

Childcare Survey 2024

Tuesday 11 June, 12pm to 1.15pm

Welcome and housekeeping

- This event is being recorded
- Please keep yourself on mute during the presentation
- Clarification questions in the chat
- All slides will be shared with attendees

Agenda

- Background
- Key findings
 - Cost of childcare
 - Is there enough childcare?
 - Provider pressures in Scotland and Wales
 - Childcare expansion in England
- Q&A with our expert panellists

Background

- 23rd annual childcare survey
- Sent to all local authorities in Great Britain
- Responses collected between November '23 and February '24
- 89% response rate
- Report published in March

Cost of childcare in 2024

- A part-time nursery place (25 hours per week) for a child under two now costs an average of **£158 per week in Great Britain**, up 7% since last year.

	Nursery		Childminder	
	Under-twos	Two-year-olds	Under-twos	Two-year-olds
Great Britain	£157.68	£151.72	£132.20	£131.52
England	£159.61	£153.69	£132.85	£131.48
Scotland	£125.42	£120.15	£133.07	£139.18
Wales	£139.94	£137.83	£121.38	

Cost increases since 2023

Price increases since 2023 for 25 hours of nursery for children under five

	Children under two	Two-year-olds	Three- to four-year-olds using universal funded entitlement
Great Britain	7.4%	6.2%	7.2%
England	7.7%	6.4%	7.3%
Scotland	6.9%	6.8%	N/A
Wales	3.6%	3.0%	5.7%

Price increases since 2023 for 50 hours nursery for children under five

	Children under two	Two-year-olds	Three- to four-year-olds using 30-hour funded entitlement
Great Britain	5.9%	3.9%	4.7%
England	5.9%	3.8%	4.6%
Scotland	6.5%	5.9%	7.1%
Wales	5.6%	5.2%	4.8%

Cost of extra hours for three- and four-year-olds

After taking account of universal entitlements

- England – 15 hours a week
- Wales – 10 hours a week
- Scotland – 1140 hours a year

	25 hours a week (after entitlements)	50 hours a week (after entitlements)
England	£63.54	£120.93
Wales	£55.95	£102.81
Scotland	N/A	£96.74

Additional charges - England

- Considerable uncertainty, half of local areas do not have a clear picture
- For those able to answer, this is a widespread practice

Proportion of providers making additional charges under funded early education entitlements, England			
	30h for three- to four-year-olds	15h for three- to four-year-olds	15h for disadvantaged two-year-olds
All or almost all	19%	16%	9%
Around three quarters	12%	12%	5%
Around half	14%	16%	6%
Around a quarter	2%	2%	9%
None, or very few	2%	2%	19%
Not known	50%	50%	53%

Childcare sufficiency

- Decrease in sufficiency across all areas.
- Only 34% of English local authorities have enough childcare for **parents working full-time**, down 14% since last year.
- In Scotland it is 21%, a decrease of 4%.
- In Wales, only 5% of local authorities report having enough childcare for this group, down 20%.

Childcare sufficiency

- 6% of English local authorities said they have enough **childcare for disabled children**
- In Wales, the figure is 5%.
- In Scotland, the figure is 25%.

Childcare sufficiency - England

Childcare sufficiency defined as 'Yes: in all areas' in England, for 2024 and 2023 (% local authorities)		
	2024	2023
Children under two	35%	50%
Two-year-old funded entitlement	45%	62%
Three- and four-year-old 15-hour entitlement	62%	73%
Three- and four-year-old 30-hour entitlement	55%	66%
5- to 11-year-olds after school	14%	25%
12- to 14-year-olds after school	7%	13%
Disabled children	6%	18%
Parents working full time	34%	48%
Parents working atypical hours	9%	15%
Families living in rural areas	16%	30%

Childcare sufficiency - Regional differences, England

Childcare sufficiency defined as 'Yes: in all areas' in English regions for early years (% local authorities)

	Children under two	Two-year-old funded entitlement	Three- and four-year-old 15-hour entitlement	Three- and four-year-old 30-hour entitlement
East Midlands	33%	44%	44%	44%
East of England	18%	27%	45%	55%
London, inner	36%	45%	82%	73%
London, outer	27%	40%	73%	60%
North East	67%	83%	83%	67%
North West	45%	55%	73%	68%
South East	33%	44%	56%	56%
South West	21%	29%	36%	14%
West Midlands	23%	31%	54%	54%
Yorkshire and Humberside	40%	40%	60%	47%

Childcare sufficiency - Regional differences, England

Childcare sufficiency defined as 'Yes: in all areas' in English regions for other groups (% local authorities)

	5- to 11-year-olds after school	12- to 14-year-olds after school	Disabled children	Parents working full time	Parents working atypical hours	Families in rural areas
East Midlands	22%	11%	11%	22%	11%	11%
East of England	9%	0%	9%	9%	9%	0%
London, inner	9%	9%	9%	36%	0%	N/A
London, outer	13%	13%	0%	33%	13%	N/A
North East	17%	17%	8%	42%	17%	17%
North West	14%	0%	0%	45%	5%	5%
South East	22%	11%	6%	44%	6%	22%
South West	14%	0%	7%	21%	0%	14%
West Midlands	8%	0%	0%	31%	0%	0%
Yorkshire and Humberside	13%	13%	13%	33%	27%	7%

Current pressures on providers - Scotland

As in the Childcare Survey 2023, we again asked local authorities about current pressures on providers – this time focusing on Scotland and Wales

- The cost of energy, staff, food and rent were each cited by 24% of local authorities in Scotland as factors decreasing sustainability.
- 24% of Scottish local authorities also cited the cost of recruiting and retaining staff as decreasing sustainability, and 24% cited parents' and carers' abilities to pay for places as decreasing sustainability.
- Views about the funding rates for the 1,140 hours offer in Scotland are mixed; 12% of local authorities report that the funding rates are increasing sustainability, however 18% of local authorities report that the funding rates are decreasing provider sustainability.

Current pressures on providers - Wales

- The vast majority of local authorities who responded (89%) say that the costs associated with recruiting and retaining staff is decreasing provider sustainability in Wales.
- More than half of Welsh local authorities also say that that the cost of energy (67%), food (61%) and rent (56%) is decreasing sustainability, as well as parents' and carers' ability to pay for places (61%) and changes in demand for places (56%).
- Almost half of local authorities in Wales report that the funding rates for the funded Childcare Offer (47%) are decreasing sustainability.

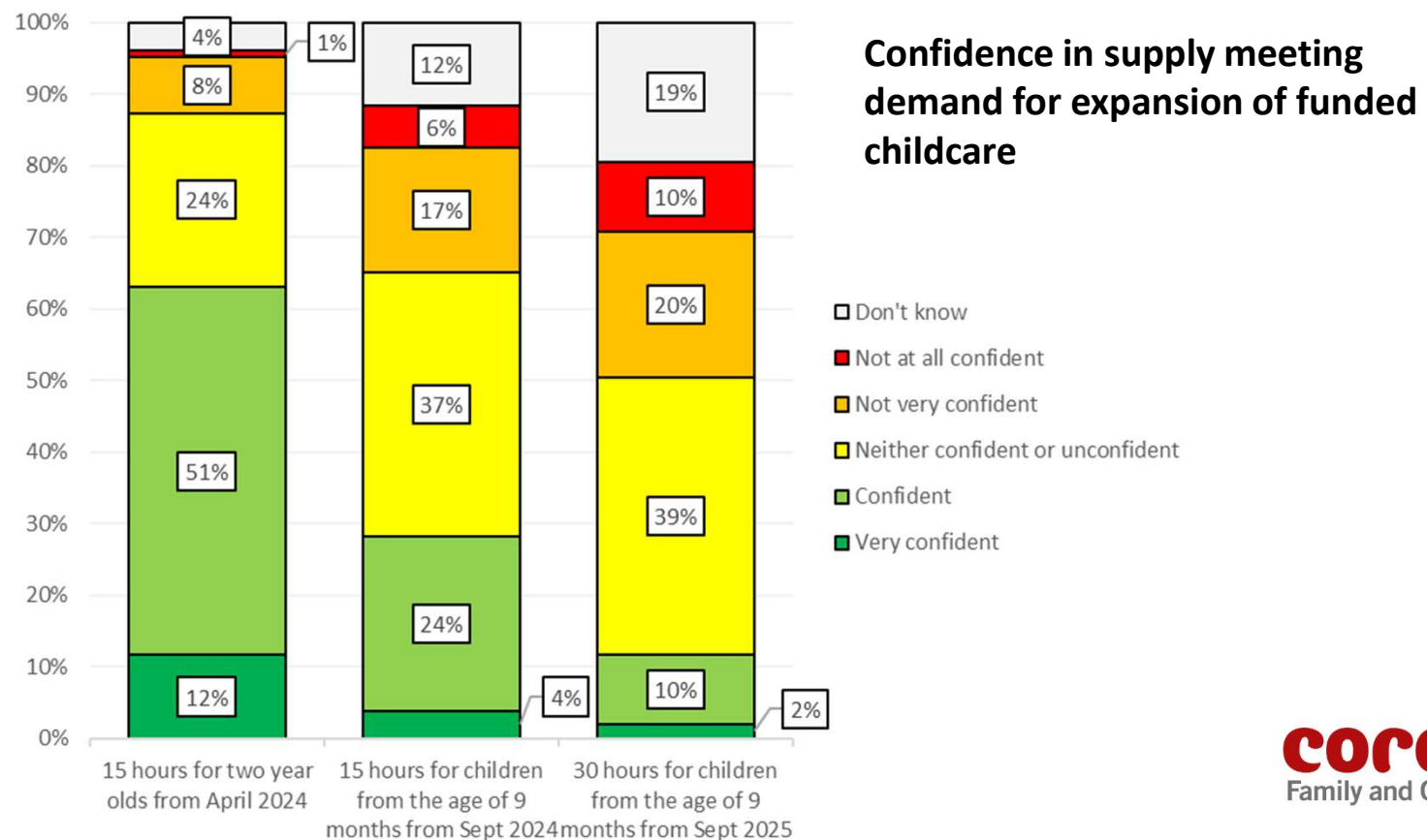
Severe financial difficulties – the childminder story

- 40% of local authorities in Scotland and 63% in Wales were concerned that childminders in their area are at risk of leaving the profession due to severe financial difficulties.
- Of those, 14% in Scotland and 19% in Wales expected this for a high number of childminders – more than a quarter.

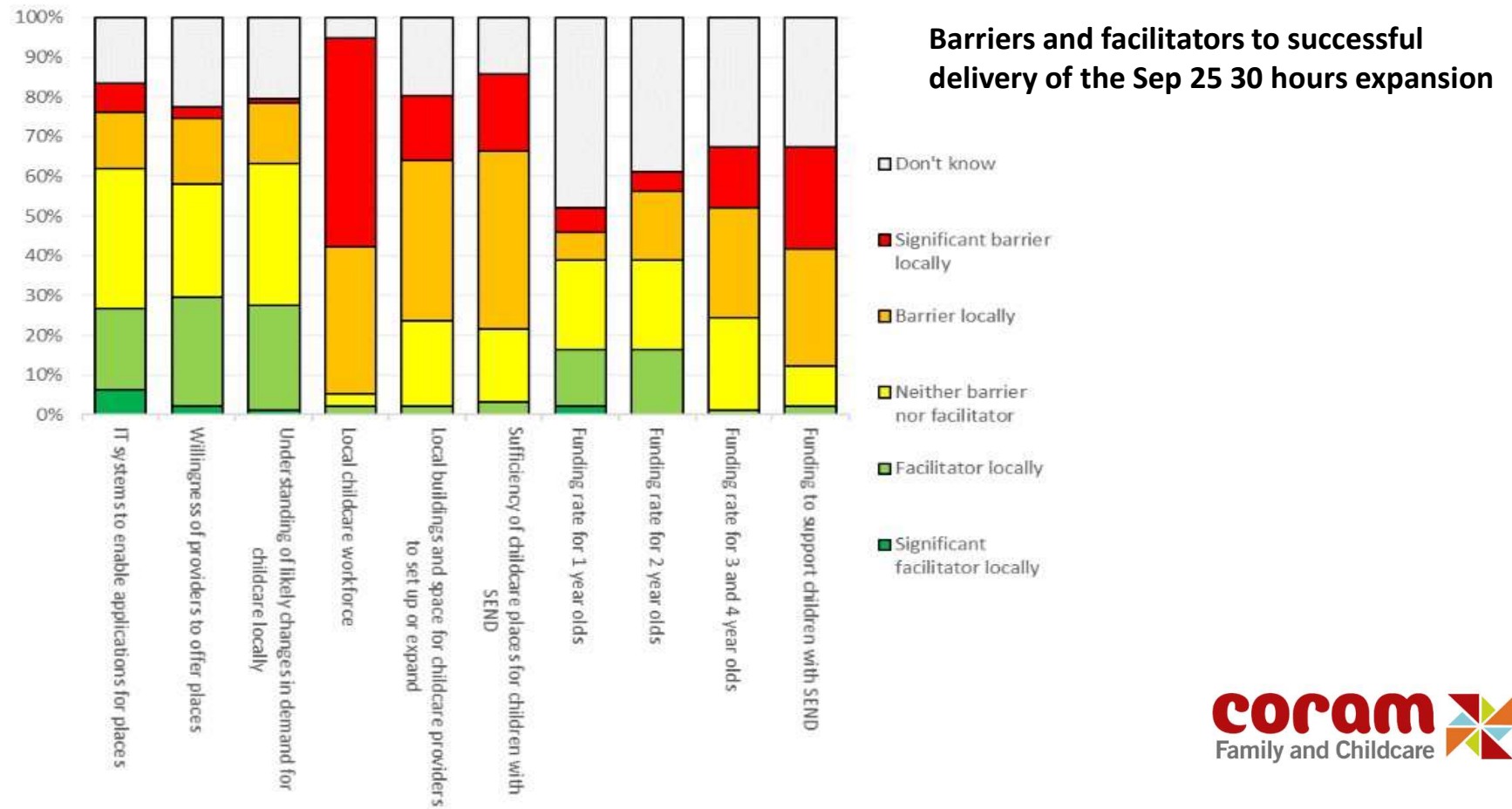
Expansion of funded early education entitlements in England - confidence

- Prior to the roll-out, 63% of local authorities said they were 'confident' or 'very confident' that there will be enough places to meet demand for the April 2024 expansion (15 funded hours for two-year-olds).
- Only 28% said the same about the expansion from September 2024 (15 funded hours from nine months).
- This falls to just 12% for the September 2025 expansion (30 funded hours from nine months).

Expansion of funded early education entitlements in England - confidence



Expansion of funded early education entitlements in England – facilitators and barriers



Q & A

Our panel:

Jane van Zyl, Working Families

June O'Sullivan OBE, LEYF

Maryam Makki, Reading Borough Council