

# Childcare Survey 2025

Wednesday 30 April, 12pm to 1.15pm

# Welcome and housekeeping

- This event is being recorded
- Microphones are muted during the presentation
- Clarification questions in the chat
- All slides will be shared with attendees

# Agenda

- Background
- What's new in 2025
- Key findings
  - Cost of childcare
  - Childcare availability
  - Parent views and experiences
- Response from Sarah Ronan, Early Education and Childcare Coalition
- Questions

# Background

- 24th annual childcare survey
- Sent to all local authorities in Great Britain
- Responses collected between November 2024 and February 2025
- 84% response rate
- Report published in March

# New in 2025

- Cost questions restructured to account for new entitlements for working parents
- Change to questions, and answer options, on childcare sufficiency
- Updated terminology
- Brand new section on parent experiences

# Cost of part time places – new childcare entitlement impact

Table 1 - Prices of 25 hours nursery for children aged under three, and price changes since 2024, after working parent entitlements in England have been taken into account (paying for 10 hours in England)						
	Under-twos			Two-year-olds		
	2025	2024	Price change*	2025	2024	Price change
England	£70.51	£159.61	-55.5%	£66.34	£153.69	-56.3%
Scotland	£122.38	£125.42	+6.9%	£124.75	£120.15	+6.5%
Wales	£155.04	£139.94	+9.7%	£146.15	£137.83	+7.2%

In England, families who are not in work, or who do not earn enough to be eligible, will pay £105 a week more than eligible families for a part-time place for a child under two, £100 more for a two-year-old.

Price of 25 hours a week at a nursery for children under two, with entitlements



# Cost of full-time places

**Table 4 - Price of 50 hours a week childcare for children under three at nurseries and childminders after working parent entitlements in England have been taken into account**

	Nursery		Childminder	
	Under two	Two	Under two	Two
England (paying for 35 hours)	£238.95	£225.70	£202.09	£198.59
Scotland	£239.78	£235.49	£259.53	£259.67
Wales	£290.06	£279.14	£259.51	£251.30

3-and-4-year olds:

- **England:** £126.94/week, 4.7% increase
- **Wales:** £119/week, 5.6% increase
- **Scotland:** £105/week, 3.7% increase



# After-school childcare costs

Table 11 - Weekly prices of an after-school club or childminder for children aged 5 - 11		
	After-school club	Childminder to 6pm
<b>Great Britain</b>	£66.48	£81.26
<b>England</b>	£66.04	£81.65
<b>Scotland</b>	£72.97	£79.99
<b>Wales</b>	£69.14	£75.41
East Midlands	£66.61	£70.55
East of England	£69.75	£83.14
London, Inner	£55.68	£136.80
London, Outer	£66.93	£117.35
North East	£67.81	£78.13
North West	£55.58	£67.54
South East	£76.09	£84.18
South West	£61.24	£70.03
West Midlands	£68.66	£83.65
Yorkshire and the Humber	£61.60	£65.32

# Sufficiency – Early years (England)

- Sufficiency is highest for:
  - Three- to four-year-olds entitled to the 15-hour funded entitlement – 82%\*
  - Three- to four-year-olds entitled to the 30-hour funded entitlement – 80%
  - Two-year-olds entitled to the 15-hour funded entitlement for disadvantaged families – 80%
- Around 1 in 6 local authorities responded 'Data not held' for all early years entitlements, compared to 1 in 3 for two-year-olds and under not entitled to any funded entitlements

*\* Throughout the sufficiency slides, percentages should be read as the percent of local authorities reporting sufficiency for at least 75% of children, unless otherwise stated*

# Sufficiency – Early Years (England)

- Please tell us the percentage of children in your local authority for whom you have enough childcare.

	At least 75%	100%	75% to 99%	50% to 75%	25% to 50%	Less than 25%	Data not held	Total responses
Two-year-olds and under (not entitled to any funded entitlement)	<b>59%</b>	21%	38%	7%	1%	0%	33%	123
Two-year-olds and under (entitled to 15-hour funded entitlement for working families)	<b>79%</b>	28%	50%	3%	1%	1%	16%	123
Two-year-olds (entitled to 15-hour funded entitlement for disadvantaged families)	<b>80%</b>	31%	49%	4%	2%	0%	14%	123
Three- to four-year-olds (entitled to 15-hour universal funded entitlement)	<b>82%</b>	45%	37%	2%	2%	0%	15%	123
Three- to four-year-olds (entitled to 30-hour funded entitlement for working families)	<b>80%</b>	41%	39%	1%	2%	0%	17%	122

# Sufficiency – Other Groups (England)

	At least 75%	100%	75% to 99%	50% to 75%	25% to 50%	Less than 25%	Data not held	Total responses
5- to 11-year-olds before school	<b>55%</b>	12%	43%	11%	1%	3%	30%	121
5- to 11-year-olds after school (until 6pm)	<b>51%</b>	6%	45%	12%	3%	4%	31%	120
12- to 14-year-olds before school	<b>14%</b>	3%	10%	6%	3%	2%	75%	118
12- to 14-year-olds after school (until 6pm)	<b>13%</b>	3%	11%	5%	3%	3%	76%	119
Children and young people with SEND	<b>29%</b>	4%	25%	16%	1%	2%	53%	120
Parents working full time (9-5 on weekdays)	<b>58%</b>	17%	41%	0%	0%	1%	42%	120
Parents working atypical hours (outside 9-5)	<b>22%</b>	3%	19%	8%	3%	5%	63%	120
Families living in rural areas	<b>44%</b>	7%	38%	4%	1%	1%	49%	72

# Sufficiency – Scotland

	At least 75%	100%	75% to 99%	50% to 75%	25% to 50%	Less than 25%	Data not held	Total responses
Two-year-olds and under (not entitled to the funded entitlement)	<b>11%</b>	4%	7%	11%	4%	0%	74%	27
Two-year-olds and under (entitled to 1,140-hour funded entitlement)	<b>78%</b>	67%	11%	0%	0%	0%	22%	27
Three- to four-year-olds	<b>78%</b>	70%	7%	0%	0%	0%	22%	27
5- to 11-year-olds before school	<b>19%</b>	15%	4%	4%	4%	4%	70%	27
5- to 11-year-olds after school	<b>22%</b>	7%	15%	0%	4%	4%	70%	27
12- to 14-year-olds before school	<b>7%</b>	7%	0%	4%	4%	0%	85%	27
12- to 14-year-olds after school	<b>7%</b>	7%	0%	4%	4%	0%	85%	27
Children and young people with SEND	<b>30%</b>	26%	4%	0%	0%	4%	67%	27
Parents working full time (weekdays 9-5)	<b>15%</b>	11%	4%	0%	0%	0%	85%	27
Parents working atypical hours	<b>7%</b>	7%	0%	0%	0%	0%	93%	27
Families living in rural areas	<b>24%</b>	24%	0%	0%	0%	0%	76%	25

# Sufficiency – Wales

	At least 75%	100%	75% to 99%	50% to 75%	25% to 50%	Less than 25%	Data not held	Total responses
Two-year-olds and under (not entitled to any funded hours)	<b>42%</b>	5%	37%	0%	0%	0%	58%	19
Two-year-olds and under (entitled to Flying Start)	<b>69%</b>	16%	53%	0%	0%	0%	32%	19
Three- to four-year-olds (entitled to the universal 10-hour offer)	<b>34%</b>	6%	28%	0%	0%	0%	67%	18
Three- to four-year-olds (entitled to 30 funded hours for working families)	<b>63%</b>	21%	42%	0%	0%	0%	37%	19
5- to 11-year-olds before school	<b>42%</b>	16%	26%	5%	0%	0%	53%	19
5- to 11-year-olds after school	<b>37%</b>	5%	32%	11%	0%	0%	53%	19
12- to 14-year-olds before school	<b>6%</b>	0%	6%	0%	0%	11%	83%	18
12- to 14-year-olds after school	<b>6%</b>	0%	6%	0%	0%	11%	83%	18
Children and young people with SEND	<b>26%</b>	5%	21%	11%	5%	0%	58%	19
Parents working full time (weekdays 9-5)	<b>43%</b>	11%	32%	0%	0%	0%	58%	19
Parents working atypical hours (outside 9-5)	<b>6%</b>	0%	6%	6%	6%	17%	67%	18
Families living in rural areas	<b>21%</b>	0%	21%	0%	0%	7%	71%	14

# Good quality childcare - parents' views and experiences

Our pilot study:

- A survey
- Two focus groups

We asked parents:

- What they value most in a childcare provider
- How far their experience has matched this
- The differences childcare has made to them and their child(ren)

In our survey:

- **52%** of parents chose being **friendly and kind** as one of their **top three** most important staff qualities
- **33%** chose **qualifications and training** as their **number one** most important staff quality
- **73%** chose **outdoor space** as one of their **top three** most important qualities in the building and environment category, and **41%** ranked it as their **number one** choice
- **92%** chose **hearing about their child's day from their provider** as one of their **top three** most important features of a childcare setting's approach and attitude, and **49%** ranked it as their **number one** choice



In our focus groups:

- As in the survey, parents told us they valued **kind** and **communicative** staff
- Parents tended to prefer soft indicators of a setting's quality – such as the **opinions of other parents** – over hard indicators like qualifications and Ofsted reports
- However, parents expressed a deep appreciation of what their providers had done to **support their child's development**, including parents whose providers had been instrumental in **identifying and supporting their child's additional needs**

“SINCE HE'S BEEN TO THE NURSERY, THEY'VE PICKED UP QUITE A LOT OF THINGS WHICH THEY WERE CONCERNED ABOUT, MAINLY SPEECH AND LANGUAGE. THEY'VE HELPED ME... TO GET THE RIGHT INFORMATION AND GO DOWN THE RIGHT ROAD.”

Focus group participant

“THEY'RE DOING ALL THIS MUSIC, THEY'RE READING, THEY'RE GOING OUT, THEY'RE EXPLORING... I'M DEFINITELY GETTING MY MONEY'S WORTH... BOTH FOR ME AND FOR HER.”

Focus group participant

# Sarah Ronan

## Director, Early Education and Childcare Coalition

**EARLY  
EDUCATION AND  
CHILDCARE COALITION**

For children, for parents, for the economy

# Questions