BRIDGEHEAD

CQC INTELLIGENCE REPORT · NOVEMBER 2026

# The State of Adult Social Care in *England*

A data-driven analysis of the 30,641 adult social care services currently registered in England.





Sourced from the CQC Syndication API
Bridgehead Communications Ltd



*When a care service in England fails, the cause is most often the same: a failure of* **leadership**. *In more than 98% of services rated below Good, it is how they are led that falls short.*

*The frontline holds the line on dignity and compassion.*
**The gap is at the top.”**

EXECUTIVE SUMMARY

# Where care fails, and *why*

England's adult social care sector comprises 30,641 currently registered locations delivering residential, nursing and domiciliary services to millions of older people and adults with disabilities. Of these, 23,665 carry a current CQC rating: 16,399 made by inspection and 7,266 under the assessment model the CQC introduced in late 2023. (A further 36,440 locations the CQC has registered since 2010 have closed and are excluded.)

One finding runs through the entire dataset: where services fail, they fail on leadership. Among the 3,685 services rated below Good, 98.3% carry a failing Well-led rating — more than any other measure the CQC assesses. Four in five rated services are Good, a genuine achievement, but the tail that falls short is defined less by funding or frontline effort than by governance and management.

This report draws entirely on the Bridgehead CQC Monitor: a live database ingesting every published inspection report, with structured analysis applied to the narrative text of 2,829 reports to date (809 of them for currently registered services).

**Why it matters**

Leadership is the clearest signal of care quality, and the most actionable. It defines good services and fails in almost every poor one, which makes it the single most effective lever for improvement.

**98.3%**

OF POOR SERVICES FAIL WELL-LED

Among 3,685 below-Good services, leadership fails more often than any other domain.

**15.6%**

RATED BELOW GOOD

3,685 of 23,665 rated services are Requires Improvement or Inadequate.

**30,641**

REGISTERED LOCATIONS

Every currently registered adult social care service in England, from the CQC Syndication API.

### HOW THE 23,665 RATED SERVICES BREAK DOWN

| Rating | Locations | Share of rated |
|---|---|---|
| Outstanding | 1,115 | 4.7% |
| Good | 18,865 | 79.7% |
| Requires Improvement | 3,519 | 14.9% |
| **Inadequate** | **166** | **0.7%** |

EXECUTIVE SUMMARY

# Eight findings from the *data*

- **Well-led is the defining failure domain**
  Among 3,685 below-Good locations, 98.3% have a failing Well-led rating — more than any other key question. Where care fails, it fails on leadership.

- **15.6% of rated services fall below Good**
  3,519 services are rated Requires Improvement and 166 Inadequate — together 15.6% of all rated locations.

- **The ratings backlog is systemic**
  51% of services — 15,701 locations — have never been inspected or assessed, or not in over five years. New ratings are recovering (3,310 in 2025), but a structural gap remains.

- **Nursing homes carry the highest risk**
  Nursing homes have the highest below-Good rate at 19.9% — against 16.5% in residential and 13.0% in home care.

- **Geography concentrates disadvantage**
  Luton (36.1%), Bexley (32.9%) and Medway (32.1%) lead on below-Good rates; Norfolk, a large county, has 29.4%. One council, Merton, has no rated service below Good.

- **Leadership separates good from poor**
  98.3% of below-Good services fail on Well-led. Leadership is discussed in every inspection report, good and poor alike — what differs is the verdict on it.

- **Dignity distinguishes the best**
  Dignity and respect appear in 87% of Good and Outstanding reports and 32% of below-Good ones — the clearest single marker of quality, in a sample weighted to poor and since-closed services.

- **The South East carries the largest volume**
  5,625 registered locations, more than any other region, ahead of London (3,980) and the North West (3,659).

THE THROUGH-LINE

## *Leadership and governance is the fault line running through the* entire dataset.

It fails in more than 98% of below-Good services and holds up in 94% of Good and Outstanding ones. Every improvement programme, commissioning decision, and oversight reform must begin there.

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PART ONE · THE SECTOR

# *Four in five are good — but the* **tail is large**

Of 23,665 rated services, 15.6% fall below Good. This section maps how England's care is rated, by status and by care type.

THIS SECTION COVERS

The full rating split and location-status breakdown

AND SETS OUT

How inadequate rates differ across care types

RATING DISTRIBUTION

# How England's care services are *rated*

Of 30,641 currently registered locations, 23,665 carry a current CQC overall rating: 16,399 made by inspection and 7,266 under the assessment model introduced with the Single Assessment Framework in late 2023. The remainder are awaiting first inspection or assessment, or have been inspected but not yet rated.




## LOCATION STATUS BREAKDOWN

| Status | Locations | % of total |
|---|---|---|
| Good | 18,865 | 61.6% |
| No current rating (either model) | 6,976 | 22.8% |
| Requires Improvement | 3,519 | 11.5% |
| Outstanding | 1,115 | 3.6% |
| Inadequate | 166 | 0.5% |
| **TOTAL** | **30,641** | **100%** |

## RATINGS BY CARE TYPE

| Service type | Total | Outstanding | Good | Req. Imp. | Inadequate | Inad. rate |
|---|---|---|---|---|---|---|
| Domiciliary | 15,708 | 486 | 8,234 | 1,238 | 60 | 0.6% |
| Residential | 10,384 | 428 | 7,583 | 1,518 | 65 | 0.7% |
| Nursing | 4,529 | 200 | 3,038 | 761 | 41 | 1.0% |

**Nursing homes carry the highest risk**

Nursing homes have the highest below-Good rate (19.9%), against 16.5% residential and 13.0% home care. Inadequate ratings are rare in every type (166 services in all).

Inadequate rate is a share of rated services. A further 20 locations are not yet categorised by service type and are excluded from this table.

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PART TWO · THE DOMAINS

# *Five questions, one* fault line

Every inspection rates five key questions. Leadership failure is near-universal among poor services; Safe failure carries the most direct risk to residents.

THIS SECTION COVERS

Domain failure rates among below-Good services

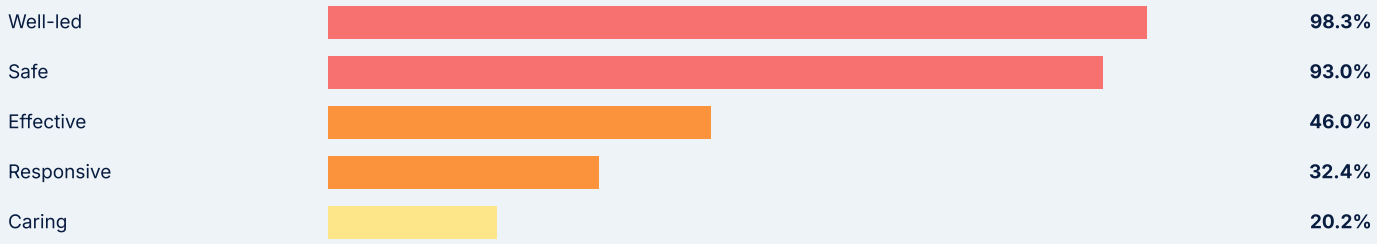
AND SETS OUT

The full key-question ratings breakdown

KEY QUESTION ANALYSIS

# The five domains behind every *rating*

Every assessment rates a service against five key questions. Among the 3,685 locations rated below Good, the chart shows how often each domain is also failing.




Share of the 3,685 below-Good locations with a failing (RI or Inadequate) rating in each domain.

## KEY QUESTION RATINGS — ALL RATED LOCATIONS

| Key question | Outstanding | Good | Req. Imp. | Inadequate | Total rated |
|---|---|---|---|---|---|
| Safe | 120 | 19,460 | 3,875 | 208 | 23,663 |
| Effective | 405 | 21,298 | 1,858 | 85 | 23,646 |
| Caring | 1,292 | 21,559 | 756 | 32 | 23,639 |
| Responsive | 1,199 | 21,044 | 1,338 | 49 | 23,630 |
| Well-led | 1,065 | 17,709 | 4,659 | 231 | 23,664 |

**Why Safe failure matters most to residents**

While Well-led failure is the most common, Safe carries the most direct risk: 208 Inadequate and 3,875 Requires Improvement for Safe — 4,083 services where medication, risk and infection control are the recurring concerns.

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PART THREE · GEOGRAPHY

# *Where quality* concentrates

Care quality in England is geographically uneven. The ratings show where; they cannot show why.

THIS SECTION COVERS

Regional rating patterns and the largest authorities

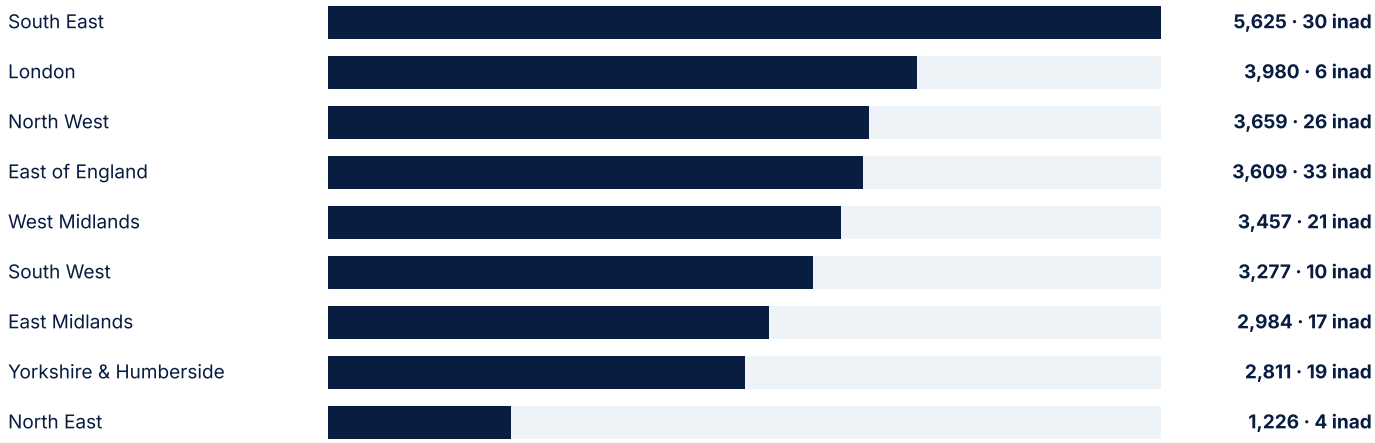
AND SETS OUT

Quality hotspots and concern areas

REGIONAL & LOCAL AUTHORITY BREAKDOWN

# Where quality *concentrates*

The geographic distribution of care quality is highly uneven. The South East carries the largest absolute volume; the West Midlands and East Midlands the highest proportional below-Good rates; the North East the lowest.




## LARGEST LOCAL AUTHORITIES BY VOLUME

| Local authority | Total |
|---|---|
| Kent | 946 |
| Essex | 907 |
| Hampshire | 871 |
| Surrey | 732 |
| Lancashire | 719 |
| Birmingham | 639 |
| Hertfordshire | 609 |
| West Sussex | 592 |

## LOCAL AUTHORITY EXTREMES

**Highest below-Good rates**

Luton (36.1%), Bexley (32.9%), Medway (32.1%), Southwark (31.6%), Bracknell Forest (31.4%); Norfolk at scale, 128 of 435 rated services (29.4%). Min. 50 registered and 30 rated locations.

**Lowest below-Good**

One council, Merton, records no rated service below Good (87 rated). A further handful sit below 3%: Gateshead (2.2%, 91 rated) and Hammersmith and Fulham (2.7%, 37).

THE REAL DIVIDE IS MIDLANDS, NOT NORTH VS SOUTH

## *Ranked by services below Good, the weak spot is the* Midlands *— not the North.*

The West Midlands (21.0% of rated services below Good) and East Midlands (19.0%) are the weakest regions. The North East is the strongest in England (7.4%), and the three northern regions and four southern ones perform almost identically overall (14.7% vs 14.3%). Inadequate ratings are rare everywhere, 166 services in all.

04



PART FOUR · OVERSIGHT

# *The 51% in the* inspection backlog

The Single Assessment Framework replaced routine inspections with ongoing assessments, but more than half of services have not been inspected or assessed in five years. Older ratings are ageing proxies for real quality.

THIS SECTION COVERS

How long ago services were last inspected or assessed

AND SETS OUT

What the backlog means for sector risk

THE INSPECTION BACKLOG

# When was each service last *inspected or assessed?*

The Single Assessment Framework, introduced in late 2023, has fundamentally changed the inspection landscape. Routine ratings inspections gave way to ongoing assessments, and published ratings fell sharply before recovering. More than half of registered services have still not been looked at in five years.

THE HEADLINE

## *51% of services have not been inspected or assessed in over five years — or ever.*

Only 6,037 locations (20%) have been inspected or assessed within the last two years. 6,883 have no inspection or assessment on record, more than nine in ten of them registered since 2022.




The 8,818 services last inspected or assessed more than five years ago are an invisible risk population — a service rated Good in 2018 may have changed ownership, management and staffing many times since.

For commissioners, operators and investors, CQC ratings must now be supplemented with live intelligence. The Bridgehead CQC Monitor tracks every published inspection the day it is released, flagging rating changes and new Inadequate services immediately.

05



PART FIVE · THE EVIDENCE

# *What inspectors* actually find

Structured analysis of 2,829 inspection reports reveals the recurring themes behind ratings — and what separates good care from poor.

THIS SECTION COVERS

Theme frequency across analysed reports

AND SETS OUT

Good vs poor homes, theme by theme

EXTRACTED THEMES · GOOD VS POOR

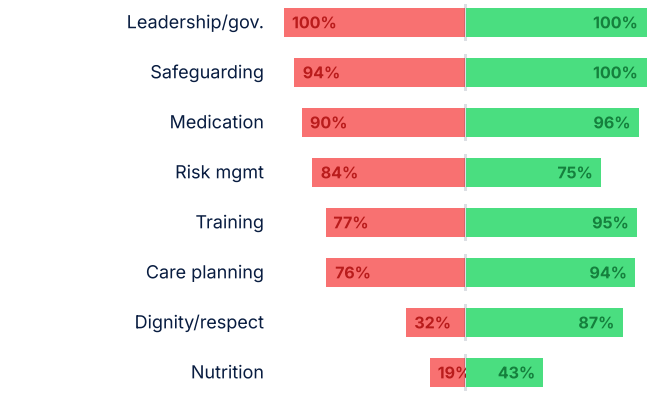
# What the reports *actually say*

The CQC Monitor applies structured analysis to every published report, extracting the recurring themes that drive ratings. 2,829 reports had been analysed by 6 November 2026, with poorly-rated services prioritised; 809 (29%) are for currently registered services, so the sample is weighted to historical and closed services.

### THEME FREQUENCY ACROSS 2,829 REPORTS




### POORLY-RATED (RED) VS GOOD/OUTSTANDING (GREEN)




**Dignity is the clearest differentiator**

Cited in 87% of good-home reports vs 32% of poor ones — a 55-point gap, the largest in the dataset.

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PART SIX · THE REGULATOR

# *Ratings fell by more than four fifths, then* began to recover

Published ratings fell by more than four fifths between 2019 and 2024 as the Single Assessment Framework arrived, then recovered under the new model. The record is refreshing again, but slowly.

THIS SECTION COVERS

How published ratings have changed since 2016

AND SETS OUT

What the recovery has and has not fixed

THE FALL AND RECOVERY IN RATINGS

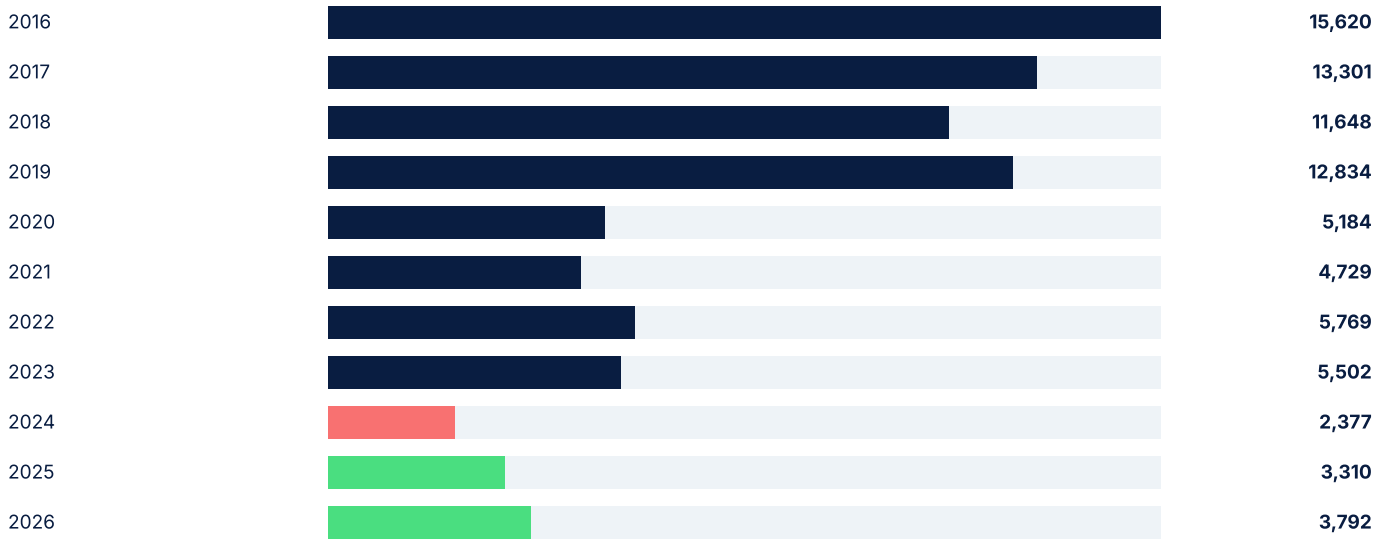
# Ratings fell by more than *four fifths*

Ratings published for adult social care services peaked at 15,620 in 2016 and were still 12,834 in 2019. They fell to 2,377 in 2024 as the Single Assessment Framework arrived, and have since recovered to 3,310 in 2025 and 3,792 so far in 2026.

THE MECHANISM

## *From 12,834 ratings in 2019 to 2,377 in 2024, then back up.*

Published ratings fell 81% between 2019 and 2024. Since then the assessment model has produced more in each quarter, from 461 in the second quarter of 2024 to 1,248 in the third quarter of 2026. At the 2025 pace it would take about 9 years to rate the whole register once.




Published ratings per calendar year, both rating models, each rating counted once (assessment ratings dated by the CQC's write-up). 2026 is to 5 November. Source: CQC Syndication API, as at 6 November 2026. This series needs the live database and is not updated by the register refresh.

The fall reflects a deliberate change in how the regulator works, not simply a backlog. Under the Single Assessment Framework the CQC moved away from routine, comprehensive inspections towards ongoing assessments of each service, and the first full year of the new method (2024) was the slowest.

The record is refreshing again, but unevenly: 39.3% of rated services still hold a rating published more than five years ago, and 22.8% hold none. For families, commissioners and operators, the signal of quality is more current than it was in 2024 but still frozen for a large part of the register — which is why continuous, independent monitoring matters.

CONCLUSIONS & FULL DATA

# What the data *concludes*

1 **The sector is predominantly good — but the tail is large**

79.7% of rated services are Good; 15.6% — some 3,685 services — are below it.

2 **Leadership is the problem and the solution**

98.3% of poor services fail Well-led. Every improvement programme must begin with governance.

3 **Ratings are recovering, but the register is still out of date**

With 51% neither inspected nor assessed for 5+ years or ever, and 23% holding no current rating, real-time public oversight is still structurally limited.

4 **Nursing homes carry disproportionate clinical risk**

At 19.9% below Good, nursing homes carry the highest risk of any care type, among the most vulnerable residents.

5 **Person-centred care must be central to reform**

Dignity, not compliance, is what separates good from poor. Culture-blind programmes will not move the dial.

## APPENDIX — REGIONAL RATING BREAKDOWN

| Region | Total | Good | Req.Imp. | Inadequate | Inad.% |
|---|---|---|---|---|---|
| South East | 5,625 | 3,357 | 677 | 30 | 0.7% |
| London | 3,980 | 2,487 | 318 | 6 | 0.2% |
| North West | 3,659 | 2,276 | 430 | 26 | 0.9% |
| East of England | 3,609 | 2,047 | 449 | 33 | 1.2% |
| West Midlands | 3,457 | 1,948 | 520 | 21 | 0.8% |
| South West | 3,277 | 2,303 | 277 | 10 | 0.4% |
| East Midlands | 2,984 | 1,685 | 409 | 17 | 0.8% |
| Yorkshire & Humberside | 2,811 | 1,834 | 363 | 19 | 0.8% |
| North East | 1,226 | 924 | 76 | 4 | 0.4% |
| Other / not stated | 13 | 4 | 0 | 0 | 0.0% |
| **TOTAL** | **30,641** | **18,865** | **3,519** | **166** | **0.7%** |

Data: CQC Syndication API · Register as at 6 November 2026 · Platform: Bridgehead CQC Monitor · Report date: November 2026
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