data in an accessible format.

The biggest voluntary company, The Adolescent and Children's Trust, owned 7 IFAs and provided the most places (785, 23% of all voluntary places).

Table 4: Small providers of voluntary IFA places as at 31 March 2024, compared with 31 March 2023

Position	Position change	Top company	Number of voluntary places, 2024	Change in number of voluntary places since 2023
1	Position unchanged	The Adolescent and Children's Trust	785	-15
2	Increase from last year's position	The Children's Family Trust	370	0
3	Decrease from last year's position	Barnado's	355	-20

Position	Position change	Top company	Number of voluntary places, 2024	Change in number of voluntary places since 2023
4	Decrease from last year’s position	Team Fostering	355	-20
5	Position unchanged	Action for Children	215	-25
6	Position unchanged	St. Christopher’s Fellowship	100	-5

Inspection profile of voluntary IFAs owned by small providers and single providers as at 31 March 2024

IFAs owned by voluntary small providers were all good and outstanding, up from 92% in 2023. Among the single providers, 94% were good and outstanding, with the remaining 4 not yet inspected.

Companies among the largest providers of children’s homes and IFA places

There are 2 companies that appeared on the list of largest providers for both children’s homes and IFAs. These were Compass Community Ltd and Nutrius UK Topco Ltd.

- Compass Community Ltd is the 5th largest provider of children’s homes (49 homes, offering 251 places), and the 3rd largest provider of IFA places (7 IFAs, offering 3,135 places).
- Nutrius UK Topco Ltd was the 12th largest provider of children’s homes (33 homes, offering 137 places), and the 2nd largest provider of IFA places (24 IFAs, offering 5,045 places).

The largest provider overall (defined as having the highest capacity to house children) was Nutrius UK Topco Ltd, with 5,182 places in private children's homes and private IFAs.

Methodology

Children's homes

We extracted the ownership data for this release from the 'get information about a company' (https://www.gov.uk/get-information-about-a-company) tool on Companies House. The information on Companies House is provided by companies themselves, and neither Companies House nor Ofsted verify its accuracy. The company names used throughout this release are presented as at source.

Due to the variation in the number of homes that companies own, we have analysed the largest providers separately. We looked at how homes owned by these companies differ from all children's homes nationally. The largest 22 providers have been regulated by a cut-off point of 14 homes, in line with last year's publication to allow comparison.

This release includes inspection activity up to and including 31 March 2024 only. However, inspections have occurred since this date. As a result, some settings' inspection grades may have improved or declined since 31 March 2024.

A full discussion of children's homes inspection outcomes is available in our Children's Social Care in England 2024 accredited official statistics (https://www.gov.uk/government/statistics/childrens-social-care-in-england-2024).

Independent fostering agencies

Data on the number of places provided by each IFA comes from Ofsted's annual fostering data collection (https://www.gov.uk/government/publications/ofsted-annual-fostering-data-collection). As the 2024 collection is ongoing, data included here reflects the 2023 returns. This means we do not know the number of places offered by the 13 agencies that registered during 2023 to 2024.

1. Single provider: IFAs that exist as a single entity and are not owned by a larger company.
2. Small provider: IFAs that are part of the ownership chain of a small company. For this release, we defined a small company as one that owns multiple IFAs but offers fewer than 1,000 fostering places through all the IFAs it owns.
3. Large provider: IFAs that are part of the ownership chain of a large company. For this release, we defined a large company as one that owns multiple IFAs and offers more than 1,000 fostering places through all the IFAs it owns.

When determining the size of companies, we chose to use the number of IFA places offered by each company, rather than the number of IFAs that it owns. This best captures the reach of a company, in terms of how many children it could offer care to. We calculated the total number of places a company offers as the sum of all places offered by all IFAs within its ownership chain. For example, if a company has 4 IFAs in its ownership chain, and each of these offered 25 places, the total places offered by the company is 100.

IFA data is rounded to the nearest 5, in line with our Fostering in England official statistics (https://www.gov.uk/government/statistics/fostering-in-england-1-april-2022-to-31-march-2023).

Our regulations (https://www.gov.uk/government/publications/social-care-common-inspection-framework-sccif-independent-fostering-agencies) require us to inspect IFAs at least once within a 3-year inspection window. Agencies judged inadequate or requiring improvement to be good are usually reinspected within a shorter time frame.

Contacts

If you are a member of the public and have any comments or feedback on this publication, contact Emma Martin emma.martin@ofsted.gov.uk or the social care team socialcaredata@ofsted.gov.uk.

Acknowledgements

Thanks to Noopur Naik.

Annex: data tables for figures

This section contains the underlying data in an accessible table format for all figures.

Data for Figure 1: Comparison of the sector breakdown of children's homes as at 31 March 2024 and 31 March 2023

As at date	Private	Voluntary	Local authority
As at 31 March 2024 (3,311)	2,748	127	436
As at 31 March 2023 (2,880)	2,450	97	333

See Figure 1

Data for Figure 2: Grade profile of children's homes with inspection outcomes as at 31 March 2024, split by sector

Sector	Total number	Outstanding	Good	Requires improvement to be good	Inadequate
Private	2,558	271	1,861	381	45
Voluntary	95	11	72	12	0

See Figure 2

Data for Figure 3: Proportion of IFAs and IFA places provided by the private and voluntary sector

Data item	Total number	Private sector	Voluntary sector
Percentage of providers	323	86%	14%
Percentage of places	37,965	91%	9%

See Figure 3

Data for Figure 4: Number of private IFAs and private IFA places as at 31 March 2024, by ownership type

Data item	Total number	Single provider	Small provider	Large provider
Number of IFAs	276	164	37	75
Number of places	34,570	10,060	5,740	18,770

See Figure 4

Data for Figure 5: Proportion of IFAs and IFA places provided by voluntary and private IFAs, by ownership type

Data item	Total number	Single provider	Small provider	Large provider
Private IFAs	276	59%	13%	27%
Private IFA places	34,570	29%	17%	54%
Voluntary IFAs	46	46%	54%	–
Voluntary IFA places	3,345	35%	65%	–

See Figure 5