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Family and Childcare

Childcare Survey

2024

Lydia Hodges, Sam Shorto and
Emma Goddard

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About this report

This report is the 23rd annual Childcare Survey. It is based on surveys from local authorities in England, Scotland and Wales, which were returned to Coram Family and Childcare between November 2023 and February 2024. We also produce the Holiday Childcare Survey, which is published annually before the school summer holidays. Previous reports are available from our website: coramfamilyandchildcare.org.uk

Note on terminology: we use childcare to refer to all forms of care which are paid for by families or the government, not provided by parents or carers and outside of compulsory schooling. Early education is one type of childcare and refers to children below school age. We believe that all activities in a child's life have a role in their education and development, but use the term childcare throughout for simplicity.

About Coram Family and Childcare

Coram Family and Childcare works to make the UK a better place for families by bringing together what we learn from our 'on the ground' parent-led programmes and our research to campaign for solutions that parents want and need. We focus on childcare and early years to make a difference to families' lives now and in the long term. Before August 2018, we were known as the Family and Childcare Trust.

Executive summary

This year will see the biggest change in childcare and early education funding and policy since 2017, with significant additional investment in support for parents with childcare costs. Announced in the Spring Budget 2023, this April marks the first of three phases rolling out this additional support. It is very welcome to see a greater focus on the importance of childcare in enabling parents and carers to work, and increased awareness of the role of early education can play in improving children's outcomes.

The Childcare Survey 2024 is our 23rd annual survey. Yet again it finds significant increases in the cost of childcare across the board. It shows that costs has increased by 7.4% across Great Britain and comes at a time of sustained cost of living pressures for many families.

For the first time, our survey looks at the additional costs charged to families accessing funded places for their children; a practice which is clearly disallowed in the statutory guidance but which many providers rely on to remain sustainable in the face of increases to their costs such as the national minimum wage. This practice is widespread and risks excluding the most disadvantaged families, who may not be able to meet these costs.

The survey also finds significant decreases in the availability of childcare across all categories since last year, including dramatic decreases in many areas. Of particular concern is the marked drop in the availability of childcare for children under two, which has fallen to just 35%. These findings raise clear questions about the ability of the current system to provide for the expansion of funded entitlements that will be introduced over the next 18 months; concerns which local authorities echoed in response to additional questions included in this year's survey.

Whilst our survey has consistently found low provision for parents working atypical hours, this has fallen to only 9% this year. Similarly, the frequently low provision for families in rural areas has fallen to just 16%. These gaps illustrate a patchy system, where families do not have equal access to the opportunity for work and improved income and some children miss out on that vital opportunity for learning and play that can really boost their outcomes now and in the future.

Most worrying of all is the sharp decline in childcare availability for disabled children, which now sits at only 6%. This has dropped to just a third of last year's figure, which was already unacceptably low. This shocking finding means that disabled children will be placed at further disadvantage when starting school, having missed out on vital years of early education and the opportunity to connect and learn with peers.

With local authorities and providers now preparing for the first of the funded entitlement expansions, our report finds substantial variation in local authorities' confidence in meeting demand, and a lack of clarity on what that demand might be. Whilst there is strong appetite in the sector to offer places, far more barriers than facilitators were identified, with 90% of local authorities particularly concerned about the skills of a workforce in a sector already struggling to recruit and retain staff.

Historically, as universal funded childcare increases, provision for children with SEND decreases and children from disadvantaged background has dropped. We share sector concerns that the unintended consequence of the increase in funded childcare will result will be further decrease in provision for children with SEND or from disadvantaged backgrounds.

7.4%

**RISE IN COST SINCE 2023,
FOR A PART-TIME CHILDCARE
PLACE FOR UNDER-TWOS IN A
NURSERY IN GREAT BRITAIN**

£157.68

**THE AVERAGE COST OF A
PART-TIME CHILDCARE
PLACE FOR UNDER-TWOS IN A
NURSERY IN GREAT BRITAIN**

Price of childcare

- The prices of childcare continues to rise, as it has done every year since our survey began, with even bigger jumps this year. The average cost of a part-time childcare place for a child under two in a nursery in Great Britain is now £157.68 per week (£7,569 per year) and £151.72 for a two-year-old (£6,264 per year).
- This year's price increase since 2023 for a part time (25 hours) place in a nursery for children in Great Britain is 7.4% for children aged under two and 6.2% for two-year-olds.

Table 1 – Prices of 25 hours nursery for children aged under five, and price increases since 2023

	Under-twos			Two-year-olds		
	2024	2023	Price increase	2024	2023	Price increase
Great Britain	£157.68	£148.63	7.4%	£151.72	£144.01	6.2%
England	£159.61	£150.89	7.7%	£153.69	£146.00	6.4%
Scotland	£125.42	£118.14	6.9%	£120.15	£114.81	6.8%
Wales	£139.94	£135.67	3.6%	£137.83	£134.92	3.0%

- Some working parents of three- and four-year-olds in England and Wales are eligible for 30 hours of funded childcare a week during term time. If they need to pay for 20 extra hours to take this up to a full time place (50 hours a week) the average weekly price in a nursery is £120.93 in England, a 4.1% increase since last year, and £102.81 in Wales, a 4.8% increase.
- All three- and four-year-olds in Scotland can access 1,140 hours of funded childcare per year. This equates to 30 hours a week during term-time, or about 22 hours if spread across the year. For a full-time place in a nursery (50 hours a week) in Scotland, families are paying on average £96.74 per week if they are receiving 30 hours of funded childcare and paying for 20 hours.
- This year, the average price of an after-school club for a week is £69.14 across Great Britain, or £2,697 a year during term time (39 weeks). The average price of a childminder to 6pm for a week is £75.87 across Great Britain, or £2,959 a year during term time. This is a price increase of 2.6% and 4.9% respectively.



Is there enough childcaee?

- We asked local authorities across England, Scotland and Wales to report whether they had sufficient provision across a range of types of childcare in terms of: 'Yes: in all areas', 'Yes: in some areas', 'No' or 'Data not held or cannot tell'.

Table 2 - Childcare sufficiency defined as 'Yes: in all areas' in England, for 2024 and 2023 (% LAs)

	2024	2023	Percentage point change
Children under two	35%	50%	-14%
Two-year-old free entitlement	45%	62%	-18%
Three- and four-year-old 15 hour entitlement	62%	73%	-11%
Three- and four-year-old 30 hour entitlement	55%	66%	-11%
5- to 11-year-olds after school	14%	25%	-10%
12- to 14-year-olds after school	7%	13%	-6%
Disabled children	6%	18%	-12%
Parents working full time	34%	48%	-14%
Parents working atypical hours	9%	15%	-7%
Families living in rural areas	16%	30%	-14%

- England has seen reductions in availability of childcare in all categories, with a significant 18 percentage point decrease for the two-year-old free entitlement (down to 45%).
- There are marked reductions for all pre-school childcare. For children under two, availability has decreased to 35% (down by 14 percentage points). Availability of the three- and four-year-old 15 hour entitlement has fallen to 62% (down by 11 percentage points) and availability of the three- and four-year-old 30 hour entitlement has fallen to 55% (down by 11 percentage points).
- Sufficiency of childcare for disabled children is now extremely low at 6%, a decrease of 12 percentage points.
- Other reductions of note in England relate to childcare for parents working full time (a decrease of 14 percentage points, down to 34%) and for families living in rural areas (also a decrease of 14 percentage points, down to 16%).
- In Scotland, availability of the three- and four-year-old 1,140 hour entitlement is relatively high at 67%, but has decreased by 30 percentage points since last year.
- In Wales, there are still some gaps in availability, with no local authorities reporting enough childcare right across the borough for 12- to 14- year-olds after-school, parents working atypical hours and families living in rural areas.



Additional costs charged to parents

- The majority of local authorities are unclear about the extent to which providers in their area make additional charges to parents.
- For those local authorities that were able to answer definitely, a third said that all or almost all providers have additional charges for three- and four-year-olds claiming both the 30 hour and 15 hour entitlements. That figure becomes 91% when we include those who said that half or more providers make those charges.

Table 3 - Proportion of providers making additional charges under funded early education entitlements, England ('Not known' answers removed)

	Three- and four-year-old 30 hour entitlement	Three- and four-year-old 15 hour entitlement	Two-year-old free entitlement
All or almost all	39%	33%	18%
Around three quarters	23%	25%	10%
Around half	28%	33%	13%
Around a quarter	5%	5%	18%
None, or very few	5%	5%	40%

Requirement to buy additional hours

- Over half of all local authorities do not know how many providers in their area require parents to buy additional hours when taking up funded early education entitlements, which is disallowed in statutory guidance*.
- In the remaining local authorities, this practice is used by around half or more providers (22% for the three- and four-year-old 30 hour entitlement, 20% for the three- and four-year-old 15 hour entitlement, and 6% for the 15 hour entitlement for disadvantaged two-year-olds).



*Source: <https://www.gov.uk/government/publications/early-education-and-childcare--2>

Table 4 - Proportion of providers requiring families to also buy additional hours when taking up funded early education entitlements ('Not known' answers removed)

	Three- and four-year-old 30 hour entitlement	Three- and four-year-old 15 hour entitlement	Two-year-old free entitlement
All or almost all	3%	3%	2%
Around three quarters	10%	7%	2%
Around half	8%	10%	3%
Around a quarter	15%	18%	5%
None, or very few	63%	62%	89%

How ready are local authorities for the expansion of funded childcare?

- While the majority of local authorities are confident there will be enough places for the 15 hour expansion for two-year-olds in April 2024, only 28% of local authorities are confident in meeting demand for the September 2024 expansion, when eligible children will be able to access 15 hours from the age of nine months.
- Confidence rates in meeting demand for the September 2025 expansion, when the entitlement for eligible children (from nine months to starting school) will increase from 15 hours to 30 hours, was lowest, at only 12%.
- While just under a third of local authorities identified facilitators to the expansion delivery, many more barriers were identified:
 - The vast majority (87%) raised the local childcare workforce as a barrier.
 - 63% are concerned about sufficiency for children with SEND, and 57% about funding for children with SEND.
 - Local buildings and space were seen as a barrier for 55% of local authorities.

Current pressures on childcare providers in Scotland and Wales

- This year we focused exclusively on current economic pressures affecting the business sustainability of childcare provision in Scotland and Wales.
- In Scotland, 24% of local authorities cite the cost of recruiting and retaining staff as decreasing sustainability and 24% also cite parents' and carers' abilities to pay for places as decreasing sustainability.
- In Wales, 89% of local authorities report that the costs associated with recruiting and retaining staff is decreasing provider sustainability and 72% report that the cost of staff in general is decreasing sustainability.
- Providers in Scotland and Wales have taken steps to help with business sustainability. In Scotland, 19% of local authorities report that providers have increased prices charged to parents. In Wales, 78% of local authorities report that providers have increased prices charged to parents.

Areas for action

The findings from our survey show a system that is not working for children and families. Increasing costs and insufficient availability of childcare across Great Britain means parents and carers do not have equal access to work and children do not have equal access to childcare, even though we know how key this can be in boosting children's outcomes, especially those from more disadvantaged backgrounds. A shocking lack of provision for disabled children will result in children with the greatest need being most at risk of missing out.

For the recent investment to truly improve the lives of children and be the game changer it has the potential to be for many parents and carers, it must come with reform of our childcare system. We call on Government to ensure the upcoming expansions do not result in greater inequalities, and instead facilitate a sufficient, high-quality childcare system that values staff, enables all parents and carers to work, and is available to all children, no matter their needs or where they live.



Immediate actions

- **Re-allocate the underspend from Tax-Free Childcare** to other parts of the childcare system.
- **Extend the current 30 hours funded early education entitlements to parents in training or education, and migrant parents.**
- **Increase funding for children with SEND and simplify the funding application process** to ensure those with the greatest need are not excluded from vital early education opportunities.
- **Bring the early years pupil premium in line with the primary pupil premium** to decrease the attainment gap between disadvantaged children and their peers.
- **Appoint a dedicated Chief Early Years Officer**, with a seat at the table and able to advocate for the profession at the heart of Government.

Long-term actions

- **Create a workforce strategy** to address the pressing issues of staff recruitment, retention and skills. Early years practitioners should have training, pay and career paths that recognise their value.
- **Agree a funding settlement** that guarantees the true cost of provision, and sets out the conditions of receiving that funding, including quality supplements or SEND provision, and is monitored and updated annually.
- **Simplify and streamline the childcare offer** to families, with a single scheme that follows children from end of parental leave until the end of primary school.
- **Introduce a right to early education**, with a guarantee of a funded childcare place for all children regardless of their or their parent or carers' background, bringing early years in line with schools.



Introduction

This is the 23rd annual Childcare Survey. It is based on surveys from local authorities in England, Scotland and Wales, that were returned to Coram Family and Childcare between November 2023 and February 2024. A total of 184 local authorities returned data generating a response rate of 89%. The methodology section at the end of the report provides further information on how the survey was conducted and the findings analysed.

The report consists of four main sections: 1) the prices of childcare, 2) the availability of childcare, 3) current pressures on providers in Scotland and Wales, 4) additional charges by providers in England and 5) readiness for the expansion of funded entitlements. Information on the price and availability of childcare is broken down by nation and region (in England), by the age of child and the type of childcare. Based on the survey data, we make recommendations for reform.

Our Childcare Survey looks at the price of childcare before the support to help pay for childcare (Tax-Free Childcare or Universal Credit) is taken into account, as this allows us to track price changes over time and recognises that different families will also be eligible for different levels of support depending on their circumstances. However, for three- and four-year-olds, we ask about the price of childcare assuming that they are using the funded childcare entitlement.

This report is published at a time of great change in the childcare system. The 2023 Spring Budget announced a significant increase in funding for childcare and major expansions to funded early education entitlements. More parents will now be entitled to access funded childcare, from earlier in their children's lives.

From April 2024, eligible working parents of two-year-olds will receive 15 funded hours per week of funded childcare. From September 2024, eligible working parents will get 15 funded hours from nine months until their children start school, and from September 2025, they will get a total of 30 funded hours from nine months until the start of school.

We welcome this investment, but our report reveals significant concerns from local authorities and childcare providers about delivering the expansion, on top of challenges already faced delivering the current entitlements, and real uncertainty around how the expansions will affect existing entitlements. Many providers express concern around inadequate funding rates, with many small providers struggling to cover the cost of provision, including increases to the national minimum wage, pension contributions, rent and utilities and having no option but to pass on these costs to parents. Issues of workforce recruitment and skill, funding rates and space to deliver the expansions add pressure to an already struggling system, evident by decreasing childcare sufficiency across all areas of Great Britain and across all categories of provision.

Childcare costs continue to increase, at a time when the cost of living remains high. The opportunity for families to increase their income through work requires a system with sufficient availability, at times that parents and carers need, that meets the needs of all children, and is available no matter where they live.

There is significant attention on childcare as the system expands but it is clear that investment alone is not the answer, and further reform is needed. The Government and opposition parties must consider the wider components of a successful system when outlining childcare policies for general election manifestos, to ensure it provides the best start in life for all children and genuine choice and opportunity for families.

Glossary 1 - Terms used in this report

Childcare – the care, education and supervision of a child or multiple children by someone who is not their parent or carer, usually including pre-school and school-aged children. In this report, childcare includes government funded early education but not compulsory schooling, nor support from relatives or friends

Early years – from a child's birth to school age.

Nursery – childcare provided in a group setting, with several early years professionals looking after a group of children. For children under five years of age and can include pre-school, day nurseries, and school nurseries.

Private, voluntary and independent (PVI) nurseries – nurseries not run by local authorities or schools. They may be run by private companies, independent schools or voluntary organisations such as charities.

Maintained nurseries – standalone local authority nurseries that provide early education and childcare to children under five years, normally during school hours in term time.

Nursery classes in schools – provide early education and childcare to children usually aged between two or three and four years. They are usually closed in school holidays.

Wraparound childcare – where children are looked after before and after school. This includes breakfast or after school clubs and childminders

Childminder – a registered child carer who works with children for more than two hours a day in their own home.

Registered childcare – childcare providers that are registered for quality assessment by the childcare regulator. In England, this is Ofsted, in Wales, it is the Care Inspectorate Wales (CIW) and in Scotland, the Care Inspectorate. To receive government funding for childcare, providers must be registered.

25 hours – considered as 'part-time' childcare to cover a typical part-time working week, including time to travel to and from work.

50 hours – considered as 'full-time' childcare to cover a typical full-time working week, including time to travel to and from work.

Weighted average – this provides a more realistic average to account for differences in the population of children and number of childcare providers in the local authority areas

Glossary 2 – Terms related to childcare payments

There is different childcare and early years provision in England, Wales and Scotland.* Where there are commonalities, we have presented the data comparatively. Where there are differences, the data is separated. The table below outlines some of the key terms.

Childcare support	Age of child	Nation	Applicability
Funded childcare for two-year-olds	Two-year-olds	England	15 hours a week for 38 weeks a year for parents in receipt of benefits (including in-work benefits) or children who are disabled or looked after.
		Scotland	Up to 1,140 hours a year for parents in receipt of certain benefits (including in-work benefits) or children who are looked after.
		Wales	12.5 hours a week for 39 weeks a year for two- to three-year-olds in Flying Start areas (geographic areas which are deprived).

*Source: Information for this table has been gathered from: www.gov.uk/help-with-childcare-costs (England); www.mygov.scot/childcare-costs-help (Scotland); www.gov.wales/get-help-flying-start (Wales)



Childcare support	Age of child	Nation	Applicability
Universal funded childcare for three- and four-year-olds	Three- to four-year-olds	England	15 hours a week for 38 weeks a year for all three- and four-year-olds.
		Scotland	1,140 hours a year (30 hours a week during term time, or 22 hours spread across the year).
		Wales	10 hours a week for all three- and four-year-olds. Increased to 12.5 hours for three-year-olds in Flying Start areas.
Funded childcare for three- and four-year-olds with working parents	Three- to four-year-olds	England	Three- and four-year-olds with working parents are entitled to an extra 15 hours a week funded childcare for 38 weeks of the year, meaning they get 30 hours a week in total.
		Scotland	1,140 hours a year (30 hours a week during term time, or 22 hours spread across the year).
		Wales	Three- and four-year-olds with working parents are entitled to 30 hours per week for 48 weeks a year.
Funded childcare for two year olds with working parents	Two-year-olds	England	From April 2024, two-year-olds with working parents are entitled to 15 hours a week funded childcare for 38 weeks of the year. This is separate from the 15 hour entitlement for two-year-olds whose parents are in receipt of benefits or who are disabled or looked after.
Funded childcare for children from nine months to two years old	Nine months to two years old	England	From September 2024, children aged nine months to three years will be entitled to 15 hours a week for 38 weeks a year. From September 2025, children aged nine months to three years will be entitled to 30 hours a week for 38 weeks a year.
Tax-Free Childcare	Aged under 12 or under 17 if child has a disability	All nations	Covers 20% of childcare costs up to a maximum of £2,000 per child per year or £4,000 for disabled children. Tax-free childcare replaces the childcare vouchers scheme which has closed for new applications. Parents and their partner (if they have one) must earn at least the equivalent of 16 hours a week at the National Minimum Wage or Living Wage. Parents' earnings cannot exceed £100,000 a year. Can be received alongside the 30 hours extended entitlement, but not Working Tax Credit or Universal Credit.
Universal Credit	Any age, with Ofsted registered providers	All nations	Universal Credit claimants are able to claim back up to 85% of their childcare costs to a maximum of £646 for one child or £1,108 for two or more children per month. Universal Credit can be claimed alongside funded childcare, but not with Working Tax Credit or Tax-Free Childcare. Parents must have an income below a certain level – this varies depending on families' circumstances.

Findings

Section 1 - Prices for childcare

This section describes the typical prices charged by childcare providers and discusses how they have changed. Most parents receive some support through the Tax-Free Childcare or benefits system to help them pay these costs (see the childcare support glossary in the introduction).

A. Prices for part-time (25 hours a week) childcare for children aged under three

This year, the average price of a part-time childcare place (25 hours) a week for a child aged under two in a nursery is £157.68 across Great Britain, or £7,569 a year*. The average price of 25 hours of childcare a week for a child aged under two by a childminder is £130.49 a week, or £6,264 a year across Great Britain. There are substantial variations between regions outlined below. Inner London has the highest and East Midlands the lowest costs for 25 hours a week childcare for two-year-olds.

Great Britain:

- In Great Britain overall, nursery prices are higher than childminder prices (for 25 hours a week for those aged under two and two-year-olds). For example, nursery costs for those aged under two were £157.68 a week and 21% more expensive than the equivalent costs for a childminder (£130.49).
- However, in Scotland, childminder prices are higher than nursery prices for this age group.
- England has higher costs for nurseries and childminders than Scotland and Wales.
- Nursery childcare for those aged under two is generally more expensive than for children aged two years. This is because the required staffing ratios are higher for younger children and hence the staffing costs are higher.
- Although the nursery prices for childcare for two-year-olds are slightly less than those aged under two, childminder costs for both age groups are relatively similar. This may reflect childminders having less scope to change staff to child ratios compared to nurseries, meaning they are more likely to charge the same or similar prices for those aged under two and two-year-olds.

English regional differences:

- Within the English regions, the highest price for 25 hours of nursery childcare for those aged under two (Inner London, £218.49) is 69% higher than the lowest price East Midlands, £129.04).
- For 25 hours of nursery childcare for children aged two, the highest prices are again seen in Inner London (£218.06), which is 75% higher than the lowest price which is seen in East Midlands (£124.60).
- Childminder costs for 25 hours (under twos) are 79% higher in Inner London (£197.38), which has the highest cost compared to the lowest price which is in the East Midlands (£110.09).



*Based on 48 weeks per year

Table 5 - Price of 25 hours a week childcare for children under three at nurseries and childminders

	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	
East Midlands	£129.04	£124.60	£110.09	£110.00
East of England	£180.55	£174.83	£128.68	£128.31
London, Inner	£218.49	£218.06	£197.38	£192.47
London, Outer	£181.28	£174.36	£170.13	£166.78
North East	£148.72	£136.45	£126.22	£126.22
North West	£150.73	£141.09	£118.44	£116.32
South East	£169.15	£159.39	£139.70	£139.58
South West	£152.56	£145.69	£127.07	£124.91
West Midlands	£148.95	£145.13	£129.93	£127.15
Yorkshire and the Humber	£135.39	£137.65	£115.99	£116.04

B. Prices for full-time (50 hours a week) childcare for children aged under three

Prices for full-time care (50 hours a week) tend to be slightly less than twice the price of 25 hours a week, as providers pass economies of scale on to parents. The average price of 50 hours of care a week for a child aged under two in nursery is £302.10 across Great Britain, or £14,501 a year (see table 6). For a childminder for a child aged under two, it is £253.02 per week across Great Britain, or £12,145 a year. There are again substantial variations between regions outlined below, with Inner London having the highest costs and East Midland the lowest for 50 hours of childcare a week for two-year-olds.

Table 6 - Price of 50 hours a week childcare for children under three at nurseries and childminders

	Nursery		Childminder	
	Under- twos	Two-year-olds	Under- twos	Two-year-olds
Great Britain	£302.10	£288.13	£253.02	£253.97
England	£305.11	£290.77	£254.12	£253.83
Scotland	£272.40	£260.72	£258.64	£278.39
Wales	£261.33	£258.32	£234.21	
East Midlands	£250.44	£246.76	£218.02	£220.06
East of England	£326.07	£283.33	£255.35	£255.22
London, Inner	£428.26	£430.75	£394.78	£384.53
London, Outer	£355.51	£349.41	£332.66	£326.09
North East	£268.22	£249.28	£236.06	£236.42
North West	£287.41	£269.74	£226.03	£223.08
South East	£333.33	£307.81	£273.65	£277.73
South West	£306.74	£291.11	£242.36	£237.57
West Midlands	£269.00	£261.44	£226.62	£220.48
Yorkshire and the Humber	£267.81	£261.02	£215.44	£225.62

Great Britain:

- Overall, nursery costs are again higher than childminder costs (for 50 hours a week for two-year-olds and those aged under two). For example, the cost of a nursery in Great Britain for under-twos is £302.10 a week, 19% more than the equivalent costs for a childminder (£253.02).
- However, in Scotland, childminder prices are higher than nursery prices for two-year-olds, although not for children under two.
- England has higher costs for nurseries than both Scotland and Wales, but childminders in Scotland are marginally more expensive than in England. Wales has the lowest prices for both nurseries and childminders.
- Average nursery costs in Wales are lower than England and Scotland. For example, for nursery costs for those aged under two (for 50 hours a week), Wales is £44 cheaper than England and £11 cheaper than Scotland.
- On the whole, 50 hours per week of childcare costs slightly more for children under two than for those aged two, apart from in the Inner London, where the cost for two-year-olds is marginally higher. Childminder costs for both age groups are relatively similar.

English regional differences:

- Within the English regions, the price for full-time nursery places (for those aged under two) are 71% higher in Inner London (£428.26) compared to the East Midlands (£250.44).
- For nursery places for children aged two, the highest prices are again in Inner London at £430.75, 75% higher than East Midlands (£246.76).
- For most of the English regions, childminder prices are generally cheaper than nurseries for 50 hours a week. The highest prices are again seen in Inner London (£394.78) for those aged under two and £384.53 for two-year-olds).

C. Prices for childcare for children aged three and four

When asking about childcare prices for three- and four-year-olds, we took into account that all children of this age group in England, Scotland and Wales are entitled to some funded early education until they start school. Parents will therefore only need to pay for some of the hours of childcare that they need. In England, a parent who needs childcare for 25 hours a week during term time, and is entitled to a funded place for 15 hours a week, would only need to pay for 10 hours.

In Scotland, since August 2021, all parents (not just working parents) now have access to funded early education for 1,140 hours per year. In Wales they would be entitled to a funded place for 10 hours a week during term time and would pay for 15 hours, except in Flying Start areas where the funded entitlement is for 12.5 hours for three-year-olds.

In addition to the universal early education entitlements, working parents of children aged three and four may be eligible to access additional hours in England and Wales. In England, for children of eligible working parents the entitlement is for up to 30 hours a week for 38 weeks per year. For some these entitlements are used during term time, for others they are 'stretched' across the year. In Wales it is also 30 hours for up to 48 weeks a year.

The following figures show costs of childcare for three- and four-year-olds (including the funded entitlements) in nurseries. These do not include additional costs - for example lunch or other consumables - which we will cover in Section 5. This means that costs during school holidays would be considerably higher.

Table 7 - Price of 25 and 50 hours a week childcare for three- and four-year-olds in nurseries in England

	25 hours a week, including universal entitlement (paying for 10 hours)	50 hours a week, including extended entitlement (paying for 20 hours)
England	£63.54	£120.93
East Midlands	£49.69	£98.85
East of England	£70.19	£132.72
London, Inner	£99.29	£197.63
London, Outer	£81.38	£145.44
North East	£63.18	£118.88
North West	£53.80	£103.25
South East	£62.86	£122.17
South West	£74.28	£146.24
West Midlands	£58.52	£107.64
Yorkshire and the Humber	£52.97	£102.44
South West	£152.56	£145.69
West Midlands	£148.95	£145.13
Yorkshire and the Humber	£135.39	£137.65



Table 8 - Prices of 25 and 50 hours a week childcare in a nursery for three- and four-year-olds in Scotland and Wales

	25 hours a week, including Universal Entitlement in Wales (paying for 10 hours)	50 hours a week, including Extended Entitlement in Wales (paying for 20 hours) and 1,140 hour entitlement in Scotland (paying for 20 hours)
Scotland	N/A	£96.74
Wales	£55.95	£102.81

Please note that in table 8, there is no cost for 25 hours a week childcare in Scotland since this is covered by the 1,140 hour entitlement.

English regional differences:

Within the English regions (see table 9), the highest price for 25 hours a week of childcare (where families receive 15 hours per week funded childcare) is seen in Inner London (£99.29) and is 100% higher than the lowest price which is seen in the East Midlands (£49.69).

The following figures show costs of childcare for three- and four-year-olds in childminder settings. Again, these do not include additional costs - for example lunch or other consumables – which will be covered in Section 5.

Table 9 - Price of 25 and 50 hours a week childcare with childminders for three- and four-year-olds in England

	25 hours a week, including universal entitlement (paying for 10 hours)	50 hours a week, including extended entitlement in England (paying for 20 hours)
England	£130.40	£233.31
East Midlands	£112.91	£233.31
East of England	£126.82	£251.89
London, Inner	£188.29	£376.58
London, Outer	£161.20	£316.73
North East	£124.98	£235.07
North West	£115.20	£219.30
South East	£141.55	£272.61
South West	£122.97	£234.28
West Midlands	£124.83	£219.34
Yorkshire and the Humber	£125.65	£225.75
South West	£152.56	£145.69
West Midlands	£148.95	£145.13
Yorkshire and the Humber	£135.39	£137.65



Table 10 - Price of 25 and 50 hours a week childcare with childminders for three- and four-year-olds in England, with entitlement

	25 hours a week, including universal entitlement (paying for 10 hours)	50 hours a week, including extended entitlement in England (paying for 20 hours)
England	£52.41	£100.04
East Midlands	£45.16	£93.32
East of England	£50.73	£100.76
London, Inner	£75.32	£150.63
London, Outer	£64.48	£126.69
North East	£49.99	£94.03
North West	£46.08	£87.72
South East	£56.62	£109.04
South West	£49.19	£93.71
West Midlands	£49.93	£87.74
Yorkshire and the Humber	£50.26	£90.30
South West	£152.56	£145.69
West Midlands	£148.95	£145.13
Yorkshire and the Humber	£135.39	£137.65

Table 11 - Price of 25 and 50 hours a week childcare with a childminder for three- and four-year-olds in Scotland and Wales

	25 hours a week, including Universal Entitlement (paying for 10 hours)	50 hours a week, including Extended Entitlement in Wales (paying for 20 hours) and 1,140 hour entitlement in Scotland (paying for 20 hours)
Scotland	£52.90	£104.85
Wales	£47.97	£92.49

Great Britain:

- In the same way that prices for childcare for younger children are often higher at nurseries than with childminders, this pattern continues for three- and four-year-olds. For 25 hours of childcare for three- and four-year-olds childminder prices are 18% less than nursery prices in England. In Wales, childminder prices are 14% lower than nursery prices.
- In Scotland, for 50 hours of childcare for three- and four-year-olds childminder prices are 1.9% higher than in a nursery. In Scotland, there is no cost for 25 hours of childcare for three- and four-year-olds with a childminder as this is covered by the 1,140 hour entitlement.

English regional differences:

- Within the English regions (see table 10), the price of 25 hours a week for a childminder (where families receive 15 hours per week funded childcare) for three- and four-year-olds is 67% higher in Inner London (£75.32) compared to the East Midlands (£45.16).
- For 50 hours per week for three- and four-year-olds, costs are again the greatest in Inner London (£150.63) and 72% higher than in the North West (£87.72).

Comparing costs for two-, three- and four-year-olds

In all nations and regions, families are paying considerably less for nursery childcare for three- and four-year-olds compared to younger children. There are two key drivers for this: 1) families are receiving funded hours resulting in parents paying for fewer hours; and 2) childcare providers are able to operate at lower staff to child ratios for older children, which often means that childcare costs less to provide. In England families pay £90.15 less for 25 hours of childcare per week during term time for three- and four-year-olds than for two-year-olds, and £169.84 less for 50 hours of childcare per week (see table 12, below).

Table 12 - Price difference for 25 and 50 hours a week childcare between three- and four-year-olds (including the funded entitlements) and two-year-olds, in England

Two-year-olds - 25 hours a week	Three- and four-year-olds - 25 hours a week, (including universal entitlement)	Price difference per week for three- and four-year-olds - 25 hours (paying for 10 hours)	Two-year-olds - 50 hours a week	Three- and four-year-olds - 50 hours a week, (including extended entitlement)	Price difference per week for three- and four-year-olds - 50 hours (paying for 20 hours)
£153.69	£63.54	-£90.15	£290.77	£120.93	-£169.84

D. Changes in childcare prices for children under five, since 2023

Nursery prices in Great Britain for all groups have risen this year, and have risen more steeply than between 2022 to 2023. The highest increases are for children under two, followed by three- and four-year-olds, and then two-year-olds. Price increases have generally risen most sharply in England, with the exception being for two-year-olds, where prices have risen most sharply in Scotland.

Table 13 - Price increases since 2023 for 25 hours nursery for children under five

	Under-twos	Two-year-olds	Three- and four-year-olds using free 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%

Great Britain:

- Across Great Britain childcare prices for a part time (25 hours per week) nursery place have increased for all ages: for under-twos by 7.4%; for two-year-olds by 6.2%; and for three- and four-year-olds by 7.2% (almost double the rise seen last year – 3.8%) (see table 13, above).
- England has seen the sharpest rise in prices for under-twos and for three- and four-year-olds – for under-twos prices have increased by 7.4%, and for three- and four-year-olds by 7.2%.
- Scotland saw the sharpest rise in prices for two-year-olds, an increase of 6.8%, compared to an increase of 6.4% in England and 3% in Wales. This increase in Scotland was almost double the price rise seen last year (3.7%)
- Wales also saw rises for all age groups, although these were less sharp than for the other regions – prices for under-twos rose by 3.6%; prices for two-year-olds rose by 3%, and prices for three- and four-year-olds rose by 5.7% (more than double the 2.6% rise seen last year).



Table 14 - Price increases since 2023 for 50 hours nursery for children under five

	Under-twos	Two- year- olds	Three- and four- year- olds using free 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%

Great Britain:

- As with part-time places, nursery prices for full-time places in Great Britain have risen across all age groups.
- Unlike for part-time care (25 hours per week, Scotland has seen the sharpest prices rises for childcare across all age groups for full-time (50 hours per week) nursery places.
- This year, Scotland has seen steeper price rises in childcare for all age groups than last year (by 6.5% compared to 0.9% for under-twos; 5.9% compared to 5.1% for two-year-olds; and 7.1% compared to 5.8% for three- and four-year-olds).
- Prices in Wales also increased for all age groups, reversing the trend from last year, when prices slightly decreased in all age groups.

E. Variations in price for part-time (25 hours a week) childcare for children aged under two

This section outlines the highest and lowest prices of 25 hours of childcare for children under two years old, relative to the average price in the region. Childcare for under two-year-olds (which is outside the funded entitlement) is provided by childcare businesses who set their fees in a competitive marketplace, leading to a broad range of difference in prices. These variations have a significant impact on families who may find that the only childcare available to them locally costs significantly more than the average.



Table 15 - Highest and lowest prices as a percentage above or below average prices, for 25 hours of care for a child under two

	Under-twos	Two- year- olds
Great Britain	+58%	-32%
England	+59%	-32%
Scotland	+14%	-19%
Wales	+64%	-28%
East Midlands	+43%	-36%
East of England	+39%	-29%
London, inner	+84%	-34%
London, outer	+86%	-35%
North East	+49%	-26%
North West	+44%	-34%
South East	+70%	-32%
South West	+30%	-27%
West Midlands	+66%	-33%
Yorkshire and Humberside	+73%	-32%



Great Britain:

- The highest prices in local authorities for 25 hours of childcare for those aged under two tend to be further from the average than the lowest prices. There is a minimum cost to providers for delivering places owing to rental, required space, minimum wage, and regulations regarding staff to child ratios.
- There is a broader variation in prices which are higher than the average compared to the prices which are lower. This suggests that some parents are able to pay considerably more than the average for childcare.
- There is less variation in price in Scotland (33 percentage point difference between highest price and lowest price) than in Wales (92 percentage point difference) and England (91 percentage point difference).

English regional differences:

- Within the English regions, the highest prices range from 30% above the average in the South West to 86% above the average in Outer London.
- The lowest prices show less variation, between 26% lower than the average in the North East and 36% lower than the average in the East Midlands.

F. Prices for childcare for school-age childcare

Childminders and after-school clubs offer childcare to 5- to 11-year-olds after school, during term time. The prices featured in this section do not include the additional costs that parents will face if they are also paying for childcare before school, which is often necessary for parents working typical 9am to 5pm hours.

Great Britain:

- This year, the average price of an after school club for a week is £69.14 across Great Britain, or £2,697 a year during term time (39 weeks). The average price of a childminder to 6pm for a week is £75.87 across Great Britain, or £2,959 a year during term time.
- England and Wales are a little more expensive for after-school clubs than Scotland, while childminder costs are highest in Scotland and lowest in England.
- This shows that childminder costs for 5- to 11-year-olds after school tend to be higher than after-school clubs. Please note, however, that after-school clubs are sometimes open for fewer hours than childminders.

English regional differences:

- The most expensive region for a weekly after-school club is Inner London (£122.93), which is 115% higher than the lowest cost which is found in the North West (£57.11).
- The price difference is notably more for childminders, with Inner London (£164.65) being 198% higher than Yorkshire and the Humber (£55.31), the least expensive region for childminders*.
- The difference between the price of after-school clubs and a childminder after-school, is particularly notable for Inner London, where a childminder (£164.65) is 55% higher than an after-school club (£122.93).
- In London, some local authorities have been running after-school clubs in-house for some time, bringing down the average price in an otherwise high-cost area. This is particularly the case in Inner London, but less so in Outer London. Childminders are less likely to be subsidised, and so the price differences between childminders and after-school clubs is likely to be greater in regions where subsidised after-school clubs are more common.

As well as using formal after-school clubs, parents may also use activity clubs after school as childcare. Prices for this are not captured in our survey. Because clubs providing a specific activity such as football or dance for children over eight do not have to be registered and regulated as childcare by Ofsted, they are not officially counted as childcare, and so parents will not usually be able to pay for them using Tax-Free Childcare or childcare support through the benefits system. Additionally, they usually do not offer enough hours of care per week, or for enough weeks per year, to provide reliable childcare for working parents.

*It is important to note that the figure for Inner London is based on a relatively small number of data points, and has been driven up by one particularly expensive local authority.

Table 16 - Weekly prices of an after-school club or childminder for children aged 5 to -11

	After-school club	Childminder to 6pm
Great Britain	£ 69.14	£ 75.87
England	£ 69.22	£ 75.45
Scotland	£ 67.27	£ 84.25
Wales	£ 68.89	£ 79.52
East Midlands	£ 65.21	£ 59.63
East of England	£ 65.80	£ 77.98
London, inner	£ 122.93	£ 164.65
London, outer	£ 75.22	£ 91.31
North East	£ 69.93	£ 84.70
North West	£ 57.11	£ 73.10
South East	£ 80.72	£ 74.97
South West	£ 57.93	£ 64.35
West Midlands	£ 86.97	£ 83.51
Yorkshire and Humberside	£ 59.38	£ 55.31



Section 2 - Childcare sufficiency

- is there enough childcare?

This section outlines the legal duties on local authorities around monitoring the local childcare market and then presents data on whether there is enough childcare across Great Britain.

A. Childcare sufficiency - legal duties

Local authorities are required to manage the market for childcare in their local area, which means they need to know whether enough childcare is available for key groups. The precise rules vary between the nations of Great Britain:

- In England, local authorities have to audit childcare sufficiency annually, including considering the funded early education entitlements, childcare for school age children, disabled children, and different types of families.
- In Scotland, local authorities have a statutory duty to consult with parents on the delivery of early education and childcare, and to publish a plan based on the results of their consultation.
- Welsh local authorities were required to produce a sufficiency assessment and action plan in 2017 and every five years thereafter, and report to the Welsh government annually through a progress update.
- Because these duties vary in different parts of the UK, we have presented sufficiency data separately for the three nations. These data are based on local authorities' assessments at the time of the survey, which may differ from their published Childcare Sufficiency Assessments if the local situation has changed since this was last published.

B. Childcare sufficiency in England

Local authorities were asked to report whether they had sufficient childcare in terms of 'Yes: in all areas', 'Yes: in some areas', 'No' or 'Data not held or cannot tell'. Overall, the provision of childcare 'in all areas' was far from universal and varied according to the type of childcare required (see table 17).

- Most local areas are able to say whether there is enough childcare in their area, with the exception of after-school childcare for 12- to 14-year-olds where there are significant and growing data gaps – 57% reported 'Data not held or cannot tell'.
- The biggest gaps in sufficiency, as measured by provision 'in all areas', are seen for parents working atypical hours (9%), parents of 12- to 14-year-olds (7%) and for disabled children (6%).
- Sufficiency 'in all areas' has decreased across all categories since last year; in many areas, sufficiency has fallen dramatically. The proportion of local authorities who are able to say they have enough childcare 'in all areas' is most marked for children eligible for the two-year-old funded entitlement (-17.6 percentage points) and for children under two (-14.4 percentage points).
- Sufficiency for disabled children 'in all areas' is now exceedingly low at 6%, down from 18% last year.
- Sufficiency for the 30 hour entitlement for three- and four-year-olds (55%) continues to be less than for the 15 hour universal entitlement the same age group (62%), and both remain higher than for the 15 hour entitlement for disadvantaged two-year-olds (45%).
- Generally, as in previous years, there is more childcare availability for younger children. 35% of local authorities report enough childcare 'in all areas' for children aged under two, 45% for those aged two (funded entitlement), 55% for three- and four-year-olds in receipt of the 30 hour entitlement and 65% for three- and four-year-olds in receipt of the 15 hour entitlement. This compares to only 15% of local authorities reporting enough provision 'in all areas' for 5- to 11-year-olds after-school and only 7% for 12- to 14-year-olds after-school.
- Provision for two-year-old 15 hour funded entitlements and universal three- and four-year-old 15 hours funded entitlements is intended to close the gap in attainment for children in the early years. The North East report the highest levels of provision for both of these categories at 83% sufficiency 'in all areas' (see table 19, overleaf).
- The East of England report the lowest levels of provision for the funded entitlement for disadvantaged two-year-olds (27%) and the South West reports the lowest levels of provision for the 15 hour entitlement for three- and four-year-olds (36%).
- The East of England generally report the least provision (from 18% to 55%) for all categories of early years childcare and the North East generally report the high levels of provision across the same categories (67% to 83%).

Table 17 - Childcare sufficiency in England

	Yes: in all areas	Yes: in some areas	No	Data not held or cannot tell
Children under two	35%	50%	3%	12%
Two- year- old free entitlement	45%	49%	1%	5%
Three- and four- year- old 15 hour entitlement	62%	33%	1%	4%
Three- and four- year- old 30 hour entitlement	55%	38%	1%	6%
5- to 11- year- olds after school	14%	51%	2%	33%
12- to 14- year- olds after school	7%	31%	4%	57%
Disabled children	6%	46%	15%	33%
Parents working full time	34%	50%	1%	15%
Parents working atypical hours	9%	39%	9%	44%
Families living in rural areas	16%	65%	1%	17%



Table 18 - Childcare sufficiency defined as 'Yes: in all areas' in England, for 2024 and 2023 (% local authorities)

	2024	2023	Percentage point change
Children under two	35%	50%	-14.4%
Two-year-old free entitlement	45%	62%	-17.6%
Three- and four-year-old 15 hour entitlement	62%	73%	-10.9%
Three- and four-year-old 30 hour entitlement	55%	66%	-10.7%
5- to 11-year-olds after school	14%	25%	-10.2%
12- to 14-year-olds after school	7%	13%	-6.0%
Disabled children	6%	18%	-12.4%
Parents working full time	34%	48%	-13.9%
Parents working atypical hours	9%	15%	-6.8%
Families living in rural areas	16%	30%	-13.7%

Table 19 - Childcare sufficiency defined as 'Yes: in all areas' in English regions, for early years (% local authorities)

	Under- twos	Two-year-old free 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%

- The majority of providers offer the 30 hour entitlement for three- and four-year-olds, and the proportion of maintained nurseries (71%), primary schools with nursery classes (92%) and childminders (80%) offering this entitlement has increased – a reversal of last year's trend (see table 21). The proportion of PVI settings offering the 30 hour entitlement (91%) is similar to last year.

Table 20 - Provision of the 30 hours extended entitlement in England

	2024	2023
Maintained nurseries	71%	64%
Primaries with nursery classes	92%	89%
PVI settings	91%	92%
Childminders	80%	71%



Table 21 - 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 afterschool	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%

- None of the local authorities in Outer London, the North West and the West Midlands report having enough provision for disabled children. The highest level of provision for disabled children is reported in Yorkshire and Humberside (13%), however this is still very low.
- Local authorities in the North West report the highest level of provision for parents working full time (45%) but report low levels of provision for several other categories; 12- to 14-year-olds after-school (0%), disabled children (0%), parents working atypical hours (5%) and families in rural areas (5%).
- The North East report the highest level of provision for 12- to 14-year-olds (17%).
- The South East report the highest level of provision for 5- to 11-year-olds after-school (22%) and for families in rural areas (also 22%).

- Sufficiency of childcare for families in rural areas has decreased dramatically in Yorkshire and Humberside, where the proportion of local authorities with enough childcare in rural areas has fallen from 60% last year to only 7% this year. Similarly, the proportion of local authorities reporting enough childcare for families in rural areas in the North East has fallen from 75% to 17%. The East Midlands is the only region to report an increase, rather than a decrease, in sufficiency of childcare for families in rural areas, with the proportion of local authorities reporting sufficiency in this category rising from 0% to 11%.
- Sufficiency of childcare across all categories is generally low in the East of England, ranging from 0% (12- to 14-year-olds after school and families in rural areas) to 9% (5- to 11-year-olds after-school, disabled children, parents working full time and parents working atypical hours). Sufficiency is also very low in the West Midlands where 0% of local authorities report having enough childcare for 12- to 14-year-olds after-school, for disabled children, for parents working atypical hours and families in rural areas. However, 31% of local authorities in the West Midlands report having enough childcare for parents working full time – close to the national average of 34%.

C. Childcare sufficiency in Scotland

Differences in statutory requirements in Scotland mean that local authorities tend to have less knowledge than their English counterparts about the availability of childcare outside of the funded entitlements. For the categories of childcare outside of the funded entitlements, Scottish local authorities report between 29% and 71% as 'Data not held or cannot tell'.

- In Scotland, the highest level of provision is for the three- and four-year-old 1,140 hour entitlement (67% sufficiency 'in all areas') and the lowest level of provision is for 5- to 11-year-olds after-school (4%) and 12- to 14-year-olds after-school (also 4%) (see table 22, below).
- The second highest level of provision 'in all areas' is for the two-year-old funded entitlement (42%).
- However, the level of provision for both the three- and four-year-old 1,140 hour entitlement and the two-year-old funded entitlement has decreased significantly since last year (from 96% and 75% respectively).
- The next highest level of provision 'in all areas' is for families living in rural areas (29%).
- Whereas last year there was a mixed picture of increases and decreases in childcare sufficiency across Scotland, this year sufficiency has decreased almost universally, with the exception of very minor increases in sufficiency for 12- to 14-year-olds after school, and for families living in rural areas.
- Last year, local authorities reported a substantial increase in sufficiency for families living in rural areas (9%). This year, the level of provision for families in rural areas has remained the same at 29%.
- 25% of local authorities in Scotland report having enough childcare for disabled children 'in all areas', however more than half (54%) report 'Data not held or cannot tell'.
- Please note that Scotland has relatively few local authorities (32, compared to 152 in England) and therefore changes in responses from a few authorities can make a noticeable difference to the overall figures.

Table 22 - Childcare sufficiency defined as 'Yes: in all areas' in Scotland for 2024 and 2023 (% local authorities)

	2024	2023	Percentage point change
Children under two	8%	21%	-13%
Two- year- old free entitlement	42%	75%	-33%
Three- and four- year- old 1,140 hour entitlement	67%	96%	-30%
5- to 11- year- olds after school	4%	7%	-3%
12- to 14- year- olds after school	4%	4%	0%
Disabled children	25%	29%	-4%
Parents working full time	21%	25%	-4%
Parents working atypical hours	8%	18%	-10%
Families living in rural areas	29%	29%	0%



D. Childcare sufficiency in Wales

Welsh local authorities were required to produce a statutory five-yearly Childcare Sufficiency Assessment in 2022. Over the last few years, the proportion of local authorities reporting that they do not know whether they have enough childcare, across a range of categories, has generally reduced, with the exception of data in 2022. This year, there are again some small increases in the proportion of local authorities who report 'Data not held or cannot tell'.

- In Wales, the highest level of sufficient childcare 'in all areas' is for the three- and four-year-old 10 hour funded entitlement (43%) (see table 23).
- The second highest level of provision is for the two-year-old funded entitlement (24%), although this has decreased significantly since last year (down by 33 percentage points since 2023).
- 24% of local authorities in Wales report sufficient childcare 'in all areas' for children accessing the 30 hour entitlement for three- and four-year-olds.
- The lowest level of early years childcare provision is for children under two (14%), which has remained at a similar level since last year (15%).
- There are significant shortages in childcare reported for 12- to 14-year-olds after-school, for parents working atypical hours and for families living in rural areas; no local authorities say that there is sufficient provision 'in all areas' for these categories.
- There are low levels of provision for 5- to 11-year-olds after-school (5%), for disabled children (5%) and for parents working full time (5%).
- However, as Wales (similarly to Scotland) has relatively few local authorities (22, compared to 152 in England), changes in responses from a few authorities can make a noticeable difference to the overall figures.

Table 23 - Childcare sufficiency defined as 'Yes: in all areas' in Wales for 2024 and 2023 (% local authorities)

	2024	2023	Percentage point change
Children under two	14%	15%	-1%
Two-year-old free entitlement	24%	55%	-31%
Three- and four-year-old 10 hour entitlement	43%	40%	+3%
Three- and four-year-old 30 hour entitlement	24%	37%	-13%
5- to 11-year-olds after school	5%	5%	0%
12- to 14-year-olds after school	0%	5%	-5%
Disabled children	5%	0%	+5%
Parents working full time	5%	25%	-20%
Parents working atypical hours	0%	0%	0%
Families living in rural areas	0%	0%	0%



Section 3 - Current pressures on childcare providers in Scotland and Wales

In this year's Childcare Survey, we have continued to ask local authorities to feedback their assessment of how current economic pressures are affecting the business sustainability of childcare provision in their area, and their view on staff recruitment and retention in the sector – this time with an exclusive focus on local authorities in Scotland and Wales. 24 local authorities surveyed across Scotland and 21 local authorities surveyed across Wales provided data on these issues, generating response rates of 75% and 95% respectively. These questions were not included in the Freedom of Information request which is used to gather the costs and sufficiency information for other parts of the survey, and so have a lower response rate.

Local authority teams often work closely with childcare providers and parents, and can identify emerging issues early. We asked about the steps taken by childcare providers to maintain sustainability during the cost of living crisis, and the impact on parents and the quality of provision. This information was gathered in November and December 2023.

This section of the survey provides insight into local authorities' assessments of their local childcare landscape at a particular point in time. They can act as a warning of the need for action to prevent the widening of existing inequalities or more volatility in the sector. When childcare providers face uncertainty, it can threaten the availability, affordability and quality of childcare.

A. Provider sustainability in Scotland

The survey finds that a significant minority of local authorities in Scotland who provided data assess that a range of economic and workforce pressures are decreasing the sustainability of local childcare providers. The cost of energy, staff, food and rent were each cited by 24% of local authorities as factors decreasing sustainability. 24% of 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.

Table 24 - Impacts on financial sustainability of childcare providers in Scotland

	Cost of energy	Cost of staff	Cost of food	Cost of rent	Recruiting and retaining staff	Changes in demand for places	Parent/carers' ability to pay for places.	Funding rate of early education entitlement.
Increasing sustainability	0%	0%	0%	0%	0%	6%	0%	12%
No impact on sustainability	0%	6%	0%	6%	12%	18%	6%	6%
Decreasing sustainability	24%	24%	24%	24%	24%	12%	24%	18%
Data not held or cannot tell	76%	71%	76%	71%	65%	65%	71%	65%

We also asked local authorities in Scotland to feedback on the proportion of childcare providers in their area who are facing severe financial difficulties. By "severe financial difficulties", we mean settings that are at substantial risk of having to cease operating, or childminders at substantial risk of leaving the profession (see table 25, below).

Table 25 - Providers facing severe financial difficulties in Scotland

	Group-based providers	Childminders
More than a quarter	0%	14%
Around a quarter	0%	0%
Almost a quarter	14%	29%
Not at all confident	0%	0%
None or almost none	86%	57%

Childminders in particular are facing financial challenges; 14% of local authorities who provided data in Scotland determine that more than a quarter of childminders in their area are at risk of leaving the profession, and a significant minority (29%) say that almost a quarter are at risk of leaving the profession. The picture is much more positive for group-based settings; 86% of local authorities who responded say that 'none or almost none' of the group-based childcare settings in their area are at substantial risk of having to cease operating, although 14% say that, in their area, it is almost a quarter.

B. How providers have responded to business sustainability pressures in Scotland

Survey findings suggest that many local authorities in Scotland determine that 'at least some' of their local childcare providers have taken steps to help with business sustainability. These steps are likely to impact negatively on the affordability and accessibility of childcare places. 19% of local authorities who provided data report that 'at least some' of their local childcare providers have increased the prices charged to parents to help with business sustainability. This figure consists of 13% of local authorities reporting that charges were increased 'by many' childcare providers and 6% reporting price increases 'by some' providers (see table 26).

Table 26 - Steps taken by childcare providers to help with business sustainability in Scotland

	Reduced opening hours	Increased opening hours	Increased staff ratios (more children per member of staff)	Decreased staff ratios (fewer children per member of staff)	Increased number of staff	Reduced number of staff	Increased number of graduate (level 6) qualified staff.	Reduced number of graduate (level 6) qualified staff.
Increasing sustainability	0%	0%	0%	6%	0%	0%	0%	0%
No impact on sustainability	13%	13%	12%	6%	13%	13%	6%	6%
Decreasing sustainability	13%	13%	12%	6%	6%	6%	13%	13%
Data not held or cannot tell	75%	75%	76%	81%	81%	81%	81%	81%

Local authorities in Scotland also report that 'at least some' of their local childcare providers:

- Reduced their opening hours (13%)
- Increased staff ratios (12%) and/or reduced their numbers of staff (13%)
- Reduced the number of funded early education places they provide (12%)

These steps could have a negative impact on the affordability and accessibility of childcare places, as well as the quality of provision in Scotland, and action must be taken to ensure that these figures do not increase across Scotland.

Low staff ratios (low numbers of children per member of staff) increase the quality of education and care that children receive, meaning that increases in staff ratios and reduction in staff numbers are concerning.

Reducing the opening hours of settings could be problematic for parents, particularly those who work longer hours, with longer commutes or single parents who cannot share drop-offs and pick-ups.

All children in Scotland aged three to four (plus eligible two-year-olds) are entitled to 1,140 hours of free childcare a year (approximately 30 hours a week during term time). This early learning and childcare entitlement was introduced to improve children's outcomes and help close the poverty-related attainment gap, to increase family resilience through improved health and wellbeing of children and parents, and to support parents into work, study or training*. Any reduction in the number of funded places being made available to children, especially disadvantaged children, means some children and their families will miss out on accessing the above benefits of early education and childcare.

C. Provider sustainability in Wales

The survey finds that many local authorities in Wales who provided data assess that a range of economic, workforce and Government funding pressures are decreasing the sustainability of local childcare providers. 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 local authorities also say that the cost of staff (72%), 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.

Table 27 - Impacts on financial sustainability of childcare providers in Wales

	Cost of energy	Cost of staff	Cost of food	Cost of rent	Recruiting and retaining staff	Changes in demand for places	Parent/ carers' ability to pay for places.	Funding rate of early education entitlement.
Increasing sustainability	0%	0%	0%	0%	0%	11%	0%	6%
No impact on sustainability	6%	6%	6%	11%	0%	6%	6%	24%
Decreasing sustainability	67%	72%	61%	56%	89%	56%	61%	47%
Data not held or cannot tell	28%	22%	33%	33%	11%	28%	33%	24%

We also asked local authorities in Wales to feedback on the proportion of childcare providers in their area who are facing severe financial difficulties. By "severe financial difficulties", we mean settings that are at substantial risk of having to cease operating, or childminders at substantial risk of leaving the profession (see table 28, below).

Table 28 - Providers facing severe financial difficulties in Wales

	Group based providers	Childminders
More than a quarter	6%	19%
Around a quarter	19%	0%
Almost a quarter	31%	44%
Not at all confident	0%	0%
None or almost none	44%	38%

As in Scotland, childminders in particular are facing financial challenges; 19% of local authorities who provided data in Wales determine that more than a quarter of childminders in their area are at risk of leaving the profession, and a significant proportion (44%) determine that almost a quarter are at risk of leaving the profession. Asked about group-based settings, 25% of local authorities in Wales who provided data report that a quarter or more are at substantial risk of having to cease operating.

D. How providers have responded to business sustainability pressures in Wales

Survey findings suggest that many local authorities in Wales determine that 'at least some' of their local childcare providers have taken steps to help with business sustainability. These steps are likely to impact negatively on the affordability and accessibility of childcare places. The majority of local authorities who provided data (78%) report that 'at least some' of their local childcare providers have increased the prices charged to parents to help with business sustainability. This figure consists of 39% of local authorities reporting that charges were increased 'by many' childcare providers and a further 39% reporting price increases 'by some' providers (see table 29, below).

Table 29 - Steps taken by childcare providers to help with business sustainability in Wales

	Reduced opening hours	Increased opening hours	Increased staff ratios - more children per member of staff	Decreased staff ratios - fewer children per member of staff	Increased number of staff	Reduced number of staff	Increased number of graduate (level 6) qualified staff
Taken by many childcare providers	0%	0%	0%	0%	0%	0%	0%
Taken by some childcare providers	33%	33%	17%	11%	11%	39%	6%
Not taken locally	28%	28%	50%	61%	44%	11%	11%
Data not held or cannot tell	39%	39%	33%	28%	44%	50%	83%

Some local authorities report that local providers have reduced the number of funded early education places they provide (6%). Conversely, 12% of local authorities in Wales report that local providers have increased the number of funded early education places they provide. In Wales, funded childcare offers differ depending on location; as in England, three- and four-year-olds with working parents across the nation are entitled to 30 hours per week for 48 weeks a year, however additional hours for this age group and for two-year-olds are available in Flying Start areas (geographic areas which are deprived). This variation may, in part, account for the variation in responses to this question. The Flying Start programme was introduced to improve children's outcomes*. A reduction in the availability of these places in some areas could mean children missing out on this vital boost to their outcomes at a time when the achievement gap is widening.

Local authorities in Wales also report that 'at least some' of their local childcare providers:

- Reduced their opening hours (33%)
- Increased staff ratios (17%) and/or reduced their numbers of staff (39%)

These steps could have a negative impact on the affordability, accessibility and quality of provision for all children in Wales.

Reducing the opening hours of settings could be problematic for parents, particularly those who work longer hours, with longer commutes or single parents who cannot share drop-offs and pick-ups.

Low staff ratios (low numbers of children per member of staff) increase the quality of education and care that children receive, meaning that increases in staff ratios and reduction in staff numbers are concerning.

*Source: <https://www.gov.wales/flying-start-programme>

Section 4 - Additional charges

One major issue facing providers and parents alike is that many providers find it necessary to charge parents additional fees for consumables (such as nappies), food, and excursions. This is because many providers find that the funding rates provided to them are not enough to cover the cost of providing care to a child claiming their early education entitlements, and so need to bolster the basic rate with additional charges to keep their setting economically viable.

A. Additional charges by providers in England

A new section of our survey on these additional charges reveals a number of points about additional costs being charged to parents.

- The first issue is that there is considerable uncertainty among local authorities as to how widespread this practice is. For every entitlement, at least 50% of local authorities said that they did not know how many providers were making additional charges to parents (see table 30).
- For those local authorities that were able to give a definitive answer, it is clear that this is a widespread practice. At least a third of local authorities said that all or almost all providers have additional charges for three- and four-year-olds claiming both the 30 hour and 15 hour entitlements.
- 91% of local authorities responded that around half or more providers are making additional charges for both the 15 hour and 30 hour entitlement for three- and four-year-olds.
- Additional charges for parents claiming the 15 hour entitlement for disadvantaged two-year-olds were far less widespread; only 18% of local authorities responded that all or almost all of their providers were making additional charges to this group, with 42% of local authorities saying that around half or more providers were doing so.

Table 30 - Proportion of providers making additional charges under funded early education entitlements, England

	Three- and four-year-old 30 hour entitlement	Three- and four-year-old 15 hour entitlement	Two-year-old free entitlement
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%



*Source: <https://www.gov.wales/flying-start-programme>

Table 31 - Proportion of providers making additional charges under funded early education entitlements, England ('Not known' answers removed)

	Three- and four-year-old 30 hour entitlement	Three- and four-year-old 15 hour entitlement	Two-year-old free entitlement
All or almost all	39%	33%	18%
Around three quarters	23%	25%	10%
Around half	28%	33%	13%
Around a quarter	5%	5%	18%
None, or very few	5%	5%	40%

We also asked local authorities about the typical daily charges providers were asking parents to pay for consumables.

- The typical daily charge for consumables for families using the 30 hour entitlement for three- and four-year-olds was £8.87. This falls slightly to £7.30 for families using the 15 hour entitlement for three- and four-year-olds, and to £3.85 for families using the 15 hour entitlement for disadvantaged two-year-olds.
- It is important to note that these figures are based on a small number of data points (16 for the 30 hour entitlements; 11 for the two year old entitlement), and so should be treated as a rough indication rather than a concrete estimate.

Table 32 - Typical daily charge for consumables made by providers underfunded early education entitlements

	Three- and four-year-old 30 hour entitlement	Three- and four-year-old 15 hour entitlement	Two-year-old free entitlement
Typical daily charge	£ 8.87	£ 7.30	£ 3.85

B. Requirement to buy additional hours

A more concerning trend is that there are reports of some providers requiring parents to also buy additional hours when taking up funded early education entitlements, is disallowed in statutory guidance*.

- As with the question about additional charges for consumables, there was a great deal of uncertainty among local authorities over how widespread this practice was.
- Over half of all local authorities answered that they did not know how many providers in their area were requiring parents to buy additional hours. This was the case for all three entitlements (see table 33).

Table 33 - Proportion of providers requiring families to also buy additional hours when taking up funded early education entitlements

	Three- and four-year-old 30 hour entitlement	Three- and four-year-old 15 hour entitlement	Two-year-old free entitlement
All or almost all	2%	2%	1%
Around three quarters	5%	3%	1%
Around half	4%	5%	2%
Around a quarter	7%	8%	2%
None, or very few	29%	28%	41%
Not known	55%	55%	53%

- Among those local authorities that were able to give an answer, 62% and 63% of local authorities said that 'None, or very few' providers in their area were requiring families using the 30 and 15 hour entitlement for three- and four-year-olds respectively to buy additional hours when taking up funded places. This rose to 89% for families using the 15 hour entitlement for disadvantaged two-year-olds.
- However, this still leaves a worrying amount of local authorities saying that this practice is being used by around half or more of providers in their area (22% for the three- and four-year-old 30 hour entitlement, 20% for the three- and four-year-old 15 hour entitlement, and 6% for the 15 hour entitlement for disadvantaged two-year-olds (see table 34).

Table 34 - Proportion of providers requiring families to also buy additional hours when taking up funded early education entitlements ('Not known' answers removed)

	Three- and four-year-old 30 hour entitlement	Three- and four-year-old 15 hour entitlement	Two-year-old free entitlement
All or almost all	3%	3%	2%
Around three quarters	10%	7%	2%
Around half	8%	10%	3%
Around a quarter	15%	18%	5%
None, or very few	63%	62%	89%

*Source: <https://www.gov.uk/government/publications/early-education-and-childcare--2>

Section 5 - Expansion to early education entitlements

In the 2023 Spring Budget, government announced a substantial increase in funding for childcare, which included three major expansions to free early education entitlements. From April 2024, eligible working parents of two-year-olds will get a new offer of 15 hours per week of free childcare. From September 2024, eligible parents will get 15 hours of free childcare per week from nine months until their children start school, and from September 2025, they will get 30 hours of free childcare from nine months until the start of school*. In December 2023, Coram Family and Childcare published a mini-report with early findings from our childcare survey about local authorities' confidence in the preparedness of providers in their area to delivering these new offers. This section provides an update, to include additional answers received after the report's publication.

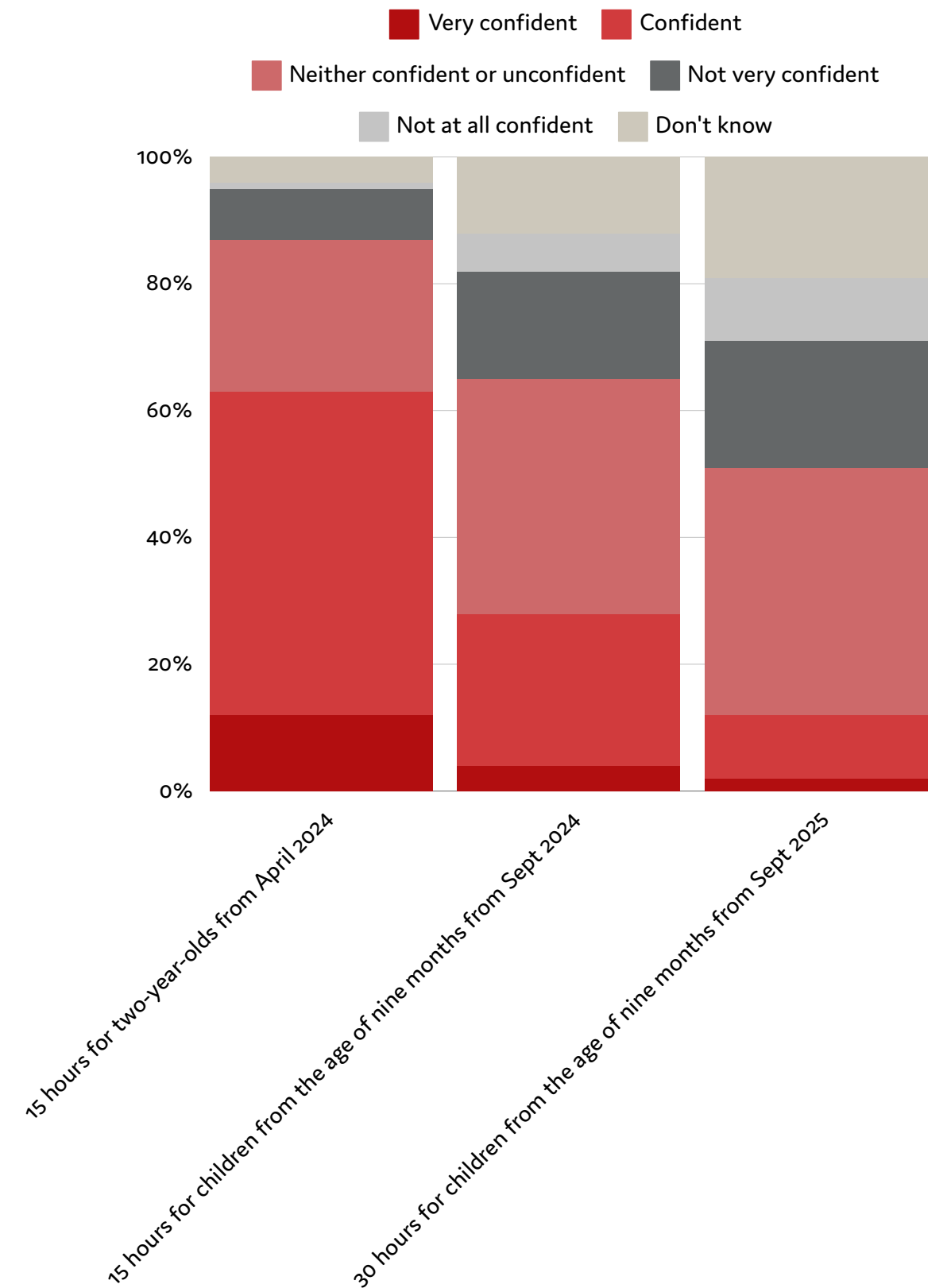
A. Supply and demand

- As shown in table 35, there is substantial variation in how confident local authorities feel about there being enough childcare places to meet demand for the expansion of funded childcare across the different expansions. The majority of local authorities (63%) are either confident or very confident that there will be enough places to meet demand for the April 2024 15 hour expansion for two-year-olds.
- However, only 28% of local authorities are confident or very confident that there will be enough supply to meet demand for the September 2024 15 hours expansion for children from the age of nine months. Local authorities have least confidence in meeting demand for the September 2024 30 hours expansion for children from the age of nine months, with only 12% saying that they were confident or very confident that their area would have enough supply to meet demand.
- There is also a great deal more uncertainty among local authorities about the two expansions for children from the age of nine months, especially for the September 2025 expansion; almost 1 in 5 local authorities (19%) do not know if supply will meet demand in their area.



*Source: Gov.uk (2023, 7 Jul). 'Press release: Government funding boost kickstarts delivery of historic new free childcare offers'. Retrieved from: <https://www.gov.uk/government/news/government-funding-boost-kickstarts-delivery-of-historic-new-free-childcare-offers>

Table 35 - Confidence in supply meeting demand for expansion of funded childcare



Question asked in survey: How confident do you feel that there will be enough childcare places locally to meet demand for the expansion of funded childcare for children with working parents?

B. Facilitators and barriers to successful delivery of expansions

- Our survey also asked what factors local authorities think are the biggest facilitators and barriers to successful delivery of the 30 hours expansion locally. As shown in table 36, the biggest facilitators identified were 'Willingness of providers to offer places', 'Understanding of likely changes in demand for childcare locally', and 'IT systems to enable applications for places', which were identified by 29%, 27%, and 26% of local authorities respectively as significant facilitators or facilitators.
- On the other hand, the vast majority (87%) of local authorities identified the local childcare workforce as a barrier or significant barrier to successful delivery of the expansion, highlighting the difficulty that the childcare sector as a whole is facing to attract and retain high-quality staff.
- Adequate provision for children with SEND was also a major concern for over half of local authorities, with 63% identifying 'Sufficiency of childcare places for children with SEND' as a barrier or significant barrier, as well as 57% for 'Funding to support children with SEND'. Another factor identified as a barrier or significant barrier by more than half of local authorities was 'Local buildings and space for childcare providers to set up or expand' (55%).
- Overall, this question revealed that local authorities see far more barriers than facilitators for the upcoming expansions, and furthermore, that they see the barriers as having more impact than the facilitators. It is also concerning that there is such a substantial variation in the types of barriers identified by local authorities, with the childcare workforce, provision for children with SEND, and space for providers to expand all being seen as significant barriers.

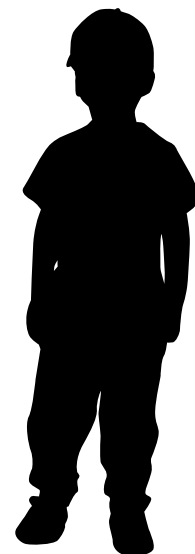
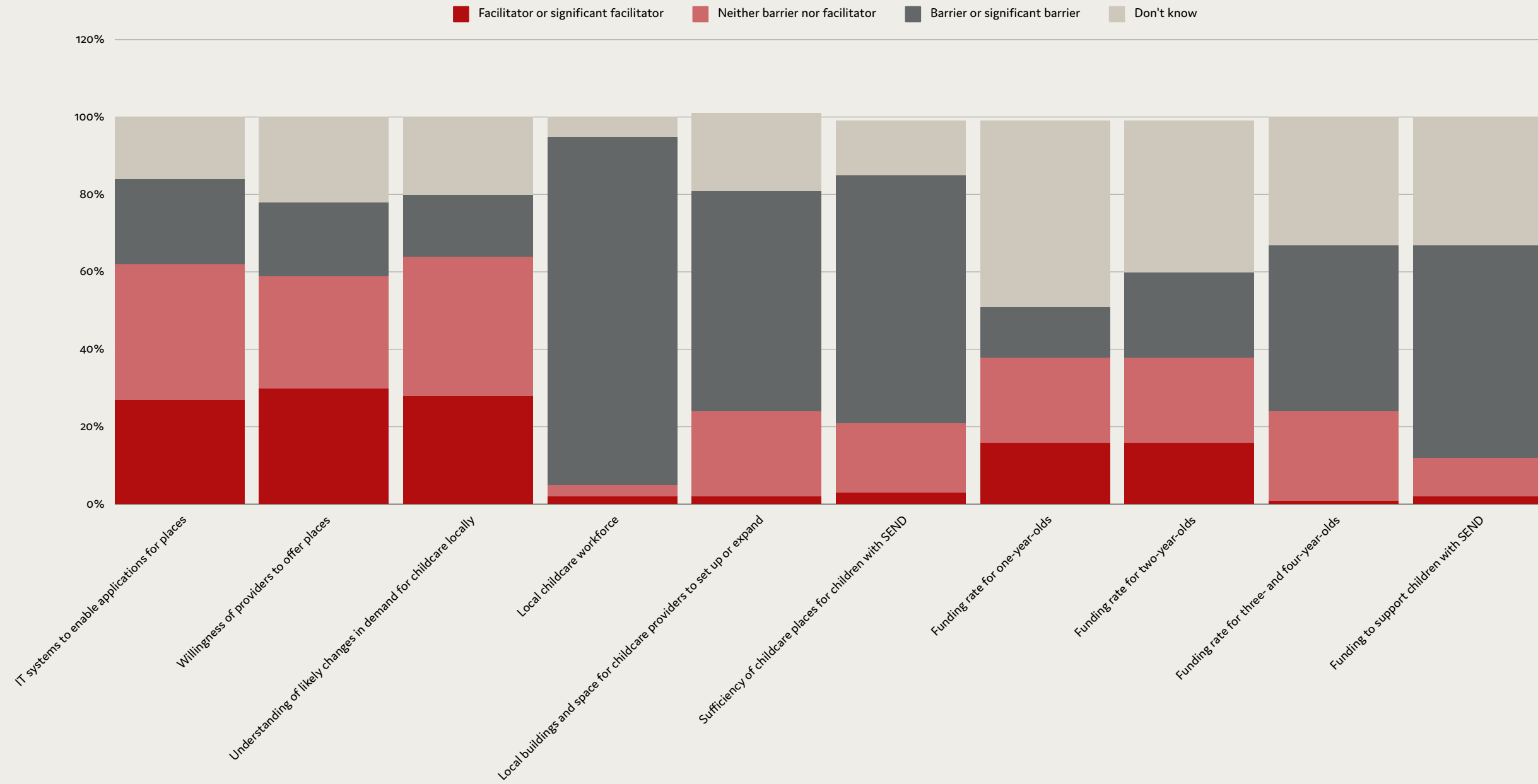


Table 36 - Barriers and facilitators to successful delivery of the 30 hours expansion

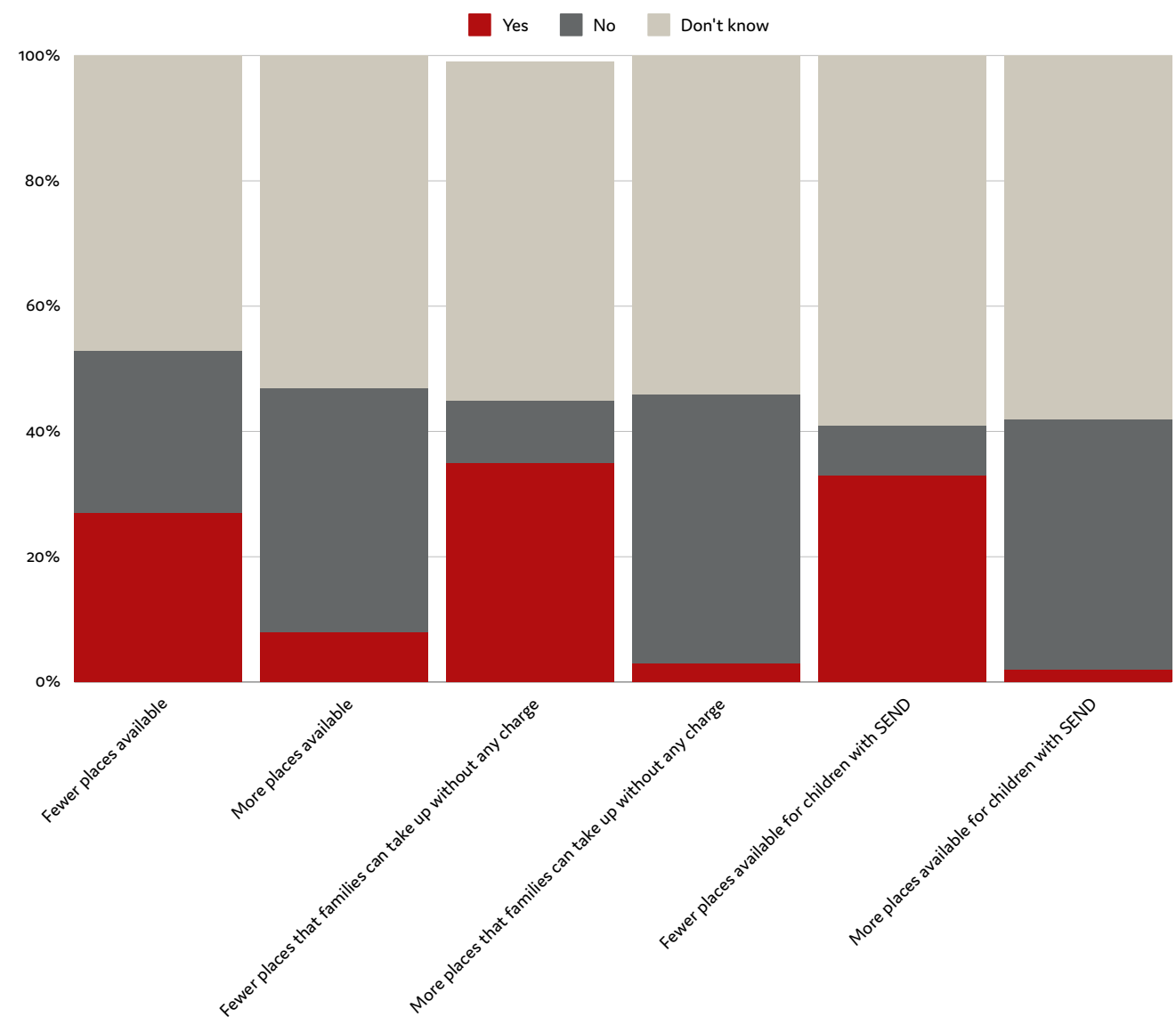


Question asked in survey: Are the following acting as barriers or facilitators to successful delivery of the 30 hours expansion locally?

C. Changes in availability of entitlements

- As shown in table 37, there is a great deal of uncertainty around how availability of the universal 15 hour entitlement for three- to four-year-olds will be impacted by the roll out of the 30 hours expansion – more than half of local authorities answered 'Don't know' for all but one category.
- However, despite this uncertainty, it is clear that local authorities expect the roll-out to have a negative impact on availability of the universal 15 hours entitlement for three- to four-year-olds, with 27% expecting fewer available places overall, 39% expecting fewer families to be able to take up their places without any charge, and 33% expecting fewer places to be available for children with SEND.

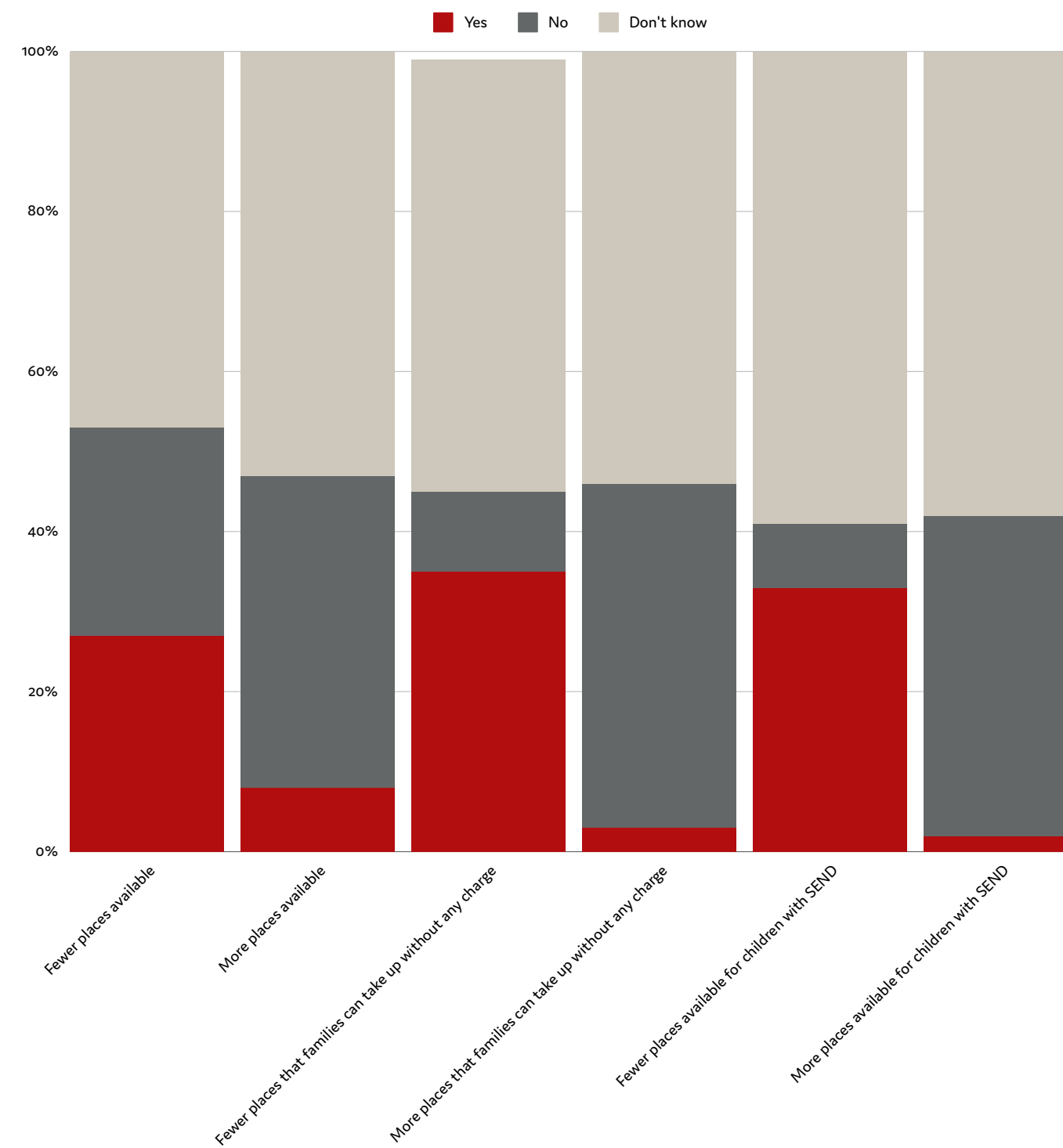
Table 37 - Expected changes in availability of the universal 15 hour entitlement for three- and four-year-olds as 30 hour expansion rolls out



Question asked in survey: As the 30 hour expansion rolls out, do you expect to see any changes in availability of the universal 15 hour entitlement for three- and four-year-olds?

- As seen in table 38, local authorities are similarly uncertain about the impact of the roll out of the 30 hour expansion on availability of the 15 hour entitlement for disadvantaged two-year-olds.
- Again, despite the uncertainty, local authorities are expecting a negative impact; 45% expect fewer places to be available overall, 33% expect fewer families to be able to take up their places without any charge, and 33% expect fewer places to be available for children with SEND.

Table 38 - Expected changes in availability of the 15 hour entitlement for disadvantaged two-year-olds as 30 hour expansion rolls out



Question asked in survey: As the 30 hour expansion rolls out, do you expect to see any changes in availability of the 15 hour entitlement for disadvantaged two-year-olds?

Conclusion

The findings of the Childcare Survey 2024 raise significant concerns. Childcare costs continue to rise at rates that are unsustainable for families and widespread additional charges create a barrier to children accessing funded places. At a time when the sector needs to increase childcare availability, the report reveals low sufficiency levels across all categories of current provision. Less than half of local authorities have enough childcare for children who are eligible for the current two-year-old funded entitlement and only 35% have enough childcare for children under two. This creates a real risk that parents and carers' expectation of a funded childcare place may not be met, and their potential door to work and income will be closed.

Only 6% of local authorities have enough childcare for disabled children. Being unable to work adds to the financial pressure on their parents, who already have higher costs than parents of non-disabled children. In addition, it means children with the greatest need are excluded from high-quality early education and placed at further disadvantage when starting school.

Areas for action

The findings from our survey show a system that is not working for children and families. Increasing costs and insufficient availability of childcare across Great Britain means parents and carers do not have equal access to work and children do not have equal access to childcare, even though we know how key this can be in boosting children's outcomes, especially those from more disadvantaged backgrounds. A shocking lack of provision for children with SEND will result in children with the greatest need being most at risk of missing out.

Immediate actions

- **Re-allocate the underspend from Tax-Free Childcare** to other parts of the childcare system.
- **Extend the current 30 hours funded early education entitlements to parents in training or education, and migrant parents.**
- **Increase funding for children with SEND and simplify the funding application process** to ensure those with the greatest need are not excluded from vital early education opportunities.
- **Bring the early years pupil premium in line with the primary pupil premium** to decrease the attainment gap between disadvantaged children and their peers.
- **Appoint a dedicated Chief Early Years Officer**, with a seat at the table and able to advocate for the profession at the heart of Government.

The first stage of the expansion of funded childcare entitlements is imminent, but the report reveals concern that reduction in existing provision may be the unintended outcome. Infrastructure must be addressed, and the sector needs a skilled workforce to meet the needs of all children.

The investment announced in the Spring Budget 2023 is a very welcome one, and should mark the first step on a journey towards an early education and childcare system that provides the best start in life for all children and genuine choice and opportunity for families. The next Government must make the most of this opportunity and address the areas for reform that can make it a reality.

For the recent investment to truly improve the lives of children and be the game changer it has the potential to be for many parents and carers, it must come with reform of our childcare system. We call on Government to ensure the upcoming expansions do not result in greater inequalities, and instead facilitate a sufficient, high-quality childcare system that values staff, enables all parents and carers to work, and is available to all children, no matter their needs or where they live.

Long-term actions

- **Create a workforce strategy** to address the pressing issues of staff recruitment, retention and skills. Early years practitioners should have training, pay and career paths that recognise their value.
- **Agree a funding settlement** that guarantees the true cost of provision, and sets out the conditions of receiving that funding, including quality supplements or SEND provision, and is monitored and updated annually.
- **Simplify and streamline the childcare offer** to families, with a single scheme that follows children from end of parental leave until the end of primary school.
- **Introduce a right to early education**, with a guarantee of a funded childcare place for all children regardless of theirs or their parent or carers' background, bringing early years in line with schools.

Methodology

Timescales

This report is based on surveys sent to all Family Information Services at local authorities in November 2023. Respondents were able to fill in a form or reply online. After a month, we sent Freedom of Information requests to those local authorities which had not responded. The questions about current pressures on providers in Scotland and Wales, additional charges and the expansion of the funded early education entitlements were not included in the Freedom of Information requests. The deadline for Freedom of Information requests was in February 2024.

Authorities who responded without the need for a Freedom of Information request were promised that individual responses would not be published, with only regional/ national averages provided in the report. This is consistent with previous surveys, and we do it to encourage honest and accurate data reporting. When Freedom of Information requests are used, some local authorities automatically publish their own responses, so we cannot make the same promise. However, we do not report these Freedom of Information individual responses in this report, and nor do we say which responses were acquired through Freedom of Information requests and which through

Data sources

Average, maximum and minimum childcare prices are provided by local authorities rather than being calculated by Coram Family and Childcare from information gathered directly from providers. Similarly, assessments of sufficiency are provided by local authorities rather than being based on data collected by Coram Family and Childcare's research team.

Where possible, we have kept questions consistent with previous versions of the survey to allow for tracking over time. However, we have made some changes to reflect the changing policy environment and in response to feedback from both survey respondents and organisations who use the data. We used slightly different surveys for local authorities in England, Scotland and Wales to reflect the different policy environments in the three nations.

Response rates

The overall response rate for the survey was 89%. For sections 1 and 2 of the survey we received responses from 82% and 89% of local authorities respectively. The lowest response rate for any region was 75%. Some local authorities did not give data for all questions, or gave data in a format that we could not use, which accounts for the different response rates per section. The response rate for section 3 – current pressures on childcare providers in Scotland and Wales – was 52% of local authorities in Scotland, and 86% of local authorities in Wales. The response rate for section 4 – additional charges – was 88% of local authorities. The response rate for section 5 – expansion of early education entitlements – was 67% of local authorities. These are lower than the response rate for the main survey as section 3, 4 and 5 questions were not included in the Freedom of Information Requests.

Weighting

In line with recent surveys, we have weighted cost data within regions and nations. This ensures that results from small local authorities which have relatively little childcare do not unduly influence overall results. Data on pre-school childcare is weighted against the nought- to four-year-old population based on ONS mid-year population estimates, and data for school-age childcare is weighted against the 5- to 11-year-old population. Within local authorities, we have weighted cost data for PVI and maintained setting providers against the number of providers in that area. This is based on an assumption that these types of settings will have the same number of children on average. Childminder cost data is presented separately and not as part of the local weighted average for non-domestic settings. This is because of difficulties accurately estimating the number of children using childminders as opposed to non-domestic settings on a local level, and the unique role childminders play in the market. We did not weight the data used for sections 3, 4 and 5.

Tracking change over time

Our comparison does not include any use of childcare subsidies through Tax-Free Childcare or the benefits system.

When comparing prices over time, we only include local authorities where we have data for both this year and the previous year. This is to avoid results being skewed by different local authorities having missing data year-on-year. This approach produces different results than would be reached simply by comparing the overall price figure from this year's survey against the overall price figure from last year. We believe this gives a more accurate reflection of the changes experienced by families.

Changes are weighted against this year's population data as described above. In some cases, we received 2023 data after the survey deadline for the year, but 2024 data within the deadline: in these cases, we have included the data in our calculations although they do not appear in the 2023 survey. This approach produces slightly different results to comparing regional weighted prices from the 2023 survey to regional weighted prices in the 2024 survey – we believe it gives a more accurate reflection of the changes experienced by families.







Data we do not collect

We do not collect data on the costs and availability of nannies and au pairs. This is because this data is not held by local authorities, and because they are used by a very small proportion of the population. Necessarily, the survey also excludes all types of informal childcare (e.g. grandparents, friends, babysitters). Information on families' use of formal and informal childcare can be found in the latest release of Childcare and Early Years Survey of Parents: 2022 (Department for Education, 2023)*.

We exclude Northern Ireland because the childcare funding system is very different, making it hard to draw direct comparisons.

*Source: <https://explore-education-statistics.service.gov.uk/find-statistics/childcare-and-early-years-survey-of-parents>)



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