

Report Price: £1495 | \$1995 | €1800

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

This report looks at the following areas:

- Social worker pressures starting to lead to wider industry issues
- Early intervention services have been most affected by spending cuts, contributing to a rise in children in care

The increase in expenditure between 2014 and 2018 was effectively stimulated by an increase in the number of children requiring social care.

However, the LGA has estimated that English councils will face a £3 billion funding gap by 2025 with many services having already been stripped back or shut down. Over 1,000 children's centres have closed since 2009, while 760 youth centres have shut since 2012.



"Although spending in the industry has risen as a whole, it has failed to keep up with growing demand for services. Alongside rising demand, there has been a reduction in funding for early intervention services. This has highlighted the increasing need for additional finances and for local authorities to ensure that children are protected and placed in the most suitable environments at all times."

– Lewis Cone, B2B Analyst

Buy this report now		
Visit	store.mintel.com	
EMEA	+44 (0) 20 7606 4533	
Brazil	0800 095 9094	
Americas	s +1 (312) 943 5250	
China	+86 (21) 6032 7300	
APAC	+61 (0) 2 8284 8100	

Report Price: £1495 | \$1995 | €1800

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



Table of Contents

OVERVIEW

- What you need to know
- Covered in this Report

EXECUTIVE SUMMARY

- The market
- Strong growth sees market value reach five-year high in 2018

Figure 1: UK market for children's social care, 2014/15-2018/19, (£ million)

 'Other' expenditure rises by highest amount, benefitting from government-led drive for these areas

Figure 2: Segmentation of the UK market for children's social care, by type of care, 2014/15 and 2018/19, (% of total spend)

Rate of growth expected to remain stable

Figure 3: UK market forecast for children's social care, 2019/20-2023/24, (£ million at 2018/19 prices)

 Referrals record second consecutive rise whilst assessments rise for fourth time in 2017/18

Figure 4: Referrals and initial assessments to children's social care, England, 2013/14-2017/18, (unit)

- Companies and brands
- What we think

ISSUES AND INSIGHTS

- Social worker pressures starting to lead to wider industry issues
- The facts
- The implications
- Early intervention services have been most affected by spending cuts, contributing to a rise in children in care
- The facts
- The implications

THE MARKET – WHAT YOU NEED TO KNOW

- Strong growth sees market value reach five-year high in 2018
- 'Other' expenditure rises by highest amount, benefitting from government-led drive for these areas
- Rate of growth expected to remain stable

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Report Price: £1495 | \$1995 | €1800

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



MARKET SIZE

 Strong growth sees market value reach five-year high in 2018

Figure 5: UK market for children's social care, 2014/15-2018/19, (£ million)

Regional analysis

Figure 6: Segmentation of UK market for children's social care, by country, 2014/15-2018/19, (£ million)

Figure 7: Number of children looked after, by country, 2014-18, (number of children)

Figure 8: Number of children looked after in England, by age and gender, as of 31 March, 2014-18, (number of children)
Figure 9: Number of children looked after in Scotland, by age and gender, as of 31 July, 2014-18, (number of children)

Figure 10: Number of children looked after in Wales, by age and gender, as of 31 March, 2014-18, (number of children)

MARKET SEGMENTATION

 'Other' expenditure rises by highest amount, benefitting from government-led drive for these areas

Figure 11: Segmentation of the UK market for children's social care, by type of care, 2014/15-2018/19, (£ million)
Figure 12: Number of children looked after, at 31 March and 31 July, by placement type, UK, 2014-18, (number of children)

Children's homes

Figure 13: UK children's home placements and average annual cost, at 31 March of each year (England, Wales and Northern Ireland) and 31 July of each year (Scotland), 2014/15–2018/19, (number of children and £ 000)

Figure 14: Number of children in children's homes in Scotland, 2014/15-2018/19, (number of children)

Figure 15: Children's homes in England, at 31 March 2018, by region, (number)

Foster care

Figure 16: UK foster care placements and average annual cost, at 31 March of each year (England, Wales and Northern Ireland) and 31 July of each year (Scotland), 2014/15-2018/19, (number of children and £ 000)

Figure 17: Foster placements in England, at 31 March of each year, by placement type and location, 2014-18, (number of children)

Figure 18: UK fostering rates, 2018/19 and 2019/20, (£ per week)

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Report Price: £1495 | \$1995 | €1800

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



Special education

Figure 19: UK market for SEN care, 2014/15–2018/19, (£ million) Figure 20: Students with special educational needs, by school type, England, 2014/15–2018/19, (number of children and % of pupils in each school type)

Figure 21: Students with special educational needs, by academy type, England, 2015–18, (number of children and % of pupils in each academy type)

Independent vs public supply

Figure 22: Segmentation of the UK market for children's social care, by type of provider, 2014/15–2018/19, (% and £ million) Figure 23: Segmentation of the UK market for children's social care, by sector and type of provider, 2014/15–2018/19, (% and £ million)

MARKET FORECAST

- Rate of growth expected to remain stable
 Figure 24: UK market forecast for children's social care, 2019/ 20-2023/24, (£ million at 2018/19 prices)
- Children's homes spend expected to record largest growth
 Figure 25: UK market segmentation forecast for children's
 social care, by type of care, 2019/20-2023/24, (£ million)
- Rising pressure on foster care allowances and fees are reducing the sector's ability to meet demand
- Funds made available to train new social workers

THE IMPACT OF THE ECONOMY

- Annual GDP growth falls to six-year low in 2018 Figure 26: Annual GDP growth rate, 2014-18, (%)
- Bank rate remains at 0.75%

MARKET TRENDS

 London is home to the most social workers but also has the highest staff turnover...

Figure 27: Children's social care workers in England, 2018, (number of FTE workers and % turnover rate)

- ...despite over a third of industry funding going towards the employment of social workers
- Most cuts to spending have occurred in economicallydeprived areas
- Referrals to children's social care rose for the second consecutive time in 2017/18, while completed initial assessments rose for a fourth time

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Report Price: £1495 | \$1995 | €1800

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



Figure 28: Referrals and initial assessments to children's social care, England, 2013/14-2017/18, (number and rate per 10,000 children under 18 years)

Figure 29: Referrals to children's social care, England, by most common source of referral, 2017/18, (%)

Figure 30: Initial assessments to children's social care, England, by most common primary need, 2017/18, (%)

MARKET DRIVERS

- The number of children living in relative poverty is rising
- With Brexit looming ever closer, uncertainty remains around social care processes and the pace of much-needed industry reform
- Co-operation on child protection and law enforcement
- Co-operation on family law matters
- · Criminal records and staff vetting

LEGISLATION

- Children Act
- Children and Families Act
- Care Standards Act
- Children's Homes Regulations
- Social Services and Well-being (Wales) Act
- The Children and Social Work Act

COMPANIES AND BRANDS - WHAT YOU NEED TO KNOW

- New partnerships formed in attempt to reduce the number of vulnerable children in care
- Councils are using data predictive systems to combat abuse cases

INDUSTRY STRUCTURE

- Industry development
- Ofsted reports small rise in the number of homes
- Private sector involvement in the industry reaches a high
 Figure 31: Proportion of all children's homes in England run by
 state or independent organisations, by region, as of 30
 September 2018, (%)
- New partnerships formed in attempt to reduce the number of vulnerable children in care
- Changes in the structure of the industry
 Figure 32: Analysis of the changes in the structure of 'other residential care activities', 2014–18, (number of outlets and businesses)

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Report Price: £1495 | \$1995 | €1800

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



Figure 33: Analysis of the changes in the structure of 'other social work activities without accommodation n.e.c.', 2014-18, (number of outlets and businesses)

Structure by employment

Figure 34: Analysis of the employment structure of 'other residential care activities', 2017 and 2018, (number of employees and outlets)

Figure 35: Analysis of the employment structure of 'other social work activities without accommodation n.e.c.', 2017 and 2018, (number of employees and outlets)

Structure by turnover

Figure 36: Analysis of the financial structure of 'other residential care activities', 2017 and 2018, (£000 and number of businesses)

Figure 37: Analysis of the financial structure of 'other social work activities without accommodation n.e.c.', 2017 and 2018, (£000 and number of businesses)

COMPETITIVE STRATEGIES

- Care leavers' services launched to help smooth transition into adult life
- Councils are using data predictive systems to combat abuse cases

COMPANY PROFILES

- Acorn Care and Education
- Recent company activity
- Financial information

Figure 38: Financial analysis of Acorn Care 1, 2013-17, (£000) Figure 39: Financial analysis of Fostering Solutions, 2013-17, (£000)

- Cambian Childcare
- Recent company activity
- Financial information

Figure 40: Financial analysis of Cambian Childcare Limited, 2013-17, (£000)

- Foster Care Associates
- Recent company activity
- · Financial information

Figure 41: Financial analysis of Foster Care Associates, 2013-17, (£ 000)

- Keys Group
- Recent company activity

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Report Price: £1495 | \$1995 | €1800

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



Financial information

Figure 42: Financial analysis of Keys Care Limited, 2017-18, (£000)

- The National Autistic Society
- Recent company activity
- · Financial information

Figure 43: Financial analysis of The National Autistic Society, 2014-18, (£000)

- National Fostering Agency
- Recent company activity
- · Financial information

Figure 44: Financial analysis of National Fostering Agency, 2013-17*, (£000)

- Priory Education and Children's Services
- Recent company activity
- · Financial information

Figure 45: Financial analysis of Priory Education Services Limited, 2013-17, (£000)

APPENDIX – DATA SOURCES, ABBREVIATIONS AND SUPPORTING INFORMATION

- Abbreviations
- Methodology

FURTHER SOURCES AND CONTACTS

- Trade associations
- Association of Directors of Children's Services Ltd (ADCS)
- CoramBAAF Academy of Adoption and Fostering
- Independent Children's Homes Association (ICHA)
- Nasen
- Nationwide Association of Fostering Providers (NAFP)
- National Children's Bureau (NCB)
- National Portage Association
- Trade magazines
- Become (formerly known as Who Cares?) (Quarterly)
- Child Care (Monthly)
- Children & Young People Now (Fortnightly)
- Social Work News (Quarterly)
- Trade events
- ADCS Annual Conference 2019
- Community Care Live London 2019
- National Children and Adult Services Conference 2019

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100



About Mintel

Mintel is the **expert in what consumers want and why.** As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit mintel.com.