

# Top ranking

As well as the usual big-hitters, this year's table of the 25 largest nursery chains in the UK features an influx of fresh faces, with many entries growing rapidly in the past year. By *Catherine Gaunt*

**T**his year's league table of the UK's biggest nursery chains reveals some new faces, with some interesting models of development. While well-known names remain firmly ensconced in the top third of the table, there are several new entries further down.

The big story from this year's league table is the inclusion for the first time of two nursery groups that are expanding very fast through franchising their brands. This operational model – whereby the group allows local owners to buy the right to run the setting under its name with a package of ongoing support and training – enables rapid expansion.

Two of the five largest nursery groups joining this year's table operate in this way. There is big growth in the franchising sector: between them, Monkey Puzzle and Banana Moon provide 4,428 places across 68 settings, and many more nursery franchises are planned.

Offering 2,273 places across 32 settings, Monkey Puzzle inches into this year's top ten in ninth position.

While the company started as a family business opening its first setting as Ladybird Day Nursery in Cambridgeshire in 1978, it now has a network of more than 30 nurseries.

Meanwhile, Banana Moon began just ten years ago with two of its own settings but sold them both to the Co-operative Childcare in 2012, before branching out using the franchising model. Since 2010 the business has grown rapidly through the franchise route to 36 settings and has big ambitions, with 18 nurseries planned for 2016 and up to 100 in the UK in the next ten years.

While not yet large enough for inclusion in the top 25, Evolution Childcare, formerly Kids Academy, also plans to grow this way, via franchises at home and abroad, alongside opening more of its own settings.

## 25 LARGEST NURSERY CHAINS IN THE UK

POSITION	2015*		NURSERY	SETTINGS	PLACES
	2015*	2014^			
1	(1)		The Busy Bees Group	238	21,735
2	(2)		Bright Horizons	207	16,715
3	(3)		Asquith Day Nurseries and Pre-schools	82	6,304
4	(4)		Pre-school Learning Alliance	122	4,472
5	(5)		Childbase Partnership	46	3,979
6	(6)		The Co-operative Childcare	47	3,499
7	(7)		Treetops Nurseries	49	3,320
8	(8)		Bertram Nursery Group	39	3,219
9	(NEW)		Monkey Puzzle Nurseries	32	2,273
10	(9)		4Children Nurseries	41	2,217
11	(NEW)		Banana Moon	36	2,155
12	(10)		Kiddi Caru Day Nurseries	20	2,128
13	(NEW)		YMCA	38	1,999
14	(NEW)		Children 1st	18	1,841
15	(13)		London Early Years Foundation	34	1,615
16	(15)		Kids Planet	15	1,424
17	(11)		Mama Bear's Day Nursery	21	1,420
18	(14)		Tops Day Nurseries	16	1,312
19	(12)		All About Children	13	1,290
20	(17)		Kids 1st	11	1,178
21	(NEW)		Just Childcare	20	1,174
22	(18)		Happy Days	16	1,156
23	(16)		Magic Nurseries	17	1,096
24	(19)		Toad Hall Nursery Group	16	1,056
25	(23)		Tiny Toez	14	980

\*Figures as of 30 October 2015 ^ Figures as of 30 November 2014

While nurseries may not spring to mind when thinking of the YMCA, the worldwide organisation operates a growing number of family support services in the UK, including nurseries, as well as out-of-school and holiday childcare. In 13th place, the group currently provides just shy of 2,000 childcare places at 38 nurseries and pre-schools across the country.

Just one position below is Children 1st, the family business started by Margaret Mason in 1988, which now operates 18 nurseries, largely in Derbyshire and Nottinghamshire.

The final new entry, in 21st position, is Just Childcare, co-founded by David Johnson in 2004, a former group managing director at Nord Anglia Education. It owns 20 nurseries in the North West and Yorkshire, and plans to more than double that number during the next year.

This year's top 25 nursery groups provide a combined total of 89,557 registered childcare places spread across 1,208 settings.

The chains in the top half of the table have seen some growth in the past 12 months. ▶

# LEAGUE TABLES

## MAKING THE GRADE: HOW DO THE CHAINS MEASURE UP?

### 20 LARGEST NURSERY CHAINS OFSTED REPORTS

<b>1 (1) KIDS 1ST</b> 10 out of 11 settings 1 new registration	<b>5.00</b>	<b>11 (11) BUSY BEES</b> 216 out of 238 settings 16 in Scotland 4 in Wales 2 new registrations	<b>3.20</b>
<b>2 (=2) KIDS PLANET</b> 13 out of 15 settings 2 new registrations	<b>4.38</b>	<b>12 (NEW) MONKEY PUZZLE</b> 22 out of 32 settings 1 in Scotland 9 new registrations	<b>3.09</b>
<b>3 (4) CHILDBASE</b> 46 out of 46 settings	<b>4.17</b>	<b>13 (=16) THE CO-OPERATIVE CHILDCARE</b> 46 out of 47 settings 1 new registration	<b>3.04</b>
<b>4 (NEW) CHILDREN 1ST</b> 13 out of 18 settings 5 new registrations	<b>4.07</b>	<b>=14 (10) ALL ABOUT CHILDREN</b> 11 out of 13 settings 2 new registrations	<b>3.00</b>
<b>5 (12) LEYF</b> 26 out of 34 settings 8 new registrations	<b>3.53</b>	<b>=14 (20) TOPS</b> 16 out of 16 settings	<b>3.00</b>
<b>6 (9) ASQUITH</b> 74 out of 82 settings 4 in Scotland 1 in Wales 3 new registrations	<b>3.48</b>	<b>16 (NEW) YMCA</b> 31 out of 38 settings 7 new registrations	<b>2.94</b>
<b>7 (8) BRIGHT HORIZONS</b> 183 out of 207 settings 13 in Scotland 5 in Ireland 6 new registrations	<b>3.28</b>	<b>17 (=16) PRE-SCHOOL LEARNING ALLIANCE</b> 112 out of 122 settings 10 new registrations	<b>2.80</b>
<b>8 (15) TREETOPS</b> 49 out of 49 settings	<b>3.24</b>	<b>18 (18) 4CHILDREN</b> 37 out of 41 settings 1 in Scotland 3 new registrations	<b>2.78</b>
<b>=9 (13) KIDDICARU</b> 19 out of 20 settings 1 new registration	<b>3.21</b>	<b>19 (19) BERTRAM</b> 16 out of 39 settings 23 in Scotland	<b>2.19</b>
<b>=9 (7) MAMA BEAR'S</b> 19 out of 21 settings 2 new registrations	<b>3.21</b>	<b>20 (NEW) BANANA MOON</b> 18 out of 36 settings 1 in Scotland 17 new registrations	<b>2.11</b>

## NOTES ON TABLE

- Compiled from the latest published Ofsted reports.
- The percentages given are based on the number of published Ofsted reports.
- 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.
- We have noted where Ofsted reports are unavailable, for example if settings are new registrations.
- Where Ofsted says a newly registered setting has an associated provider, we have used the grade for that setting. Where there is a nursery at the same postcode that is not linked in this way by Ofsted, we have not used the grade, except where the chain itself explicitly links the two settings on its website.

## Table rankings

We allocated points to each setting on the basis of its Ofsted report. For each group, the total number of points was then divided by the number of reports to give a final score. Red figures in brackets show last year's position.


**Outstanding:** 5 points

**Good:** 3 points

**Requires improvement:** 1 point

**Inadequate:** -2 points

## Key

	Outstanding
	Good
	Requires Improvement
	Inadequate

Ofsted grades supplied by:



In July, Bright Horizons acquired the Active Learning group of nine nurseries, based in London and Surrey.

Asquith remains the third-largest nursery group. It has completed six acquisitions and openings in recent months, increasing its places by an extra 449 and taking its offer to more than 6,300 places.

Social enterprise group the London Early Years Foundation added a further seven community and children's centre nurseries to its operations.

Townmead Community Nursery, LEYF's 34th nursery in London, is a partnership with Shepherds Bush Housing Association. It is the group's first in Hammersmith and Fulham.

Kids Planet bought a group of three nurseries in Liverpool earlier this year to increase its presence in the North West.

In 2015, the 25 largest groups offer a total of 9,383 more places and 125 more settings than last year's table.

This year's directory includes the details of 179 nursery groups and 17 new entries. They include the Scottish chain Kirktonholme Early Learning and Childcare, which has nine nurseries offering just under 800 places. And in Wales, Schoolhouse Daycare, based in Swansea, operates seven nurseries, providing around 450 places.

## OFSTED REPORTS

For the fifth consecutive year, our unique Ofsted table gives a measure of the quality of provision at the biggest groups operating in England.

Data provider Watchsted has compiled the grades of the 20 largest chains, and we have analysed

the findings using our points-based rating system.

Congratulations must go to Kids 1st, in the top spot for the fifth year running, achieving the highest score possible – all of the group's inspected nurseries have achieved 'outstanding' Ofsted grades.

Kids Planet remains in second place, but the group has improved its grades, with nine of its settings now rated outstanding.

Childbase is in third place, up one position from last year, with three more nurseries achieving outstanding grades, and the rest rated good.

New entry to the league table Children 1st has eight outstanding nurseries, and four graded good.

LEYF must also be congratulated for jumping to fifth place, up from 12th position in last year's quality of provision table.

Across the 20 groups, this year's average score is 3.45, up from 3.21 last year.

This upward trend is a good sign that quality is continuing to rise among the 20 biggest nursery groups.

Moreover, an analysis of our Ofsted ratings table shows that the 20 biggest groups are rated higher overall than the average for all nurseries in England.

Of the settings owned or managed by the 20 largest groups, 89.8 per cent are good or outstanding.

This is a higher proportion than Ofsted's latest figures for all nurseries, which shows that as of 31 March this year, 87 per cent of providers on non-domestic premises were judged good or outstanding in their most recent inspection. ■

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