

CQC INTELLIGENCE REPORT · JULY 2026

The State of Adult Social Care in *England*

A data-driven analysis of all 65,339 registered adult social care services in England.

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*When a care service in England fails, the cause is most often the same: a failure of **leadership**. In 97% 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.”

Where care fails, and *why*

England's adult social care sector comprises 65,339 registered locations delivering residential, nursing and domiciliary services to millions of older people and adults with disabilities. Of these, 32,538 carry a current CQC rating.

One finding runs through the entire dataset: where services fail, they fail on leadership. Among the 6,799 services rated below Good, 97.2% carry a failing Well-led rating — more than any other measure the CQC assesses. Three in four 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.

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.

97.2% OF POOR SERVICES FAIL WELL-LED Among 6,799 below-Good services, leadership fails more often than any other domain.	20.9% RATED BELOW GOOD 6,799 of 32,538 rated services are Requires Improvement or Inadequate.	65,339 REGISTERED LOCATIONS Every adult social care service in England, tracked daily from the CQC Syndication API.
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HOW THE 32,538 RATED SERVICES BREAK DOWN

Rating	Locations	Share of rated
Outstanding	1,112	3.4%
Good	24,627	75.7%
Requires Improvement	5,455	16.8%
Inadequate	1,344	4.1%

Eight findings from the *data*

- **Well-led is the defining failure domain**

Among 6,799 below-Good locations, 97.2% have a failing Well-led rating — more than any other key question. Where care fails, it fails on leadership.

- **1 in 5 rated services falls below Good**

5,455 services are rated Requires Improvement and 1,344 Inadequate — together 20.9% of all rated locations.

- **The inspection void is systemic**

81% of services — 52,923 locations — have never been inspected or not in over five years. A structural gap, not a backlog.

- **Nursing homes carry the highest risk**

Nursing homes have a 5.9% Inadequate rate — more than double the 2.5% rate in domiciliary care.

- **Geography concentrates disadvantage**

Walsall (35.5%) and Medway (34.8%) lead on below-Good rates; Norfolk, a large county, has 34.2% of rated services below Good. London has the lowest inadequate rate.

- **Leadership is cause and consequence**

Leadership/governance features in virtually every report — good homes are defined by its strength, poor homes by its failure.

- **Dignity distinguishes the best**

Good homes cite dignity and respect in 87% of reports; poor homes in only 32% — the clearest single marker of quality.

- **The South East carries the largest volume**

11,900 locations including 238 Inadequate — more absolute quality risk than any other region.

THE THROUGH-LINE

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

It fails in 97% of poor services and defines every good one. Every improvement programme, commissioning decision, and oversight reform must begin there.

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PART ONE · THE SECTOR

Three in four are good — but the tail is large

Of 32,538 rated services, 20.9% 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

How England's care services are *rated*

Of 65,339 registered locations, 32,538 carry a current CQC overall rating. The remainder are awaiting first inspection, inspected but not yet rated, or registered under the Single Assessment Framework, which has sharply reduced published ratings since late 2023.



FULL LOCATION STATUS BREAKDOWN

Status	Locations	% of total
Good	24,627	37.7%
Unrated (no inspection yet)	23,671	36.2%
No published rating	8,919	13.7%
Requires Improvement	5,455	8.3%
Inadequate	1,344	2.1%
Outstanding	1,112	1.7%
Inspected but not rated	179	0.3%
Insufficient evidence to rate	32	0.0%
TOTAL	65,339	100%

RATINGS BY CARE TYPE

Service type	Total	Outstanding	Good	Req. Imp.	Inadequate	Inad. rate
Domiciliary	34,086	493	11,017	2,130	352	2.5%
Residential	22,485	410	10,177	2,184	692	5.1%
Nursing	8,633	207	3,390	1,135	298	5.9%

Nursing homes carry the highest clinical risk

The nursing Inadequate rate (5.9%) is 2.4× the domiciliary rate — systemic quality pressure in the settings serving the most medically complex residents.

Inadequate rate is a share of rated services. A further 135 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.

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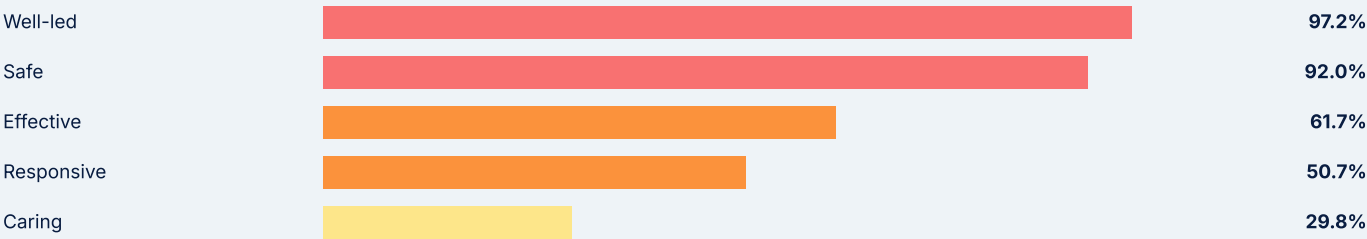
Domain failure rates among below-Good services

AND SETS OUT

The full key-question ratings breakdown

The five domains behind every *rating*

Every inspection rates a service against five key questions. The overall rating is driven by the worst-performing domain. Among the 6,799 locations rated below Good, the chart shows how often each domain is also failing.



Share of the 6,799 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	110	25,024	5,989	1,435	32,558
Effective	381	27,397	4,054	679	32,511
Caring	1,222	29,185	1,820	272	32,499
Responsive	1,428	27,234	3,363	475	32,500
Well-led	1,098	22,940	6,946	1,567	32,551

Why Safe failure matters most to residents

While Well-led failure is the most common, Safe carries the most direct risk: 1,435 Inadequate and 5,989 Requires Improvement for Safe — 7,424 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 — a function of commissioning culture, funding and market maturity, not chance.

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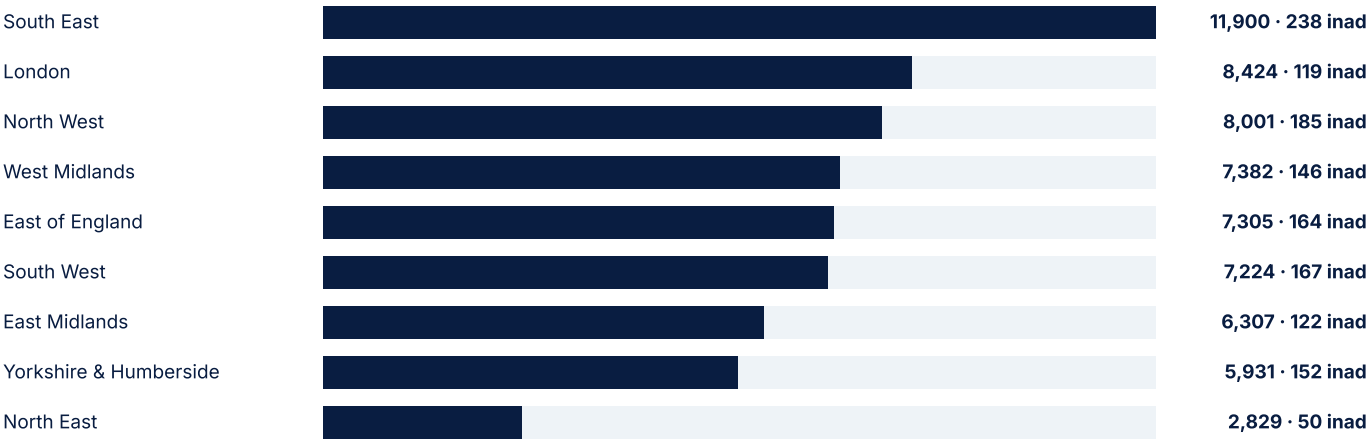
Regional rating patterns and the largest authorities

AND SETS OUT

Quality hotspots and concern areas

Where quality concentrates

The geographic distribution of care quality is highly uneven. The South East carries the largest absolute volume; Yorkshire & Humberside the highest proportional inadequate risk; London the lowest inadequate rate despite its density.



LARGEST LOCAL AUTHORITIES BY VOLUME

Local authority	Total
Kent	2,073
Hampshire	1,832
Essex	1,714
Surrey	1,609
Lancashire	1,480
Birmingham	1,391
West Sussex	1,192
Hertfordshire	1,175

LOCAL AUTHORITY EXTREMES

Highest below-Good rates

Walsall (35.5%), Medway (34.8%), Slough (34.6%), Luton and Portsmouth (34.3%); Norfolk at scale, 209 of 612 rated services (34.2%). Highest Inadequate rate: Halton (13.6%), Portsmouth (12.4%), Torbay (12.0%) — over 3x the 4.1% national rate. Min. 50 rated locations.

Highest Outstanding / lowest below-Good

South Gloucestershire (13.0%), Trafford (9.8%), Suffolk (9.7%), Devon (9.2%, also leads on count with 55). Darlington (5.8%) and Richmond upon Thames (6.1%) post the lowest below-Good rates at scale.

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 (25.4% of rated services below Good) and East Midlands (23.8%) are the weakest regions. The North East is the strongest in England (14.4%), and North and South perform almost identically overall (20.2% vs 19.8%). Severe failure is more dispersed: Yorkshire & Humberside carries the highest Inadequate rate of any region.

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PART FOUR · OVERSIGHT

The 81% in the **inspection void**

The Single Assessment Framework has left most services without a current rating. Published ratings are increasingly stale proxies for real quality.

THIS SECTION COVERS

How long ago services were last inspected

AND SETS OUT

What the void means for sector risk

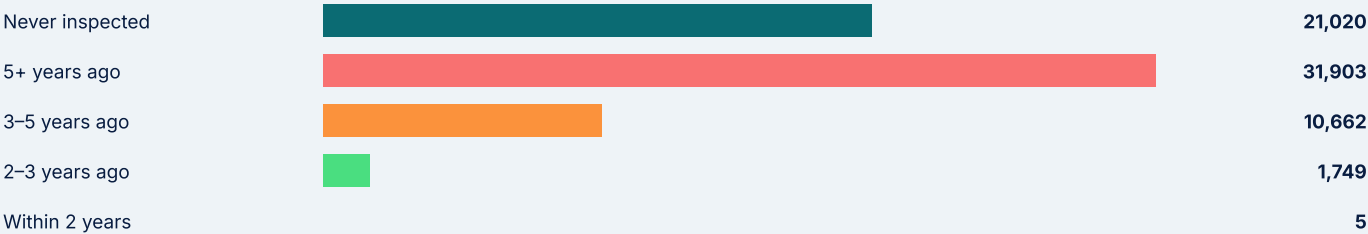
When was each service last *inspected*?

The Single Assessment Framework, introduced in late 2023, has fundamentally changed the inspection landscape. Published ratings fell sharply, and most registered services now operate without a current rating.

THE HEADLINE

81% of services have not been inspected in over five years — or ever.

Only 5 locations have been inspected within the last two years. 21,020 have never received a CQC inspection since registration.



The 31,903 services last inspected 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.



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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

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 have been analysed to date, with poorly-rated services prioritised.

THEME FREQUENCY ACROSS 2,829 REPORTS

Leadership/governance		2,820
Safeguarding		2,689
Medication		2,577
Risk management		2,340
Training		2,250
Care planning		2,215
Staffing		2,039
Recruitment		1,917
Infection control		1,199
Dignity/respect		1,131

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

Leadership/gov.	100%	100%
Safeguarding	94%	100%
Medication	90%	96%
Risk mgmt	84%	75%
Training	77%	95%
Care planning	76%	94%
Dignity/respect	32%	87%
Nutrition	19%	43%

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.

PART SIX · THE REGULATOR

The inspections have all but stopped

Published rated inspections have collapsed since the Single Assessment Framework arrived in late 2023. The void is widening, not clearing.

THIS SECTION COVERS

How published inspection activity has fallen since 2016

AND SETS OUT

Why the public record is freezing in place

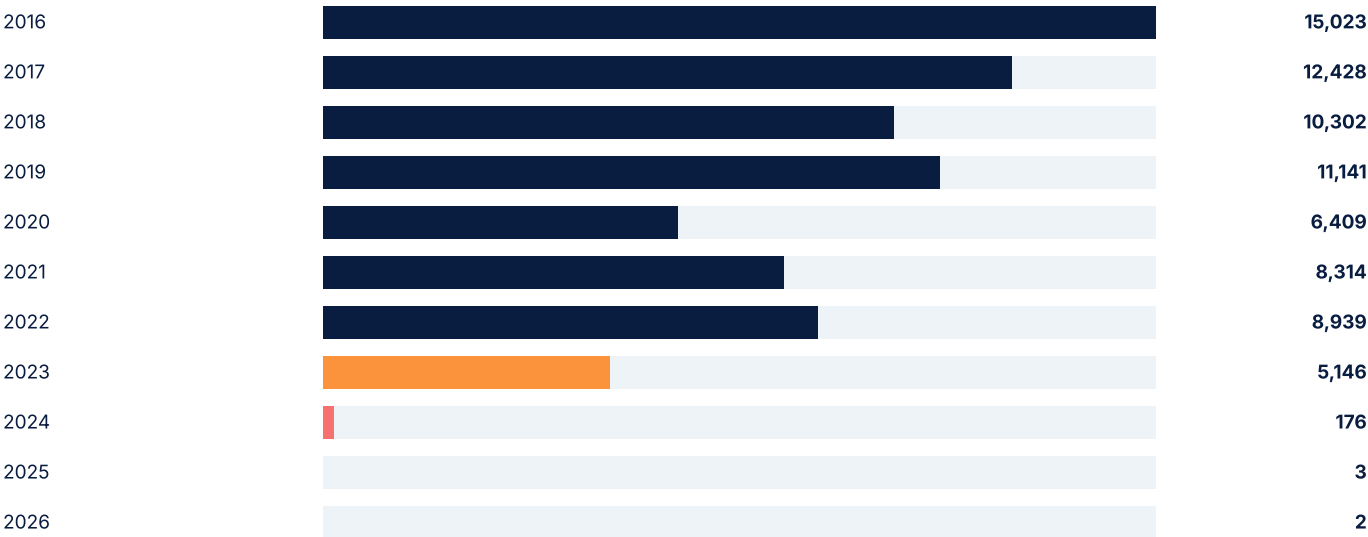
Why the void keeps *growing*

The inspection void is not static. It widens every month, because the flow of new published ratings has almost entirely stopped. Published, rated inspections of adult social care services have fallen from roughly 9,000 a year to almost none.

THE MECHANISM

From 8,939 rated inspections in 2022 to just 176 in 2024.

Since the Single Assessment Framework replaced routine ratings inspections in late 2023, only 181 adult social care services received a newly published rated inspection across the whole of 2024, 2025 and 2026 combined.



Published, rated adult social care inspections per calendar year. Source: CQC Syndication API.

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 that produce a published overall rating, towards a continuous but far less visible model of assessment.

The effect on the public record is stark: the ratings on the register are ageing, and almost nothing new is replacing them. For families, commissioners and operators, the single most important signal of quality is frozen in time — which is precisely why continuous, independent monitoring now matters more than ever.

What the data concludes

- 1

The sector is predominantly good — but the tail is large

75.7% of rated services are Good; 20.9% — some 6,799 services — are below it.
- 2

Leadership is the problem and the solution

97.2% of poor services fail Well-led. Every improvement programme must begin with governance.
- 3

The inspection regime is not fit for current capacity

With 81% unrated or years-stale, real-time public oversight is structurally limited.
- 4

Nursing homes carry disproportionate clinical risk

A 5.9% Inadequate rate among the most vulnerable residents is not acceptable.
- 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	11,900	4,471	956	238	2.0%
London	8,424	2,962	632	119	1.4%
North West	8,001	3,230	652	185	2.3%
West Midlands	7,382	2,637	776	146	2.0%
East of England	7,305	2,745	637	164	2.2%
South West	7,224	2,943	477	167	2.3%
East Midlands	6,307	2,223	608	122	1.9%
Yorkshire & Humberside	5,931	2,228	557	152	2.6%
North East	2,829	1,185	160	50	1.8%
Other / not stated	36	3	0	1	2.8%
TOTAL	65,339	24,627	5,455	1,344	2.1%

Data: CQC Syndication API · Platform: Bridgehead CQC Monitor · Report date: July 2026
Bridgehead Communications Ltd · Company No. 12736276 · bridgeheadcommunications.com