

High fliers

You'll find some new names in our Top 25 table of nursery groups this year, and in the directory too. *Catherine Gaunt* analyses the ups and downs in both size and quality of the chains

The number of new chains featured in our directory of nursery groups in the UK and Ireland continues to grow.

The directory now includes the names of 180 nursery groups, varying in size from small chains with just a few settings to Busy Bees, which remains the largest private provider in the country, with 137 nurseries and offering more than 11,800 places.

This year there are 12 new entries, including *Nursery World* award winners Cranley Nursery, which was named as our Nursery Chain of the Year in September.

Based in Edinburgh, the group has three nurseries, generates a turnover of more than £1 million, and plans to open a fourth nursery.

Mon Ami Children's Day Nurseries, highly commended, and Toybox Day Nurseries, finalists in the same category, are also included for the first time.

All about Children, set up last year by Russell Ford, the former chief executive of Asquith Nurseries, is another new addition. The group currently has four nurseries in Cheltenham, Clapham Junction, Gloucester and Sutton Coldfield and ambitious plans to acquire a further four settings during the next six months.

The largest of our new entries is Blackpool-based Safehands Greenstart Nurseries, sold earlier this month to Simon and Linda Rigby, who were previously minority shareholders in the business.

The business, with settings all based in the north-west of England, encompasses seven nurseries providing 446 places, as well as a national babysitting service and creche provision for venues.

New owner Mr Rigby has the experience of running large companies, after setting up and selling utility services group Spice last year for

25 LARGEST NURSERY CHAINS, UK AND IRELAND

POSITION		NURSERY	SETTINGS	PLACES
2011*	2010†			
1	(1)	The Busy Bees Group	137	11,831
2	(2)	Bright Horizons	132	8,455
3	(4)	Just Learning	71	6,691
4	(3)	Asquith	81	6,173
5	(5)	Kidsunlimited	57	5,222
6	(12)	Pre-School Learning Alliance	110	4,199
7	(6)	Childbase	41	3,497
8	(7)	Casterbridge Nurseries	27	2,809
9	(8)	Bertram Nursery Group	33	2,652
10	(9)	Treetops Nurseries	31	2,236
11	(10)	Giraffe Childcare	21	2,206
12	(11)	The Childcare Corporation	20	2,044
13	(NEW)	The Co-operative Childcare Group	29	2,030
14	(14)	CfBT Education Trust	14	1,389
15	(15)	Cocoon Nurseries	15	1,214
16	(16)	Toad Hall Nursery Group	16	1,070
17	(17)	Happy Days Nurseries	16	1,029
18	(20)	London Early Years Foundation (LEYF)	22	957
19	(19)	Kids 1st Day Nurseries	8	854
20	(NEW)	4Children	18	834
21	(21)	Kinder Nurseries	9	827
22	(18)	For Under Fives	15	820
23	(22)	Tops Day Nurseries	11	798
24	(NEW)	Caring Daycare	10	789
25	(NEW)	Childcare Scotland	9	772

*Figures as of 31 October 2011 †Figures as of 31 October 2010

The top 25 groups have a total of 952 nurseries and 71,382 places

£251m. He is also the founder and director of renewable electricity company Farmgen.

Another of the new medium-sized providers in terms of registered childcare places is Honeybuns Nursery Group based in Staffordshire, which has 294 places spread across three sites. The group's Telford nursery offers 189 places in a purpose-built setting with individual outdoor areas for each room and a new holiday and after-school club. The Stafford nursery, which currently has 59 places, is also being refurbished.

Meanwhile, Chestnut Nursery Schools has seven sites in London and offers 261 places.

IN NUMBERS

In *Nursery Chains*' 2010 edition, the largest nursery groups offered a combined total of 67,707 places across 881 nurseries.

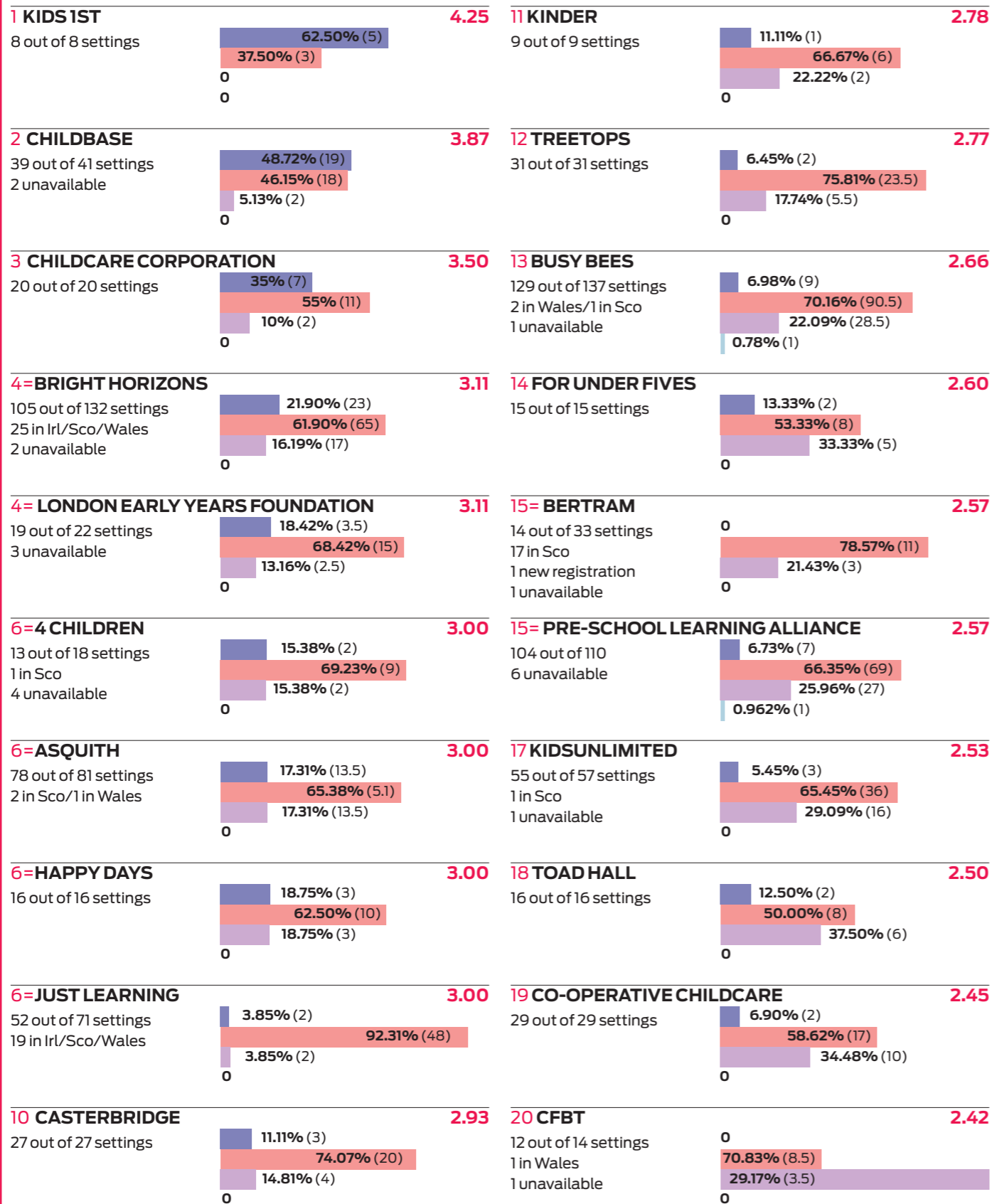
This year, the joint offer from the largest 25 groups in the UK and Ireland is a total of 952 nurseries and 71,382 places.

The Pre-School Learning Alliance has grown over the years to be ►

LEAGUE TABLES

MAKING THE GRADE: HOW DO THE CHAINS MEASURE UP?

LARGEST NURSERY CHAINS OFSTED REPORTS



NOTES ON TABLE

- Table compiled from the latest published Ofsted reports.
- The percentages given are based on the number of nurseries each group owns or manages in England.
- For the purposes of our survey, in order to compare like with like, we have only included nurseries registered and inspected by Ofsted and excluded nurseries in Scotland, Wales, Northern Ireland and Ireland, which fall under different inspection regimes.
- Where Ofsted reports are unavailable, for example if settings are new registrations, we have discounted these.
- As inspections are carried out on average every three years, some of the latest inspection reports are more recent than others. This means that we have also included inspections carried out under the previous Ofsted inspection regime when nurseries were awarded separate grades for education and care. Where nurseries have been inspected for care and education 0.5 has been allocated for each grade.

Table rankings

We allocated points to each setting on the basis of their Ofsted report. For each group, the total number of points was then divided by the number of reports to give a final score.

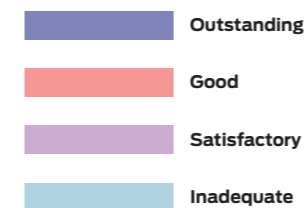
Outstanding: 5 points

Good: 3 points

Satisfactory: 1 point

Inadequate: -2 points

Key



a major early years provider, running nurseries and children's centres throughout England.

Although included in last year's table, it is the first time that we have been able to provide detailed information of the settings owned and managed by the Alliance, with a regional breakdown.

This accounts for the group's leap up the table from 12th to sixth place, offering 4,199 places at 110 nurseries and children's centres.

However, the biggest deal of the year and the highest new entry in our table of 25 is The Co-operative Childcare.

The group has jumped straight into 13th place due to the acquisition in January of the Buffer Bear nursery chain to create the largest nursery group in the UK run along social enterprise and co-operative lines.

Prior to the merger, Co-operative Childcare which is owned and operated by the Midcounties Co-operative, had operated six settings since 2003 and changed its name from Imagine Co-operative Childcare in 2009.

The new combined group is made up of 29 nurseries offering just over 2,000 places spread through England, including children's centres and NHS and workplace nurseries.

The Co-operative Childcare is spending £1.8m on refurbishing all its settings and re-branding the former Buffer Bear nurseries.

In an interview with *Nursery World* in June, chief executive Linda Knight said the group's aim was to become one of the top five nursery chains in the country, in size and quality.

'We want to fill the gap between nurseries in Manchester and the Mid-Counties, and are looking for possible acquisitions of nursery chains or new builds,' she said.

Busy Bees has also added to its portfolio this year with a number of new nurseries. Deals include the acquisition in July of Q Day Nurseries, with settings in Corby, Farnborough and Ashford.

Another new entry, 4Children, is now the 20th largest provider with 18 settings that it either owns or manages, many at children's centres.

Earlier this year, the children's charity took over 16 children's centres in Wiltshire, adding to the 25 children's centres it already managed.

The other entries nudging into the bottom of the table are Caring Daycare with ten nurseries and Childcare Scotland with nine settings.

Kids 1st takes top spot for quality, with the majority of nurseries 'outstanding'

MAKING THE GRADE

This year, we have analysed the Ofsted reports of the largest 20 nursery groups to find out how the big chains measure up, not just in size but in quality of provision.

In order to make direct comparisons between the groups, we have only included nurseries that fall within Ofsted's remit, that is early years settings in England.

For each group we have calculated the percentage of nurseries that are outstanding, good, satisfactory or inadequate.

In addition, we have devised a points-based rating system for the first time to determine a top 20 table for quality comprising the largest groups with nurseries in England (see box).

We have excluded both Giraffe and Cocoon Nurseries on the basis that all their settings are in Ireland, but included Kinder Nurseries and For Under Fives, who are in 21st and 22nd position in our table of the largest nursery groups.

We have included Bertram Nursery Group – despite its large number of Scottish nurseries – as 16 of its 33 nurseries are in England.

The first time we carried out this exercise in 2009, Childbase came top for having the highest proportion of outstanding grades among the biggest nursery providers.

It is still doing well, and is in second place, but has been knocked off the top spot by Kids 1st.

In just eight years, this group, based in the north-east, has expanded steadily to own and manage eight nurseries offering more than 850 places and is notable for its excellent quality of provision.

Five of the group's purpose-built nurseries are outstanding and the remaining three have been judged as good by Ofsted. Kids 1st also won *Nursery World's* Nursery Chain of the Year award in 2009.

Childbase is in second place with 19 outstanding nurseries and 18 rated good – equivalent to 95 per cent of its settings achieving these grades.

Childcare Corporation is close behind in third place, with 90 per cent of its nurseries either outstanding or good.

In joint fourth place for quality are Bright Horizons and London Early Years Foundation.

Finally, four groups share the next spots – 4Children, Asquith, Happy Days and Just Learning.