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## Childcare Survey 2025

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Family and Childcare

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## About Coram Family and Childcare

Coram Family and Childcare works to make the UK a better place for families, focussing on childcare and early years to make a difference to families' lives now and in the long term. We are a leading voice on early education and childcare, carrying out research to aid understanding and drive change in national and local policy.

## About this report

This report is the 24th 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 2024 and February 2025. Questions on cost and sufficiency were revised and updated this year; further details can be found in the Introduction.

This year, the report also includes findings from a pilot survey of parents in England, collected between October 2024 and November 2024, and two focus groups with parents, held in December 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](https://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.



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# Executive summary

This year saw the first two phases of the entitlements for working parents in England rolled out as a result of the new Government, elected in the summer, sustaining the commitment it inherited. As local authorities and providers set to work delivering the additional places for families, new initiatives and a government ambition to break the link between children's background and future opportunities were announced.

The Childcare Survey 2025 is our 24th annual survey and, at a time of such change for the system, it was only right that the survey changed with it. New questions were introduced to take account of the new entitlements and sufficiency questions were changed to give a more detailed picture of current circumstances and, importantly, of how far we are on the journey to ensuring that all children can access a childcare place.

This year's survey shows just how different a parent's childcare bill can be with funded entitlements. Working parents of children aged under three in England paid less than half of last year's cost for a part-time nursery place, and more than 20% less for a full-time place. This is a very welcome step towards making childcare affordable for working families and easing the difficult choices between work and care that parents have been faced with for many years.

There are however families who are not eligible for the new entitlements. 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, and £100 more for a two-year-old. This raises the question of whether disadvantaged children have the same opportunity to learn and play as their more affluent peers, or whether they are simply priced out of the chance to boost their future outcomes.

As these new entitlements are only in England, there were no such cost reductions for families of children under three in the other nations of Great Britain. Prices increased by nearly 7% for under-twos in Scotland, and nearly 10% in Wales.

In Great Britain overall, parents of three- to four-year-olds saw increases of nearly 5% for a part-time nursery place, as established entitlements for this age group remained the same across all nations.

Our new sufficiency questions found that the dedication and commitment of local authorities and childcare providers to deliver the expansion has paid off, with high levels of sufficiency reported for all the funded entitlements.

However, despite the change in questions precluding direct year-on-year comparisons, for some families – parents of older children, parents working atypical hours and children with special educational needs and disabilities (SEND) – the trends of low sufficiency remain the same this year as in previous years. Less than a third of local authorities say they have enough places for at least 75% of children with SEND, and more than half were not able to say either way.

This year we piloted a brand-new survey with parents, followed by focus groups. Whilst a smaller study, this has given new insight into what parents value the most about their childcare provider, how far their experiences have matched this, and the differences they have seen in their children since attending childcare.

We found that outdoor space was a top priority for parents when considering the place their children attend and that most parents looked for a friendly and kind approach from the people looking after their children, though staff qualifications and training were also highly rated. Communication between childcare providers and parents was essential for nearly all parents surveyed, and something that was echoed in our focus groups.

Parents in both the survey and focus groups talked about the difference that attending childcare had made, sharing stories of children's speech coming on in leaps and bounds, children learning to play and make friends with others, and of the help given when children showed signs of additional needs. Parents felt that attending childcare had made their children more excited about starting school, and that they as parents felt more confident about that next step, too.

This new window into parents' views shows the value of good quality childcare, and the change it can bring about.





1

## Great Britain

- Parents of three- to four-year-olds saw increases of nearly 5% since 2024 for a part time nursery place, as established entitlements for this age group remained the same across all nations.
- The average price of an after-school club for a week is £66.48. The average price of a childminder after school to 6pm for a week is £81.26 across Great Britain.

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## England

- Working parents of children aged under three paid less than half of last year's cost for a part-time nursery place, and more than 20% less for a full-time place.
- 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 nursery place for a child under two, and £100 more for a two-year-old.
- The costs for full-time nursery places for children under the age of three have decreased due to the new working parent 15 hour entitlement. Parents who need to pay for 35 extra hours to take this up to a full-time place will pay an average of £238.95 per week for children under two and £225.70 per week for two-year-olds.
- For parents of three- and four-year-olds using a full-time nursery place the average weekly price in a nursery is £126.94 in England, a 4.7% increase since last year.
- Less than a third of local authorities say they have enough places for at least 75% of children with SEND, and more than half were not able to say either way.

3

## Scotland

- Parents saw increases of nearly 7% in the cost of part-time nursery places for under-twos and two-year-olds, compared to 2024.
- The average full-time place in a nursery for a three- and four-year-old costs £105.88 per week, if they are receiving 30 hours of funded childcare and paying for 20 hours, a 3.7% increase on last year.
- Availability of the universal 1,140 hour entitlement for three- and four-year-olds, and the targeted 1,140 hour entitlement for two-year-olds, are both relatively high with 78% of LAs reporting enough places for at least three quarters of children.

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## Wales

- Parents saw increases of nearly 10% in the cost of part-time nursery childcare for under-twos since last year, and just over 7% for two-year olds.
- The average full-time place in a nursery for a three- and four-year-old costs £119.23 a week, a 5.6% increase on 2024.
- 67% of local authorities have sufficient places for at least three quarters of children entitled to Flying Start, and 61% said the same for the working parent entitlement for three- to four-year-olds.

Price of childcare

- There are now significant differences in the average cost of childcare for children aged under three between England and the other nations of Great Britain due to the introduction of new entitlements in England that gave eligible working parents 15 hours per week of government-funded childcare for 38 weeks of the year (for parents of two-year-olds from April 2024, and from the age of nine months from September 2024).
- Costs in England have more than halved since 2024 for a part-time (25 hours) place in a nursery for children aged two and under due to the new entitlements, as working parents now only need to pay for some of the hours they need. Table 1 figures show the cost of paying for 10 hours per week.

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%

\*Price change figures are based only on those local authorities that provided responses to the survey across both this year and last year. Therefore, it is not necessarily the same percentage change as would be reached by simply calculating the difference between the 2025 and 2024 figures in this table. More information can be found in the Methodology section of this report.

- Part-time nursery costs in Scotland increased by 6.9% for children aged under two, and by 6.5% for two-year-olds. Wales saw even greater increases, with costs climbing by 9.7% for children aged under two and by 7.2% for two-year-olds.
- As with part-time places, the costs for full-time nursery places for children under the age of three have decreased in England due to the new working parent 15-hour entitlement. Parents who need to pay for 35 extra hours to take this up to a full-time place (50 hours a week) will pay an average of £238.95 per week for a child under two, 21.5% less than in 2024, and £225.70 per week for a two-year-old, a decrease of 22.6%.
- Working parents of three- and four-year-olds in England and Wales are eligible for 30 hours of funded childcare a week for 38 and 48 weeks a year respectively. If they need to pay for 20 extra hours to take this up to a full-time nursery place (50 hours a week), the average weekly cost to parents is £126.94 in England, a 4.7% increase since last year, and £119.23 in Wales, a 5.6% 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 £105.88 per week if they are receiving 30 hours of funded childcare and paying for 20 hours, a 3.7% increase.
- The average price of an after-school club for a week is £66.48 across Great Britain, or £2,593 a year during term time (39 weeks). The average price of a childminder after school to 6pm for a week is £81.26 across Great Britain, or £3,169 a year during term time.

Figure 1a - Prices of 25 hours nursery for children aged under two, and price changes since 2024, after working parent entitlements in England have been taken into account (paying for 10 hours in England)

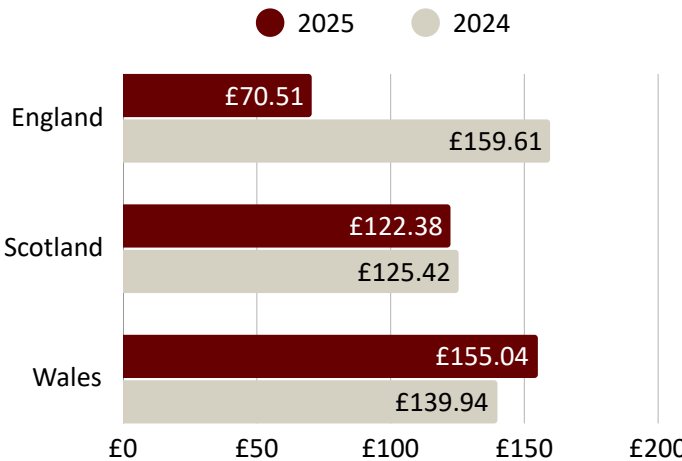
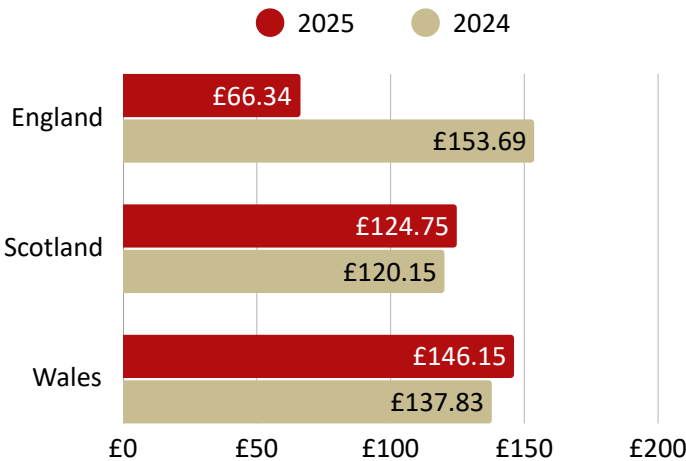


Figure 1b - Prices of 25 hours nursery for children aged two years old, and price changes since 2024, after working parent entitlements in England have been taken into account (paying for 10 hours in England)



## Is there enough childcare?

- Our sufficiency questions changed this year, shifting the focus from geographical coverage within a local authority to the number of children in an area, and gathering more detailed data on levels of provision. New categories were also added, to reflect the new entitlements in England and to ask about availability of childcare before school.
- Local authorities across England, Scotland and Wales were asked to report on the percentage of children for whom they have sufficient childcare across a range of categories in terms of: '100%', '75% to 99%', '50% to 75%', '25% to 50%', 'less than 25%' or 'Data not held or cannot tell'.
- Sufficiency is high for the funded entitlements, with around 8 in 10 local authorities having enough places for at least three quarters of children in their area for all the funded entitlements (see table 2).
- Despite looking at sufficiency in a different way, the categories of children for whom sufficiency is lowest follow the same pattern as previous years with older children, parents working atypical hours, children with special educational needs and disabilities, and families in rural areas all least well-served.
- In Scotland, availability of the universal 1,140-hour entitlement for three- and four-year-olds, and the targeted 1,140-hour entitlement for two-year-olds, are both relatively high with 78% of LAs reporting enough places for at least three quarters of children. Sufficiency for other categories in Scotland were not well enough known to draw a relevant conclusion.
- In Wales, 69% of local authorities have sufficient places for at least three quarters of children entitled to Flying Start, and 63% said the same for the working parent entitlement for three- to four-year-olds. Similarly to Scotland, sufficiency for other categories was not well known.

**Table 2 - Childcare sufficiency defined as the combined sum of '100%' and '75% to 99%' of children, in England (% LAs)**

	At least 75%	Total responses
Two-year-olds and under working parent entitlement (15 hours)	79%	123
Disadvantaged two-year-olds entitlement (15 hours)	80%	123
Two-year-olds and under without any funded entitlement	59%	123
Three- and four-year-old universal entitlement (15 hours)	82%	123
Three- and four-year-old working parent entitlement (30 hours)	80%	122
5- to 11-year-olds before school	55%	121
5- to 11-year-olds after school	51%	120
12- to 14-year-olds before school	14%	118
12- to 14-year-olds after school	13%	119
Children and young people with SEND	29%	120
Parents working full time	58%	120
Parents working atypical hours	22%	120
Families living in rural areas	44%	72



## Parents' views and experiences of childcare

- Over half of parents (52%) we surveyed said that being friendly and kind was one of their top three most important staff qualities, but qualifications and training was most commonly ranked as the number one priority, chosen by 33% of parents.
- Outdoor space was a top three choice for most parents (73%) as well as the top priority, with 41% of parents surveyed ranking it their number one in the building and environment category.
- Communication was key for parents, with the vast majority (92%) saying that hearing about their child's day from their provider was one of the top three most important features of a childcare setting's approach and attitude. This was also the most popular first choice (49%).
- Parents saw differences in their children since attending childcare, including their child becoming more independent, more excited about starting school, feeling happier with new people and having new friends. They also saw changes in their child's development, including talking more and becoming better with physical activities like walking, running, jumping, or using a scooter or bike.
- Parents told us the most important qualities in a childcare setting are that their child enjoys being there and that the staff are kind and communicative. Parents tended to prefer soft indicators of a setting's quality – such as the opinions of other parents – over hard indicators like Ofsted reports. 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.



## Areas for action

We call on all Governments in Great Britain to rebalance the system to enable all parents and carers to work and to ensure that children have the best start in life during their essential early years.

### Immediate actions:

- **Extend the working parent funded early education entitlements to children whose parents are in training or education, are migrants who meet the work criteria, or who are unable to work due to terminal illness.**
- **Further increase the early years pupil premium to bring it in line with the primary pupil premium** and to decrease the attainment gap between disadvantaged children and their peers.
- **Ensure that new school-based nurseries are opened in areas of most need**, addressing gaps in sufficiency including provision for children who are currently less well-served, such as children with SEND.
- **Increase the value of early years SEND funding.** Ring-fence funding for early years within the additional investment for children with SEND (announced at the Autumn 2024 Budget), and the high needs block funding for early years.
- **Create a more flexible SEND funding system**, not linked to other assessments such as Disability Living Allowance (DLA) and Education Health and Care Plans (EHCPs).
- **Update the funding model to ensure rates cover the true cost of provision**, including employer National Insurance contributions (NICs) and recruitment costs based on accurate assessments of turnover.
- **Re-allocate the underspend from Tax-Free Childcare** to other parts of the childcare system.

### Long term actions:

- **Remove the parental work criteria from the childcare entitlements**, giving all children an equal right to 30 hours per week of early education from the age of nine months until they start school, and introduce a single, means-tested co-payment system for families wishing to access additional hours, with families below the poverty line paying nothing.
- **Create a workforce strategy** that addresses the issues of staff recruitment, retention and skills.
- **Work towards provision of government-funded free meals in early years**, using the same criteria as free school meals.
- **Safeguard access to provision for disadvantaged children** by extending the duty to accept children with an EHCP, and to give priority admission to looked-after and previously looked-after children, to all registered early years settings as a condition of receiving government funding.
- **Allocate separate and dedicated funding to LAs to support their role**, delinked from the rate paid to providers.



# Introduction

This is the 24th 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 2024 and January 2025. A total of 173 local authorities returned data generating a response rate of 84%. This year, the report also includes findings from a pilot survey of parents in England, collected between October 2024 and November 2024, and two focus groups with parents, held in December 2024. The methodology section at the end of the report provides further information on how the surveys and focus groups were conducted and the findings analysed.

The report consists of three main sections: 1) the prices of childcare, 2) the availability of childcare and 3) parents views and experiences of childcare. 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 local authority survey data, we make recommendations for action, which can be found in the conclusion section.

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. Since 2017, for three- and four-year-olds, we have asked about the price of childcare assuming that they are using the funded childcare entitlements.

This year, it was necessary to change the price question for children under the age of three, to take account of the expansion of funded entitlements for working families. Since April 2024, eligible working parents of two-year-olds are entitled to 15 funded hours of childcare per week. In September 2024 this was expanded to younger children, from the age of nine months. The final stage of the expansion will take place in September this year, when the entitlement will increase to 30 funded hours per week.

Local authorities were given the option of providing childcare prices for two-year-olds and under twos, either before or after the 15-hour entitlement was taken into account, allowing responses to be calculated for either scenario. From this, we are able to show the difference the new entitlement makes to overall cost for parents.

After reviewing the survey, it was decided to update the long-standing questions on childcare sufficiency. Previous surveys asked local authorities 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'. This year local authorities were asked to report on the percentage of children for whom they have sufficient childcare, either '100%', '75% to 99%', '50% to 75%', '25 to 50%', 'less than 25%' or 'Data not held or cannot tell'. This changes the focus from geographical locations ('areas') within a local authority, to children. The change takes into account feedback from local authorities on the way in which sufficiency information is collected and assessed in practice, and feedback that the space between the responses 'Yes: in all areas' and 'No', covered by only one option of 'Yes: in some areas', was very wide. The new question was developed with local authority input.

Looking at provision as a percentage of children gives a more accurate picture of current circumstances and of how far we are on the journey to ensuring that all children can access a childcare place. However, in recognition that geographical location remains important for many families, we included an additional new question asking local authorities for the percentage of wards in their local area that have enough childcare.

Due to the fundamental difference in this year's questions, it is not possible to make direct comparisons with last year's sufficiency results. It is always difficult to balance the value of tracking data over time through consistent questions with the inevitable need for long-running surveys to adapt and evolve.

This report is published in another busy year for the childcare system. The new Government, elected in July 2024, continued the previous Government's commitment to expand funded childcare entitlements for working families. The first two stages of the expansion were rolled out in April 2024 and September 2024. Local authorities and childcare providers now look to the final stage, in September 2025.

Since the election there have been a flurry of new announcements, including a plan to create 3,000 new school-based nurseries and a new £75 million expansion grant to support provision of the additional places needed for the expansion.



It's not all been about the expanded entitlements. The Government's Opportunity Mission set an intention to break the link between a child's background and their opportunities in life, and their Plan for Change outlined a milestone of 75% of children reaching a good level of development by the time they start school in 2028. Early years pupil premium was increased by more than 45% (to up to £570 per eligible child per year) and universal free breakfast clubs in primary schools were announced. A new undergraduate route to Early Years Teacher Status, the Early Years Teacher Degree Apprenticeship (EYTDA) standard, was published, as well as a new experience-based route to count early years staff in ratios.

These new initiatives sit alongside other developments, such as investment in Start for Life services and Family Hubs, the continuation of the holiday activities and food (HAF) programme, removal of one-word Ofsted judgements, appointment of a taskforce to work on a Child Poverty Strategy and the introduction of a Children's Wellbeing and Schools Bill.

The new Secretary of State has repeatedly said that early years is her top priority and it certainly feels that we are in another important time for our sector.

However, the excitement of these ambitions sits alongside a cloudier financial picture. At the Autumn Budget, a rise of nearly 7% to the National Living Wage was announced, and employer National Insurance Contributions (NICs) were increased from 13.8% to 15%. Employers will also start paying NICs earlier, as the per-employee threshold for payments was reduced from £9,100 to £5,000 per year. These changes come into effect from April and have caused widespread concern for childcare providers, for whom staff costs make up the majority of their expenditure. It remains unclear whether childcare providers will be eligible for Employment Allowance to support with these increased costs.

In addition, updated Statutory Guidance makes it clear that additional charges to parents accessing the funded entitlements must be voluntary. In future, providers will need to publish these charges and clearly list them on invoices. Parents who opt not to pay must be offered reasonable alternatives. Providers have questions about how this will work in practice, and some are concerned about ongoing financial stability in an environment where options to diversify their income are reducing.

And a question remains about children who are not included in the funded entitlements for working families. Children whose parents are not in work, or who do not earn enough to qualify, must wait until the term after they turn two to access a funded entitlement (subject to criteria such as accessing certain benefits) at the earliest. That entitlement is for 15 hours per week and stays at 15 hours per week until they start school. There is no entitlement at nine months and no increase to 30 hours. If the government truly wants to ensure children are 'school ready' and break the link between background and life chances, then they must look to rebalance the system, which currently gives less early education to children who stand to benefit from it the most. The disadvantage gap starts early. The government has an opportunity to close it at the Autumn Spending Review by committing to making the funded childcare entitlement universal.



## 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.

**Childminder** – a registered child carer who works with children for more than two hours a day in domestic premises (usually their own home) or, in England, in approved non-domestic premises (such as a community or village hall).

**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.

Funded childcare in England, Scotland and Wales		
Age of child	Nation	Eligibility and hours
Children aged nine months to two years	England	Since September 2024, 15 hours a week for 38 weeks a year. 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. From September 2025, children from nine months to four years old will be entitled to 30 hours total a week for 38 weeks a year. The same eligibility criteria as the September 2024 expanded offer.
Two-year-olds	England	15 hours a week for 38 weeks a year for parents in receipt of certain benefits, or children who are disabled or looked after. Since April 2024, 15 hours a week for 38 weeks a year. 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. From September 2025, children from nine months to four years old in working households will be entitled to 30 hours total a week for 38 weeks a year. The same eligibility criteria as the April 2024 expanded offer.
	Scotland	Up to 1,140 hours a year for parents in receipt of certain benefits or children who are looked after (30 hours a week for 38 weeks a year, or 22 hours spread across the year).
	Wales	12.5 hours a week for 39 weeks a year for two- to three-year-olds eligible for Flying Start.
Three- to four-year-olds	England	15 hours a week for 38 weeks a year for all three- and four-year-olds. An extra 15 hours a week (30 hours a week total) for 38 weeks a year for three- and four-year-olds. 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.
	Scotland	1,140 hours a year for all three- to four-year-olds (30 hours a week for 38 weeks a year, or 22 hours spread across the year).
	Wales	10, 12.5 or 30 hours a week depending on local authority. Children with working parents are entitled to 30 hours in total, 48 weeks a year.

Additional support with childcare costs across Great Britain			
Type of support	Age of child	Nation	Applicability
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	Aged under 16	All nations	Universal Credit claimants can claim back up to 85% of their childcare costs (or receive them up-front if moving into work) to a maximum of £1,014.63 for one child or £1,739.37 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 - Price of childcare

This section describes the typical prices charged by childcare providers across Great Britain and discusses how they have changed. The data illustrates differences in childcare costs between England, Scotland and Wales, as well as between English regions. Most parents receive some support through Tax-Free Childcare or the benefits system to help pay these costs. We also take into account that many children are entitled to funded early education via universal or working parent entitlements. Many parents will therefore only need to pay for some of the hours of childcare that they use (see the glossary in the introduction).

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

This section provides an overview of the cost of part-time (25 hours per week) childcare for children under three years old across Great Britain. The section also discusses the impact of the new funded entitlement for working parents in England. It is important to note that only families eligible for the working parent entitlement benefit from the reduced costs, while those ineligible continue to face rising costs (see table 3b).

When asking about prices in England, this year we have taken into account that children of this age group with working parents are now entitled to 15 funded hours per week. Parents who want to access additional hours will therefore only need to pay for some of the hours of childcare that they need.

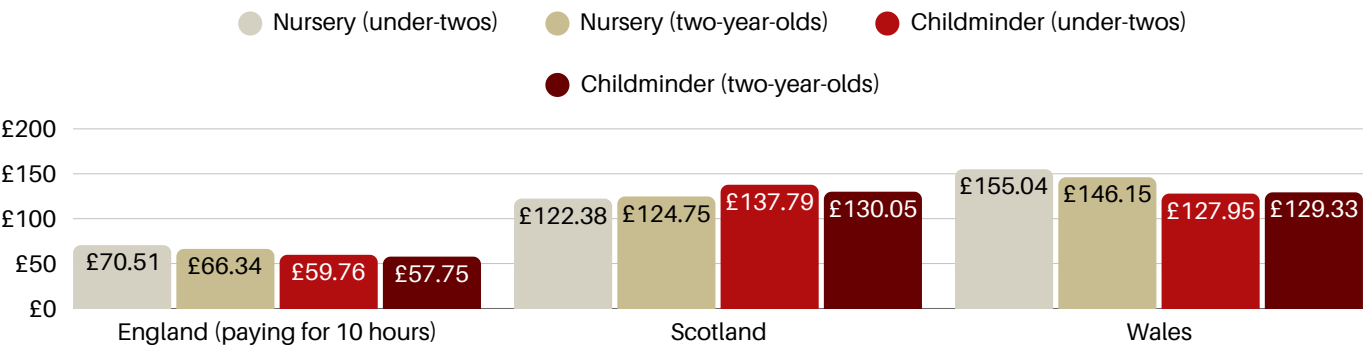
The following figures show costs of childcare for children under three, in nurseries and with childminders. These do not include costs that hours taken outside of term-term incur for families, meaning that costs during school holidays would be considerably higher.

Table 3a - Price of 25 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 10 hours)	£70.51	£66.34	£59.76	£57.75
Scotland	£122.38	£124.75	£137.79	£130.05
Wales	£155.04	£146.15	£127.95	£129.33
East Midlands	£60.71	£57.69	£49.27	£49.59
East of England	£77.52	£70.42	£57.55	£57.18
London, Inner	£92.01	£90.25	£82.55	£81.76
London, Outer	£84.05	£83.73	£77.57	£74.14
North East	£66.98	£58.43	£53.93	£56.53
North West	£64.91	£58.42	£51.98	£50.47
South East	£69.65	£64.59	£54.22	£53.92
South West	£70.32	£64.65	£72.43	£56.72
West Midlands	£70.93	£68.55	£63.02	£62.46
Yorkshire and the Humber	£60.51	£59.53	£51.00	£50.82

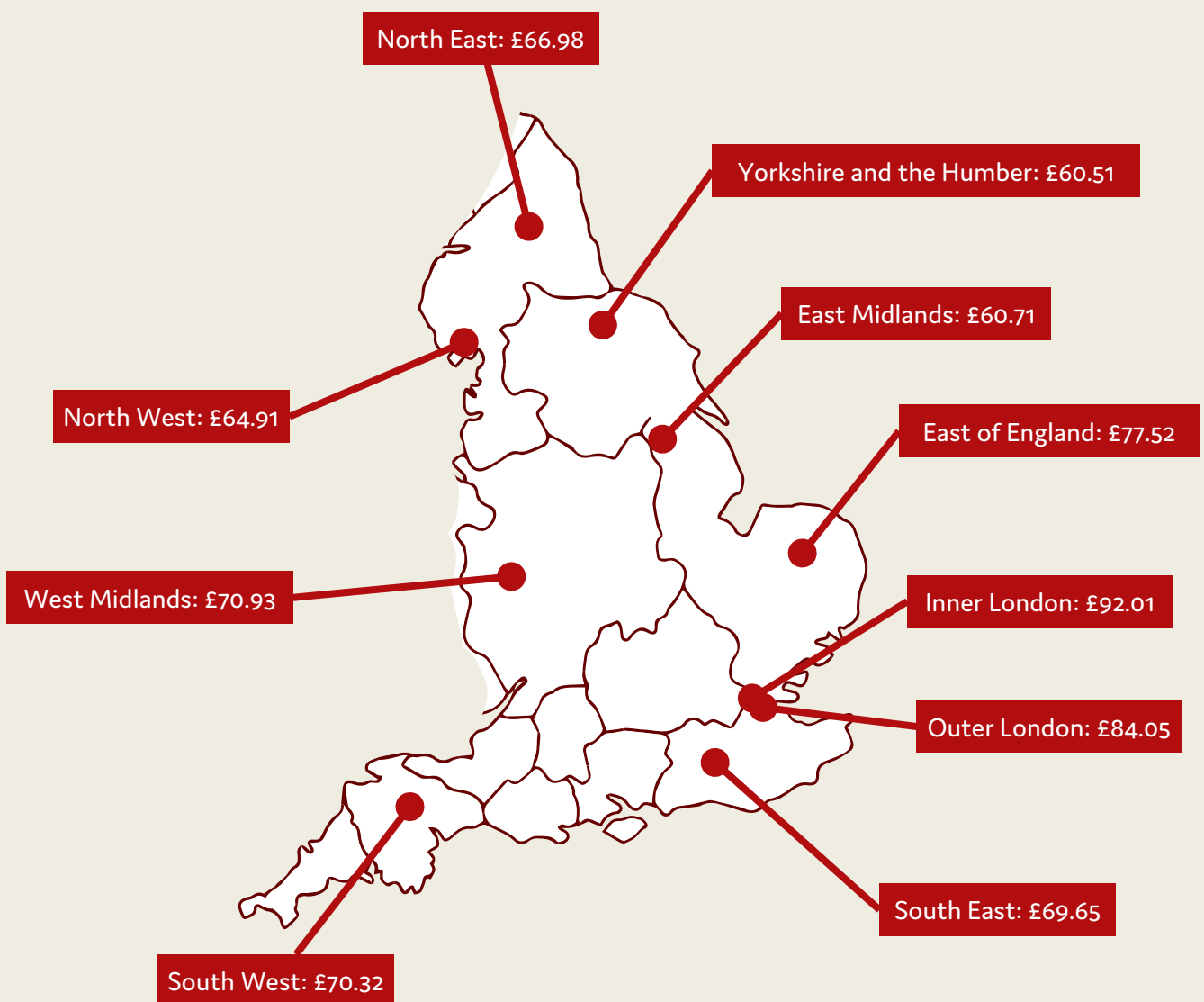
\*Note - there are no funded entitlements for these age groups in Scotland and Wales (except those for disadvantaged children), explaining why they are much more expensive.

Figure 2 - Price of 25 hours a week childcare for children aged under three at nurseries and childminders, after working parent entitlements in England have been taken into account



- England has considerably lower costs for 25 hours of childcare for children under three than Scotland and Wales due to the new working parent entitlement of 15 hours funded childcare per week (see table 3a).
- Nurseries in Wales cost more than in Scotland for both under-tuos and two-year-olds. The weekly average for those aged under two is £155.04 in Wales, 27% more expensive than Scotland (£122.38).
- However, childminders in Scotland are slightly more expensive than in Wales for both age groups. The average weekly price for a child aged under two is £137.79 in Scotland, 8% more expensive than Wales (£127.95).
- In England and Wales, a nursery place for a child under two is more expensive than for a child aged two years old. However, the opposite is true in Scotland.

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



### English regional differences:

- In the English regions, the cost of 25 hours of childcare for children under two varies substantially. Nursery costs are highest in Inner London (£92.01), which is 52% more expensive than the lowest cost in Yorkshire and the Humber (£60.51). Childminder costs in Inner London (£82.55) are 68% more expensive than in the East Midlands (£49.27).
- For children aged two, nursery costs are again highest in Inner London (£90.25), 56% higher than in the East Midlands (£57.69), which has the lowest cost. Childminder costs in Inner London (£81.76) are 65% higher than in the East Midlands (£49.59).
- However, it is worth noting that some English regions contain fewer local authorities than others and therefore responses from a few authorities in those regions can make a noticeable difference to the regional figure.

**Table 3b- Price of 25 hours a week childcare for children under three at nurseries and childminders, without working parent entitlement**

	Nursery		Childminder	
	Under two	Two	Under two	Two
<b>England</b>	£176.27	£165.85	£149.41	£144.37
East Midlands	£151.77	£144.22	£123.19	£123.98
East of England	£193.79	£176.06	£143.87	£142.96
London, Inner	£230.02	£225.63	£206.38	£204.39
London, Outer	£210.13	£209.33	£193.93	£185.36
North East	£167.44	£146.07	£134.82	£141.33
North West	£162.28	£146.06	£129.94	£126.17
South East	£174.12	£161.48	£135.56	£134.80
South West	£175.79	£161.62	£181.08	£141.80
West Midlands	£177.33	£171.38	£157.55	£156.15
Yorkshire and the Humber	£151.26	£148.82	£127.49	£127.05

- For families ineligible for the 15 hours of funded childcare for working parents, a 25-hour part-time nursery place for a child under two years old costs £176.27 per week, £105.76 more than for those who can access the funded entitlement. For two-year-olds, the cost is £165.85 per week, £99.51 more than for eligible families.
- The same applies to childminder places. For families ineligible for funded childcare, a 25-hour part-time place for a child under two costs £149.41 per week, £89.64 more than for eligible families. For two-year-olds, the cost is £144.37 per week, £86.62 more than for those with access to the funded hours.
- These cost differences are most pronounced in Inner London, where ineligible families pay £138.01 more per week for nursery places and £123.83 more for childminders for a child under two. In the East Midlands, the region with the smallest difference, families pay £91.06 more per week for nursery places and £73.91 more for childminders.
- In England as a whole, families with access to funded hours for working parents for children under two save an average of £105.76 per week on nursery costs and £89.64 per week on childminder costs.



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

Historically, the cost of full-time childcare (50 hours per week) was slightly less than twice the cost of part-time care (25 hours per week) due to providers passing on economies of scale to parents. However, since the expansion of funded childcare in England, this is no longer the case. While the overall cost of full-time childcare has decreased on average, the reduction has not been as substantial as the decrease for part-time places.

When asking about prices in England, this year we have taken into account that children of this age group with working parents are now entitled to 15 funded hours per week. Parents who want to access additional hours will therefore only need to pay for some of the hours of childcare that they need.

**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**

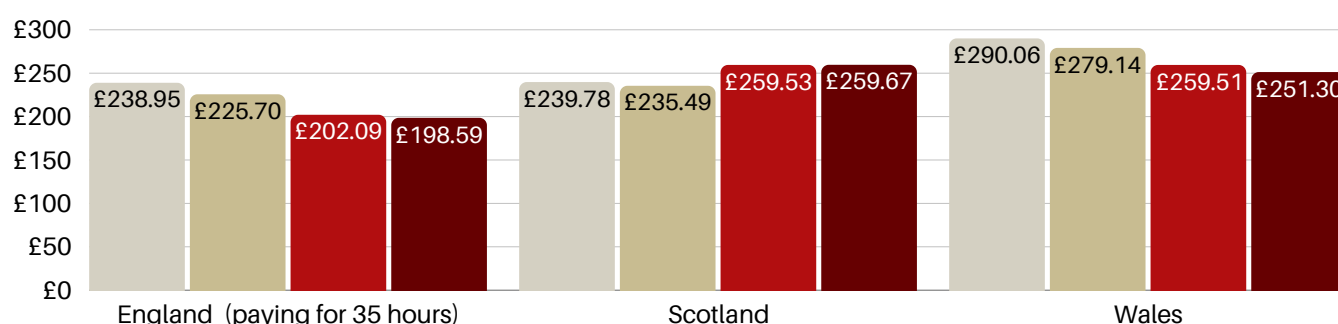
	Nursery		Childminder	
	Under two	Two	Under two	Two
<b>England (paying for 35 hours)</b>	£238.95	£225.70	£202.09	£198.59
<b>Scotland</b>	£239.78	£235.49	£259.53	£259.67
<b>Wales</b>	£290.06	£279.14	£259.51	£251.30
East Midlands	£197.48	£189.35	£169.03	£169.89
East of England	£268.23	£246.70	£201.56	£200.40
London, Inner	£319.24	£313.42	£288.84	£286.22
London, Outer	£274.48	£266.15	£253.20	£251.28
North East	£224.48	£204.14	£183.15	£190.32
North West	£212.16	£194.36	£170.57	£167.83
South East	£242.16	£227.91	£187.87	£187.20
South West	£245.35	£226.95	£216.95	£196.12
West Midlands	£244.29	£239.70	£225.76	£217.68
Yorkshire and the Humber	£210.76	£201.14	£178.42	£177.75

### Nursery and childminder costs in Great Britain:

- In England, nursery costs are higher on average than childminder costs. For example, the average cost for 50 hours of nursery care per week for a child under two is £238.95, 18% more than for a childminder (£202.09) (see table 4).
- However, in Scotland, childminder prices for children under two are, on average, 8% higher than nursery prices. For children aged two, childminder prices are, on average, 10% higher than nursery prices.
- England now has generally lower childcare costs per week for children under three than both Scotland and Wales, due to the new entitlements. In England, nursery costs for children under two are £0.83 cheaper than in Scotland and £51.11 cheaper than in Wales, while costs for two-year-olds are £10.77 cheaper than in Scotland and £54.42 cheaper than in Wales.
- Generally, the cost of 50 hours per week of childcare is slightly higher for children under two compared to those aged two. Childminder costs for both age groups are relatively similar.

**Figure 3 - Price of 50 hours a week childcare for children aged under three at nurseries and childminders, after working parent entitlements in England have been taken into account**

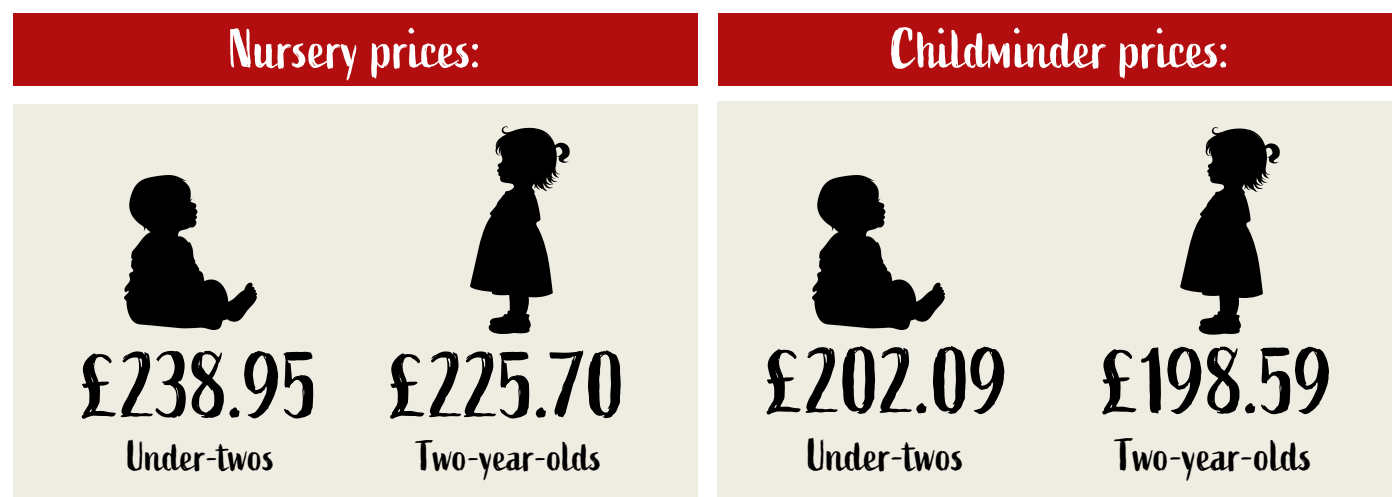
● Nursery (under-twos) 
 ● Nursery (two-year-olds) 
 ● Childminder (under-twos) 
 ● Childminder (two-year-olds)



### English regional differences:

- Within the English regions, the cost of a full-time nursery place (for those aged under two) is 62% higher in Inner London (£319.24) than the East Midlands (£197.48).
- For all the English regions, childminder prices are cheaper than nursery prices for 50 hours a week. The highest prices are again seen in Inner London for those aged under two (£288.84) and for two-year-olds (£286.22).
- For nursery places for children aged two, the highest prices are again in Inner London at £313.42, 66% higher than the East Midlands (£189.35).

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



### C. Prices for childcare for children aged three and four

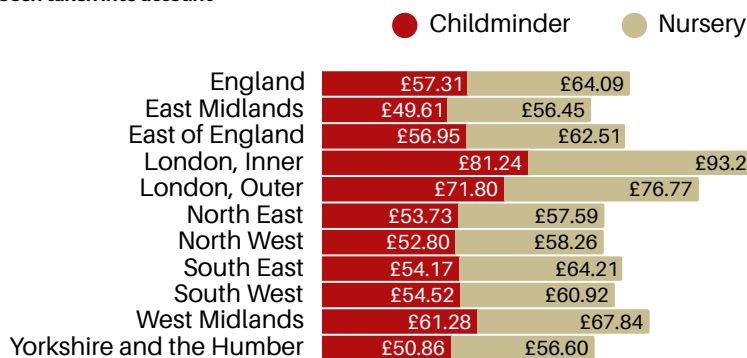
When asking about childcare prices for three- and four-year-olds, we take into account that all children of this age group in England, Scotland and Wales are entitled to some funded early education before they start school. Parents who want to access additional hours will therefore only need to pay for some of the hours of childcare that they need.

The following figures show costs of childcare for three- and four-year-olds in nurseries and with childminders. These do not include costs that hours taken outside of term-term incur for families, meaning that costs during school holidays would be considerably higher.

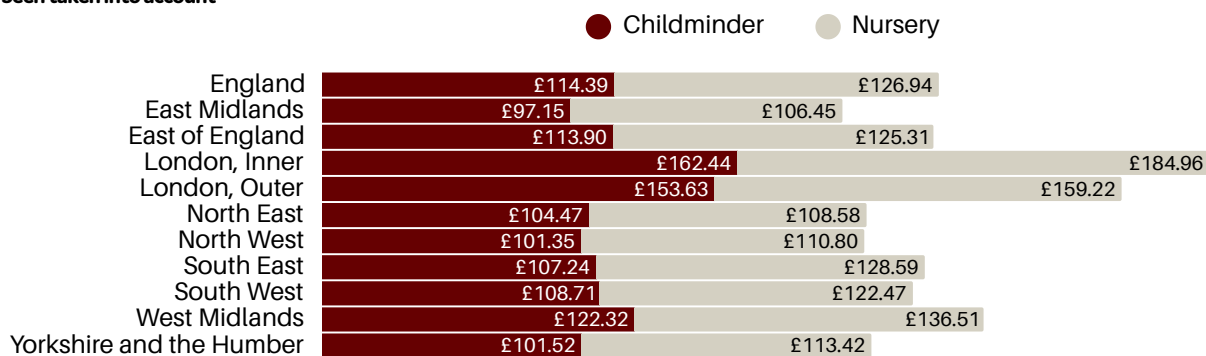
Table 5- Price of 25 and 50 hours a week childcare for three- and four-year-olds at nurseries and childminders in England, after entitlements have been taken into account

	25 hours a week, including universal entitlement (paying for 10 hours)		50 hours a week, including extended entitlement in England (paying for 20 hours)	
	Nursery	Childminder	Nursery	Childminder
England	£64.09	£57.31	£126.94	£114.39
East Midlands	£56.45	£49.61	£106.45	£97.15
East of England	£62.51	£56.95	£125.31	£113.90
London, Inner	£93.29	£81.24	£184.96	£162.44
London, Outer	£76.77	£71.80	£159.22	£153.63
North East	£57.59	£53.73	£108.58	£104.47
North West	£58.26	£52.80	£110.80	£101.35
South East	£64.21	£54.17	£128.59	£107.24
South West	£60.92	£54.52	£122.47	£108.71
West Midlands	£67.84	£61.28	£136.51	£122.32
Yorkshire and the Humber	£56.60	£50.86	£113.42	£101.52

**Figure 4a - Price of 25 hours a week childcare for three- and four-year-olds at nurseries and childminders in England, after entitlements have been taken into account**



**Figure 4b - Price of 50 hours a week childcare for three- and four-year-olds at nurseries and childminders in England, after entitlements have been taken into account**



### Nursery and childminder costs in Great Britain:

- Nursery costs for three- and four-year-olds are generally higher than those for childminders.
- In England, part-time (25 hours) nursery care is 12% more expensive, and full-time (50 hours) nursery care is 11% more expensive than with childminders.
- In Wales, part-time nursery care is 14% more expensive, and full-time nursery care is 12% more expensive than with childminders.
- In Scotland, full-time nursery care is 3% more expensive than full-time childminder care. In Scotland, there is no cost for 25 hours of childcare for three- and four-year-old as this is covered by the 1,140-hour entitlement.

**Table 6 - Prices of 25 and 50 hours a week childcare at nurseries and childminders for three- and four-year-olds in Scotland and Wales**

	25 hours a week, including universal entitlement (paying for 15 hours in Wales)		50 hours a week, including extended entitlement in Wales (paying for 20 hours) and 1,140 hour entitlement in Scotland (paying for 20 hours)	
	Nursery	Childminder	Nursery	Childminder
Scotland	N/A	N/A	£105.88	£102.79
Wales	£88.66	£77.52	£119.23	£106.98

\*Please note that in table 6, there is no cost for 25 hours a week childcare in Scotland since this is entirely covered by the 1,140-hour entitlement.

### English regional differences:

- The cost of a part-time nursery place (25 hours a week) for three- and four-year-olds is highest in Inner London at £93.29, 65% more than the lowest cost of £56.45 in the East Midlands.
- Inner London also has the highest cost for 25 hours with a childminder (£81.24), 74% higher than the lowest cost of £46.61 in the East Midlands.
- A similar pattern is seen for full-time places (50 hours a week). In Inner London, a full-time nursery place costs £184.96 and a childminder place costs £162.44.
- The East Midlands has the lowest full-time costs, with a nursery place at £106.45 and a childminder place at £97.15.
- On average, Inner London is 70% more expensive than the East Midlands for full-time childcare.

D. Changes in childcare prices for children under five, since 2024

In England, when including the new entitlements for working parents, the average cost of a nursery place has decreased substantially for under-tuos and two-year-olds. However, these price reductions only benefit working families in England; prices for under-tuos and two-year-olds in Scotland and Wales have increased. Nursery costs for three- and four-year-olds across Great Britain have increased. The greatest increase was seen in Wales, for children under two.

Table 7 - Price changes since 2024 for 25 hours nursery for children under 5			
	Under-two including working parent entitlement in England	Two-year-old including working parent entitlement in England	Three- to four-year-old using funded entitlement
Great Britain			+4.6%
England	-55.5%	-56.3%	+4.6%
Scotland	+6.9%	+6.5%	N/A
Wales	+9.7%	+7.2%	+4.1%

Figure 5a - Price changes since 2024 for 25 hours nursery for children under five, including new working parent entitlements in England

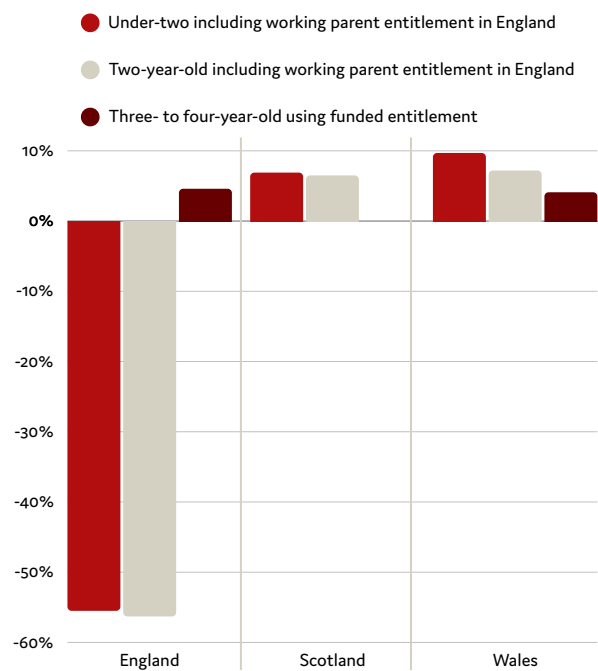


Figure 5b - Price changes since 2024 for 50 hours nursery for children under five, including new working parent entitlements in England

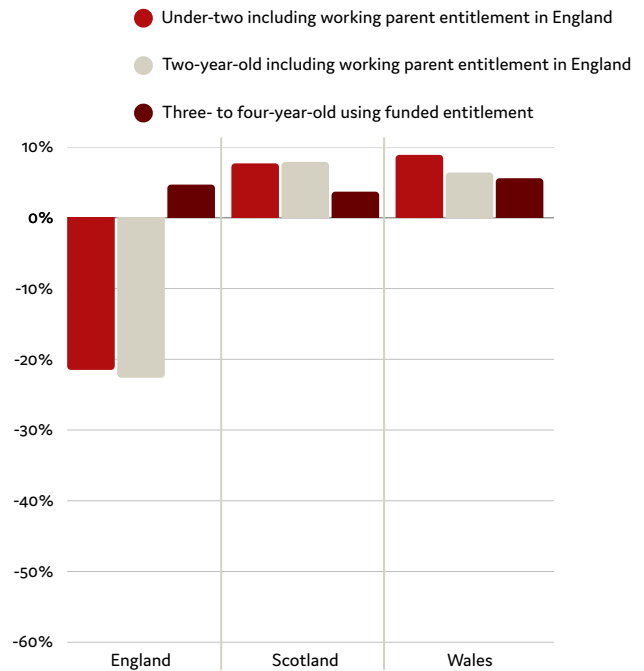


Table 8 - Price changes since 2024 for 50 hours nursery for children under five, including new working parent entitlements in England

	Under-two including working parent entitlement in England	Two-year-old including working parent entitlement in England	Three- to four-year-old using funded entitlement
Great Britain			+4.8%
England	-21.5%	-22.6%	+4.7%
Scotland	+7.7%	+7.9%	+3.7%
Wales	+8.9%	+6.4%	+5.6%

- We have not included price changes for under-twos and two-year-olds in Great Britain overall. This is because the introduction of the new working parent entitlements in England has changed its average prices dramatically, affecting the Great Britain figure in a way that does not accurately represent the situation in Great Britain as a whole.
- The introduction of the new entitlements in England led to a decrease of 21.5% for under-twos and 22.7% for two-year-olds (see table 8).
- By contrast, costs for three- and four-year-old places continued to increase by 4.8% in Great Britain overall, higher than the 4.7% increase between 2023 and 2024.
- Scotland experienced an increase in costs for all age groups. For under threes, costs have risen more steeply than between 2023-2024, whereas rising costs for three- and four-year-olds slowed.
- Wales also experienced rising cost increases across all age groups, which were steeper than between 2023-2024.

**Comparing costs for three- and four-year-olds, two-year-olds and under-twos in England (working families entitlements)**

The below table compares the cost of the average part-time (25 hours a week) and full-time (50 hours a week) nursery place in England for under-fives who are entitled to funded childcare for working families, versus the same nursery places for children who do not have access to this funded entitlement. We have included any universal entitlements in England (currently, only the 15-hour universal funded entitlement for three- and four-year-olds) to highlight the difference the funded entitlement makes for working families.

Table 9 - Price difference for 25 and 50 hours a week in a nursery, with and without funded entitlements for working families in England						
	Part-time (25 hours a week)			Full-time (50 hours a week)		
	Under-twos	Two-year-olds	Three- and four-year-olds	Under-twos	Two-year-olds	Three- and four-year-olds
Including funded entitlements for working families	£70.51	£66.34	N/A	£238.95	£224.72	£126.94
Without funded entitlement for working families	£176.27	£165.85	£64.09	£341.36	£321.03	£222.15

- When including funded entitlements currently available for working families, the average part-time nursery place for a child under two in England costs £70.51 per week. For a two-year-old, the cost is £66.34. For a three- or four-year-old, there is no cost because this is covered by the 30-hour funded childcare entitlement for working families (see table 9).
- Without the working families' entitlement, the average part-time nursery place for a child under two is £176.27 per week and for two-year-olds it is £165.85 per week.
- For three- and four-year-olds not entitled to funded childcare for working families, a part-time nursery place costs £64.09. This is much lower than the cost for under-twos and two-year-olds because all three- and four-year-olds are entitled to 15 hours per week of funded childcare.
- The average price of a 50-hour nursery place, including the working families' funded entitlement, for under-twos (£238.95) and two-year-olds (£224.72) is much higher than a 50-hour place for three- and four-year-olds (£126.94). This is because the new entitlements for under-twos and two-year-olds are only for 15 funded hours, whereas three- and four-year-olds can access 30 hours under the entitlement for working families.



## 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 is largely provided by childcare businesses who set their fees in a competitive marketplace, leading to a broad range of different 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 national or regional average.

**Table 10 - Highest and lowest prices as a percentage above or below average prices, for 25 hours of care for a child under two**

	Highest price above average	Lowest price below average
<b>Great Britain</b>	+162%	68%
<b>England</b>	+163%	67%
<b>Scotland</b>	+146%	88%
<b>Wales</b>	+155%	77%
East Midlands	+184%	61%
East of England	+126%	84%
London, inner	+172%	68%
London, outer	+164%	64%
North East	+151%	72%
North West	+136%	65%
South East	+158%	67%
South West	+143%	64%
West Midlands	+173%	67%
Yorkshire and Humberside	+226%	78%

### Great Britain:

- The highest prices in local authorities for 25 hours of childcare for those aged under two tend to be much 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 (see table 10).
- There is less variation in cost to families in Scotland (58 percentage point difference between highest price and lowest price), than in Wales (80 percentage point difference), and England (96 percentage point difference).

### English regional differences:

- Within the English regions, the highest prices range from 126% above the average in the East of England to 226% above the average in Yorkshire and the Humber.
- The lowest prices show less variation, between 61% lower than the average in the East Midlands, and 84% lower than the average in the East of England.

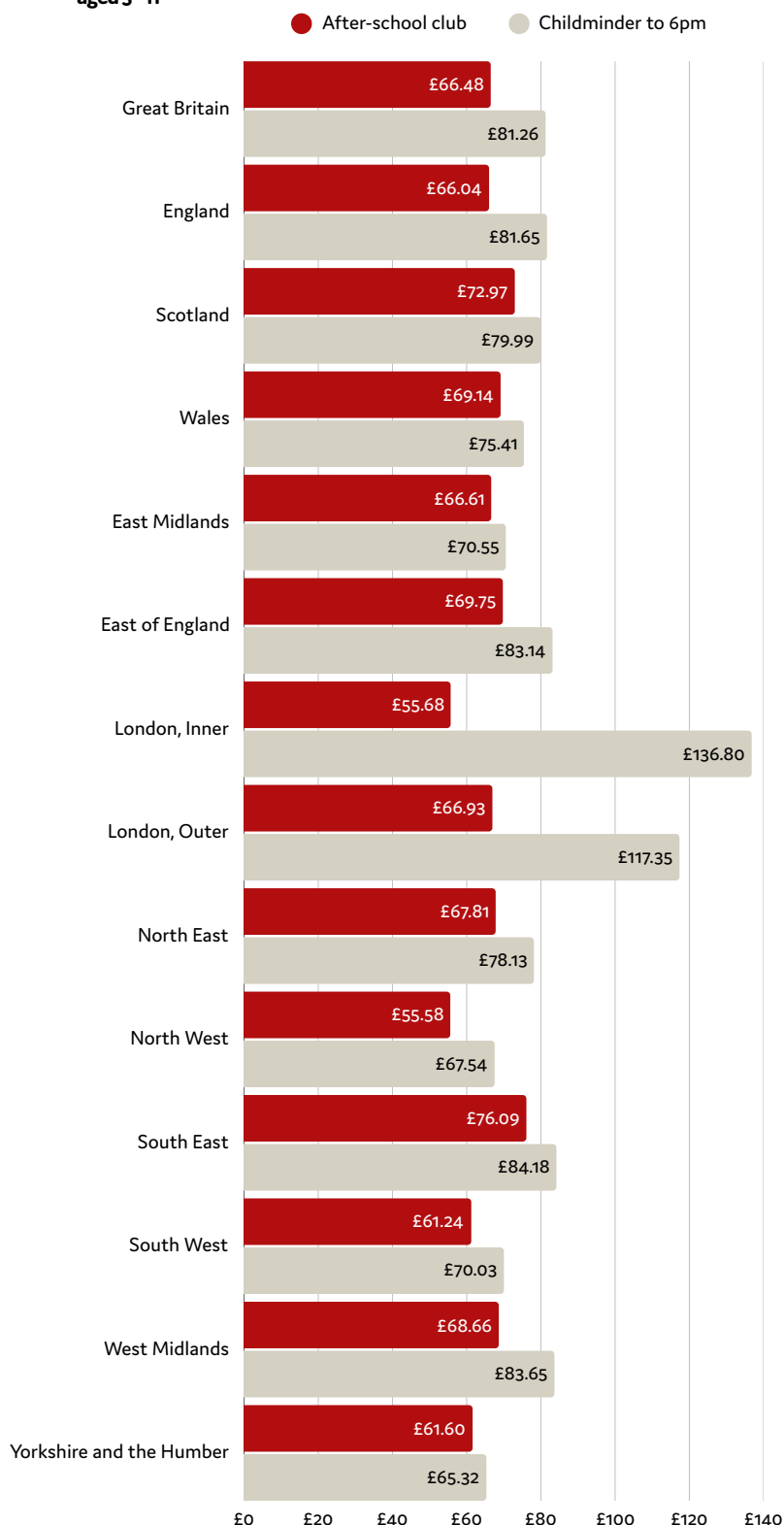
## F. Prices for school-age childcare

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 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.

**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

**Figure 6 - Weekly prices of an after-school club or childminder for children aged 5 - 11**



#### After-school club and childminder costs in Great Britain:

- This year, the average price of an after-school club for a week is £66.48 across Great Britain, compared to £81.26 for a childminder after school to 6pm per week (table 11).
- The most substantial difference is in London, where after-school clubs are often subsidised by the local authority.
- Costs for after-school clubs are higher in Scotland than in England and Wales, while childminder costs are highest in England and lowest in Wales.

#### English regional differences:

- The most expensive region for after-school clubs is the South East (£76.09), which is 31% higher than the lowest cost found in the North West (£55.58).
- The price difference is even more pronounced for childminders, with Inner London (£136.80) being 109% higher than Yorkshire and the Humber (£65.32).
- The difference in cost between after-school clubs and childminders is particularly notable in Inner London, where a childminder (£136.80) costs 84% more than an after-school club (£55.98). Again, this difference is likely due to after-school costs being subsidised by local authorities.
- 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. 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.

## 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.

This year, we changed the questions we asked local authorities about childcare sufficiency in order to increase the accuracy and reliability of data. For this reason, we have not included comparisons to last year's data as we have done in previous years.

### 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

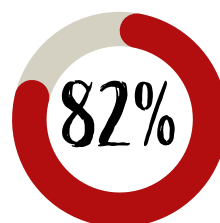
Local authorities were asked to report the percentage of children in their area for whom they have enough childcare. This is a different question to previous years which asked local authorities to report if they had childcare sufficiency in 'all', 'some', or 'no' areas. We updated the question to capture more specific information about the level of childcare sufficiency, and to change the focus of the main questions from geographical areas to children (see table 12).

We have also asked about before school care (e.g. breakfast clubs or childminders) for the first time, and have updated our wording to ask about childcare for 'children and young people with SEND' rather than 'disabled children' because special educational needs and disabilities encompasses a wider range of additional needs. We also ask about the new entitlement – the 15-hour funded entitlement for two-year-olds and under in working families – and about children aged two who are not eligible for either the working parent entitlement or the disadvantaged two-year-old entitlement, though this represents a small number of children due to the two entitlements available for this age group (working parent entitlement and the disadvantaged two-year-old entitlement).

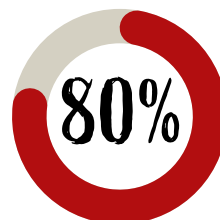
These new, more detailed questions have resulted in a greater number of local authorities reporting 'Data not held or cannot tell' and as such we have included the number of responses received, to clarify the number of local authorities represented by the percentages. However, this has increased the reliability of the data local authorities have been able to report.



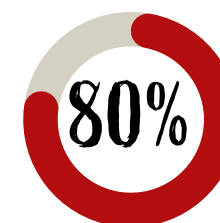
- Most local authorities are able to say whether there is enough childcare for children in their area, with the exception of 12- to 14-year-olds before school, 12- to 14-year-olds after school, parents working atypical hours and children and young people with SEND.
- Sufficiency is highest for three- to four-year-olds entitled to the 15-hour and 30-hour funded entitlements, with 82% and 80% of local authorities who responded reporting sufficiency for at least 75% of children in their area, and for two-year-olds entitled to the 15-hour funded entitlement for disadvantaged families (80%); these categories also have the highest proportion of local authorities who report 100% sufficiency (45%, 41% and 31% of local authorities).
- Local authorities report the lowest levels of sufficiency for 12- to 14-year-olds before and after school (14% and 13% reporting sufficiency for at least 75% of children, respectively), for parents working atypical hours (22% reporting sufficiency for at least 75% of children) and for children and young people with SEND (29% reporting sufficiency for at least 75% of children). However, it is important to note that local authorities also report the highest levels of uncertainty for these categories of childcare.



**OF LOCAL AUTHORITIES WHO RESPONDED HAVE AT LEAST 75% SUFFICIENCY FOR THE 15 HOUR ENTITLEMENT FOR 3- TO 4-YEAR-OLDS**



**OF LOCAL AUTHORITIES WHO RESPONDED HAVE AT LEAST 75% SUFFICIENCY FOR THE 30 HOUR ENTITLEMENT FOR 3- TO 4-YEAR-OLDS**



**OF LOCAL AUTHORITIES WHO RESPONDED HAVE AT LEAST 75% SUFFICIENCY FOR THE 15 HOUR ENTITLEMENT FOR DISADVANTAGED 2-YEAR-OLDS**

**Table 12 - Childcare sufficiency in England**

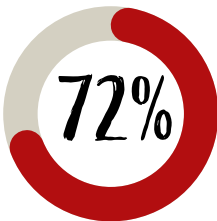
	100%	75% to 99%	50% to 75%	25% to 50%	Less than 25%	Data not held or cannot tell	Total responses
Two-year-olds and under (entitled to 15-hour funded entitlement for working families)	28%	50%	3%	1%	1%	16%	123
Two-year-olds (entitled to 15-hour funded entitlement for disadvantaged families)	31%	49%	4%	2%	0%	14%	123
Two-year-olds and under (not entitled to any funded entitlement)	21%	38%	7%	1%	0%	33%	123
Three- to four-year-olds (entitled to 15-hour universal funded entitlement)	45%	37%	2%	2%	0%	15%	123
Three- to four-year-olds (entitled to 30-hour funded entitlement for working families)	41%	39%	1%	2%	0%	17%	122
5- to 11-year-olds before school (e.g. breakfast club or childminder)	12%	43%	11%	1%	3%	30%	121
5- to 11-year-olds after school (until around 6pm)	6%	45%	12%	3%	4%	31%	120
12- to 14-year-olds before school (e.g. breakfast club or childminder)	3%	10%	6%	3%	2%	75%	118
12- to 14-year-olds after school (until around 6pm)	3%	11%	5%	3%	3%	76%	119
Children and young people with SEND	4%	25%	16%	1%	2%	53%	120
Parents working full time (9am to 5pm-on-weekdays)	17%	41%	0%	0%	1%	42%	120
Parents working atypical hours (outside 9am to 5pm-on-weekdays)	3%	19%	8%	3%	5%	63%	120
Families living in rural areas (please leave this question blank if there are no rural areas in your local authority)	7%	38%	4%	1%	1%	49%	72

As explained above, this year's childcare sufficiency questions asked about sufficiency for children rather than geographical areas, so to understand the geographical spread of childcare in each local authority, we added a new question about the percentage of wards in which local authorities have enough childcare for early years children, and for school age children and young people (see table 13).

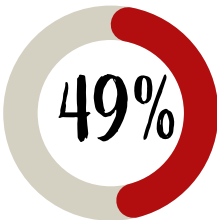
Table 13 - Childcare sufficiency in England as a percentage of wards

	100%	75% to 99%	50% to 75%	25% to 50%	Less than 25%	Data not held or cannot tell	Total responses
For early years children	13%	59%	7%	2%	0%	19%	121
For school age children and young people	8%	41%	6%	2%	2%	41%	121

- 72% of local authorities who responded say they have sufficient childcare for early years children in at least 75% of wards.
- 49% of local authorities say they have sufficient childcare for school age children and young people in at least 75% of wards.
- Inner London has the lowest levels of provision for two-year-olds who are entitled to the 15-hour funded entitlement for disadvantaged families (55%) and for three- to four-year-olds who are entitled to the 15-hour universal funded entitlement (55%).
- However, it is worth noting that some English regions contain fewer local authorities than others and therefore responses from a few authorities in those regions can make a noticeable difference to the regional figure.
- Across the English regions, the West Midlands reports the highest levels of sufficiency for all the funded entitlements; all local authorities who responded in this region report having enough childcare places for at least 75% of children who are eligible for each entitlement.
- The South West has the lowest levels of provision for two-year-olds and under who are entitled to the new 15-hour funded entitlement for working families (64%) and for three- to four-year-olds who are entitled to the 30-hour funded entitlement for working families (50%) This is partly influenced by high numbers of 'data not held or cannot tell' responses (36%).



**OF LOCAL AUTHORITIES WHO RESPONDED SAY THEY HAVE SUFFICIENT CHILDCARE FOR EARLY YEARS CHILDREN IN AT LEAST 75% OF WARDS.**



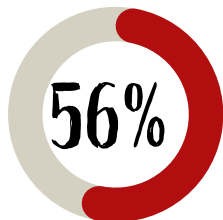
**OF LOCAL AUTHORITIES SAY THEY HAVE SUFFICIENT CHILDCARE FOR SCHOOL AGE CHILDREN AND YOUNG PEOPLE IN AT LEAST 75% OF WARDS.**



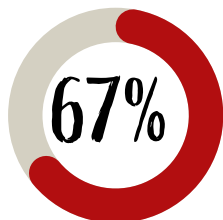


**Table 14 - Childcare sufficiency defined as LAs with sufficient childcare for 100% or 75% to 99% of children in English regions, for early years (% local authorities)**

	Two-year-olds and under (entitled to 15-hour funded entitlement for working families)	Two-year-olds (entitled to 15-hour funded entitlement for disadvantaged families)	Two-year-olds and under (not entitled to any funded entitlement)	Three- to four-year-olds (entitled to 15-hour universal funded entitlement)	Three- to four-year-olds (entitled to 30-hour funded entitlement for working families)	Region response
England	79%	80%	60%	82%	80%	124/153
EM	80%	80%	70%	80%	80%	10/10
EoE	78%	89%	67%	89%	89%	9/11
London, Inner	73%	55%	36%	55%	64%	11/13
London, Outer	75%	81%	63%	94%	94%	16/20
NE	80%	80%	30%	80%	70%	10/12
NW	82%	82%	64%	82%	82%	22/24
SE	87%	87%	67%	87%	87%	15/19
SW	64%	64%	45%	64%	50%	11/15
WM	100%	100%	71%	100%	100%	7/14
Y&H	77%	85%	77%	92%	85%	13/15



**OF LOCAL AUTHORITIES IN THE EAST OF ENGLAND WHO RESPONDED SAY THEY HAVE ENOUGH CHILDCARE FOR AT LEAST 75% OF CHILDREN WITH SEND**



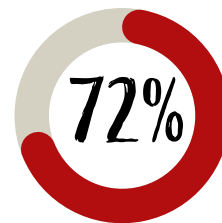
**OF LOCAL AUTHORITIES IN THE EAST OF ENGLAND WHO RESPONDED SAY THEY HAVE ENOUGH CHILDCARE FOR AT LEAST 75% OF CHILDREN IN RURAL AREAS**

- Yorkshire and the Humber report the highest levels of provision for 5- to 11-year-olds before school (77%) but the joint lowest levels of provision (with the North East) for 12- to 14-year-olds before and after school (0% for both).
- The East of England reports the highest levels of provision for children and young people with SEND: 56% of local authorities in the region say they have enough places for at least 75% of children and young people with SEND.
- The East of England also reports the highest levels of provision for families living in rural areas (67%).

**Table 15 - Childcare sufficiency defined as LAs with sufficient childcare for 100% or 75% to 99% of children in English regions, for other groups (% local authorities)**

	5- to 11-year-olds before school (e.g. breakfast club or childminder)	5- to 11-year-olds after school (until around 6pm)	12- to 14-year-olds before school (e.g. breakfast club or childminder)	12- to 14-year-olds after school (until around 6pm)	Children and young people with SEND	Parents working full time (9am to 5pm-on-weekdays)	Parents working atypical hours (outside 9am to 5pm-on-weekdays)	Families living in rural areas	Region response
<b>England</b>	<b>55%</b>	<b>50%</b>	<b>13%</b>	<b>13%</b>	<b>28%</b>	<b>57%</b>	<b>21%</b>	<b>43%</b>	<b>124/153</b>
EM	50%	50%	20%	20%	44%	50%	30%	40%	10/10
EoE	67%	67%	22%	22%	56%	56%	22%	67%	9/11
London, Inner	45%	27%	9%	9%	9%	30%	0%	0%	11/13
London, Outer	69%	63%	6%	6%	25%	69%	19%	20%	16/20
NE	40%	40%	0%	0%	10%	30%	0%	40%	10/12
NW	55%	50%	23%	23%	18%	64%	32%	38%	22/24
SE	47%	47%	14%	14%	40%	53%	13%	42%	15/19
SW	27%	27%	9%	9%	27%	45%	18%	38%	11/15
WM	71%	71%	29%	29%	14%	86%	43%	60%	7/14
Y&H	77%	67%	0%	0%	46%	77%	31%	63%	13/15

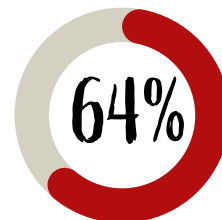
- Outer London has the highest levels of sufficiency for early years children as a percentage of wards; 94% of local authorities in this region say that at least 75% of wards in their area have enough childcare for this group.
- The North West has the highest levels of sufficiency for school age children and young people as a percentage of wards; 64% of local authorities in this region say that at least 75% of wards in their area have enough childcare for this group.
- The South West has the lowest level of provision for early years children as a percentage of wards (45%) and Inner London has the lowest level of provision for school age children and young people as a percentage of wards (18%).



**OF LOCAL AUTHORITIES WHO RESPONDED SAID THEY HAD SUFFICIENT CHILDCARE FOR EARLY YEARS CHILDREN IN AT LEAST 75% OF WARDS**



**OF LOCAL AUTHORITIES IN OUTER LONDON SAY THAT AT LEAST 75% OF WARDS IN THEIR AREA HAVE ENOUGH CHILDCARE FOR EARLY YEARS CHILDREN**



**OF LOCAL AUTHORITIES IN THE NORTH WEST SAY THAT AT LEAST 75% OF WARDS IN THEIR AREA HAVE ENOUGH CHILDCARE FOR SCHOOL AGE CHILDREN AND YOUNG PEOPLE**

Table 16 - Childcare sufficiency in English regions as a percentage of wards			
	For early years children	For school age children and young people	Region response
England	72%	49%	124/153
EM	60%	50%	10/10
EoE	78%	56%	9/11
London, Inner	64%	18%	11/13
London, Outer	94%	56%	16/20
NE	56%	30%	10/12
NW	64%	64%	22/24
SE	73%	53%	15/19
SW	45%	27%	11/15
WM	86%	57%	7/14
Y&H	92%	62%	13/15



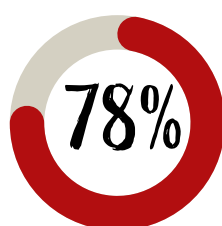
## C. Childcare sufficiency in Scotland

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 22% and 93% as 'Data not held or cannot tell'. Because we have changed the question to be more specific, we have also seen more uncertainty in responses (an increase in the percentage of local authorities reporting 'Data not held or cannot tell') across the three nations in Great Britain. However, this has increased the reliability of the data local authorities have been able to report.

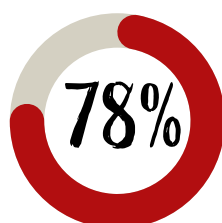
As in the survey for local authorities in England, local authorities in Scotland were asked to report the percentage of children in their area for whom they have enough childcare. This is a different question to previous years which asked local authorities to report if they had childcare sufficiency in 'all', 'some', or 'no' areas. We updated the question to capture more specific information about the level of childcare sufficiency, and to change the focus of the main questions from geographical areas to children.

We have also asked about before school care (e.g. breakfast clubs or childminders) for the first time, and have updated our wording to ask about childcare for 'children and young people with SEND' rather than 'disabled children' because special educational needs and disabilities encompasses a wider range of additional needs.

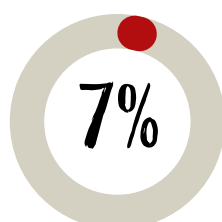
- Sufficiency in Scotland is high for children entitled to the 1,140-hour funded entitlement; 78% of local authorities who responded say they have enough provision for at least 75% of children aged three to four (all of whom are entitled to 1,140 funded hours), and 78% of local authorities also report high levels of provision for two-year-olds who are entitled to the 1,140-hour funded entitlement on a targeted basis (see table 17).
- Only 7% of local authorities who responded say they have enough childcare for at least 75% of children aged 12 to 14 both before and after school, and for children whose parents work atypical hours. However, local authorities also reported very high levels of uncertainty for these categories.



**OF LOCAL AUTHORITIES WHO RESPONDED SAY THEY HAVE ENOUGH PROVISION FOR AT LEAST 75% OF CHILDREN AGED THREE TO FOUR**



**OF LOCAL AUTHORITIES ALSO REPORT HIGH LEVELS OF PROVISION FOR TWO-YEAR-OLDS WHO ARE ENTITLED TO THE 1,140-HOUR FUNDED ENTITLEMENT ON A TARGETED BASIS**



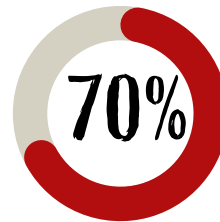
**OF LOCAL AUTHORITIES WHO RESPONDED SAY THEY HAVE ENOUGH CHILDCARE FOR AT LEAST 75% OF CHILDREN AGED 12 TO 14 BOTH BEFORE AND AFTER SCHOOL AND FOR CHILDREN WHOSE PARENTS WORK ATYPICAL HOURS**



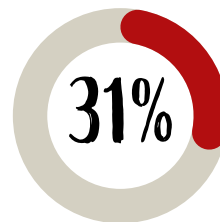
Table 17 - Childcare sufficiency in Scotland

	100%	75% to 99%	50% to 75%	25% to 50%	Less than 25%	Data not held or cannot tell	Total responses
Two-year-olds and under (entitled to 1,140-hour funded entitlement)	67%	11%	0%	0%	0%	22%	27/32
Two-year-olds and under (not entitled to the funded entitlement)	4%	7%	11%	4%	0%	74%	27/32
Three- to four-year-olds	70%	7%	0%	0%	0%	22%	27/32
5- to 11-year-olds before school (e.g. breakfast club or childminder)	15%	4%	4%	4%	4%	70%	27/32
5- to 11-year-olds after school (until around 6pm)	7%	15%	0%	4%	4%	70%	27/32
12- to 14-year-olds before school (e.g. breakfast club or childminder)	7%	0%	4%	4%	0%	85%	27/32
12- to 14-year-olds after school (until around 6pm)	7%	0%	4%	4%	0%	85%	27/32
Children and young people with SEND	26%	4%	0%	0%	4%	67%	27/32
Parents working full time (9am to 5pm on weekdays)	11%	4%	0%	0%	0%	85%	27/32
Parents working atypical hours (outside 9am to 5pm on weekdays)	7%	0%	0%	0%	0%	93%	27/32
Families living in rural areas (please leave this question blank if there are no rural areas in your local authority)	24%	0%	0%	0%	0%	76%	25/32

- Local authorities in Scotland report high levels of childcare sufficiency at ward level; 70% of local authorities who responded say that at least 75% of wards in their area have enough childcare places for early years children (see table 18).
- 31% of local authorities who responded say that at least 75% of wards in their area have sufficient childcare for children and young people.
- Please note that Scotland has relatively few local authorities (32, compared to 152 in England) and therefore responses from a few authorities can make a noticeable difference to the overall figures.



**70%**  
OF LOCAL AUTHORITIES WHO RESPONDED SAY THAT AT LEAST 75% OF WARDS IN THEIR AREA HAVE ENOUGH CHILDCARE PLACES FOR EARLY YEARS CHILDREN.



**31%**  
OF LOCAL AUTHORITIES WHO RESPONDED SAY THAT AT LEAST 75% OF WARDS IN THEIR AREA HAVE SUFFICIENT CHILDCARE FOR CHILDREN AND YOUNG PEOPLE.

Table 18 - Childcare sufficiency in Scotland as a percentage of wards

	100%	75% to 99%	50% to 75%	25% to 50%	Less than 25%	Data not held or cannot tell	Total responses
For early years children	59%	11%	0%	0%	0%	30%	27/32
For school age children and young people	23%	8%	0%	4%	0%	65%	26/32



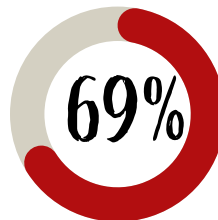
## D. Childcare sufficiency in Wales

Welsh local authorities were required to produce a statutory five-yearly Childcare Sufficiency Assessment in 2022. This initially led to a decrease in the proportion of local authorities reporting that they do not know whether they have enough childcare across a range of categories, however in recent years this proportion has again increased. Because we have changed the question to be more specific, we have also seen more uncertainty in responses (an increase in the percentage of local authorities reporting 'Data not held or cannot tell') across the three nations in Great Britain. However, this has increased the reliability of the data local authorities have been able to report.

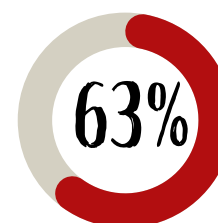
As in the surveys for local authorities in England and Scotland, local authorities in Wales were asked to report the percentage of children in their area for whom they have enough childcare. This is a different question to previous years which asked local authorities to report if they had childcare sufficiency in 'all', 'some' or 'no' areas. We updated the question to capture more specific information about the level of childcare sufficiency, and to change the focus of the main questions from geographical areas to children.

We have also asked about before school care (e.g. breakfast clubs or childminders) for the first time, and have updated our wording to ask about childcare for 'children and young people with SEND' rather than 'disabled children' because special educational needs and disabilities encompasses a wider range of additional needs.

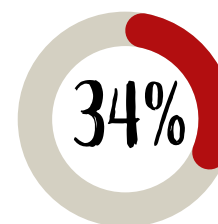
- Local authorities in Wales report the highest levels of sufficiency for two-year-olds who are entitled to Flying Start, with 69% of local authorities who responded saying they have enough places for at least 75% of children in their area.
- 63% of local authorities who responded say they have enough places for at least 75% of children in their area entitled to the 30-hour offer for three- to four-year-olds in working families, but only 34% of local authorities report this level of sufficiency for three- to four-year-olds entitled to the universal 10-hour offer.
- Local authorities report very low sufficiency for older children and young people, with only 6% of local authorities who responded saying they have enough childcare for 12- to 14-year-olds both before and after school. However, sufficiency is slightly higher for 5- to 11-year-olds before and after school, although still low with 42% and 37% of local authorities saying they have places for at least 75% of children in this category.



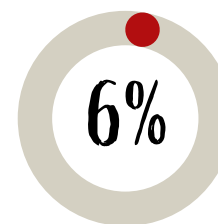
**OF LOCAL AUTHORITIES WHO RESPONDED SAY THEY HAVE ENOUGH PLACES FOR AT LEAST 75% OF 2-YEAR-OLDS WHO ARE ENTITLED TO FLYING START**



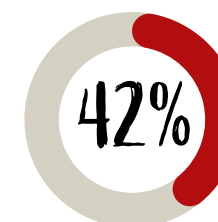
**OF LOCAL AUTHORITIES WHO RESPONDED SAY THEY HAVE ENOUGH PLACES FOR AT LEAST 75% OF CHILDREN IN THEIR AREA ENTITLED TO THE 30-HOUR OFFER FOR 3- TO 4-YEAR-OLDS IN WORKING FAMILIES**



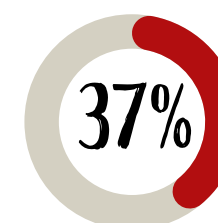
**OF LOCAL AUTHORITIES REPORT ENOUGH PLACES FOR AT LEAST 75% OF 3- TO 4-YEAR-OLDS ENTITLED TO THE UNIVERSAL 10-HOUR OFFER**



**OF LOCAL AUTHORITIES WHO RESPONDED SAY THEY HAVE ENOUGH CHILDCARE FOR 12- TO 14-YEAR-OLDS BOTH BEFORE AND AFTER SCHOOL**



**OF LOCAL AUTHORITIES WHO RESPONDED SAY THEY HAVE ENOUGH BEFORE-SCHOOL CHILDCARE PLACES FOR AT LEAST 75% OF 5- TO 11-YEAR-OLDS**

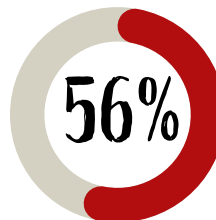


**OF LOCAL AUTHORITIES WHO RESPONDED SAY THEY HAVE ENOUGH AFTER-SCHOOL CHILDCARE PLACES FOR AT LEAST 75% OF 5- TO 11-YEAR-OLDS**

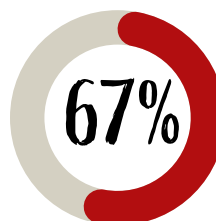
Table 19 - Childcare sufficiency in Wales

	100%	75% to 99%	50% to 75%	25% to 50%	Less than 25%	Data not held or cannot tell	Total responses
Two-year-olds and under (entitled to Flying Start)	16%	53%	0%	0%	0%	32%	19/22
Two-year-olds and under (not entitled to any funded hours)	5%	37%	0%	0%	0%	58%	19/22
Three- to four-year-olds (entitled to the universal 10-hour offer)	6%	28%	0%	0%	0%	67%	18/22
Three- to four-year-olds (entitled to 30 funded hours for working families)	21%	42%	0%	0%	0%	37%	19/22
5- to 11-year-olds before school (e.g. breakfast club or childminder)	16%	26%	5%	0%	0%	53%	19/22
5- to 11-year-olds after school (until around 6pm)	5%	32%	11%	0%	0%	53%	19/22
12- to 14-year-olds before school (e.g. breakfast club or childminder)	0%	6%	0%	0%	11%	83%	18/22
12- to 14-year-olds after school (until around 6pm)	0%	6%	0%	0%	11%	83%	18/22
Children and young people with SEND	5%	21%	11%	5%	0%	58%	19/22
Parents working full time (9am to 5pm on weekdays)	11%	32%	0%	0%	0%	58%	19/22
Parents working atypical hours (outside 9am to 5pm on weekdays)	0%	6%	6%	6%	17%	67%	18/22
Families living in rural areas (please leave this question blank if there are no rural areas in your local authority)	0%	21%	0%	0%	7%	71%	14/22

- Local authorities in Wales report high levels of uncertainty about the sufficiency of childcare as a percentage of wards; 56% report 'data not held or cannot tell' for childcare for early years children, and 67% report 'data not held or cannot tell' for childcare for school age children and young people (see table 20).
- However, as Wales (similarly to Scotland) has relatively few local authorities (22, compared to 152 in England), responses from a few authorities can make a noticeable difference to the overall figures.



**OF LOCAL AUTHORITIES IN WALES REPORT 'DATA NOT HELD OR CANNOT TELL' FOR CHILDCARE FOR EARLY YEARS CHILDREN**



**OF LOCAL AUTHORITIES IN WALES REPORT 'DATA NOT HELD OR CANNOT TELL' FOR CHILDCARE FOR SCHOOL AGE CHILDREN AND YOUNG PEOPLE**

Table 20 - Childcare sufficiency as a percentage of wards

	100%	75% to 99%	50% to 75%	25% to 50%	Less than 25%	Data not held or cannot tell	Total responses
For early years children	0%	33%	6%	6%	0%	56%	18/22
For school age children and young people	6%	17%	6%	0%	6%	67%	18/22

## Section 3 - Good quality childcare - parents' views and experiences

This section describes parents' views on what good quality childcare means to them, whether they have experienced this in their nursery or childminder, and the difference this has made to them and their child.

This is a new section in the Childcare Survey added in 2025. Rather than a fully representative, national survey, parent views were captured through a pilot study combining a small scale survey of parents with focus group explanation of the themes.

For this section, we asked parents to complete a survey and we ran two focus groups.

For every quantitative question in the survey, we report the overall proportion of parents who responded in a particular way, and we report the response patterns of parents who claim means-tested benefits versus parents who do not claim means-tested benefits. We do this to understand if there is a difference in experience between low-income families and other families. This is particularly pertinent as low-income families are less likely to be entitled to extended funded early education entitlements. We chose to ask parents which, if any, benefits they are claiming instead of asking which, if any, entitlement they are claiming because the current system of early education entitlements is complicated and recent additions less familiar to parents than benefits.

### A. What good quality childcare means to parents

We asked parents an open-ended question about what they would look for in a nursery or childminder if price, location and availability were not an issue. We did this to allow parents to give their own answers, without being influenced by the multiple-choice options we included in subsequent questions.

- Most parents (59%) mentioned at least one aspect of the physical environment of a childcare setting as being one of the main things they look for, with outdoor space being mentioned by a quarter (25%) of all parents.
- A substantial minority (43%) of parents mentioned qualities in the staff as being a priority, such as staff that are kind, friendly or supportive (27%) or staff that are particularly trustworthy or committed to their role (11%).
- The emotional environment was a priority; 18% of parents said they would look for a safe and welcoming environment, and 11% said they would want a relaxed or home-like environment.
- Parents frequently mentioned good early years education and child development (17%), good communication between staff and parents (15%) and care tailored to individual children (11%).

**"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."**

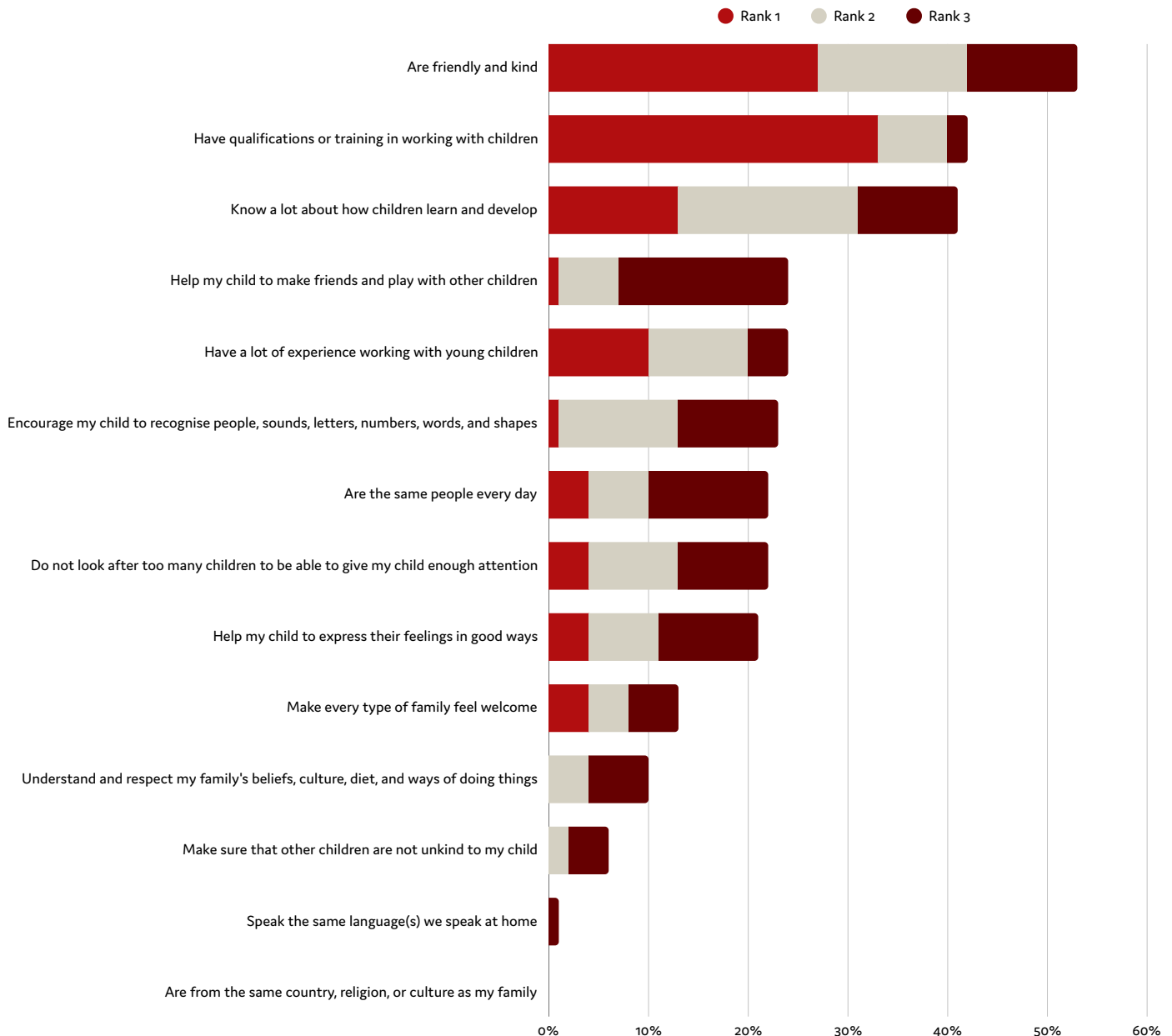
Focus group participant

We asked parents what they value from their childcare provider in terms of the staff, the building or environment, the approaches and attitudes of the setting, and what they value most overall. We then asked parents if they had experienced these things when accessing childcare.

## The staff:

We asked parents to identify, from a list of 14 options, three things about childcare staff that are most important to them, and to rank them in order of importance. We then asked parents if they had experienced the three things they identified.

**Figure 7- Parents' top three most important qualities in staff**

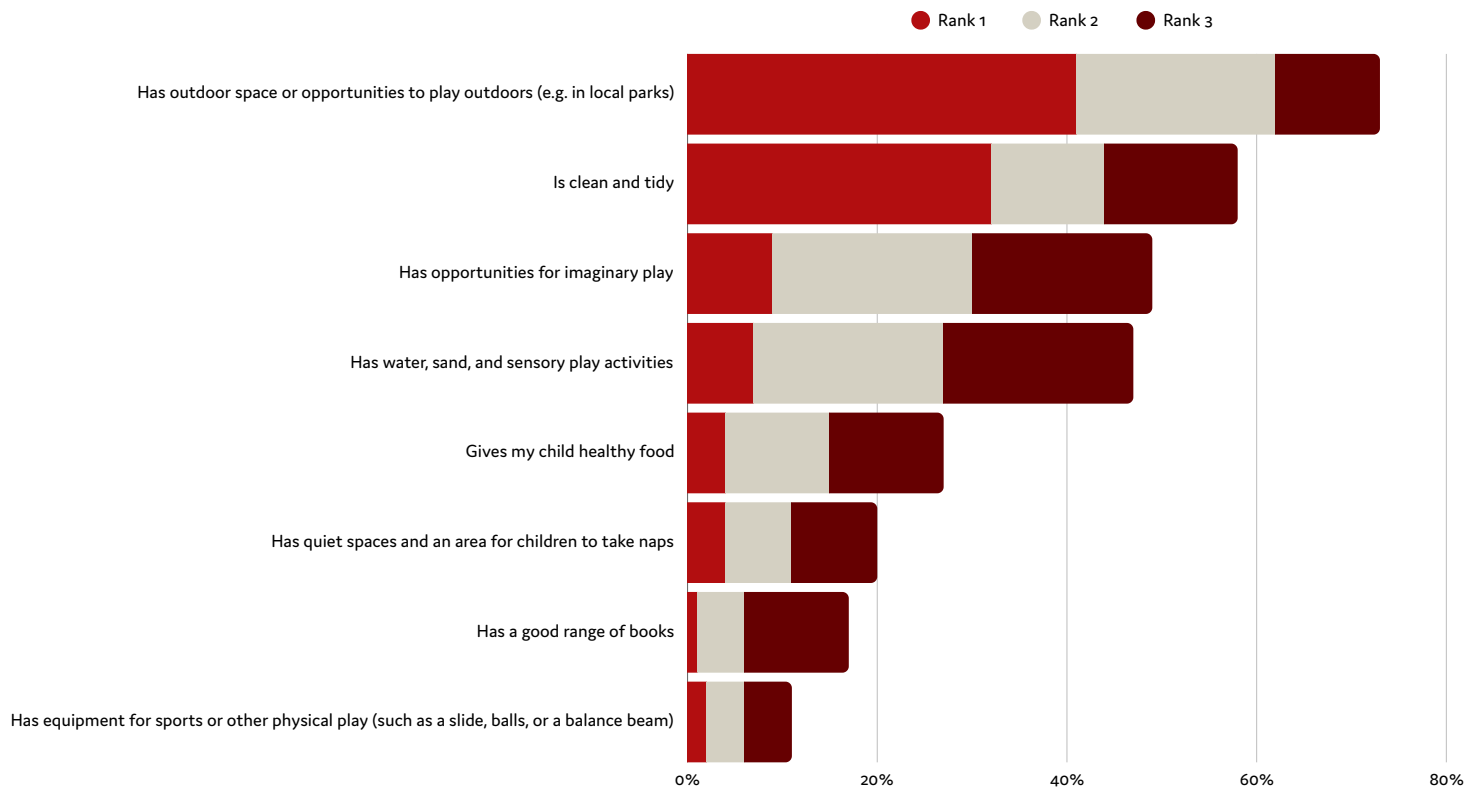


- Over half of the parents (52%) identified friendly and kind as being in the top three most important qualities for staff.
- The highest proportion of parents (33%) ranked having qualifications or training in working with children as their number one priority in terms of staff.
- The third highest priority for parents in terms of staff – both as a first place choice (13%) and overall top three ranking (41%) – was that they know a lot about how children grow and develop.
- A higher proportion of parents claiming means-tested benefits (38%) identified staff having qualifications or training in working with children as a number one priority than other parents (29%).
- Most parents (77%) said that their nursery or childminder always has or had (if they used childcare in the past) the staff qualities they identified. The remaining 23% said their nursery or childminder usually has/had those qualities in their staff.

## The building or environment:

We asked parents to identify which three things, from a list of eight options, about the building or environment in which their childcare is provided are most important to them, and to rank them in order of importance. We then asked parents if they had experienced the three things they identified.

Figure 8 - Parents' top three most important qualities in the building or environment



- Most parents (73%) said that the childcare setting having outdoor space or opportunities to play outdoors (e.g. in local parks) was among the top three most important things for their childcare setting to have in terms of the building or environment.
- The largest proportion of parents (41%) also identified this as their number one priority.
- The second most popular choice for parents overall (58%) and as a number one priority (32%) was that the childcare setting be clean and tidy.
- However, most parents who claim means-tested benefits identified a setting being clean and tidy (42%) as their top priority, whereas most parents who do not claim any means-tested benefits identified having outdoor space or opportunities to play outdoors (47%) as their top priority.
- Most parents (64%) said that their nursery or childminder always has or had (if they used childcare in the past) the aspects of the building or environment that they identified, and 26% said their nursery or childminder usually has or had those aspects.
- A slightly higher proportion of people who do not claim any means-tested benefits (84%) said their nursery or childminder always has or had those things than parents who do claim means-tested benefits (72%).
- However, the proportion of parents who said their provider always has/had the staff qualities they valued was higher for parents who do not claim means-tested benefits (82%) than it was for parents claiming means-tested benefits (71%).

**"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"**

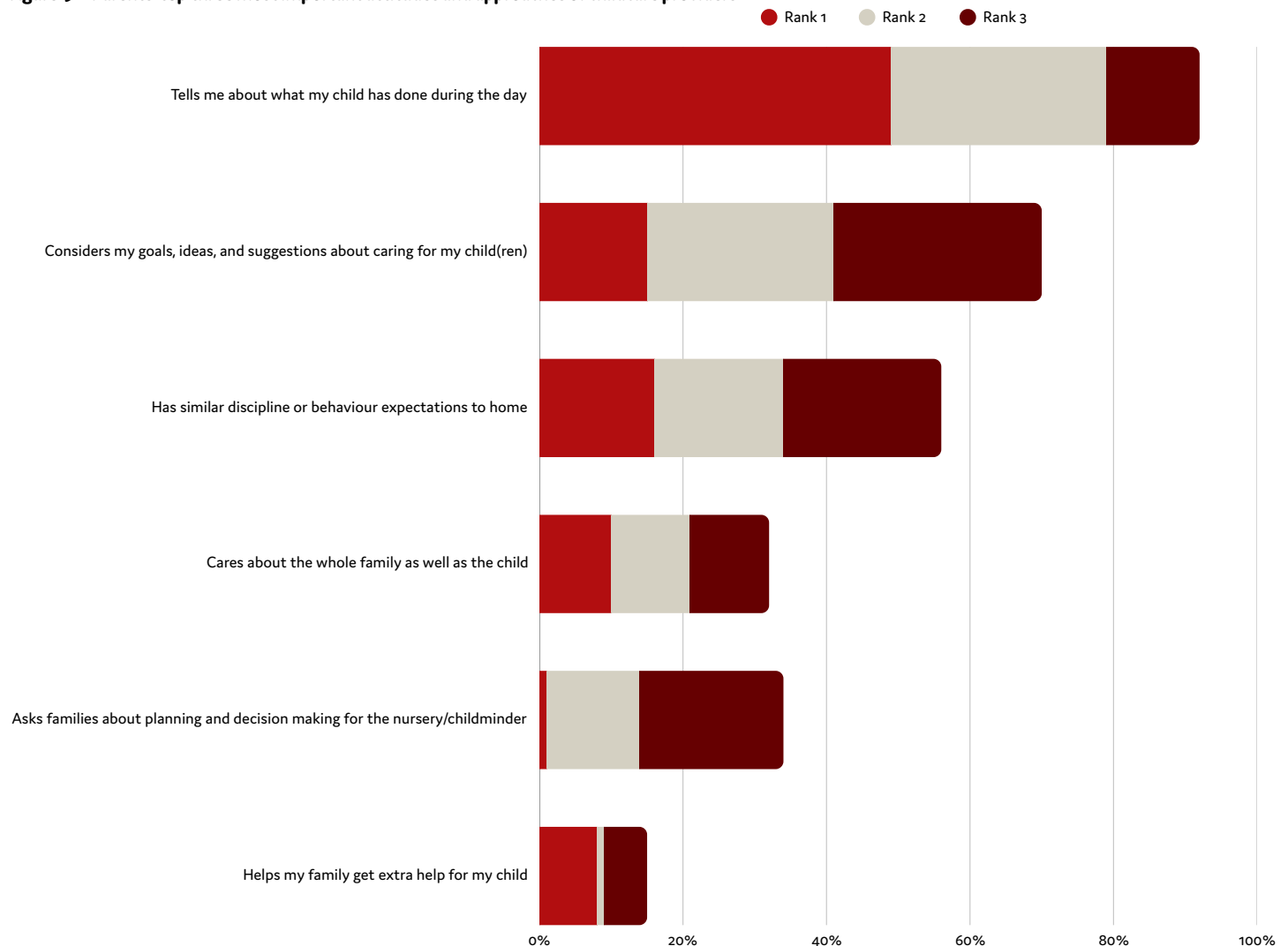
Focus group participant



## The approach and attitudes of the setting:

We asked parents to identify which three things, from a list of six options, about the attitudes and approaches of a childcare provider are most important to them, and to rank them in order of importance. We then asked parents if they had experienced the three things they identified.

**Figure 9 - Parents' top three most important attitudes and approaches of childcare providers**



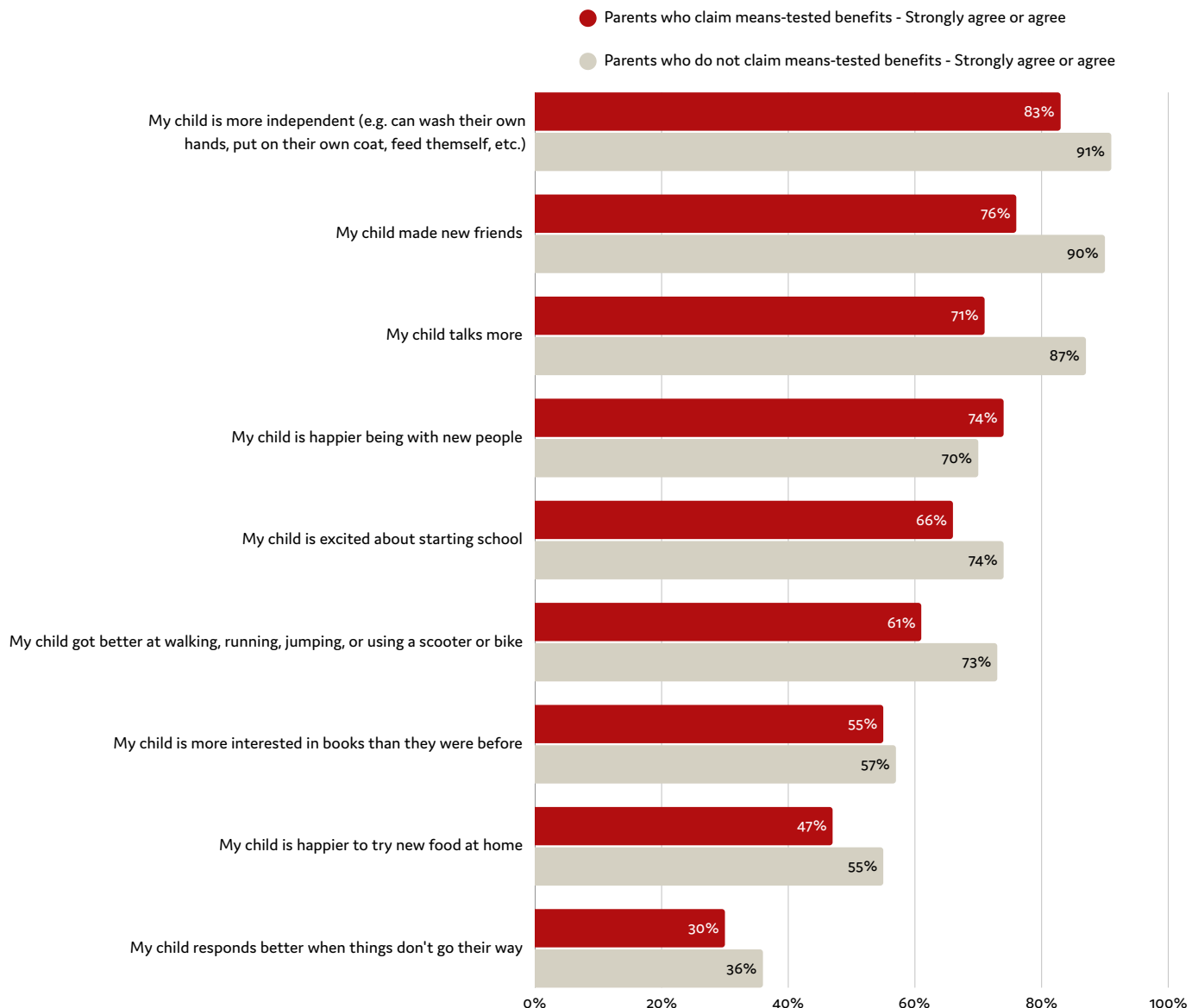
- The vast majority of parents (92%) chose their setting 'telling them about what their child has done during the day' as one of their top three most important features of a childcare setting's approach and attitude; this was also the most popular first choice (49%).
- The second most popular top-three choice (70%) was that their setting considers their goals, ideas, and suggestions about caring for their child(ren).
- The above findings suggest that good, two-way communication is important to parents when accessing childcare.
- The second most popular first-choice option (16%) was for their setting to have similar discipline or behaviour expectations to home.
- Most parents (64%) said their nursery or childminder always has or had (if they used childcare in the past) the things they selected in their top three, and 26% said their nursery or childminder usually has or had those things.
- The proportion of parents claiming means-tested benefits who said their nursery always has or had those things (59%) was lower than for parents who do not claim means-tested benefits (70%).

## B. The difference good quality childcare makes to children and their families

### For children:

We asked parents to think about the difference that going to a nursery or childminder has made to their child, and to tell us how far they agree with eight statements about the benefits of childcare for children.

Figure 10 - Parents' views on the differences using childcare made to their child



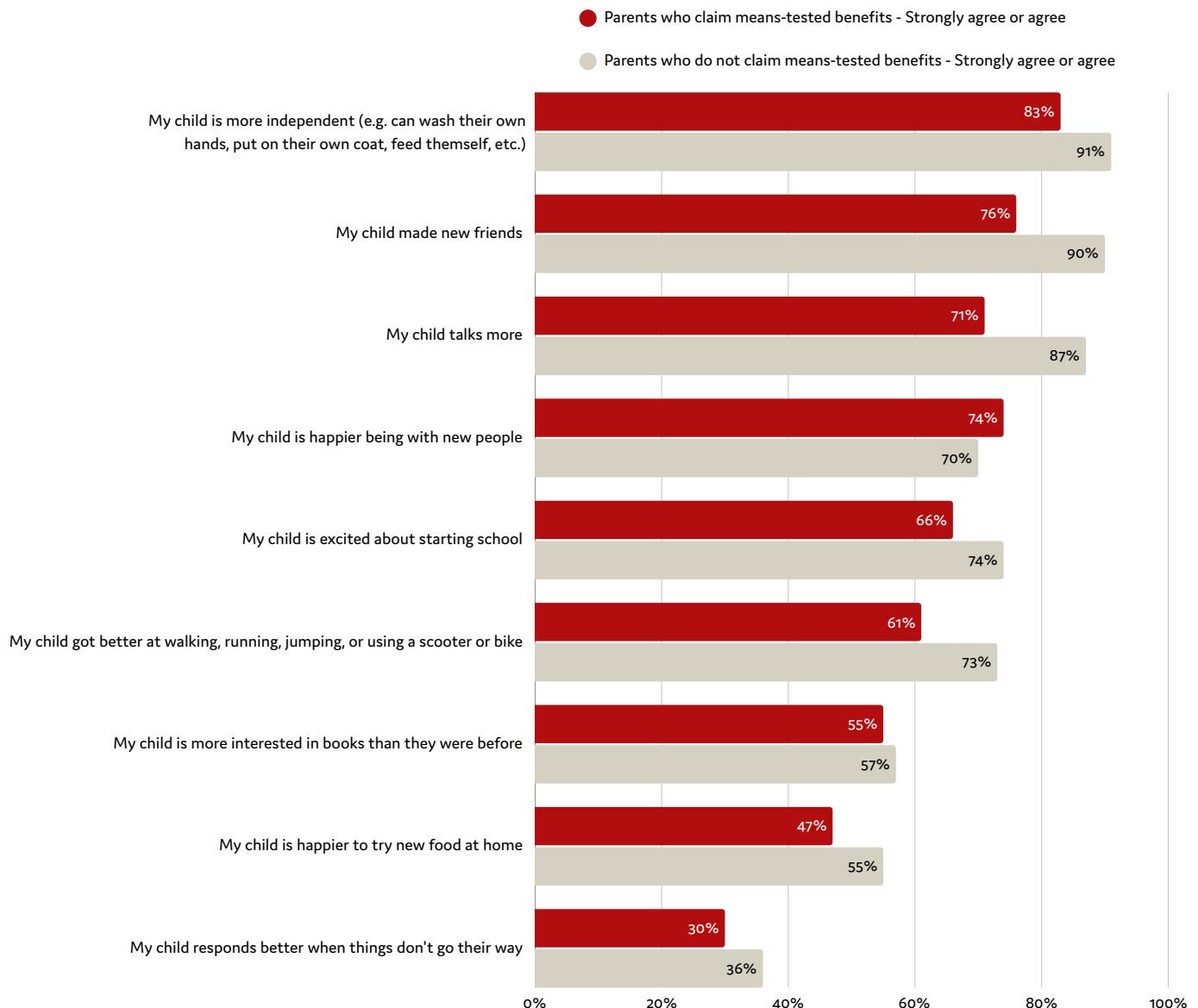
- Most parents said they agree or strongly agree that their child is more independent, excited about starting school, 'happier being with new people, 'better at walking, running, jumping, or using a scooter or bike, 'talks more' and had 'made new friends'.
- Parents who do not claim means-tested benefits are 14% more likely than parent claiming means-tested benefits to say they strongly agree that their child made new friends and talks more and 12% more likely to say they strongly agree that their child is more independent.
- Parents not claiming means-tested benefits are more likely than parents claiming means-tested benefits to say they strongly agree with most of these statements, except that their child is 'happier being with new people, excited about starting school, and more interested in books than before.

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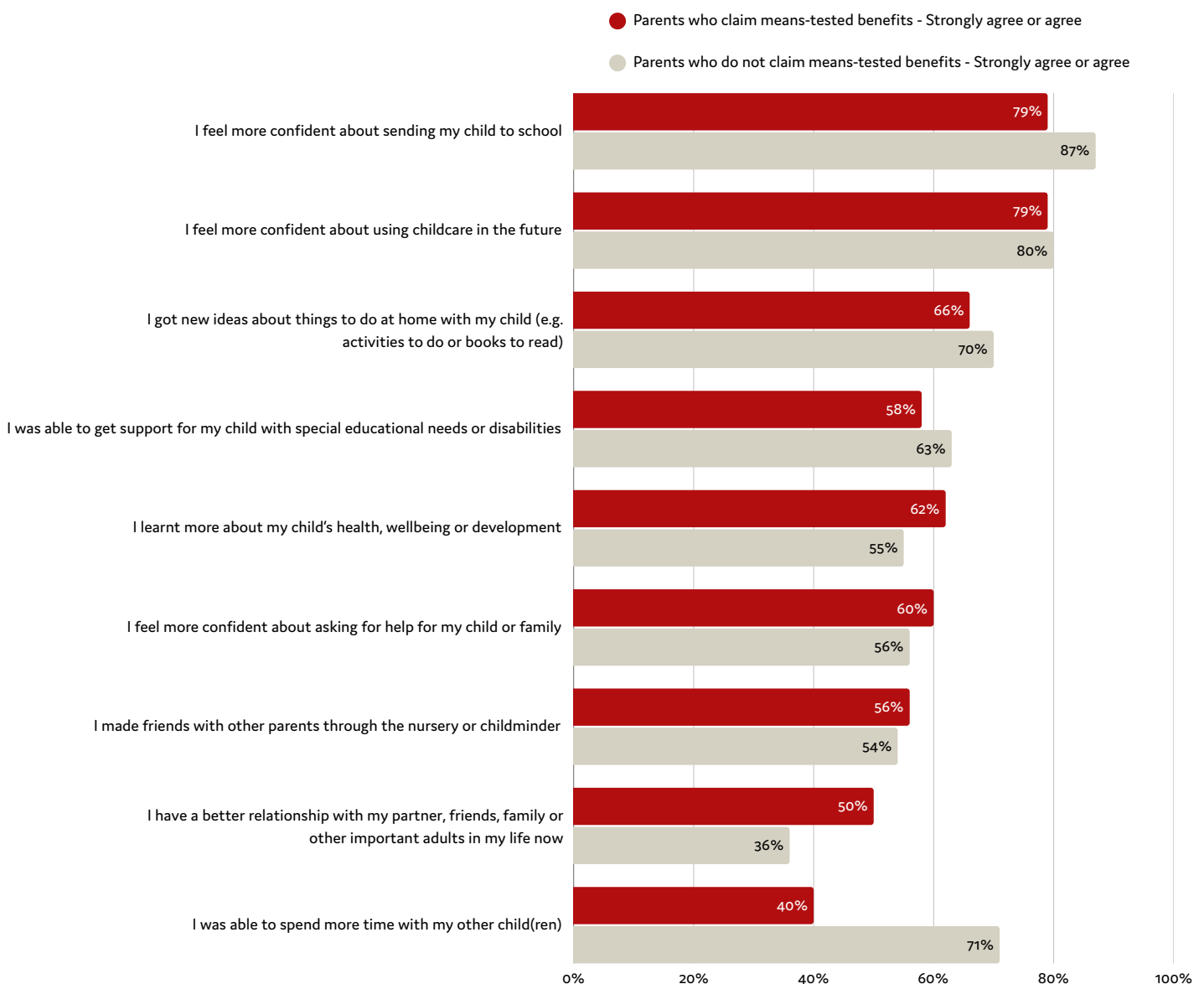


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- Parents who do not claim means-tested benefits are 14% more likely than parent claiming means-tested benefits to say they strongly agree that their child made new friends and talks more and 12% more likely to say they strongly agree that their child is more independent.
- Parents not claiming means-tested benefits are more likely than parents claiming means-tested benefits to say they strongly agree with most of these statements, except that their child is 'happier being with new people, excited about starting school, and more interested in books than before.

## For parents:

We asked parents to think about the differences that their child going to a nursery or childminder has made to them as a parent, and to tell us how far they agree with seven statements about the benefits of childcare for parents. We did not include answer options related to the ability of parents to work because there is already a wealth of research on this topic and we wanted to explore the less-reported, but no less important, benefits of childcare for families.

**Figure 11 - Parents' views on the differences using childcare made to them as a parent**



- The vast majority of parents said they agree or strongly agree that they feel more confident about sending their child to school and about using childcare in the future.
- Parents who claim means-tested benefits were more likely than parents who do not claim means-tested benefits to say they strongly agree that they learnt more about their child's health, wellbeing or development (62% vs 55%), feel more confident about asking for help for their child or family (60% vs 56%), made friends with other parents through the nursery or childminder (56% vs 54%) and have a better relationship with their partner, friends, family or other important adults in their life now (50% vs 36%).

## C. An in-depth look at parents' views and experiences of good quality childcare

We ran two focus groups and asked parents how they would decide which nursery or childminder to access if price, location and availability were not an issue, and what they had found most beneficial about using childcare, both for their child and themselves. Here is a summary of what parents told us.

### Children's enjoyment of the setting

- In both focus groups, parents said that how much their child enjoys the setting is very important when assessing a childcare provider.
- One parent said that knowing their child is enjoying themselves at childcare helps lessen feelings of 'mum guilt' when they prioritise their own needs such as exercising, socialising or pursuing education or training.
- Another parent said that the fact that their child enjoyed going to the setting – 'He loves it. He runs into the door' – was more important to them than formal indicators of the provider's quality.

**"EVEN IF I WAS IN A POSITION WHERE I COULD BE A FULL-TIME STAY-AT-HOME [PARENT], I WOULD STILL SEND HIM FOR THE SOCIAL ASPECT AND THE ACTIVITIES SHE DOES WITH HIM."**

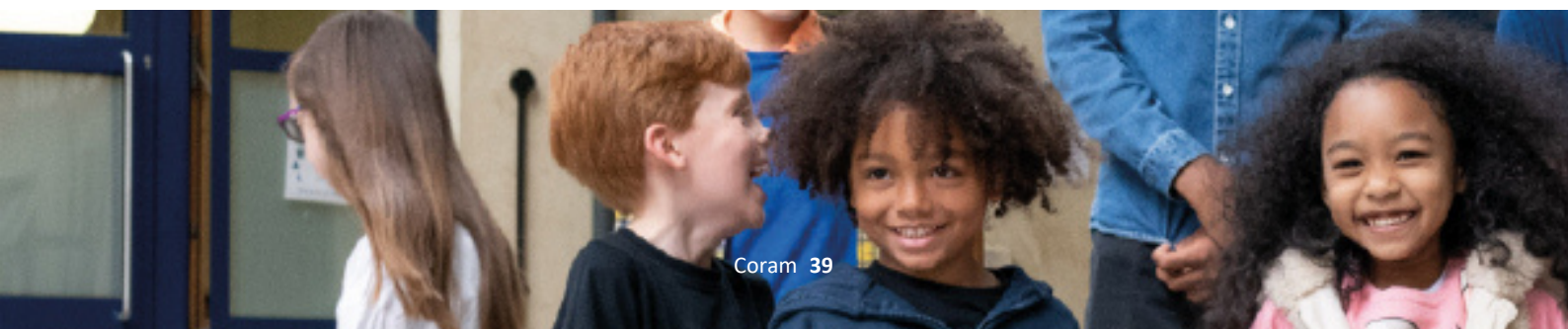
Focus group participant

### Formal versus informal indicators of quality

- Many parents said they place more value on other parents' opinions than on Ofsted ratings, as most felt they were not good indicators of the qualities that matter to them.
- Parents who did not value Ofsted ratings explained that because the reports can be up to five years old, they may not reflect the current state of the setting or its staff, and because they consider the personal qualities of the staff to be more important than the information captured in the report.
- However, some parents said that Ofsted reports could be useful for a parent who is new to the area and may have less access to word-of-mouth recommendations.
- Similarly, parents were divided on the importance of staff qualifications; some said that these can be a useful starting point when assessing the quality of a provider, but many parents said that staff being kind and compassionate was at least as important as staff having qualifications, if not more so: 'It doesn't matter what qualifications they've got if they're not compassionate. You can't teach that.'
- One parent highlighted a time when they were personally struggling and staff at their child's childcare provider were supportive and gave good advice in a sensitive way. The parent said that they valued this type of staff interaction more than they did formal qualifications.
- Many parents said that staff members' experience in working with young children is more important to them than formal qualifications.

**"IT DOESN'T MATTER WHAT QUALIFICATIONS THEY'VE GOT IF THEY'RE NOT COMPASSIONATE. YOU CAN'T TEACH THAT"**

Focus group participant



## Community, communication and working with parents

- For many parents, the relationship between either themselves and the provider or their child and the provider was very important.
- Some parents expressed the importance of not only providing a service but being part of the community - 'every time I'd be out on a walk, I'd quite often bump into her before he started or before I even enrolled him' - or having a pre-existing relationship with the provider: 'I used to look after her children and now she looked after mine'.
- Parents had different views on the usefulness of apps which some childcare settings use to communicate with parents; these can involve parents receiving a notification every time their child's nappy is changed, or information about illnesses.
- One parent said they preferred more personalised face-to-face communication about their child than receiving a notification via an app.
- A different parent said that their provider's use of an app had helped them to keep to a routine at home:
- This parent also said they had not expected their childminder to provide individualised care that considers the parents' goals, but they found it very beneficial:

**"IT'S QUITE USEFUL BECAUSE WE HAVE OUR OWN LOGGING TO MAKE SURE THAT WE CHANGE NAPPIES REGULARLY, GO TO BED WHEN HE SHOULD BE, ETCETERA, AND IT WORKS OUT QUITE WELL."**

Focus group participant

**"WE'RE TRYING TO GET HIM TO FEED HIMSELF AND WE SAID TO THE CHILDMINDER, 'CAN YOU JUST TRY AND GET HIM TO...?' SHE WAS FEEDING HIM AND THEN HE WAS COMING BACK HERE AND EXPECTING TO BE FED AS WELL. WE'RE TRYING TO GET HIM TO DO IT HIMSELF AND SHE TOOK IT ON. AND NOW IT'S PROGRESSING TO THE POINT WHERE HE CAN PRETTY MUCH FEED HIMSELF COMPLETELY ... I WOULDN'T EXPECT HER TO DO THAT ONE-ON-ONE KIND OF THING. FROM A DEVELOPMENT PERSPECTIVE, IT'S BEEN BRILLIANT."**

Focus group participant

- One parent said that their childminder had shared their expertise with them and helped them to nurture their child's development:

**HE'D BE TERRIBLE AT SLEEPING, ABSOLUTELY AWFUL AT SLEEPING. BUT WHEN I WENT OVER THERE, [CHILDMINDER] WOULD GET HIM DOWN LIKE THAT... AND SHE JUST TOLD US TECHNIQUES WHICH HAS BEEN FANTASTIC... HE'S SLEEPING ALL THE WAY THROUGH THE NIGHT NOW, SO IT'S BRILLIANT.**

Focus group participant

- Another parent summed up this experience of good communication and partnership between parent and provider:

**"YOU FORGET THAT, ACTUALLY, THERE ARE OTHER CHILDREN IN THE ROOM BECAUSE OF THE WAY THEY [STAFF] CAN MAKE YOU FEEL ... THEY GIVE YOU SUCH PERSONALISED ADVICE AND FEEDBACK ON THEIR DAY. IT'S JUST BRILLIANT."**

Focus group participant



## Social development

- Although most parents said they mainly use childcare so they could work, one working parent said: 'even if I was in a position where I could be a full-time stay-at-home [parent], I would still send him for the social aspect and the activities she does with him.'
- Several parents said they valued the social aspect of childcare for their child.
- One parent said that, having attended a nursery for some time, 'my little boy's much more sociable now, he'll make friends with most people.'
- Another parent agreed, adding that their child has learnt a lot of social skills from their childcare setting such as 'playing nice', being taught how to be kind to others and how to share, especially with younger children.
- One parent said, 'my youngest, especially, has a better social life than me' and liked that their childcare setting was diverse and enabled their child to learn about different cultures.

**"I THINK BECAUSE SHE'S A REALLY GOOD CHILDMINDER, AND I DIDN'T APPRECIATE THE IMPORTANCE OF THE STUFF SHE DOES IN TERMS OF HER EARLY YEARS DEVELOPMENT, AND HIS SPEECH HAS COME ON SO MUCH SINCE BEING WITH HER."**

Focus group participant

## Early years development and activities

- Many parents said that, although it was not their main reason for using childcare, they liked that their child would be learning things while there: 'it's good that they go out and learn things as well'.
- One parent said they had not considered early years development when choosing a childcare provider for their child, but that the quality of care and early education their child received from their childminder had changed their perspective:
- Another parent said that the breadth of activities their childminder provided represented good value for money:

**"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

- A different parent also mentioned the improvement to their child's speech since attending childcare:

**SHE USED TO BE VERY CONFINED ... JUST BABBLING ALL THE WAY TILL SHE WAS THREE AND I WAS LIKE ... 'WHY IS SHE NOT SPEAKING LIKE THE OTHER KIDS?' I KNOW WE SHOULDN'T COMPARE AND ALL THAT, BUT THE THING IS, WHEN I SEE KIDS OF THE SAME AGE IDENTIFYING COLOURS AND BUILDINGS AND TRUCKS AND CARS, MY KID WOULD HARDLY LOOK AT THEM AND MAKE ANY SENSE ... SO, I WAS A BIT WORRIED. BUT THE MOMENT SHE LEFT TO THE NURSERY, AND SHE STARTED LEARNING THINGS. AND THEN WHEN I GO OUT WITH HER, SHE WOULD POINT THINGS TO HERSELF: 'THAT'S A CAR, THAT'S RED, THAT'S GREEN.'**

Focus group participant

- Several parents said that, by attending childcare, their child benefits from doing activities that they themselves do not have the resources or expertise to facilitate at home.
- One parent said, 'It's nice sending him there and knowing that he does lots more that I can't do, I don't know how to do or what.'

**"AT HOME, WE CAN'T DO EVERYTHING WITH THEM BECAUSE YOU GOT SO MUCH STUFF TO DO ... YOU CAN'T PLAY THE WAY THEY'RE PLAYING ... SO IT'S QUITE USEFUL GOING TO A CHILDMINDER OR NURSERY BECAUSE IT GIVES YOU THAT TIME WHEN THEY CAN LEARN THINGS THERE THAT WE, AT HOME, CAN'T DO MUCH AS WHAT THEY CAN DO."**

Focus group participant

#### Additional needs

- Several parents mentioned getting help with recognising and supporting additional needs, especially speech and language difficulties.
  - One parent said that their child's nursery had been crucial in identifying their child's additional needs and had helped them to access support:
- "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 GO – BECAUSE THEY'RE ATTACHED TO A SCHOOL, THEY'VE GOT A SENCO – IT HELPED ME TO GET THE RIGHT INFORMATION AND GO DOWN THE RIGHT ROAD."** Focus group participant
- A second parent said their child also had difficulties with speech and language, and that they too had received wide-ranging support from their childcare provider, including how to access medical support and advice for supporting their child's needs at home:

**"MY SON'S GOT SPEECH AND LANGUAGE PROBLEMS AS WELL SO THEY'VE HELPED ME... THEY'VE WORKED WITH THE PAEDIATRICIAN, WITH [SPEECH AND LANGUAGE CHARITY]. I'M REALLY HAPPY WITH THAT ... THIS HELPS ME WITH THE SPEECH AS WELL, EVERYTHING WHAT TO DO NEXT BECAUSE I WOULDN'T HAVE KNOWN THAT ALL BY MYSELF, WHAT TO DO IF THEY HAD NOT TOLD ME. "**

Focus group participant

- A third parent said that their child was three when she first went to nursery and was having trouble talking to others despite attending talking therapy. However, after two months in the nursery, they saw improvements in their child's speech and vocabulary. This parent also said their child made new friends, began to love reading and now wants to go to the library – a huge change for them – and are keen to start school.
- A fourth parent said their child had struggled with talking too quickly and found it difficult to get their words out, but their childcare provider helped the child to slow down and gave the parents exercises to do with their child at home. Their child's speech quickly improved.
- A fifth parent said that their childcare setting had identified and assessed special educational needs, and they saw a huge improvement in their child's English language ability (their child speaks English as an additional language) since starting childcare.



### Parents having time to themselves

- Several parents spoke about the importance of having time to themselves, to 'renew yourself' and that childcare 'gives you that space to just be yourself again because you lose yourself having a baby'.
- One parent said that childcare 'gives a bit of breathing space. Literally, I would say'.
- Another parent described how using childcare had helped them take care of themselves again:

**"I HAD A BIT MORE TIME TO DO THINGS THAT I NEED TO DO LIKE APPOINTMENTS AND GOING TO THE GYM AND JUST MY HEALTH AND WELLBEING REALLY ... I FIND IT DIFFICULT TO FIT ALL THAT IN. YOU WILL LOOK AFTER EVERYONE ELSE EXCEPT YOURSELF, MAINLY, WHEN YOU'RE A PARENT."**

Focus group participant

- Parents also mentioned that accessing childcare gave them the ability to study or complete training, with one saying that they started a degree when their child turned three and became eligible for the universal 15-hour funded entitlement.

# Conclusion

The findings of the Childcare Survey 2025 show the difference that funded entitlements make to childcare affordability.

After new entitlements for working families are taken into account, the cost of a part-time childcare place has more than halved for parents of younger children in England, and the cost of a full-time place has reduced by more than 20%.

The increase in costs for three- to four-year-olds, and the picture for all age groups in Scotland and Wales, act as a barometer for how different the picture might have been for English working families this year without this support.

Whilst a full-time place in England still costs significantly more for children under the age of three due to the difference in funded hours (15 hours for children aged nine months to two, 30 hours for three and four year olds), this year's cost decreases are encouraging signs for the potential of the final stage of the expansion, when funded hours will increase to 30 per week for all children of working parents from the age of nine months.

This is a welcome boost for working families and has the potential to shift employment options for many parents and carers, particularly mothers.

However, the picture is very different for children whose parents are not eligible for the new entitlements. Children in low income and non-working households, which includes parents unable to work for reasons such as disability or terminal illness, have had no increase in entitlement. Parents who want their children to have the same early education opportunity will face bills of hundreds of pounds per week, which is simply unaffordable for most parents in those circumstances.

Similarly, families with no recourse to public funds (NRPF), including those who have been granted permission to work, are not eligible for the working parent entitlements, regardless of how much they earn or how many hours they work.

Looking at childcare sufficiency through a different lens this year showed us a number of key takeaways. Around 8 out of 10 local authorities have enough places for at least three quarters of children in their area for all the funded entitlements, and these are the categories of provision where local authorities are most certain of their knowledge.

This is a testament to the hard work and commitment of local authorities and childcare providers, particularly while the sector faces rising demand, rising costs and challenges with workforce recruitment and retention.

Local authorities are much less certain of their position for older children and for families in specific circumstances such as those in rural areas and with working patterns outside of a Monday to Friday, 9 to 5. More than half were not able to say how many children with special educational needs and disabilities (SEND) they have places for, and less than a third have places for at least 75% of children with SEND in their area. The report shows provision for children with SEND also varies significantly across England. We are still a long way from children with SEND having the same chance of securing a place as other children.

Our new work with parents this year shines a light on the difference that high-quality childcare can make to children and families. Whilst this was a small pilot, it gives an indication of how greatly parents value the role of nurseries and childminders, and of the improvements they observed in their children's physical, emotional and social development since attending childcare.

Recent investment in childcare entitlements has significantly changed the early years landscape and laid the foundations for recognition of its importance as social infrastructure. More children are eligible for more funded hours than ever before, and more parents have support to enter and stay in work. But the gap between entitlements for disadvantaged children and those with working parents is now wider than at any other time and set to get even wider later this year. When early education has the power to make such a difference to a child's life, it's essential that all children have the same opportunity to benefit, no matter their parents' circumstances, their needs or where they live.

## Areas for action

We call on all Governments in Great Britain to rebalance the system to enable all parents and carers to work and to ensure that children have the best start in life during their essential early years.

### Immediate actions:

- **Extend the working parent funded early education entitlements to children whose parents are in training or education, are migrants who meet the work criteria, or who are unable to work due to terminal illness.**
- **Further increase the early years pupil premium to bring it in line with the primary pupil premium** and to decrease the attainment gap between disadvantaged children and their peers.
- **Ensure that new school-based nurseries are opened in areas of most need**, addressing gaps in sufficiency including provision for children who are currently less well-served, such as children with SEND.
- **Increase the value of early years SEND funding.** Ring-fence funding for early years within the additional investment for children with SEND (announced at the Autumn 2024 Budget), and the high needs block funding for early years.
- **Create a more flexible SEND funding system**, not linked to other assessments such as Disability Living Allowance (DLA) and Education Health and Care Plans (EHCPs).
- **Update the funding model to ensure rates cover the true cost of provision**, including employer NICs and recruitment costs based on accurate assessments of turnover.
- **Re-allocate the underspend from Tax-Free Childcare to other parts of the childcare system.**

### Long term actions:

- **Remove the parental work criteria from the childcare entitlements**, giving all children an equal right to 30 hours per week of early education from the age of nine months until they start school, and introduce a single, means-tested co-payment system for families wishing to access additional hours, with families below the poverty line paying nothing.
- **Create a workforce strategy** that addresses the issues of staff recruitment, retention and skills.
- **Work towards provision of government-funded free meals in early years**, using the same criteria as free school meals.
- **Safeguard access to provision for disadvantaged children** by extending the duty to accept children with an EHCP, and to give priority admission to looked-after and previously looked-after children, to all registered early years settings as a condition of receiving government funding.
- **Allocate separate and dedicated funding to LAs to support their role**, delinked from the rate paid to providers.

# Methodology

## Childcare survey

### Timescales

This report is based on surveys sent to all Family Information Services at local authorities in November 2024. Respondents were able to fill in a form or reply online. After a month, we sent Freedom of Information requests to those local authorities that had not responded. The last Freedom of Information request returns were received in February 2025. 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 this 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 our initial survey request.

### 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, this year we have made a number of changes to the questions that we ask. We did this largely due to the significant changes in childcare policy since the previous edition of the survey, but also to update terminology, to gather more detailed information and to make the survey easier for respondents to complete. 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 84%. For Section 1 (Price) and Section 2 (Sufficiency) of the survey we received responses from 77% and 83% of local authorities respectively. The lowest response rate for any region was 50%. 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.

### 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 childcare for each age group was weighted against the total population for that age group, based on the latest ONS mid-year population estimates (from June 2023). 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. Sufficiency data is not weighted.

### 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 2024 data after the survey deadline for the year, but 2025 data within the deadline: in these cases, we have included the data in our calculations although they do not appear in the 2024 survey. This approach produces slightly different results to comparing regional weighted prices from the 2024 survey to regional weighted prices in the 2025 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: 2023 (Department for Education, 2024)\*. We exclude Northern Ireland because the childcare funding system is very different, making it hard to draw direct comparisons.



## Parent survey and focus groups

### Timescales

This section of the report is based on surveys sent out to parents in October 2024, and focus groups carried out in December 2024. Respondents could give their answers to the survey online. The focus groups were also carried out online.

### Survey sampling and recruitment

As this survey was a pilot study, we used a simple convenience and snowball sampling method, using our established parent networks such as Parent Champions to promote the survey. We also asked Family Information Services for help with promotion, as well as Dingley's Promise, a charity specialising in early years provision for children with special educational needs and disabilities.

Parents were entered into a draw to win one of two £40 shopping vouchers for participating in the survey. Parents who took part in the focus groups were given a £15 shopping voucher as a thank you for their participation.

### Response rate and focus group attendance

The survey received 122 responses in total, with 95 responses that answered all questions, and a further 27 answering some, but not all questions.

We held two focus groups, with seven participants in the first focus group and four in the second, for a total of eleven participants.

### Focus groups

Following on from the survey, we carried out two focus groups. Participants were recruited through a section at the end of the survey, in which they could leave their name and contact details if they were interested in taking part. We recruited a total of 11 parents to the focus groups. Each group lasted for approximately one hour. Each focus group was transcribed and thematically analysed before being written up into the final report.




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