



# Childcare Sufficiency Assessment

2025-2026



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## Introduction

The London Borough of Newham has a statutory duty to ensure that early years provision is available free of charge for parents of children eligible for government funded entitlements and so far as is reasonably practicable, ensure the provision of childcare is sufficient for parents to work or to undertake education or training for employment. This duty applies to children aged 0-14 and up to 18 for children with Special Educational Needs and Disabilities (SEND).

The [Early Education and Childcare statutory guidance for local authorities](#) provides further details on what requirements and expectations are placed on Newham regarding the sufficiency of childcare places.

Newham's ambition is to be a borough where every child has and enjoys the best possible opportunities in life through exceptional family support and high-quality early education, that is delivered in an inclusive early years setting and a supported childcare offer that ensures children are safe, stable, loved and cared for.

Accessible, high-quality early years and school-age childcare are key drivers in fulfilling this ambition, which means that families are not only able to find childcare that meets their child's learning and developmental needs but also enables parents to make a strong choice about work and training thereby reducing child poverty, inequalities and supporting family economic stability.

Section B.2 of the statutory guidance on Early Education and Childcare requires local authorities to report annually to elected council members on how they are meeting their duty to secure sufficient childcare. The report will also be made available and accessible to parents.

The report includes:

- a specific reference to how local authorities ensures there is sufficient childcare available to meet the needs of: children with SEND, children from families in receipt of Universal Credit, children with parents who work irregular hours, children taking up free early education and childcare places, school-age children and children needing holiday care,
- information about the current and projected supply and demand of childcare for age ranges of children, and the affordability, accessibility, and quality of provision, and
- details of how any gaps in childcare provision will be addressed.

From 2026 to 2027 onwards, the Department for Education has requested local authorities to submit their CSA with particular emphasis on school-age childcare in their area. Information on school-age elements of the CSA will be provided on a termly basis over the financial year.

## Executive Summary

The annual Childcare Sufficiency Assessment (CSA) evaluates the sufficiency of early education and childcare places across the borough and demonstrates how the Council continues to meet its statutory childcare sufficiency responsibilities and.

- outlines the national policy and reforms in early education and childcare,
- provides an overview of findings and progress since the last Childcare Sufficiency Assessment,
- provides information on the demand of childcare in Newham including data in relation to the take-up of funded early education places, children with special educational needs and disability (SEND) school-age childcare and holiday activities and food programme,
- provides an indication of childcare availability/supply, quality, affordability and demand to help parents understand the childcare landscape across Newham, and
- sets out an action plan to address potential gaps in early education and school-age childcare provision including identified local barriers and challenges.

### 1.1 2025-26 CSA Key highlights

- Early Years childcare provision in Newham remains sufficient with **293** registered OfSTED providers across the borough's 24 wards.
- Newham has sufficient childcare places for the funded entitlements schemes to meet current demand including for the expanded element of the funded early education and childcare with an overall increase in capacity from **6,259 in 2024 to 9,312 places in 2025** marking an expansion of childcare provision by **49%**
- A total of **171,985.32 hours** were accessed by entitled 0–4-year-olds as at Spring 2026. The funded hours are now the main source of income for most providers
- There are **123 registered SEND inclusive providers** who have specialist facilities, and/or currently receive Disability Access Funding (DAF) to support children with additional SEND needs. **85%** of PVI providers now have a qualified SENCo.
- Strong progress was achieved in the implementation of the national wraparound childcare programme in 2025–2026 with an additional **241 children** accessing out of school care provision. Newham now has **163** registered providers with an additional 4 schools through the Early Adopter Free Breakfast Programme delivering school-age childcare.

- Further work is needed to **secure sufficient school-age childcare** places to meet demand for eligible children.
- Monitoring of impact on overall demand shows that Newham's Family Information and Local Offer webpage reached a high count of **93,323** users over the course of 2025
- Overall occupancy in Early Years and School-age Childcare provision stands at **15% full**, with 85% of providers reporting vacancies across settings.
- **95%** of our Early Years providers are Good or Outstanding and **99%** of School-age childcare providers are Good or Outstanding under the previous OfSTED framework and **33 providers** inspected under the new OfSTED Education Inspection Framework meet the new standard.
- The overall costs for childcare have risen since last year, although **22%** of the parents surveyed rate the affordability of their provision as 'very good'.
- **Flexibility of hours** remains a concern and is the main factor parents prioritise when choosing childcare with **85%** of parents saying they were satisfied overall with their childcare arrangements.
- Attracting parents and families is now the greatest business concern. However, **72%** of Early Years and School-age Childcare providers are confident in the sustainability of their provision.
- Newham's Holiday, Activities and Food (HAF) programme delivers the equivalent of 6 weeks' provision across Easter, Summer and Winter holiday breaks enabling children access a minimum of 24 days over the year (34% of the total English school holidays).
- In 2025, **69,348** HAF places were commissioned inclusive of **2,648** places specifically for children with SEND. Of these, **54,031** HAF places were taken up over Easter 2025, Summer 2025 and Winter 2025 (uptake as follows: 70%, 84% and 72% respectively).
- **24,398** children were eligible for the HAF programme at the point of the Spring 2026 Census, representing an **8%** increase compared to Spring 2025.

## Section 1: National Policy context and Reforms

### 1.1 Policy Updates and reforms

There are several policy initiatives that had an impact on the outcomes of childcare sufficiency and some of these will continue to impact through 2026-2028. These include:

- [Early education and childcare entitlements expansion \(2025\)](#): Final rollout of the expanded, government-funded childcare entitlements to reduce costs for families with eligible working parents able to access up to 30 free hours per week (over 38 weeks a year) for children aged from 9 months old until they start school, alongside extensions to local funding, the expansion of eligibility for Early Years Pupil Premium (EYPP) and Disability Access Fund (DAF) to the children accessing the new entitlements.
- [Best Start in Life Strategy](#): which outlines how the government will improve child health and development as well as ensure that all children have the chance to achieve and thrive by providing high quality support to parents and children from pregnancy to age 5.
- [School Based Nursery programme](#) aimed at helping more families access early years provision through a government programme that establishes nursery provision located on a school site or satellite site.
- [The Early Adopter Free Breakfast Programme](#): A commitment to ensure state primary schools offer free breakfast clubs to all pupils. The national roll out of the programme expected from April 2026 seeks to support improved punctuality, attendance, nutritional outcomes and increase readiness to learn.
- [School-age childcare](#): builds on existing programmes including holiday activities and food programme, wrap around and free breakfast clubs by investing in a resilient system to deliver sufficient places that meets local needs and supports long term sustainability.
- [OfSTED Education Inspection Framework](#) (EIF) and [Changes to the early years foundation stage](#) framework place increased emphasis on inclusion, transitions, communication and language, and early identification of need.

This Childcare Sufficiency Assessment highlights the impact of these policy changes specifically on the sufficiency of early years and childcare places across the borough.

## Section 2: Progress against previous year’s action plan.

This section details the progress made so far against the previous year’s CSA action plan and provides an assessment of how the council has responded to the priority objectives identified for 2025-2026 in delivering current childcare needs of families living in Newham set against national reforms.

PRIORITY	OBJECTIVE	PROGRESS AGAINST OBJECTIVES
<b>Funded early years and childcare entitlement expansion.</b>	To ensure sufficient, accessible, and flexible childcare places to meet the national expansion of funded early education and childcare entitlements.	32 projects supported, resulting in 3,053 new childcare places.
		Increase in funded childminder educators.
		Adequate mix of part week, stretched and flexible delivery models across borough.
		12 workshops delivered for parent facing professionals.
		Termly promotional campaigns and monthly newsletters issued on working parents’ entitlement.
		8 provider briefings covering funding, eligibility, and system changes.
		Extensive support following provider portal launch (daily helpline + 24 surgeries).
		Transition support embedded in provider engagement.
<b>Out of School and Wraparound Offer for primary-aged children.</b>	Support working families by increasing access to affordable, high-quality wraparound childcare.	Successful delivery of breakfast provision across early adopter schools.
		New/expanded 8am–6pm places created for an additional 241 children in 2025–2026.
		Targeted provider engagement delivered (1:1 advice, workshops, Childcare Works resources).
		Strengthened wraparound communications across schools and digital platforms.
<b>Special Educational Needs and Disabilities.</b>	Ensure inclusive access and early support for children with SEND and emerging needs.	20 new Level 3 SENCos trained; 85% of PVIs now have a qualified SENCo.
		Monitoring of SEND take up to identify barriers and improve access.
		SEND data used to inform planning, funding, and service development.
		Early Notification process used to ensure timely SENIF support.
		Delivery aligned with Newham Local Area SEND & Inclusion Strategy 2023–2028.
		Social media recruitment campaigns delivered using DfE “Do Something Big” assets.

<b>Workforce development</b>	Support recruitment, retention, and development of a skilled early years workforce.	<p>Promotion of DfE childcare recruitment campaign through digital channels.</p> <p>Engagement with Jobcentre Plus, colleges, and schools on apprenticeship pathways.</p> <p>27 outreach events delivered across community and SEND events.</p> <p>Workforce updates shared regularly in EY Matters newsletter.</p> <p>Local vacancy page and DfE job portal promoted to providers.</p> <p>Childminder support maintained, with 98% rated Good or Outstanding.</p>
<b>Sustainability</b>	Support a stable, responsive, and sustainable childcare market.	<p>Childcare embedded in wider economic and workforce strategy.</p> <p>Enhanced support for new settings including allocated advisory support led by qualified teachers.</p> <p>Ongoing sharing of business, funding streams, and opportunities with providers.</p> <p>Intelligence gathering underway to understand demand shift and occupancy strategies.</p>
<b>Quality of Provision</b>	Maintain and improve the quality of early years and childcare provision across Newham.	<p>EY Advisory Teacher recruited; Senior Newham Early Education Practitioner role created.</p> <p>Ongoing statutory quality improvement for new and below 'Good' settings.</p> <p>Targeted EIF sessions delivered; quality audit tool introduced.</p> <p>Strong OfSTED profile maintained: Childminders 98%, PVI 97%, LA Maintained Nurseries 100%, School Based Nurseries 100%.</p> <p>13 new settings supported (3 PVI, 10 Childminders).</p> <p>Targeted sustainability, staff change and safeguarding support for at risk settings.</p> <p>33 Continuous Professional Development courses delivered (statutory, teaching &amp; learning, safeguarding, SEND).</p>
<b>Communications</b>	Ensure families can easily access clear, trusted childcare information.	<p>FIS and Local Offer website content under full refresh (completed by 31 March 2026).</p> <p>Increased use of social media, community language content, and parent workshops.</p> <p>Directory of community groups created; targeted outreach delivered.</p> <p>Promotion of flexible childcare options (stretched offers, childminders, partnerships).</p> <p>Inclusion/SEND, cultural and language support information shared via FIS/LO.</p> <p>Promotion of <a href="https://childcarechoices.gov.uk">childcarechoices.gov.uk</a>, childcare calculator and Best Start in Life tools.</p>

## Section 3: Gap Analysis and Recommended Actions for 2026–27

The data and information provided in this report utilises quantitative and qualitative evidence including forecasts based on population projections, birth data, spring school census, early years census (headcount) unless otherwise specified, and feedback through an annual parental and provider surveys

### 3.1 Gap Analysis

#### 3.1.1 Funded Early Years and Childcare Entitlement:

- Early years childcare provider types remain uneven across the borough limiting parental preference options.
- Inconsistent access to flexible and atypical-hours childcare, including part-week, early mornings, late evenings, and weekend provision.
- 123 out of 293 SEND inclusive registered providers are receiving DAF and/or have established SEN facilities to support children with a 15% gap in our PVI providers without their own qualified SENCo.
- Business continuity pressures remain a constraint on sustainability and expansion across early years providers.
- Early years providers report that their provisions are 0-90% full rising from 81% in 2024 to 85% in 2025 showing a gap in parent and family recruitment and retention linked to changing parental behaviour, cost-of-living impact, and a decline in birth rate.

#### 3.1.2 School-Age Childcare:

- School-age childcare access remains uneven and is broadly insufficient, with some schools unable to offer full 8am–6pm provision due to space, staffing or operational constraints, limiting parental options.
- School-age childcare providers report that their provisions are 0-90% full rising from 82% in 2024 to 85% in 2025 showing a gap in customer recruitment and retention linked to changing parental behaviour, cost-of-living impact, compounded by a decline in birth rate.
- Inconsistent access to flexible and atypical-hours childcare, including part-week, early mornings, late evenings, and weekend provision.
- Breakfast provision gaps remain outside of early adopter schools, with opportunities to expand once national rollout progresses.
- Holiday childcare availability is inconsistent, particularly for working parents who need continuity between term-time and during holiday.
- HAF programme offer is strong for SEND pupils but could be expanded to ensure more children have access to multiple days over all three holiday periods.

- The planning of HAF programme in areas with high FSM numbers and deprivation remains a priority to enable families to access provision close to home. Work will continue to engage eligible families for the HAF programme to match the 8% increase of children eligible for Free School Meals.

### **3.2 Local Barriers:**

- Of the 223 parents who responded to our survey, 22% advised that they had unmet childcare needs. This marks a slight decrease compared to 2024 and 2023 where 23% of respondents advised of their unmet childcare needs. Flexibility and hours available to meet childcare needs still present a barrier for working families and a proportion of parents.
- Cost of fee-paying childcare continues to rise, which is impacting take-up especially among lower-income families in the least deprived areas of the borough.
- Parental misconceptions or limited understanding of entitlement changes and childcare options is impacting take-up, so awareness campaign via utilisation of social media to be continued.
- Physical space limitations in some schools, restricting their ability to deliver wraparound childcare or breakfast provision at scale.
- Recruitment and retention challenges affecting both early years settings and wraparound providers.
- Providers report that parents and family retention and financial factors have become more burdensome.
- Administrative burden associated with new funding systems, digital tools, and policy changes.

**Current national reforms combined with the above gap analysis inform Newham’s priorities for 2026–27 and its broader ambition for every child to have the best start in life.**

### 3.3 Action Plan 2026-27

The tables below set out the Council’s priority objectives for 2026-27 alongside key action plan as we continue to build on and embed, the successful actions already achieved in the previous year.

2026–27 OBJECTIVES	ACTION PLAN
<b>Funded Early Education &amp; Childcare Entitlement Expansion</b>	Monitoring, aligned to DfE move to termly returns from April 2026 for all entitlements.
	Further increase Childminder participation focused on under threes and flexible delivery.
	Embed system improvements to reduce administrative burden.
	Maintain a focus on effective transitions between educational providers by collaborating with stakeholders to promote positive outcomes for every child, in accordance with Best Start Strategy 2025.
<b>School age childcare</b>	Refresh mapping and forecasts to respond to demand and demographic changes.
	Continue engagement with DfE on SBN phase 2 & 3 to support expansion and sustainability.
	Embed sustainability support and strengthen peer learning in School-age Childcare network.
	Refresh communication to target under-represented areas and families needing support.
	Further integrate holiday/term-time wraparound childcare aligned with HAF.
	Boost engagement and sufficiency of HAF programme to meet increase in pupil eligibility.
	Support the National Roll out of the Breakfast Programme in schools.
	Monitoring existing School-age Childcare to ensure sufficient provision where needed.
	Expand HAF programme to encompass half-term holidays to enable parents have access to childcare at additional points in the year.
<b>Access and Inclusion</b>	Increase SENCo training towards aspiration of every setting having a qualified SENCo.

	Further embed data-led planning and strengthen parent/carer feedback loops.
	Maintain and refine Early Notification pathways ensuring that new providers are aware of support.
	Continued pre-inspection support to strengthen quality, inclusion, and outcomes across early years provision.
	Expand HAF provision to enable children and young people with SEND to access additional places.
<b>Quality of Provision</b>	Review and refresh CPD offer annually aligned to sector priorities.
	Improve audit engagement among Childminder providers and further embed digital monitoring.
	Maintain focus on continuity/transitions aligned to Best Start in Life Strategy
<b>Workforce development</b>	Continue workforce promotion campaign into 2026–27.
	Formalise partnerships for apprenticeships and expand pathways including increasing employment & training opportunities for our care leavers.
	Explore new initiatives to strengthen childminder recruitment/retention.
<b>Sustainability</b>	Strengthen the alignment between childcare sufficiency, economic planning and regeneration.
	Review and refine early-stage support for new providers.
	Expand business support focusing on emerging challenges.
	Develop and disseminate case studies to support occupancy and long-term sustainability.
<b>Engagement</b>	Implement revised 2026 communications plan focusing on termly entitlement promotion via digital screens, billboards, social media, libraries and newsletters
	Expand outreach programme based on engagement outcome.
	Strengthening targeted promotion of flexible childcare offers.

## Section 4: Demand for Childcare

Childcare refers to any provision inclusive of education for children under school age and any supervised activity outside of school hours for children of school age. Childcare can be either formal, which is usually registered (with OfSTED or the Independent School Inspectorate) and paid for, or informal, which is usually not registered and often not paid for.

To assess the demand and supply for childcare places, the local authority compares current known capacity with predicted demand. This takes account of factors such as the population, births, housing growth and patterns of inward and outward migration.

This section provides an overview of the demand for early years and childcare in Newham.

### 4.1 Newham context: Population, Demography and Economic conditions

The population profile provides baseline information and highlights interrelated and evolving factors impacting demand for childcare in the borough.

Newham's population grew by **14% to 351,100**, one of the fastest growth rates in London, making it one of England's most densely populated areas according to the 2021 Census.

The borough remains incredibly diverse with **42.2%** residents identified as **Asian, Asian British or Asian Welsh** compared to **43.5%** (in 2011). **29%** identified their ethnic group within the **"White"** category, an increase of **1.8%** since 2011), while **17.5%** identified their ethnic group within the **"Black, Black British, Black Welsh, Caribbean or African"** category (compared with **19.6%** the previous decade). The percentage of people who identified their ethnic group within the **"Other"** category ("Arab" or "Any other ethnic group") increased from **3.5% in 2011 to 4.9% in 2021**.

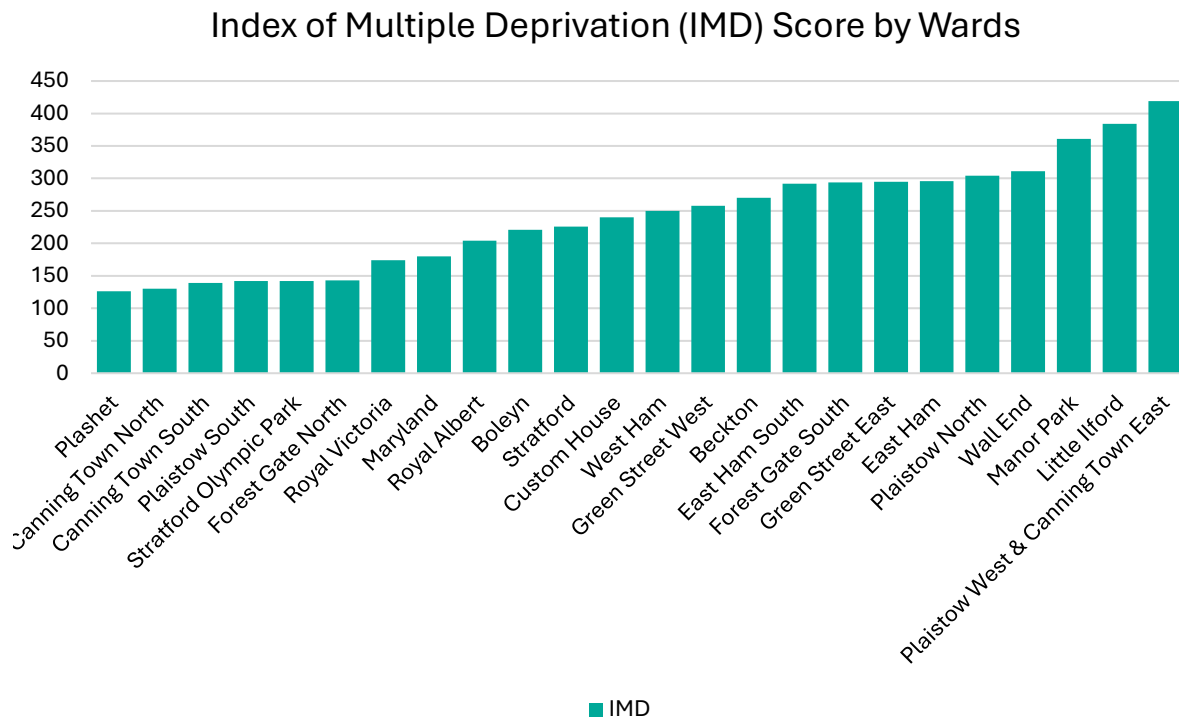
Despite a projected fall in net internal migration, the population in Newham is still projected to increase to **392,601** people in 2032.

This growth in population, significant cultural & linguistic diversity, and rising number of children with identified or emerging additional needs has been seen alongside high levels of multiple deprivation.

Whilst there has been improvement in the latest English Index of Multiple Deprivation (IMD) ranking in domains relating to Crime, Health, disability and access to Housing and Services domain moving **from 1<sup>st</sup> in 2019 to 3<sup>rd</sup> in 2025**; the borough remains among England's most deprived areas, **ranking 7<sup>th</sup> overall**.

Newham also ranks **2<sup>nd</sup> and 3<sup>rd</sup> respectively for income deprivation affecting children and older people respectively**.

**Figure 1:** highlights a breakdown of Newham’s Index of Multiple Deprivation (IMD) scores by ward.



Source: *English Indices of Deprivation 2025 (IoD25) constructed for the Ministry of Housing, Communities & Local Government.*

The ranks and deciles published for the Indices of Deprivation are based on scores: the larger the score, the more deprived the area (the lower its rank).

**Income deprivation** doubled since 2019 from **16.9% to 39.0% in 2025**, meaning nearly 4 in 10 residents are either out of work or in work but on low earnings with an increase in the proportion of children living in income-deprived families: rising from **20.1% in 2019 to 59.7% in 2025** demonstrating the severe impact of economic and housing pressures.

The London Plan (adopted 2021) had a target of 522,870 additional homes across London for the next ten years. Newham has the **second highest** housing target of **32,800** set to be built

**22,595** homes were built in Newham (including the area of the borough where the LLDC had planning powers) between 2017/18 and 2024/25 with **2,829** completed as low cost ret properties. Despite this significant increase in housing numbers, the median house price in Newham stands at £419,603 as of June 2023 (14 times the annual earnings).

This is a contributing factor as to why **49% of Newham residents are in poverty** after housing costs are considered.

These demographic characteristics create complex and changing demand patterns for childcare in the borough.

## 4.2 Child population and projections

Births in Newham rose significantly from **5,963 in 2008 to 6,426 in 2012**. Since the 7% peak in 2012, there has been a year-on-year reduction in the birth rate decreasing by **14% between 2012 to 2023**. Despite the lower birth rate, the borough still has the third highest 0-15 aged child population in London and has experienced a dramatic increase in the proportion of children living in income-deprived families, rising from **20.1% in 2019 to 59.7% in 2025**. This means that nearly **6 in 10** children in Newham now live in households experiencing income deprivation.

Therefore, demand needs to be balanced against affordability and flexibility whilst ensuring sufficiency.

Current GLA population projections show that there are **24,042** children aged 0 to 4 residents in the borough as of 2025/26.

**Figure 2:** The table below shows the projected 0-4 aged child population in Newham over the next five years.

Year	0-4 years borough Total	Increase/Decrease
2025/26	24042	N/A
2026/27	23793	-1%
2027/28	23007	-3%
2028/29	22592	-2%
2029/30	22315	-1%

Source: *GLA BPO projections*

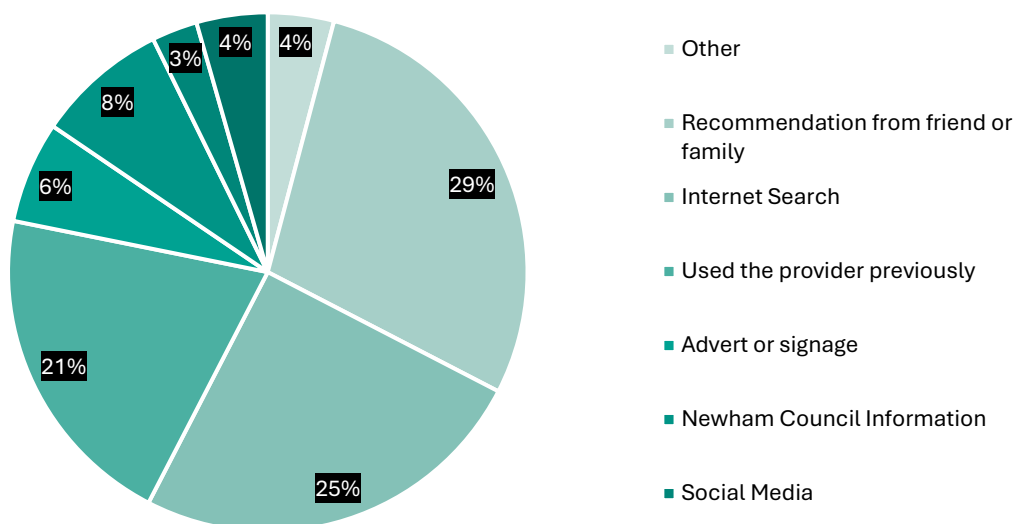
As highlighted above, our 0–4-year-old population is projected to decline over the next 4 years in line with projected decrease in birthrate.

In monitoring demand for childcare, we rely on responses gathered through our parents' survey in addition to engagement tracking via our Family Information service and Local offer webpages.

**Figure 3:** the chart below maps out the responses from families who engaged with our childcare providers to inform us how they found out about the provision they are accessing.

**223** people responded to our survey and were able to report on the different ways they found out about the childcare provision they use.

### Finding out about childcare



Many respondents reported that their childcare provision they were accessing was through personal recommendation from a friend or family member. This was closely followed by via internet search facility. This is further supported by **35,606 users** viewing the Family Information Service and Local Offer web pages in the **Spring**, **43,092 users** in the **Summer** and **93,323 users** in the **Autumn**.

The ranking reported is in line with responses from the previous year’s survey, except for ‘other’ which was placed as the third most common method. The least common route was gleaning information via social media channels, as also reported in the survey last year. This avenue needs to be explored further to strengthen engagement with more families.

#### 4.3 Take up funded entitlements

Childcare take up is shaped by multiple factors, such as parental choice, individual child needs, employment and work patterns, income levels, family structure and support networks, alongside families’ access to information and understanding of local childcare options.

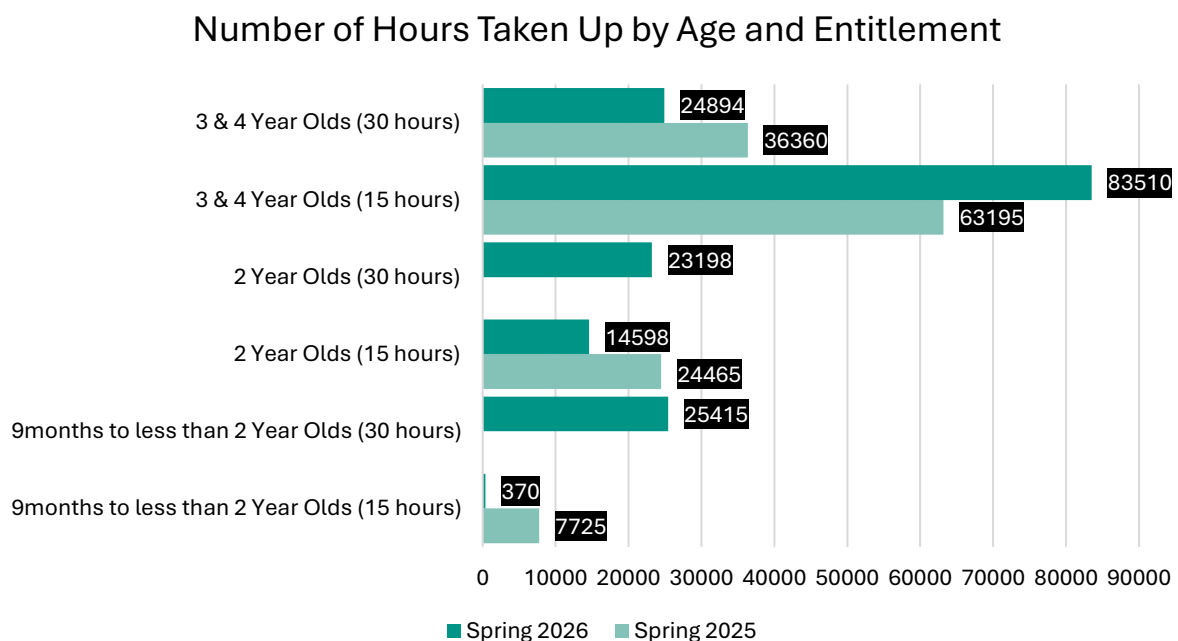
An expansion of funded early education for working families with children under three was implemented between April 2024 and September 2025 whereby eligible working families with children from 9 months upwards can get 30 hours (1140 hours over a year).

The Early Learning for 2-year-olds’ which replaced ‘Families Receiving Additional Support (FRAS)’ in which some families were eligible for 15 hours of free childcare for their 2-year-old children will come into force from April 2026.

The consistent entitlement, despite these changes, was the Universal 15 hours of childcare for all 3-and- 4-year-olds.

Data from our March 2026 early years census headcount, showed that there were **9,377 0-4-year-old** children who took up childcare places for the funded entitlements. This accounts for 39% of 0–4-year-olds projected population in Newham. Our projections show that we have 40.3% of children who are likely to be eligible for funded childcare, so about **1.3% of our 0–4-year-olds** are currently not taking up their entitlement.

**Figure 4:** the table below compares the take up of hours broken down into the funded age groups and their varying entitlements for the Spring 2025 and 2026 headcounts.



Source: *Early Years Admissions Termly Census Data Spring 2025 – Spring 2026*

Since the 30 hours national roll out of expanded childcare for 9 months to 2-year-olds and for 2-year-olds in September 2025, we have seen a total of **25,415 hours** and **23,198 hours** taken up, respectively. Due to this expansion, some families who would have ordinarily accessed 15 hours now have access to 30 hours. These changes in entitlement provide justification for the decline in 2-year-olds accessing 15 hours of funded entitlement (**-40%**) and 9 months to 2-year-olds accessing 15 hours of funded entitlement (**-95%**).

Between Spring 2025 to Spring 2026, the number 3- and 4-year-olds claiming 30 funded hours have fallen by **32%** whilst children in the same age range claiming 15 funded hours have risen by **35%**.

The largest percentage of hours claimed by parents at both points of headcount were those who were entitled to 15 hours of free childcare for their 3- to 4-year-olds - this was **42.3% in 2025** and **48.6% in 2026**.

#### 4.4 Demand for School-age childcare

School-age childcare includes childcare provided by schools, PVIs and childminders, both on and off the school premises. School-age childcare includes programmes that may not have childcare as their primary focus but provide care for children outside of the school day. This includes government programmes such as free breakfast clubs and the HAF programme.

With the government initiative to roll out free breakfast clubs from April 2026, there is an expectation that demand for school age childcare will grow to allow parents to continue to work or enter the workplace and families are supported, year-round by a seamless care across school hours and out of school time

**98%** of schools in Newham either offer breakfast and after-school provision themselves or commission PVIs to provide this.

Of the **2%** who do not provide out of school childcare, our records show that one decommissioned the provision due to lack of interest amongst parents. Plans to address this with the other school will be progressed through the national roll out of the breakfast programme.

In spring 2026, there were **30,327** children on roll at a Newham primary phase school from Reception to Year 6. These children may require childcare before and after school, and/or during the school holidays. As the below highlights an overall **4% decrease** compared to the spring 2025 census for the 2024/25 academic year.

**Figure 5:** Primary school on roll numbers broken down by Year group.

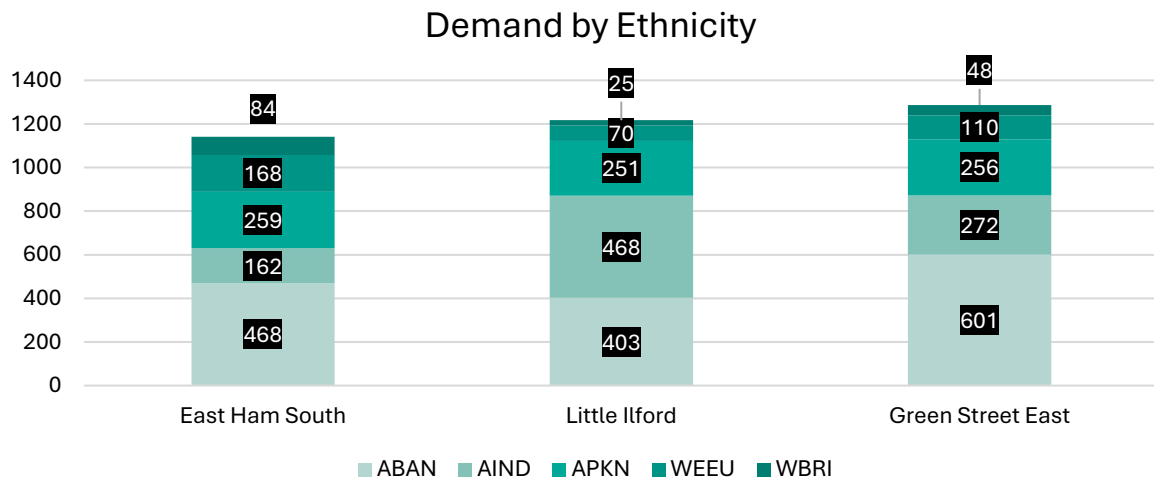
Year Group	Spring 2025	Spring 2026	Increase/Decrease
Reception	4344	4157	-4%
Year 1	4484	4254	-5%
Year 2	4559	4333	-5%
Year 3	4650	4392	-6%
Year 4	4462	4486	1%
Year 5	4468	4336	-3%
Year 6	4560	4369	-4%
<b>Total</b>	<b>31527</b>	<b>30327</b>	<b>-4%</b>

Whilst our primary on roll numbers has declined, our assessment of our school age childcare is that we do not have sufficient provision to meet demand especially if there is requirement to provide an out of school provision for primary aged children based on the above numbers. However, we are aware that parents also rely on families or use other forms of provision which is not considered ‘as registered childcare,’

Therefore, our main focus will be in ensuring that there is sufficient out of school provision available to meet demand for the proportion of children living in income-deprived families which has risen in 2025 to **59.7% (about 18,105 children)** to enable parents remain in work or undertake education or training for employment.

Based on our analysis in Section 6.2, the three wards who do not have sufficient school-age childcare provision are **East Ham South, Little Ilford, and Green Street East** with the following ethnicities; **Bangladeshi (7,123), Indian (3,731), Pakistani (3,731) and White Eastern European (2,496)** making up the highest proportion of our school-age population in the three wards.

The chart below in **Figure 6** illustrates the number of children from each of these ethnicities within these three specific wards.



The ethnicity accounting for the highest proportion of the school age population in East Ham South and Green Street East are Bangladeshi people (**41%** and **47%**, respectively), whereas Indian people represent the highest proportion in Little Ilford (**38%**).

Consequently, continued planning with schools and providers will be key in maintaining sufficient, flexible and inclusive wraparound and school-age childcare across the borough.

#### 4.5 Demand for childcare for children with Special Educational Needs and Disability (SEND)

The SEND code of Practice (DfE, 2015: Sections 5.52-5.54) requires the authority to support early years providers and childminders in the borough to identify, plan and support provision and practice for children with SEND so that they may reach their full potential.

The **Disability Access Fund (DAF)**, a one-off annual per-child payment (if the child is receiving Disability Living Allowance) made to early years providers to support children with SEND. Its purpose is to make reasonable adjustment to their provision and remove ‘barriers’ which prevent children from accessing their funded early education entitlement. Our spring 2026 headcount shows that there were **87** eligible claims for additional support from the Disability Access Fund from Early Years providers for two-, three- and four-year-olds.

It is also statutory that all local authorities must provide a Special Educational Needs (SEN) Inclusion Fund (SENIF) targeted to support early years providers with children who are identified as having lower level or emerging SEN taking up free entitlement. Children with a final Education, Health and Care Plan (EHCP) are not eligible for SENIF, as they are funded through the early years high-needs block.

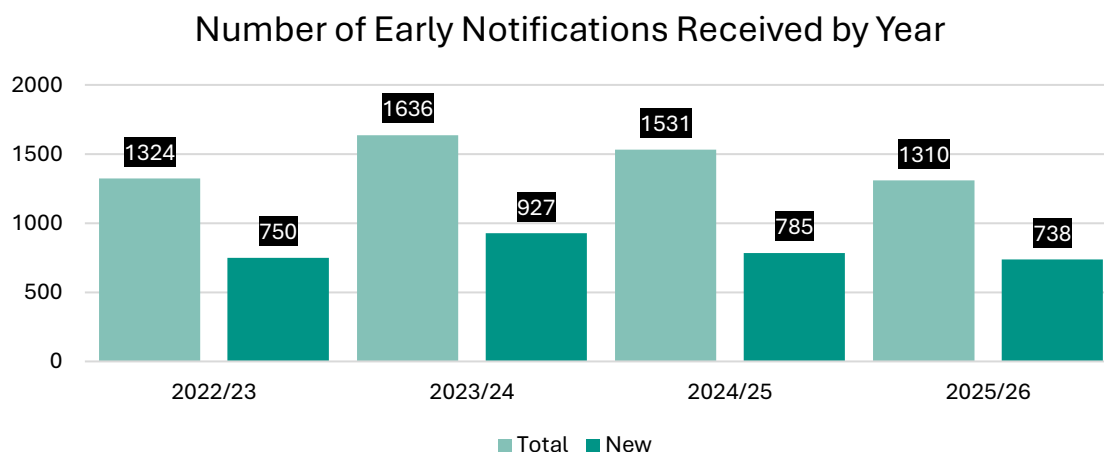
Where needs are identified at birth, health professionals have access to Newham’s early notification (EN) process to inform the local authority, and support can be provided for the child and family.

Where needs are identified whilst a child is in an early education setting (private voluntary and independent nurseries, childminders, or school nurseries’), the setting will also use the early notification process to ensure timely SENIF support.

In 2024, there were 480 children receiving SENIF and in 2025, there were **487**. Since this represents a 1% increase from the previous year, the number of children accessing this level of support is consistent with historic data.

There are 45 providers who are awaiting their first OfSTED inspection/assessment, Access, guidance, advice and enhanced support is available to all new providers through our early years advisory and Area SENCo teams to ensure that our SEND children are fully supported, and parents are informed of the offer available to them.

**Figure 7:** highlights out the number of early notifications received since 2022 along with those notifications that were for new children.



There has been a year-on-year decline in the number of ENs received since 2023/24 in line with the decline in birth rates.

For the 738 new ENs received, **684** were for Communication & Interaction, **41** for Cognition & Learning and **13** for Sensory or Physical needs. This is in line with our SEND projections where there has been an increase in the number of pupils with complex autism resulting in the highest growing need category of Communication and Interaction needs.

Comparing **Figure 7** with our Spring 2025 where **12 children** in our maintained and /or school-based nurseries had an EHCP and in the 2026 census t EHCP numbers have increased for this cohort to **14**. This reflects the **growing complexity of needs** where children identified with SEND, now requiring a more bespoke offer through a plan as opposed to differentiation techniques made possible through SEN Support.

#### **4.6 Demand for holiday periods, broken down by age and time**

The Holiday Activities and Food (HAF) Programme is a DfE initiative delivered by Newham since 2022 over the Easter, Summer, and Winter holiday periods for children aged 4 to 16. Children and young people living in and/or attending a school in Newham who are eligible for benefits related free school meals can stay active, make new friends, learn new skills, and enjoy a healthy meal over the school break through the HAF programme.

While the primary focus of HAF remains to be the three predominant holiday periods, local authorities have a discretion to extend delivery of HAF across half-term holidays for the 2026 to 2027 financial year. As set out by the DfE, this spending should not exceed 5% of a LA's total HAF funding allocation. Therefore, Newham will target half-term delivery at secondary school aged pupils only in 2026.

Newham also optimises a 15% discretionary place allowance to grant eligibility to children otherwise deemed vulnerable due to having identified SEND needs, being looked after children or those referred to the programme by specialist services.

As of the Spring 2026 census, there were **24,398** children who were eligible for the HAF programme based on their free school meal status.

In the Spring 2025 census, there were 22,677 children that were eligible. **4,922 unique eligible children representing 21.7%** (at the start of the financial year) **or 20.1%** (at the end of the financial year) of those who access benefits related free school meals **engaged** with the programme taking up a total of **54,031 places were attended out of 67,098 externally and internally commissioned places** over the course of the Easter, Summer, and Winter breaks.

Of these commissioned places, **70%** were filled during Easter break, **84%** were filled during the summer break and **72%** were filled during the Winter break.

In comparison to the Spring 2024 census, there were **20,284** children eligible for the HAF programme due to their free school meal status. Of the children that were eligible, **5,052 unique children representing 24.9%** of those who accessed benefits related free school meals engaged with the programme taking up a total of **47,830 out of 74,944 commissioned places** were attended over the course of the Easter, Summer, and Winter 2024 breaks. Of the places commissioned by break, **60%** were filled during Easter, **69%** were filled during the Summer and **41%** were filled during Winter.

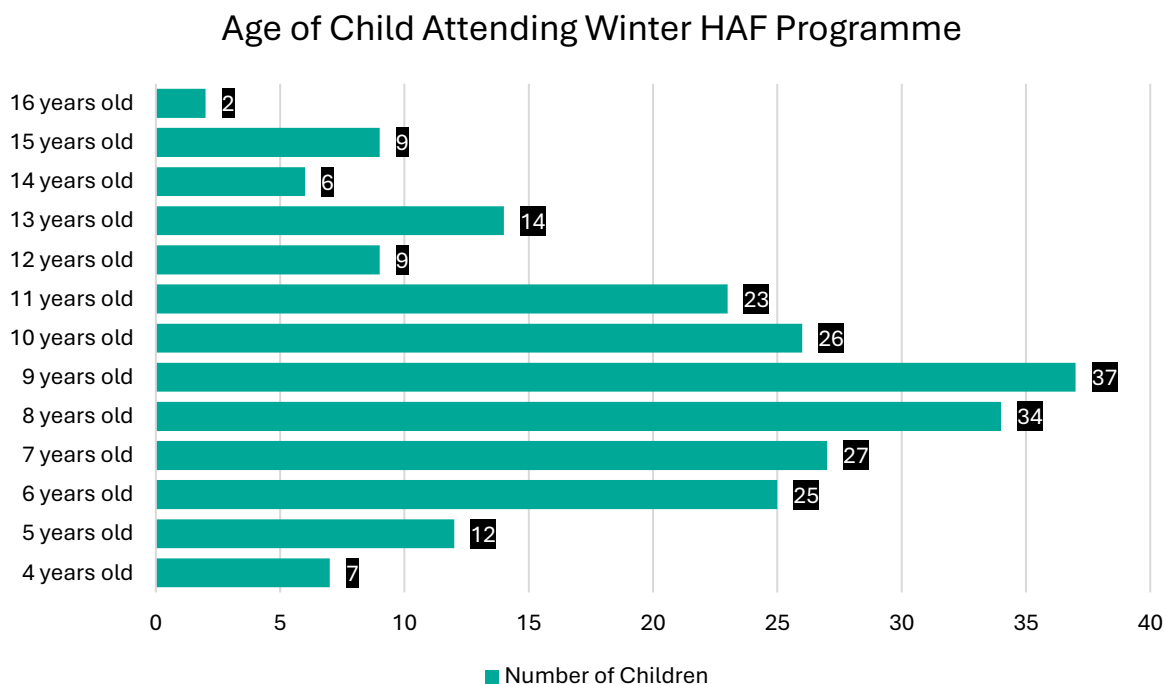
Data therefore suggests an increase in demand with more children accessing and engaging with HAF during the summer holidays.

**Figure 8:** the table below breaks down the year groups of Newham resident children who are eligible for FSM and shows a comparison between those who were eligible at the point of the Spring 2025, Summer 2025, Autumn 2025, and Spring 2026 census.

Year Group	Spring 2025	Summer 2025	Autumn 2025	Spring 2026
Reception	931	1189	490	764
Year 1	1345	1563	1263	1380
Year 2	1483	1649	1651	1728
Year 3	1778	1903	1696	1779
Year 4	1844	1992	1935	2025
Year 5	1978	2100	2036	2076
Year 6	2050	2182	2168	2237
Year 7	2168	2325	2285	2294
Year 8	2282	2428	2365	2428
Year 9	2336	2494	2487	2536
Year 10	2287	2443	2539	2582
Year 11	2195	2348	2516	2569
<b>Totals</b>	<b>22677</b>	<b>24616</b>	<b>23431</b>	<b>24398</b>

As shown in the table above, the Spring 2026 census shows an increase in the number of children who were eligible for Free School Meals with the highest proportion of those being secondary school aged children. There has been a government initiative to expand the offer to more children demonstrating an **8% increase in eligibility**. Whilst our secondary accounts for a greater proportion of our eligible cohort, this does not necessarily mean that there is more demand for provision for children of this age.

**Figure 9** below, gives a breakdown of the number of children by age group whose parents took part in a feedback survey about the HAF programme during the Winter 2025 break.



As depicted above, secondary school aged children did not account for a high proportion of those whose parents filled in this feedback survey. This is reflected in the actual attendees where 1,501 were of primary age and 612 were of secondary. There is greater demand for the programme amongst parents with children of primary school age. This is reflected in our survey of the families whose children engaged in the HAF programme, where **83%** of those who responded were parents of primary school aged children.

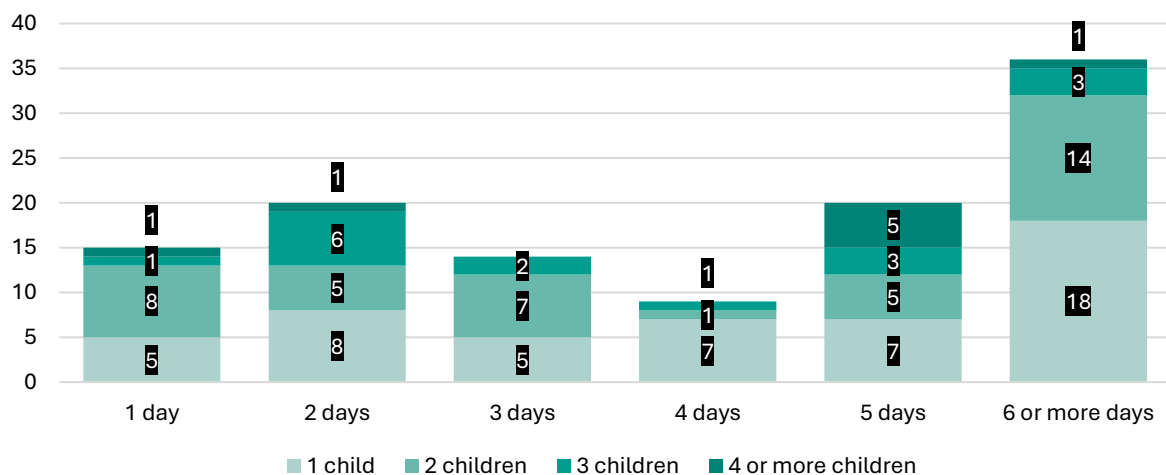
To encourage engagement, a range of measures highlighted below were some of those which were adopted our central HAF Programme team. However, we also worked with an established network of providers across the borough to deliver provision in accessible locations and promoting the programme through schools and local partners to raise awareness among eligible families.

Shared with Council Early Help & Family Hub teams.	Shared with SENDIASS and SEND Statutory teams.	Spoke at Healthy Schools Alliance	Spoke at Edge of Care team meetings.	Shared with schools directly.
Shared with Library Service.	Into Resident newsletters.	Radio adverts for Christmas & Easter.	Shared with Youth Zones.	Shared with SENCOs across Newham Schools
Shared in Education Matters newsletter to schools.	Spoke at Newham Food Alliance meeting.	Physical posters at Leisure Centres.	Shared with Children Centres.	Paid social media promotion.

Parents and carers of eligible children who engaged with HAF provided feedback on how many children they had who accessed the programme and the average number days they used.

**Figure 10** below shows the average number of days broken down by the number of children across the 114 respondents whose children attended during the Winter break.

Number of Days Taken Up Over the Winter break



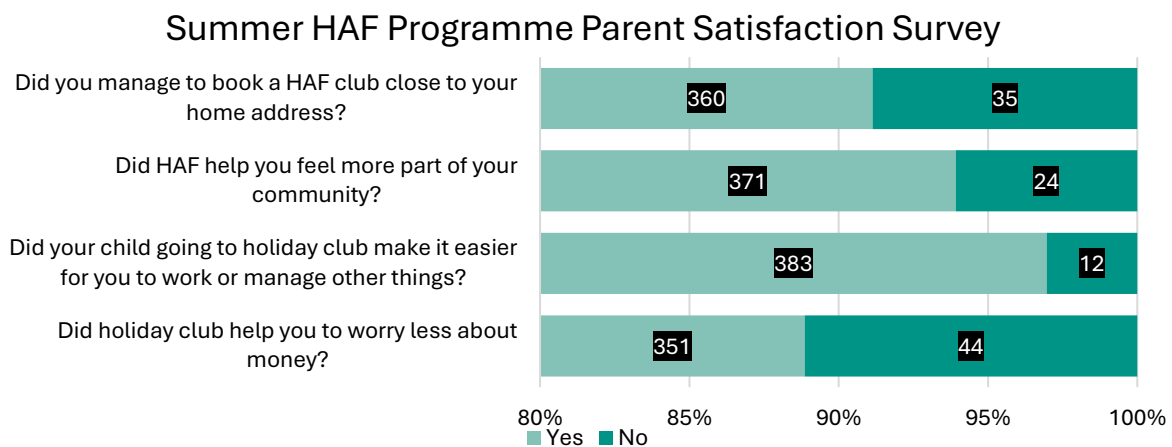
As shown above, families required more provision for 6 days a week, followed by 2 and 5 days. This suggests that parents require more childcare hours during the holiday period.

As part of a collaborative survey between Northumbria University, the University of Lincoln and the educational technology provider Eequ, 20,000 parents and carers who participated in the summer break HAF activities gave their views about the programme.

Of those who completed the survey, 385 selected Newham as their home local authority.

**91%** were able to secure a HAF club that was close to their home address; **89%** felt that the HAF programme helped them worry less about money, **94%** felt that the HAF programme allowed them to feel like more of a part of their community and **97%** felt that their child’s attendance at the HAF programme allowed them to manage work and other things.

**Figure 11** below outlines their level of satisfaction with the programme.



**Source:** [Families back nationwide school holiday activities programme in record survey](#)

The responses highlight that demand for HAF is centered on; financial considerations, proximity to home, a sense of community and its ability to enhance work/life balance. Each of these demands are inextricably linked where proximity assists with financial circumstances, work/life balance and creating a sense of community.

## Section 5: Supply of Childcare

This section provides an overview of the early-years market in Newham, summarising the types of provision available across the borough.

The mix typically includes Private, Voluntary and Independent (PVI) settings, childminders, school-based nurseries and LA maintained nursery schools. This diversity is important to support parental choice, differing childcare preferences and varying working patterns.

Overall, the childcare supply in Newham remains broadly sufficient at present with some early signs of unmet needs emerging in a small number of wards and demand increasing for children aged 3-to 4-years-old for full-time funded places. Patterns of employment and the expanded eligibility for funded hours are contributing to rising uptake.

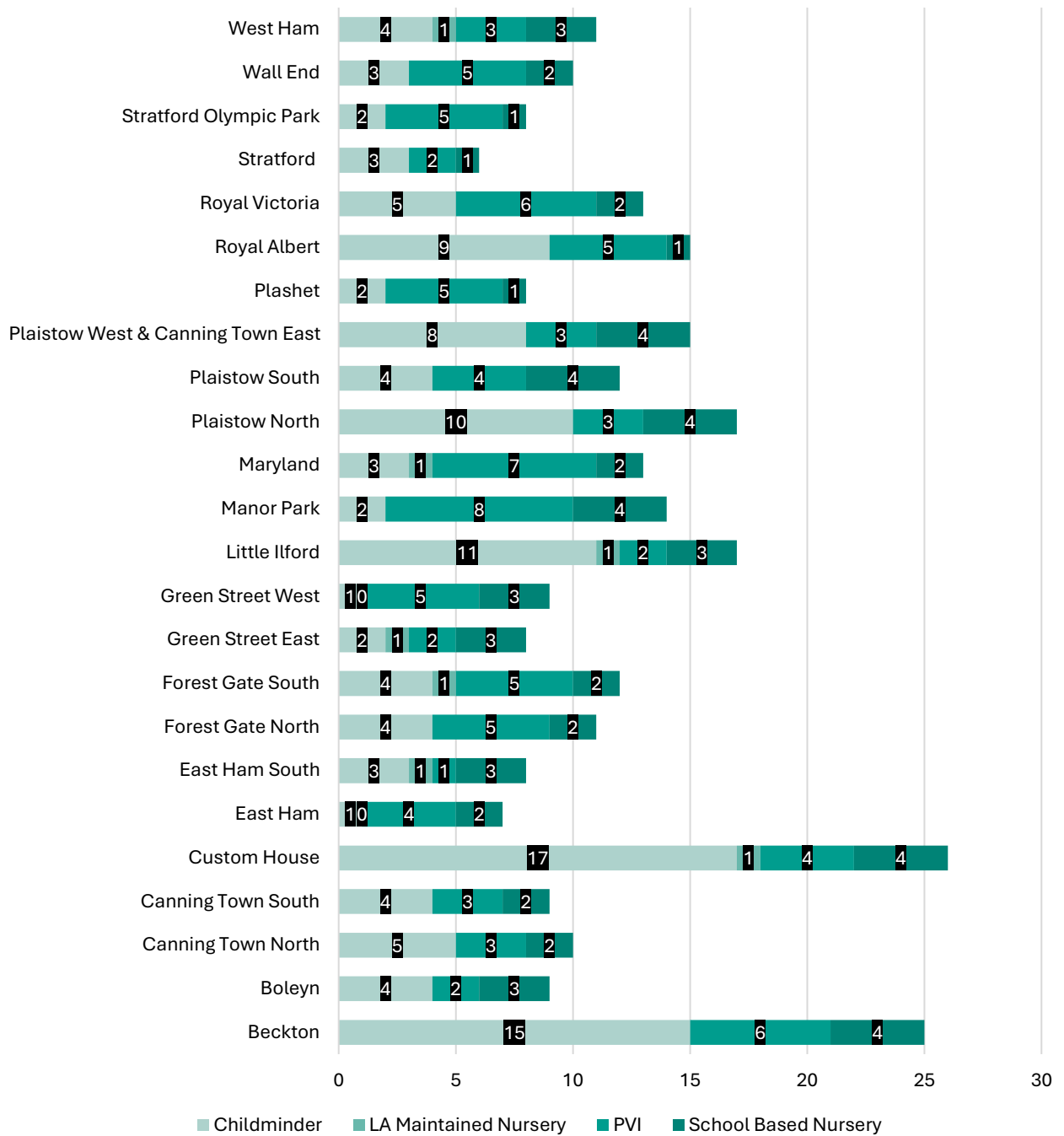
While many wards continue to have adequate provision, Newham's ongoing regeneration planned housing growth, and economic pace will continue to influence the distribution and type of childcare required. This CSA supports forward planning by identifying any emerging pressures, ensuring that childcare supply responds to demographic changes, policy reforms and remains high quality, inclusive and sustainable for families across Newham.

### 5.1 Number of early years providers by type

Newham has a total of **293** OfSTED registered Early Years childcare providers ranging from Childminders, LA Maintained Nurseries, PVI's and School Based Nurseries.

**Figure 12:** the graph below shows the distribution of these providers by type across Newham's 24 Wards.

## Summary of Early Years Childcare Providers by Wards



**Custom House and Beckton** have the highest number of providers both accounting for **9%** of Newham’s early years childcare provision, respectively. **East Ham and Stratford** have the least number of providers where they both account for **2%** of Newham’s providers, respectively.

Of the 4 types of provision in Newham, **Childminders** account for the highest number at **43%**, then **PVIs** at **33%**, followed by **School Based Nurseries** at **21%** and **LA Maintained Nurseries** at **2%**.

Childminders generally offer fewer places for children whereas providers operating in non-domestic spaces have greater capacity to take more.

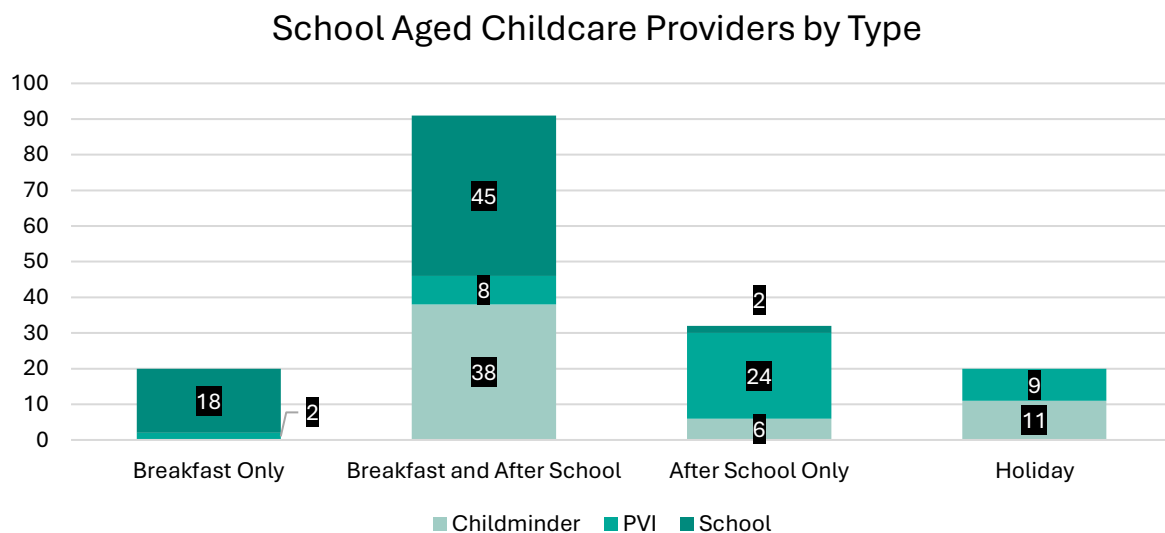
**Section 6.1** highlights a granular assessment of childcare provision and the levels of sufficiency per ward.

## 5.2 Supply of childcare for school age children

Local authorities are expected to support the delivery and sustainability of school-age childcare through the national rollout of the free breakfast clubs and foster links between holiday childcare and the HAF programme to strengthen the efficient delivery of sufficient childcare. In Newham, school-age childcare is provided by schools, PVI's and childminders, both on and off the school premises through breakfast, after school clubs and during the school holidays via holiday activities and the HAF programme.

Across the borough, we have **163** providers who deliver childcare including wraparound provision for school aged children which represents an increase of 6 providers since 2024.

Of these providers, **20** offer provisions at breakfast time only, **32** offer provision after school, **91** offers both breakfast & after school provision and **20** have reported that they offer holiday childcare. This is depicted in **Figure 13** below:



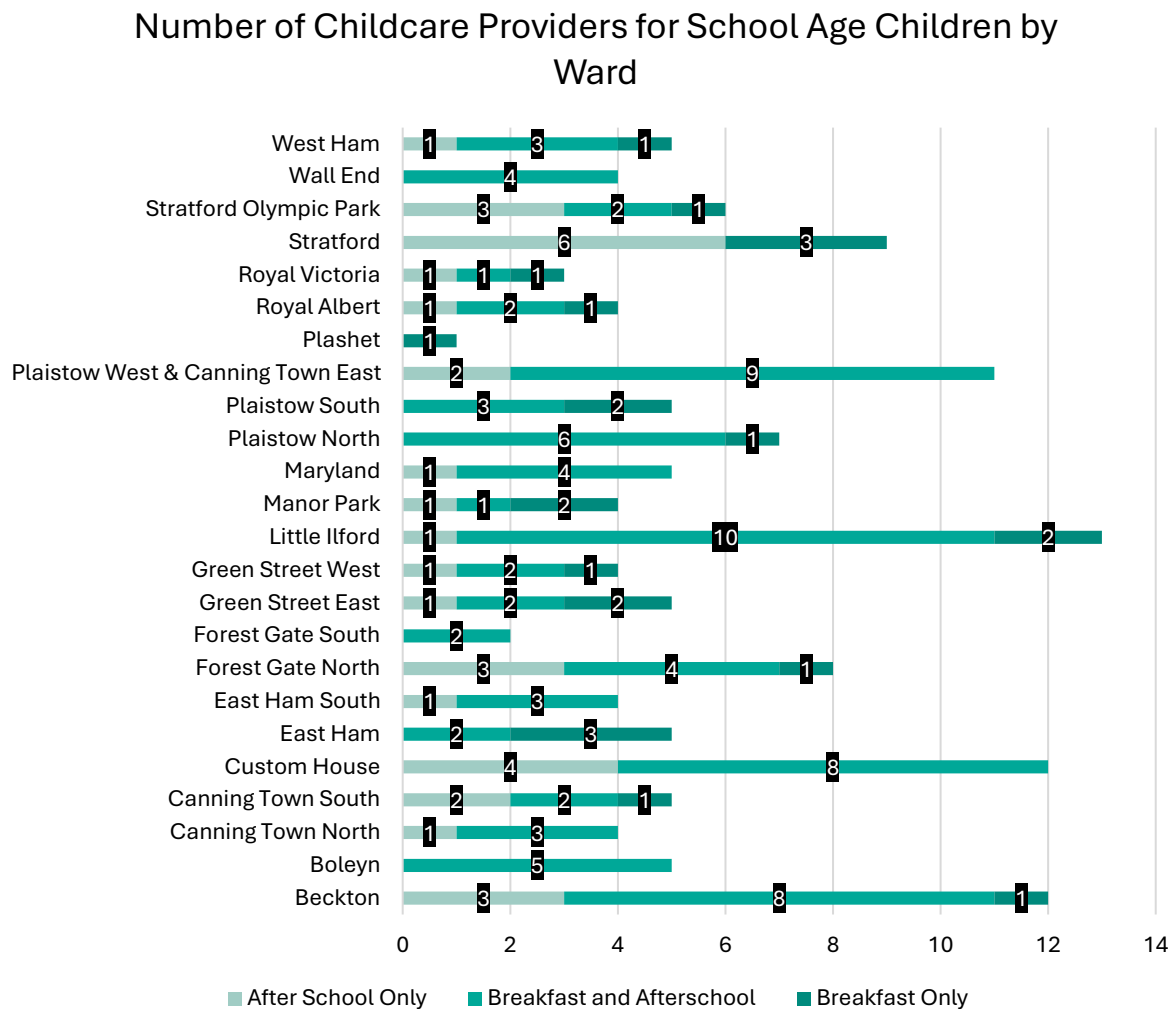
As demonstrated above, **schools** account for the highest percentage of childcare providers for school aged children, with **40%** of the provision in Newham. This is followed by **childminders (34%)** and **PVIs (26%)**. This is different to 2024 where **schools** accounted for **46%** of the provision, **39% childminders** and **15% PVIs** because many schools now commission PVIs to deliver their out of school childcare to meet local demand for extended 8am to 6pm hours which better suit the needs of working families.

As a result of this expansion, **96%** of our schools either deliver or commission PVIs to deliver out of school care during term time. This resulted in the creation of new or

expanded 8am–6pm places for **241** children in 2025 under the national wraparound childcare programme.

**4** of our schools were part of the Early Adopter Free Breakfast Programme which increased provision in **Canning Town South, Custom House, Plaistow North, and Stratford Olympic Park**.

**Figure 14:** below shows the number of Newham childcare providers who deliver breakfast and after school clubs broken down by ward as of 31 December 2025.



**Little Ilford** has the highest number, accounting for **9%** of Newham’s providers. This is closely followed by **Beckton, Custom House and Plaistow West & Canning Town East**, who each account for **8%** respectively. The wards with the least number of providers are **Royal Victoria (2%), Forest Gate South (1%)** and **Plashet (1%)**.

**Section 6.2** references a granular assessment of school-aged childcare sufficiency.

### 5.3 Access and Inclusion

Children’s needs may be identified at birth or over time as they grow and develop.

Among the youngest children, SEND may only be identified when they start in childcare or school, and support will be provided within the setting and through several specialist services within maintained and voluntary organisations.

Some children may also have needs that are related to English being an additional language. In line with the Equality Act (2010), providers are expected to make reasonable adjustments to address these to boost inclusion.

Many providers offer strong support for children requiring additional help, however, families in some areas experience difficulties securing appropriate places due to variations in specialist expertise and environmental suitability.

Availability of flexible and SEND inclusive nurseries and pre-schools remains uneven across the borough with **123 out of the 293** have specialist facilities or currently receive DAF to support children with additional SEN needs. Whilst there are at least **2** providers in each ward that families with children who have SEND can access, this limits parents' options significantly.

The ward with the greatest number of SEND provision is **Maryland with 9 providers** followed by **Forest Gate South with 8** and **Beckton, Custom House and Manor Park with 7 respectively**. The ward with the least SEND provision is **Boleyn with 2 providers**.

It remains our objective to strengthen inclusive practice, support providers through SENCo training with a view for every setting to have a qualified SENCo, advisory support and funding mechanisms thereby increasing capacity for children with additional needs to ensure that all children can access provision that supports their development and wellbeing.

In terms of childcare during holiday periods, in 2025 we externally commissioned **2,648 places** for children with SEND. For 2026, we have externally commissioned **5,474 places** for children with SEND to take place over the Easter, Summer and Winter holidays with an additional **1,200 places** commissioned internally making a combined total of **6,674 places**. This represents an increase of 4,026 additional places, recognizing the importance of inclusion and addressing a gap in our current provision.

Our total population of Reception to Year 11 aged pupils who have an EHCP is **2,867** which allows participation of at least **2 days each** in the HAF programme.

#### **5.4 Supply for holiday periods, broken down by age, provider type and time**

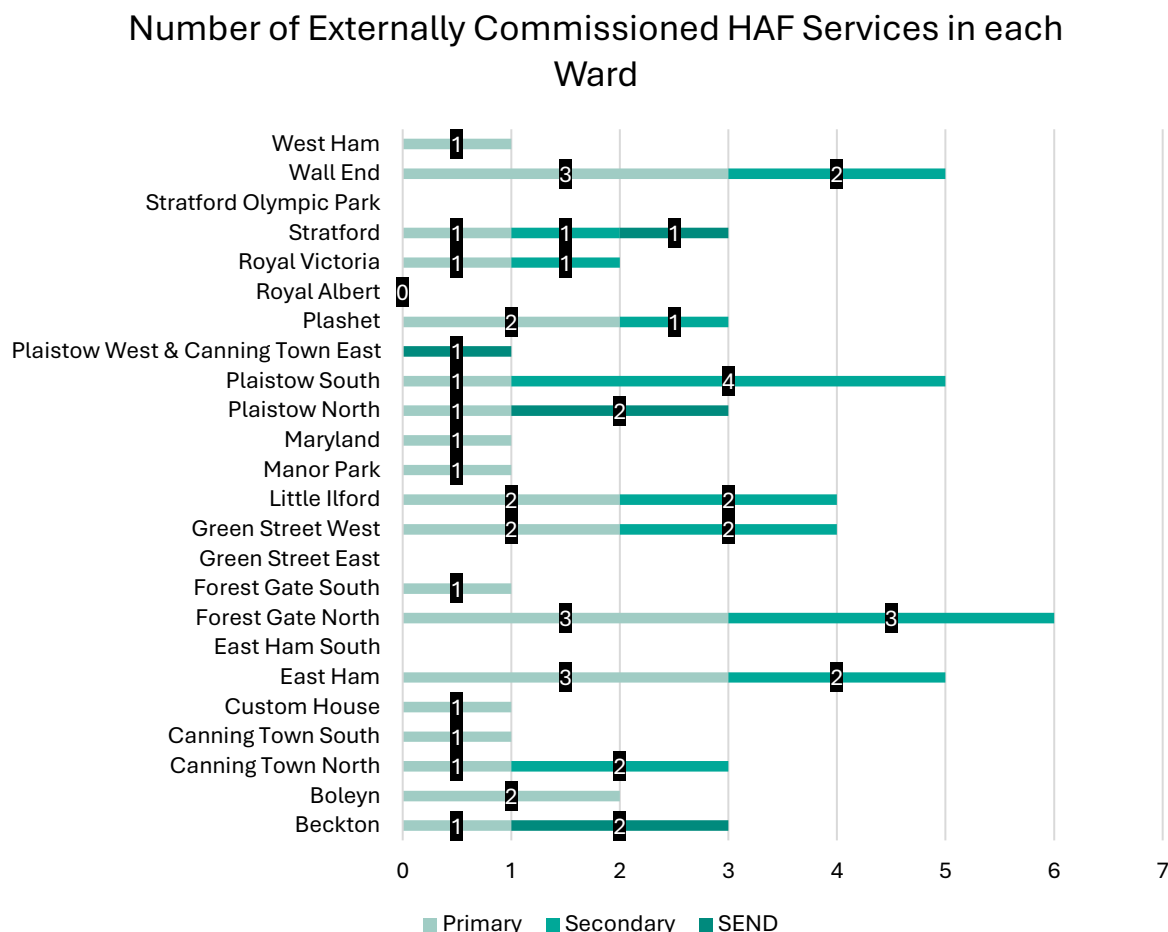
HAF programme places were both internally and externally commissioned in 2025. Of those internally commissioned, there were **4,000 primary places, 400 secondary places and 1,200 SEND Short Breaks Family Activities**. The total internally commissioned places delivered by the Youth Justice Service and Short Breaks Team was **5,600** and took place in **7 specific wards: Beckton, Custom House, Forest Gate North, Little Ilford, Plaistow South, Stratford, and Green Street East**.

The Short Breaks Family Activities took place in a range of wards as these were activity specific and dependent on the location that could accommodate them.

Across the borough, we had **35** different external (PVI) providers with a total of **61,498 commissioned places with a combined total of 67,098**, to deliver the HAF programme catering to varying age groups and in several locations. This is a decrease of about 7,731 places from 2024 due to the increased cost per place to accommodate increased spending on SEND places which are more expensive.

Once providers are selected, they have access to a provision of regular support from Newham including funding and mobilisation support, clear onboarding and compliance guidance, training, and briefings ahead of each delivery phase and ongoing delivery support. This is complemented by monitoring and quality assurance processes, alongside a strong focus on partnership working, inclusion (particularly around SEND), and continuous improvement across the provider network.

**Figure 15:** the graph below shows which wards hosted externally commissioned provision and breaks this down into the services for primary, secondary, SEND and SEND 1:1 group.

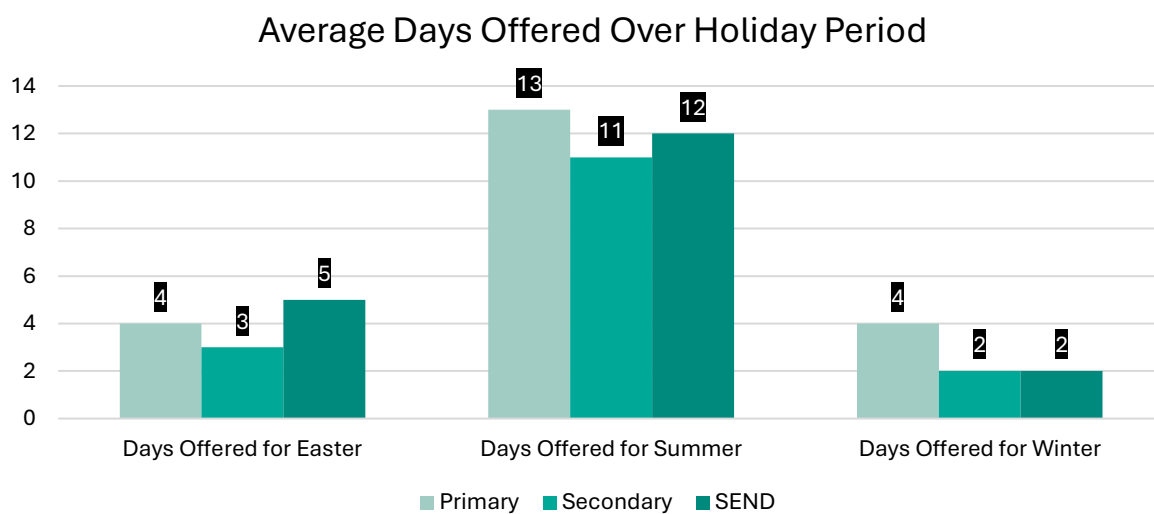


Please note that there is no distinction between primary and secondary aged SEND provision as this was not commissioned by age.

As depicted in the graph, there were more programmes being delivered for **primary aged children**, accounting for **53%** compared to **36% for secondary aged children**. This is in response to the higher take up by primary aged children accessing out of school childcare as also shown in **Figure 7**.

**Forest Gate North** accounted for the highest percentage of activities covering **11%** of borough-wide activities. This was followed by **East Ham, Plaistow South and Wall end with 9%, respectively**. The wards which had no activities taking place were **East Ham South, Green Street East, Royal Albert and Stratford Olympic Park**.

On average, each provider delivered activities for **4 hours** during each holiday period as shown in **Figure 16 below**. The chart sets out the average number of days offered for each age group over the 3 holiday periods.



Each age group were offered a differing number of days over each holiday period with primary aged children receiving a greater number than secondary aged children. The holiday period with the most days offered for each group is the Summer. This is to be expected as the summer holiday typically extends over a period of 6 weeks with Easter and Winter normally covering 2 weeks.

For a granular assessment of the sufficiency of holiday childcare, please refer to Section 6.3.

### 5.5 Occupancy rates and Vacancies

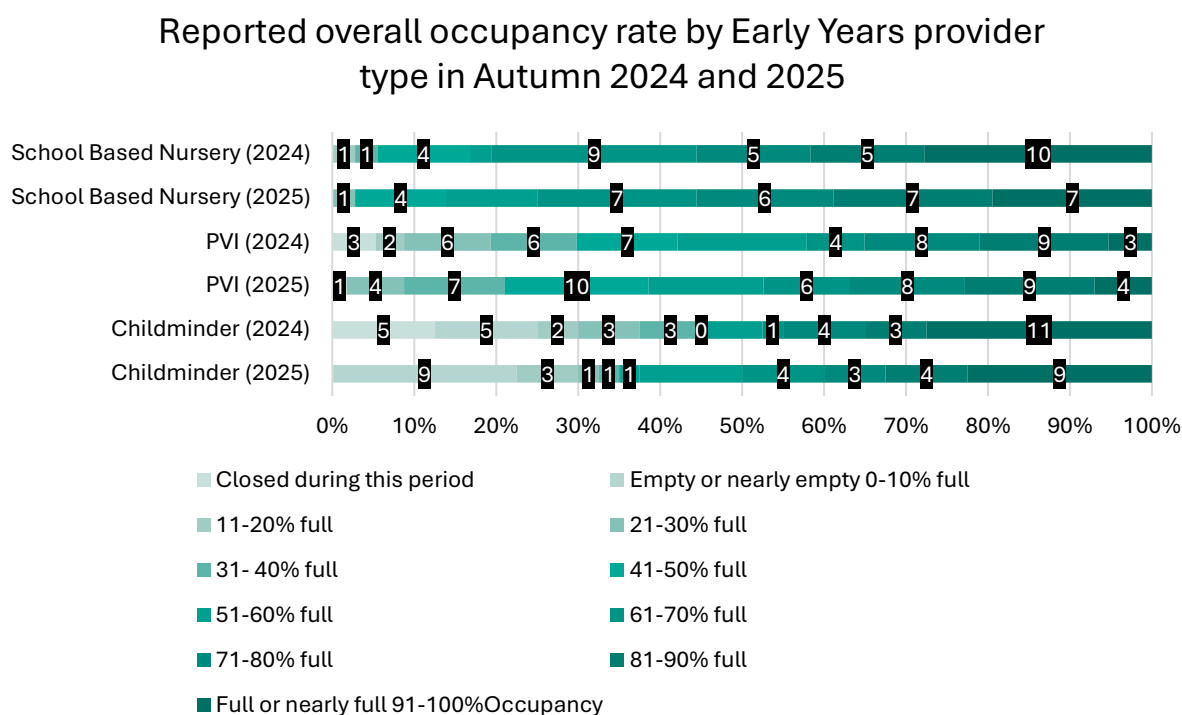
Occupancy is a crucial factor in determining a setting’s sustainability where costs such as rent, rates, utilities and management time can be spread across more children – thus lowering the cost per hour delivered.

A survey of childcare providers about overall occupancy levels was undertaken with **133 responses received from Early Years and School-age Childcare providers in autumn 2025**.

Overall, **81%** of respondents reported that they were not full (or between 91-100%) in 2024 compared to **85%** in 2025 showing an increase in overall vacancies.

This is reflected in our overall capacity of childminder providers compared to the number of children they on roll; where **childminders** are at **48% capacity**, **PVIs** are at **84%** and **School Based Nurseries** are at **70% capacity**. Although, we did not receive responses from **LA Maintained Nurseries**, our census data suggest that they are at **99% capacity** across the borough.

**Figure 17:** the graph below demonstrates the reported overall occupancy rate by Early Years provider type in Autumn 2024 and 2025.



Compared to 2024, **two less childminders** reported that they were full or nearly full in 2025 accounting for **9 out of 40 respondents**. On the other end of the spectrum, **four more childminders** reported that they were empty or nearly empty than they were in 2024, accounting for **9 out of 40 respondents**.

Excluding those who were closed during this period, **69%** of respondents were not full (or between 91-100%) in 2024 compared to **78%** in 2025 showing an increase in vacancies amongst childminders.

**1 more PVI** reported that they were full or nearly full in 2025 compared to 2024, accounting for **4 out of 56 respondents**. On the other end of the spectrum, the number of PVIs who reported that they were empty or nearly empty than they were in 2024 **stayed the same**, accounting for **0 out of 56 respondents**. Excluding those who were closed during this period, **94%** of responders were not full (or between 91-100%) in 2024 compared to **93%** in 2025 showing a decrease in vacancies amongst PVIs.

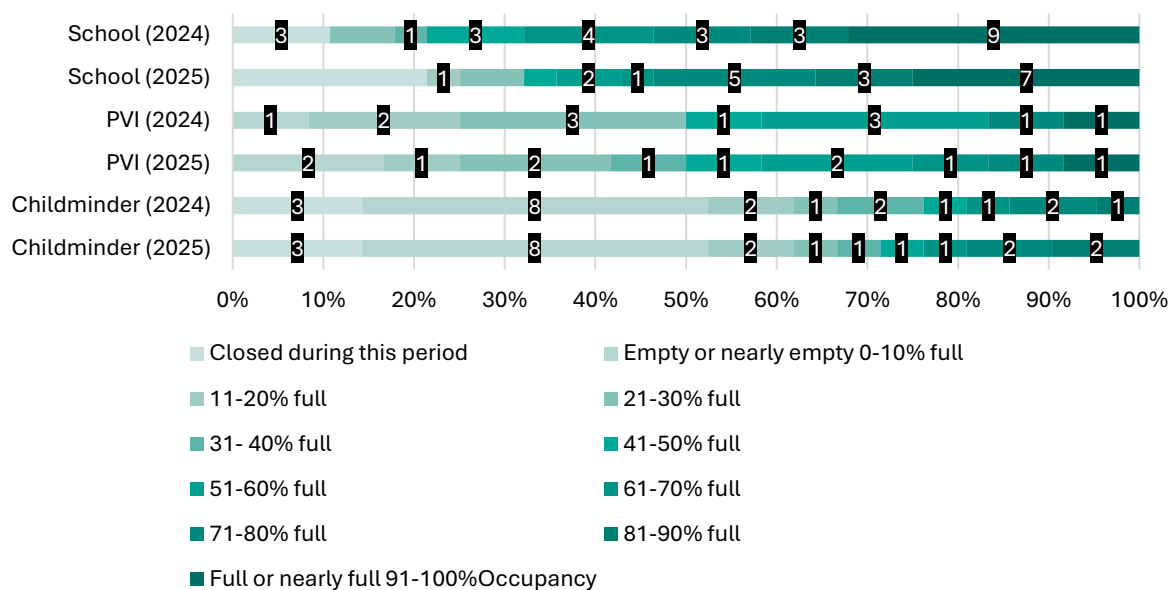
**3 less School Based Nurseries** reported that they were full or nearly full in 2025 than they did in 2024 accounting for **7 out of 36 respondents**. On the other end of the spectrum, the number of School Based Nurseries who reported that they were empty or nearly empty than they were in 2024 stayed the same, accounting for **0 out of 36 respondents**.

Excluding those who were closed during this period, **72%** of responders were not full (or between 91-100%) in 2024 compared to **81%** in 2025 showing an increase in vacancies amongst School Based Nurseries.

**Figure 18:** the graph below demonstrates the reported overall occupancy rate by School-age Childcare provider type in Autumn 2024 and 2025.

Overall, **82%** of respondents reported that they were not full (or between 91-100%) in 2024 compared to **85%** in 2025 showing an increase in overall vacancies.

Reported overall occupancy rate by School-age Childcare provider type in Autumn 2024 and 2025



Compared to 2024, **the same number of childminders** reported that they were full or nearly full in 2025 accounting for **0 out of 18 respondents**. On the other end of the spectrum, **the same number of childminders** reported that they were empty or nearly empty than they were in 2024, accounting for **8 out of 18 respondents**. Excluding those who were closed during this period, **100%** of responders were not full (or between 91-100%) in 2024 which was the same in 2025.

**The same number of PVIs** reported that they were full or nearly full in 2025 compared to 2024, accounting for **1 out of 12 respondents**. On the other end of the spectrum, the number of PVIs who reported that they have surplus places **stayed the same as in 2024**, accounting for **0 out of 12 respondents**. Excluding those who were closed

during this period, **92%** of responders were not full (or between 91-100%) in 2024 which was the same in 2025.

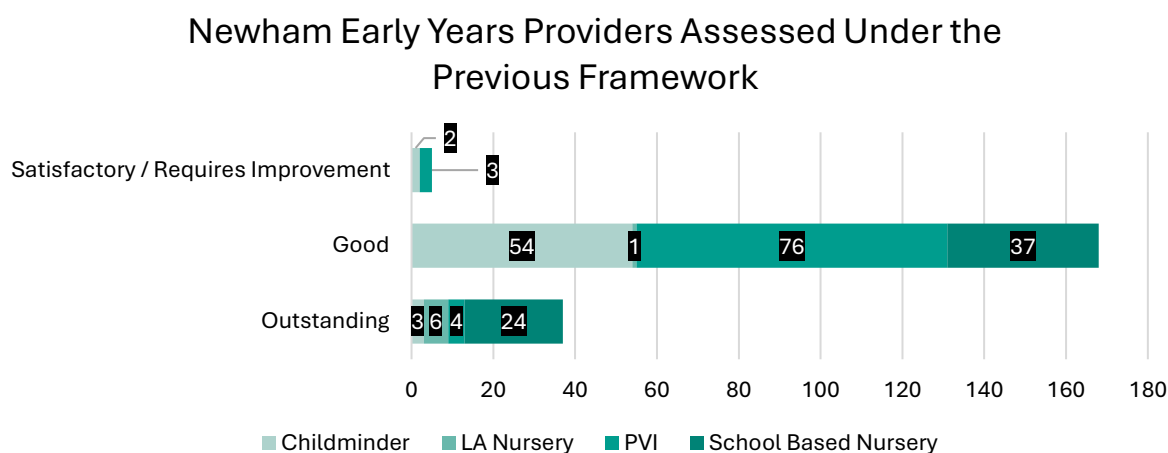
**2 less** Schools reported that they were full or nearly full in 2025 than they did in 2024 accounting for **7 out of 22 respondents**. On the other end of the spectrum, the number of Schools who reported that they were empty or nearly empty than they were in 2024 stayed the same, accounting for **0 out of 22** respondents. Excluding those who were closed during this period, **64%** of responders were not full (or between 91-100%) in 2024 compared to **68%** in 2025 showing an increase in vacancies amongst School’s wraparound care provision.

We have been unable to collect numbers on roll for school-age childcare or the exact places available outside school hours and therefore cannot report on the vacancy rate based on the survey return.

### 5.6 Quality of Early Years & Childcare provision

In 2024/2025, OfSTED introduced a new inspection framework, replacing single-word grades with detailed report cards to better reflect provider quality which will change the way we measure quality of provision.

**Figure 19:** the graph below summarises the OfSTED ratings for Newham’s school-based nurseries, LA maintained nurseries, PVIs and childminder Early Years childcare provisions assessed under the previous framework.

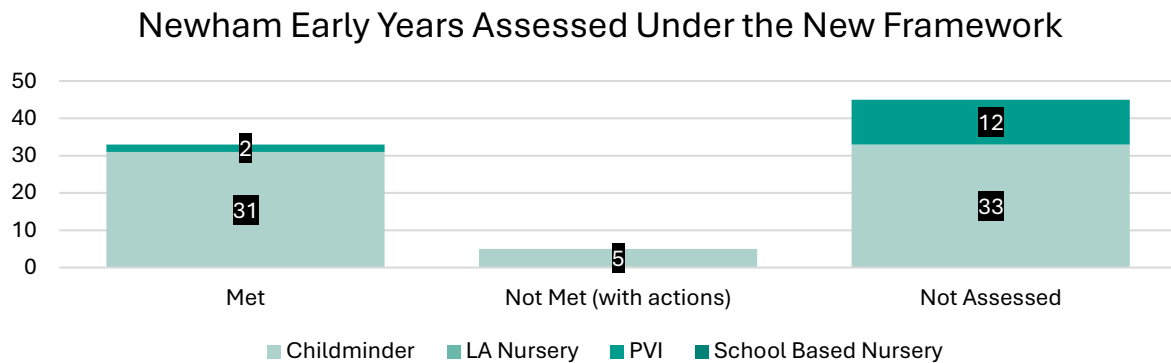


Source: [Childcare providers and inspections: management information - GOV.UK](https://www.gov.uk/government/publications/childcare-providers-and-inspections-management-information)

Of the **210** providers maintaining their OfSTED rating under the previous framework, **98%** were rated as **Outstanding or Good**. This demonstrates a strong quality of provision across Newham’s Early Years childcare providers and marks an increase from the **95%** reported in 2024. Only **2%** were rated as **Satisfactory or Requires Improvement** during 2025 compared to **5%** in the previous year. Due to the changes with the inspection framework, these provisions will require new assessments.

Under the new framework, **38** Newham providers have been assessed. Of these providers,

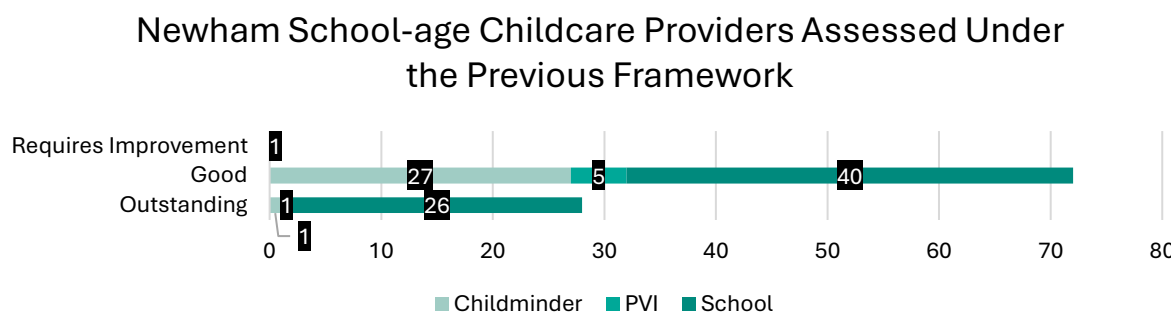
**Figure 20:** the graph below summarises the ratings for Newham’s school-based nurseries, LA maintained nurseries, PVI and childminder Early Years childcare provisions assessed under the new framework.



Source: [Childcare providers and inspections: management information - GOV.UK](#)

**87% meet the standard** (please note that we have included one provider who has been assessed under the Independent School Inspectorate). **13% either do not meet the standard or do not meet the standard with actions required** to be completed. Whilst provisions assessed under the new framework are generally of a good quality, there is markedly a higher percentage of those that do not meet the standard, suggesting that the new framework has identified new areas for improvement in the assessment process. There are **45 Early Years provisions** (childminders and PVIs) that are **awaiting their first inspection, 32 of whom are new providers**.

**Figure 21:** the graph below summarises the ratings for Newham’s child minders, PVIs and Schools delivering school-age childcare assessed under the previous OfSTED framework.

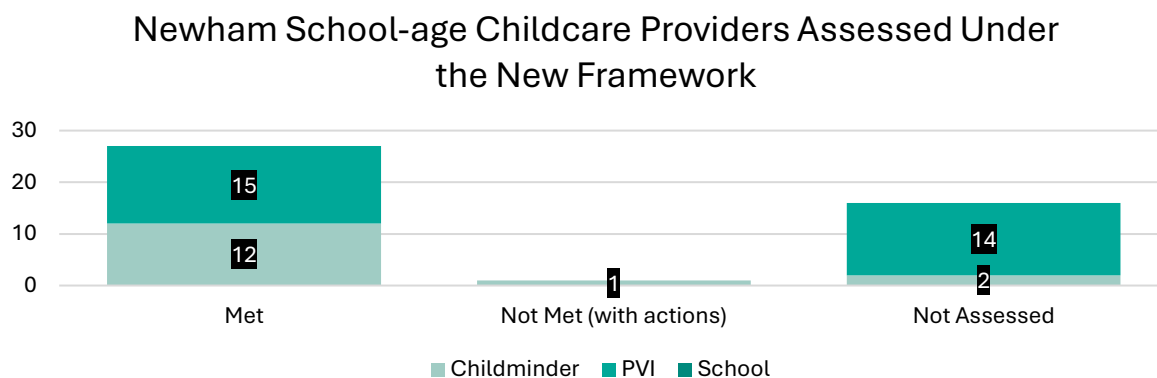


Source: [Childcare providers and inspections: management information - GOV.UK](#)

Of the **101** providers maintaining their OfSTED rating under the previous framework, **99%** were rated as **Outstanding or Good** which is the same percentage of providers as 2024. This demonstrates a strong quality of provision across Newham’s childcare providers where only **1% Requires Improvement** in which the same percentage in

2024. Due to the changes with the inspection framework, these provisions will require new assessments.

**Figure 22:** the graph below summarises the ratings for Newham’s schools, PVI and childminder School-age childcare provisions assessed under the new framework.



Source: [Childcare providers and inspections: management information - GOV.UK](https://www.gov.uk/government/statistics/childcare-providers-and-inspections-management-information)

Under the new framework, **38** Newham providers have been assessed. Of these providers, **87% meet the standard**. This marks an **8%** increase in the percentage of providers who met the framework last year. In 2025 there were **3%** of providers who do **not meet the standard with actions required** to be completed. Whilst provisions assessed under the new framework are generally of a good quality, there is markedly a higher percentage of those that do not meet the standard, suggesting that the new framework has identified new areas for improvement in the assessment process. There are **45 school age childcare provisions** that are **awaiting their first assessment**.

### 5.7 Affordability and costs

We asked our childcare providers to complete a survey to inform us of their weekly rates to enable us to work out an average price per hour once free funded entitlements have been taken into consideration.

We received **126** responses, representing **43%** of our providers. This does not reflect the true average cost as we did not receive a response from all registered providers. For some providers outside of the funded entitlements, there may be variations to process based on the number of hours a family uses, reductions for longer hours or discounts for sibling groups. There also may be additional payments for other services such as lunch and other meals which may not be reflected in these prices.

**Figure 23:** the table below shows a comparison of the price of 25 hours a week childcare for children under 3 at nurseries and childminders, **after working parent entitlements** in England (15 hours) have been considered.

Nursery

Childminder

	Under two	Two	Under Two	Two
<b>England</b>	£70.51	£66.34	£59.76	£57.75
<b>Inner London</b>	£92.01	£90.25	£82.55	£81.76
<b>Outer London</b>	£84.05	£83.73	£77.57	£74.14
<b>Newham</b>	£85.52	£78.28	£83.30	£80.60

Source: [CORAM survey](#)

As shown above, the price of 25 hours a week childcare (deducting 15 hours of funding) for children under 3 at nurseries and childminders is **more than the England average** and typically **less than Inner London** (except for childcare provided by childminders for children under two).

**Figure 24:** the table below shows a comparison of the price of **25 hours a week of childcare** for children under 3 at nurseries and childminders, **without working parent entitlements** in England.

	Nursery		Childminder	
	Under two	Two	Under Two	Two
<b>England</b>	£176.27	£165.85	£149.41	£144.37
<b>Inner London</b>	£230.02	£255.63	£206.38	£204.39
<b>Outer London</b>	£210.13	£209.33	£193.93	£155.36
<b>Newham</b>	£213.79	£194.92	£208.26	£201.55

Source: [CORAM survey](#)

As shown above, the price of 25 hours a week for children under 3 at nurseries and childminders is **more than the England average** and typically **less than Inner London** (except for childcare provided by childminders for children under two).

**Figure 25:** the table below shows a comparison of the price of **50 hours a week childcare for children under 3** at nurseries and childminders, after working parent entitlements in England (15 hours) have been considered.

	Nursery		Childminder	
	Under two	Two	Under Two	Two
<b>England</b>	£238.95	£225.70	£202.09	£198.59
<b>Inner London</b>	£319.24	£313.42	£288.84	£286.22
<b>Outer London</b>	£274.48	£266.15	£253.20	£251.28
<b>Newham</b>	£299.31	£272.88	£291.56	£282.18

Source: [CORAM survey](#)

As shown above, the price of 50 hours a week for children under 3 at nurseries and childminders is **more than the England average** and typically **less than Inner London** (except for childcare provided by childminders for children under two).

**Figure 26:** shows a comparison of the **price of 25 and 50 hours a week childcare for children 3- to 4-year-olds** at nurseries and childminders, after working parent entitlements in England (15 hours and 30 hours respectively) have been considered.

	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
<b>England</b>	£64.09	£57.31	£126.94	£114.39
<b>Inner London</b>	£93.29	£81.24	£184.96	£162.44
<b>Outer London</b>	£76.77	£71.80	£159.22	£153.63
<b>Newham</b>	£86.94	£84.51	£173.89	£169.02

Source: [CORAM survey](#)

As shown above, the price of 25 and 50 hours a week for children over 3 at nurseries and childminders is **more than the England average** and typically **less than Inner London** (except for childcare provided by childminders for children who receive 50 hours a week with 30 hours funded).

**Figure 27** below shows a comparison of the price of **50 hours a week** early years childcare **for children of all ages** and provider types over the past 5 years with the various funded hours deducted.

Age Range	Newham weekly average (50 hours)					Increase/Decrease
	2021	2022	2023	2024	2025	
<b>0-2-year-olds</b>						
No funded hours	£284	£303	£328	£385	£422	+49%
15 funded hours	No Data	No Data	No Data	£287	£296	+3%
30 funded hours	No Data	No Data	No Data	No Data	£167	Not Applicable
<b>2-3-year-olds</b>						
no funded hours	£276	£285	£314	£370	£397	+44%
15 funded hours	£208	£213	£223	£270	£278	+34%
30 funded hours	No Data	No Data	No Data	No Data	£159	Not Applicable
<b>3-4-year-olds</b>						
15 funded hours	£206	£211	£223	£266	£215	+5%
30 funded hours	£140	£142	£166	£185	£172	+23%

Weekly average costs for childcare have **risen since 2021** in line with inflation and the cost of living. Excluding those age groups where funding for 30 hours was expanded (0-2 and 2-3), each age range has seen a **yearly increase** in costs, except for children aged 3-4. As 15 hours of free childcare is universal in this age group, it is to be expected that a competitive market emerges with customer retention being a serious concern for providers (as demonstrated within Section 5.8 of this analysis). Overall, those who are entitled to funded hours benefit from considerable savings and continue to do so in 2025.

**Figure 28** below shows a comparison of the price of school-age childcare for children of all ages and provider types over two years.

Provider Type	2024-2025	2025-2026
---------------	-----------	-----------

	Average hours per week	Average hourly rate	Average weekly rate	Average hours per week	Average hourly rate	Average weekly rate
<b>PVI</b>						
Breakfast	7	£6.21	£44	6.25	£6.31	£27.50
After School	15	£5.37	£81	15.6	£11.47	£66.25
Holidays	44	£4.58	£303	47.9	£5.13	£450
<b>Childminder</b>						
Breakfast	8	£7.06	£53	6.71	£13.56	£68.50
After School	15	£7.19	£108	15.5	£13.47	£129.33*
Holidays	44	£6.28	£276	42.7	£8.19	£310
<b>School</b>						
Breakfast	4.5	£2.48	£11	4.78	£3.89	£18.02
After School	11	£3.79	£42	10	£3.03	£35.25
Holidays	36	£3.11	£112	No Data	No Data	No Data

\* This cost may include the cost for holiday childcare.

We received 50 responses from school-age childcare providers which represents only 35% of our provision in Newham. As a result, the above data may not be truly reflective of the average costs of childcare.

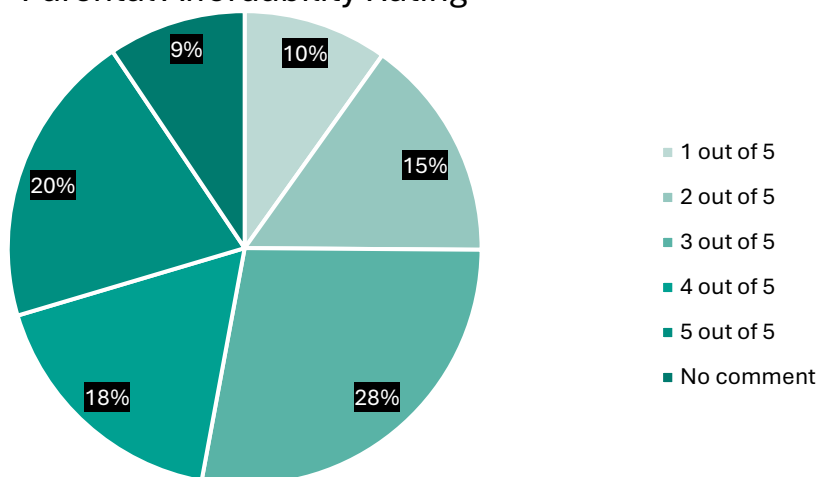
The data above suggests that there has been a decrease in the average hours of breakfast provision across PVIs and Childminders but a slight increase amongst schools. There has been an overall increase in the hours offered after school by PVIs and Childminders but a decrease in hours provided by school. Generally, school-aged childcare is currently more expensive compared to last year, apart from after school clubs delivered by schools which shows a decrease in costs.

In terms of holiday care, we received responses from 20 providers. As a result, our averages will not be truly representative of costs across the borough. However, based on responses, the data set suggests based that hourly rates and weekly fees have increased. The average cost of hours per week have increased for PVIs but decreased for childminders.

**233 responses** received from our parents & carers as part of our parents' survey on their perception of chosen provider pricing based on affordability are shown below.

**Figure 29** demonstrates parental perception of affordability captured by ranking-where (1 being poor and 5 being very good). Of the 223 respondents, **21 did not comment** on the affordability of the provision they were accessing, **leaving 202 that did.**

### Parental Affordability Rating



Of this number, **22% rated it as very good (5) and 11% rated it as poor (1)**. Whilst affordability is generally less than the Inner London average and more in line with that of Outer London, parents **72%** of the respondents who voted rated the provision as **3 out of 5** which is average in line with the data as reported and reflects the increase in the proportion of children living in income-deprived families.

Parents and carers were also asked to rank the following statements in the order of utmost important.

**Figure 30** below ranks important factors to parents and carers in the order of their popularity.

Rank	Factor
1.	The provider can offer the hours and weeks of care I need
2.	It is convenient as it is close to work or home
3.	The cost / affordability
4.	The provider has a good reputation / OfSTED grade
5.	The provider can be flexible in changing the hours that I use
6.	The provider clearly explains their services and the activities and benefits for my child
7.	I know the provider
8.	My child has friends or siblings at the same provider
9.	My child's special need is supported

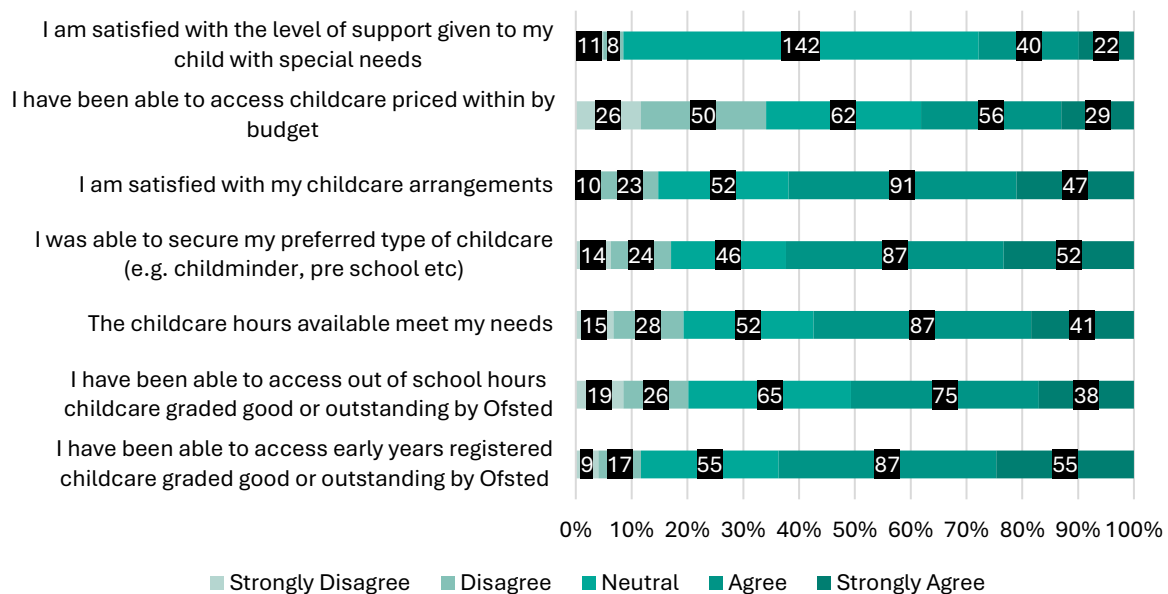
As demonstrated in the rankings, the most important factor to parents and carers, accounting for **27%** of respondents is that the provider can **offer the hours and weeks of care that is needed**. This was closely followed by the provider's **proximity to the family home or place of work (16%)** and then the **cost / affordability (17%)**. The factor that is considered the least significant to parents and carers is the **support for a child's special educational needs** which accounted for **70%** of respondents.

We requested that parent and carers inform us about their level of satisfaction with their childcare provider.

Overall, **85% either agreed, strongly agreed or felt neutrally** that they were **satisfied with their childcare arrangements**, whereas **15% disagreed or strongly disagreed**. This emphasises that provision is generally strong but there is room for improvement.

**Figure 31** below illustrates whether parents strongly disagree, disagree, are neutral, agree or strongly agree with a specific statement about their provider.

### Parent Satisfaction Survey Results



The above results show that of the 233 respondents; **81% either agreed, strongly agreed or felt neutrally** that the **childcare hours met their needs**, whereas **19% disagreed or strongly disagreed**. This suggests a need to explore provision that is flexible, consistent with longer opening hours.

**66% either agreed, strongly agreed or felt neutrally** that they were able to **access childcare within their budget**, whereas **34% disagreed or strongly disagreed**. This highlights that financial considerations continue to be a concern for parents.

In comparison with the 2024 CSA, (although, with 593 survey responses received) where the overall satisfaction was **82%**, there has been a slight **increase** in the percentage of respondents who felt positively about their childcare arrangements.

### 5.8 Workforce and Sustainability

Compared with previous years where workforce recruitment and retention have been the most significant risk to childcare sufficiency in Newham, 2025 has reported new challenges through our survey. Whilst providers continue to have difficulty securing qualified practitioners and retaining experienced staff, driven by national shortages and the impact of cost-of-living pressures, **customer retention** and **financial factors** have become more burdensome. These constraints limit providers' ability to operate at full capacity and respond to demand. Strengthening training, professional

development and retention initiatives will be critical to sustaining and expanding future provision (if required in the future).

**Figure 32:** the chart below ranks business challenges faced by providers in order of their importance.

Rank	Business Challenge
1.	Attracting new parents and families
2.	Cash flow
3.	Access to finance
4.	Staff retention and recruitment
5.	Staff wellbeing and morale
6.	Staff training
7.	Managing relationships with parents using services
8.	Understanding changing patterns of childcare needs

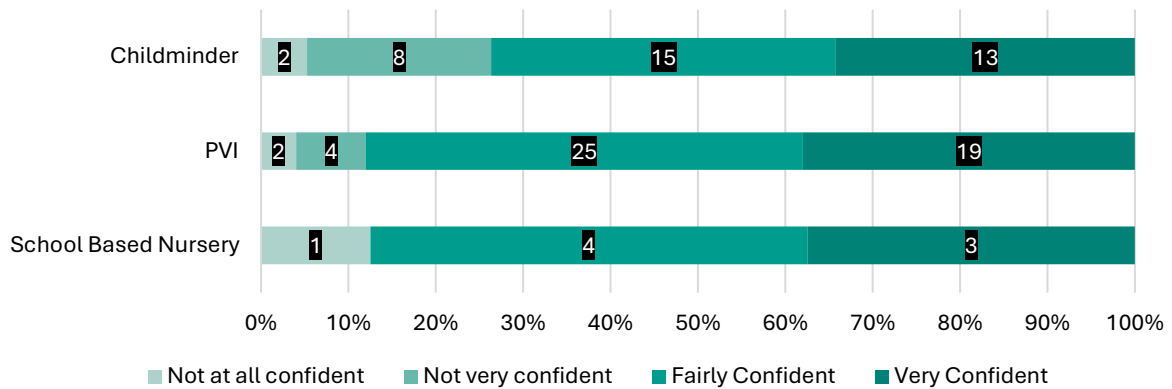
As demonstrated in the rankings, the most significant risk to providers, accounting for **26% of respondents**, is **attracting parents and families**. This was closely followed by **cash flow (35%)** and then **access to finance (27%)**. The factor that is considered **the least significant** to providers is **understanding changing patterns of childcare needs** which accounted for **29% of respondents**.

Despite these challenges, the overall quality of early years provision in Newham remains strong. As previously shown, most settings are rated Good or Outstanding by OfSTED, with providers starting to meet standards through the new assessment framework, reflecting sector resilience and commitment to high quality early education.

Maintaining these standards will depend on a stable and well-supported workforce, strong leadership within settings and continued access to professional development opportunities which we will ensure through our workforce promotion campaign, formalizing partnerships for apprenticeships and pathways as well as exploring innovative ways to strengthen childminder recruitment and retention.

**Figure 33** below is collated from our provider survey to the question, “***How confident are you that your childcare business is sustainable over the next 12 months?***”

## Childcare Provider Confidence in their Business Sustainability



**96** providers responded to this question in the survey, **82%** advised that they are **confident** in the business continuity of their childcare provision with **18%** advising that they were **not confident**. This shows an **increase** in perception of sustainability compared with 2024 where **72% were confident and 28% were not**, suggesting that our previous measures to address workforce sustainability have contributed to the level of provider confidence in business continuity.

## Section 6: 2025 Childcare Sufficiency Assessment

Sufficiency is defined as, for the purpose of this assessment, meeting the needs of local families who have need of childcare to empower them to take up, or remain in, work or undertake training or education that will lead to work.

### 6.1 Ward Profile Dashboard: 0-4 Childcare provision

The table shows a detailed breakdown of childcare sufficiency profile of childcare provision for families receiving additional forms of support now known as Early Learning for 2-year-olds and 30 hours of free childcare for working parents.

It also highlights where potential shortfall of childcare places has been identified.

Ward	Population of 0 to 4-year-olds	No. of eligible less than 9 months to 2-year-olds	No. of eligible 3- to 4-year-olds (30 hrs)	No. of registered places	No. 0-4-year-olds reported on Headcount	Vacancies	Sufficient or Insufficient childcare places for eligible children	Is there a need to create funded childcare places for eligible children in this ward?
Beckton	1110	135	32	591	534	57	Sufficient	No
Boleyn	1219	123	37	459	352	107	Sufficient	No
Canning Town North	650	56	17	456	316	140	Sufficient	No
Canning Town South	491	63	19	342	251	91	Sufficient	No
Custom House	1030	118	49	568	443	125	Sufficient	No
East Ham	1136	63	22	351	261	90	Sufficient	No
East Ham South	1140	86	31	425	393	32	Sufficient	No
Forest Gate North	768	123	37	482	316	166	Sufficient	No
Forest Gate South	1186	115	53	434	432	2	Insufficient	<b>Yes</b>
Green Street East	1375	57	17	541	503	38	Sufficient	No
Green Street West	1332	82	25	635	488	147	Sufficient	No

Little Ilford	1249	87	26	587	505	82	Sufficient	No
Manor Park	1132	85	25	715	509	206	Sufficient	No
Maryland	728	101	30	669	474	195	Sufficient	No
Plaistow North	1195	80	42	678	468	210	Sufficient	No
Plaistow South	784	91	28	389	281	108	Sufficient	No
Plaistow West & Canning Town East	1048	89	43	576	459	117	Sufficient	No
Plashet	822	65	17	480	318	162	Sufficient	No
Royal Albert	799	104	30	376	275	101	Sufficient	No
Royal Victoria	1237	171	36	433	371	62	Sufficient	No
Stratford	828	100	27	318	271	47	Sufficient	No
Stratford Olympic Park	878	119	31	454	397	57	Sufficient	No
Wall End	1033	106	16	425	365	60	Sufficient	No
West Ham	872	82	31	431	330	101	Sufficient	No
<b>Totals</b>	<b>24042</b>	<b>2301</b>	<b>719</b>	<b>10609</b>	<b>9312</b>	<b>1297</b>	<b>Sufficient</b>	<b>No</b>

*Sources: 2025 BPO population Projections, and number of registered places of Providers delivering funded early education and childcare (EE&C) places*

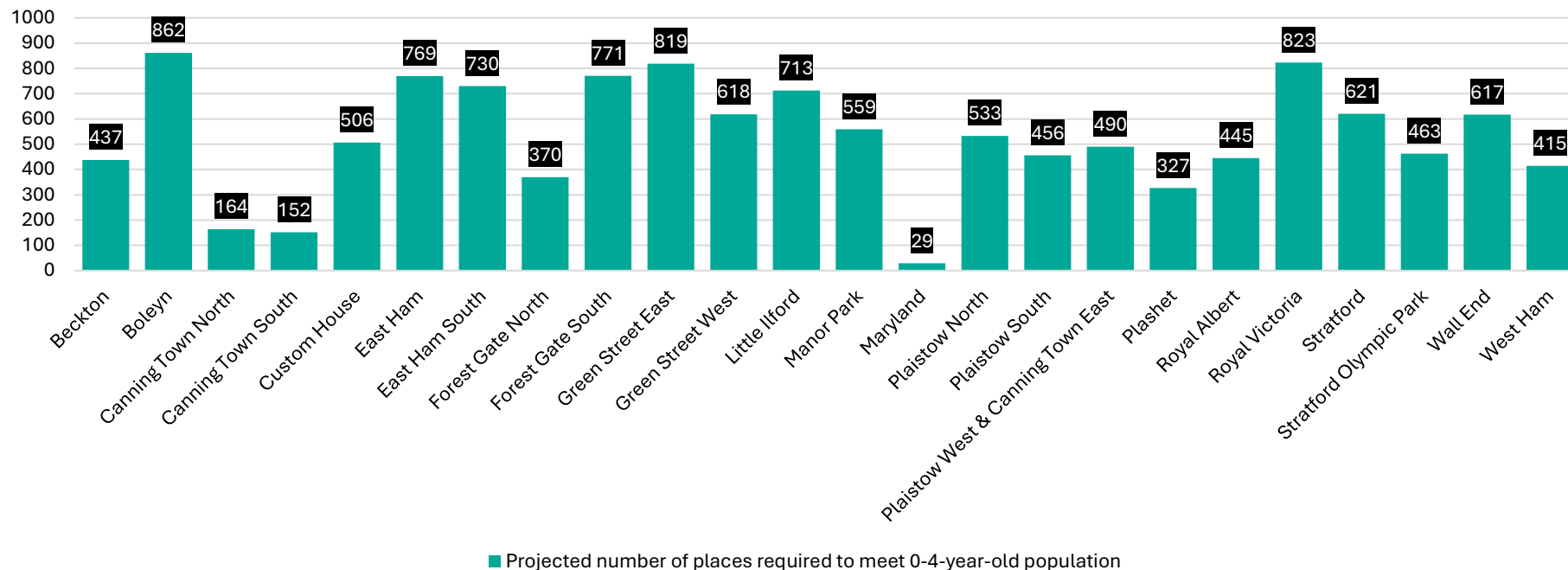
Based on the above, there is sufficient childcare provision across Newham for children aged 0-4 who are eligible for funded early education and childcare entitlements of (30 hours of free childcare and the Early Learning for 2-year-olds), apart from the **Forest Gate South** ward that is at capacity with only **2 vacancies remaining**. We would be increasing capacity in this ward through the phase 3 of the school based nursery programme.

The sufficient level of early years childcare provision reflects an overall increase in capacity from **6,259** in 2024 to **9,312** in 2025 marking an expansion of childcare provision by **49%**. **Plaistow North** and **Manor Park wards** have a significant level of surplus places (**both exceeding 200 vacancies**), followed by **Maryland** and **Forest Gate North**.

Not all 9months -2year olds and 3 - 4-year-olds are eligible for 30hours of free childcare a week, families will often make their own childcare arrangements therefore, assessing sufficiency for this cohort of children is often difficult. Any new or expansion of an existing

provision for our 0-4 children who do not qualify for funded places based on the population above, would require an **additional 13,895 places** broken down by ward as shown in the below:

Projected number of places required to meet 0-4-year-old population



However, as seen in our recent provider survey, **customer retention** is now the **biggest business concern** and is **unlikely to improve** due to the decline in birth rate and overall population projected over the next five years.

Although there may be a **need to expand provision for our non-eligible children cohort**, **take-up may be difficult to achieve due to changing patterns of childcare needs and financial circumstance of families with regards to the cost of childcare.**

Therefore, our assessment is that any new or an expansion of early years provision should be done in collaboration with **PVIs to maximise delivery of up to 50 hours a week to enhance existing offer and stem an oversupply of the childcare market**

**thereby ensuring the stability and sustainability of the childcare market in Newham.** We are actively engaging with our providers on the School Based nursery (SBN) programme to ensure the above criteria is met as part of the phase 3 of the programme.

## 6.2 Ward Profile Dashboard: Out of School Provision for School Age Children

There is a particular emphasis on providing sufficient out-of-school provision for all families. Due to the recent government initiative, all primary school aged children will qualify for Breakfast Club provisions. However, not all children will require childcare after school.

Ward	School population of Reception to Year 6	Total Breakfast club places available	Total Breakfast needed (school aged population)	Total After School club places	Total After School needed (59.7% of school age population)	Is there a need to create Out of School Provision in this ward?
Beckton	1328	197	1328	237	793	Yes
Boleyn	1557	90	1557	155	930	Yes
Canning Town North	729	695	729	96	435	Yes
Canning Town South	556	109	556	88	332	Yes
Custom House	1523	210	1523	230	909	Yes
East Ham	1423	198	1423	103	850	Yes
East Ham South	1786	90	1786	105	1066	Yes
Forest Gate North	785	125	785	159	469	Yes
Forest Gate South	1422	65	1422	80	849	Yes
Green Street East	1523	159	1523	94	909	Yes
Green Street West	1479	150	1479	450	883	Yes
Little Ilford	1883	235	1883	222	1124	Yes
Manor Park	1406	120	1406	70	839	Yes
Maryland	849	113	849	143	507	Yes
Plaistow North	1326	115	1326	98	792	Yes
Plaistow South	1263	228	1263	108	754	Yes
Plaistow West & Canning Town East	1418	208	1418	178	847	Yes

Plasht	972	30	972	0	580	Yes
Royal Albert	810	43	810	48	484	Yes
Royal Victoria	999	40	999	150	596	Yes
Stratford	649	120	649	156	387	Yes
Stratford Olympic Park	517	96	517	144	309	Yes
Wall End	1459	125	1459	112	871	Yes
West Ham	1052	133	1052	113	628	Yes
Out of Borough	1613	N/A	1613	N/A	963	N/A
<b>Total</b>	<b>30327</b>	<b>3694</b>	<b>30327</b>	<b>3,361*</b>	<b>18105</b>	<b>Yes</b>

\* This data excludes from 3 providers regarding capacity. These providers are located within Plaistow West & Canning Town East, Stratford, and Custom House.

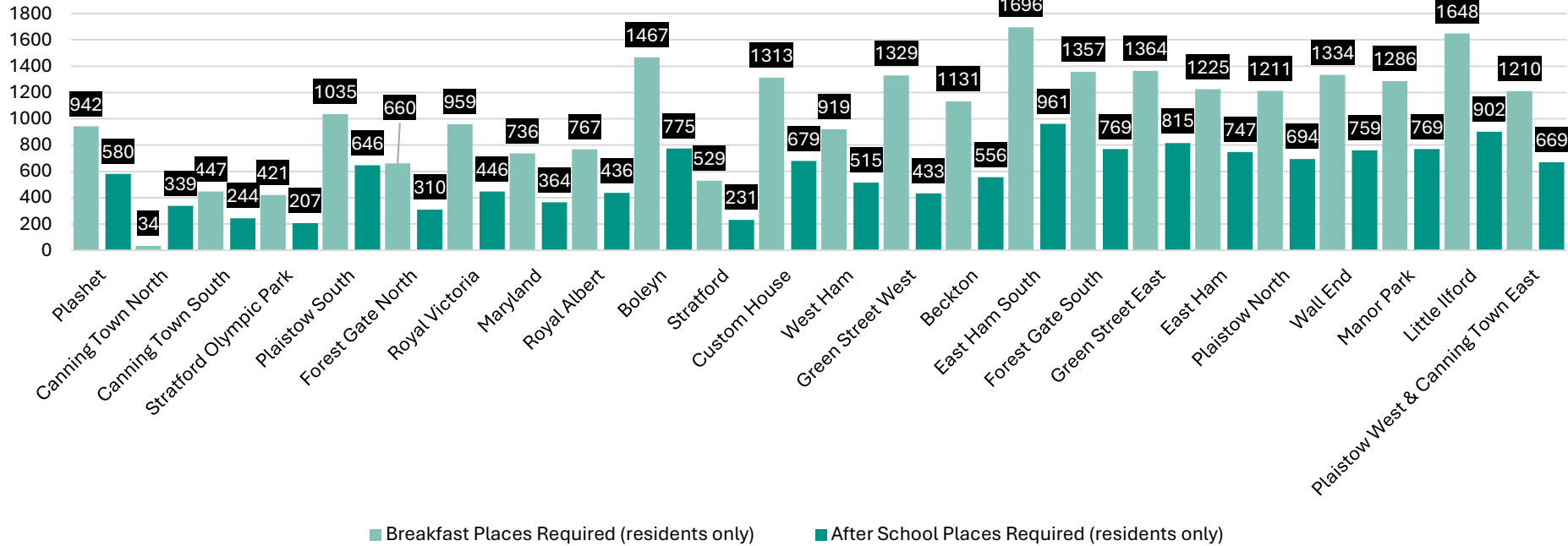
As with the previous year, we require an **expansion of capacity in breakfast and after school provision**. Whilst breakfast and afterschool childcare has **risen from 3,120 to 3,694** and **3,098 to 3,331** places respectively, our existing infrastructure of school-aged childcare provision is **not sufficient** in meeting the demand of out of school provision to enable our adult population who have children to work.

To meet demand of provision for all children to have access to breakfast, **we would need to create an additional 25,020 places, accessible five days a week**. For after school childcare provision, we lack sufficiency across all wards, but we will need an extra **13,875 places across the borough, accessible five days a week**. Since not all children will require an after-school club considering that families will have their own childcare arrangements.

With each of the above assessment, we have discounted our borough resident children in our Newham schools. We have assumed that families may have arrangements that suits their familial circumstances including preferences to out of school provision close to their home in their respective boroughs. However, an additional **1,613 breakfast places** and **732 after school places if there is a requirement to create places to include out borough resident school population**.

The following chart displays the number of additional places we would require in each ward in an ascending order from the ward with the lowest IMD score to the highest:

### Additional Places Required by Ward



Source: *English Indices of Deprivation 2025 (IoD25) constructed for the Ministry of Housing, Communities & Local Government.*

**Canning Town North, Canning Town South and Stratford Olympic Park** have sufficient level of breakfast provision reflected in the number of places available. All other wards are **substantially under catered** for.

**Canning Town South and Stratford Olympic Park ward** also have sufficient level of after school provision whereas additional provision is needed in **East Ham South, Little Ilford, and Green Street East**.

### 6.3 Ward Profile Dashboard: Holiday Provision for School Age Children

There is a particular emphasis on children who are eligible for Free School Meals accessing provision during the main school holidays of Easter, Summer, and Winter to enable them to have access to food whilst allowing their parents to work or conduct other activities.

The table below represents what the HAF Programme Team have commissioned for Easter, Summer and Winter 2025. The providers have given their provisional locations of delivery however for many providers, they are able to work from various locations and as such, the HAF Programme Team will be able to utilise the information in this table to encourage provider to move their intended 'locations of delivery.'

Ward	School population of Reception to Year 11	Total eligible children	Total Easter Offered Places	Total Summer Offered Places	Total Winter Offered Places	Total Places Offered	Is there a need to create more holiday provision for HAF-eligible children in this ward?
Beckton	2320	1078	255	930	375	1560	Yes
Boleyn	2623	1106	1280	1300	600	3180	Yes
Canning Town North	1275	652	2720	1200	195	4115	No
Canning Town South	985	576	80	0	180	260	Yes
Custom House	2675	1419	255	950	355	1560	Yes
East Ham	2463	1077	80	1950	580	2610	Yes
East Ham South	3241	1494	0	0	0	0	Yes
Forest Gate North	1307	508	975	6080	1055	8110	No
Forest Gate South	2371	1049	560	0	200	760	Yes
Green Street East	2581	1027	150	300	150	600	Yes
Green Street West	2419	890	960	4380	2190	7530	No
Little Ilford	3166	1606	455	2860	175	3490	Yes
Manor Park	2382	1071	0	0	420	420	Yes
Maryland	1429	632	800	1600	240	2640	Yes
Plaistow North	2365	1114	240	3800	1440	5480	No

Plaistow South	2258	1018	100	2500	1210	3810	Yes
Plaistow West & Canning Town East	2495	1230	144	360	60	564	Yes
Plashet	1650	633	560	5500	900	6960	No
Royal Albert	1369	737	0	0	0	0	Yes
Royal Victoria	1429	595	120	600	0	720	Yes
Stratford	1148	546	1390	1560	664	3614	No
Stratford Olympic Park	1040	534	0	0	0	0	Yes
Wall End	2596	1214	900	3705	1400	6005	No
West Ham	1813	831	1280	2880	0	4160	No
Out of Borough	3733	1761	N/A	N/A	N/A	N/A	N/A
<b>Total</b>	<b>53133</b>	<b>24398</b>	<b>13604*</b>	<b>43055*</b>	<b>12689*</b>	<b>69348*</b>	<b>Yes</b>

*\*these totals are inclusive of SEND Short Stay activities which were not ward specific and delivered 1200 places to children over the course of Easter, Summer and Winter.*

Based on our school population data above, 24,398 are **eligible for Free School Meals** but not all children engage with the offer available to them. Of the **22,677** children eligible at the start of 2025, **21.7%** engaged with the HAF programme.

The DfE regards 20% engagement as a good level which determines our demand baseline. Once this has been taken into consideration, we calculate an **average number of days each child would require** for each holiday period based on the DfE's guidance that children should be able to access 24 days in total cross the three holiday periods (4 during Easter, 16 during Summer and 4 during Winter) and multiply these by the 20% of children the DfE determines as a good level of engagement from each ward. This then gives us a realistic **baseline of the number of places required over each holiday**.

Based on the above methodology, it shows that there is sufficient provision across the three holiday periods in **Canning Town North, Forest Gate North, Green Street West, Plaistow North, Plashet, Stratford, Wall End** and **West Ham**. It should be noted that, whilst there is overall sufficiency across the three holiday periods, **Plaistow North** and **Wall End** would have required an additional **651** and **71 places respectively** during the Easter break; **Canning Town North, Stratford** and **Wall End** would have required an additional **886, 187** and **180 places respectively** during the Summer break; and **Canning Town North** and **West Ham** would have required an additional **327** and **665** places during the Winter break to fully meet realistic demand. **Boleyn** and **Maryland** also had sufficient places to offer a sufficient level at Easter but no other holiday period.

Except for the above mentioned, all other wards did not have sufficient provision, therefore, we would have **required** an additional 40,510 places broken down by **4,806 places for Easter, 29,983 places during Summer** and **5,721 places during Winter**.

Although there is a significant gap in our sufficiency for holiday childcare using the above-highlighted methodology, it must be noted that the cost per mainstream place is **£22 per primary aged child** and **£24 per secondary aged child**. Whilst these places cost **lower than other London boroughs**, our expenditure is **limited** by the **cost per SEND placement** which is **higher compared to other boroughs**. Since the HAF programme is delivered through designated funding, **we would require additional funding to realistically meet this gap in sufficiency**.

The DfE sets out that the HAF programme should endeavour to offer all eligible children the equivalent of 4 hours a day, 4 days a week though they recognise that this is not always practical or possible. Considering this baseline, the **total number of places we were able to offer across the borough was 69,348**. Compared with the total number of places required for 100% of the eligible population, would require **1,275,192 places**. This is based on the **average days** required calculations of **4 at Easter, 16 during Summer** and **4 during Winter**, multiplied by the total number of eligible children. As a result, **we would require 193,014 places during Easter (we offered 13,604), 772,054 places during Summer (we offered 43,055) and 193,014 places during Winter (we offered 12,689)**.

Our objective, therefore, remains to **target provision** in the wards where our data highlights the highest levels of children eligible for Free School Meals and/or in wards with a **high Index of Multiple Deprivation** namely, **Little Ilford, East Ham South, Custom House, and Plaistow West & Canning Town East**.

## Appendix 1: Ward Map



## Appendix 2a: Useful information for Parents, Carers and Providers

Directory of links	Further details
<p>I. <b>Find out about different providers via <a href="#">Newham Online Directory of Childcare Providers</a>.</b></p>	<p>Private, Voluntary, and Independent providers Day provide a range of coverage from full or part-time day care for children aged from birth to 5 years. Some are open from at 8am - 6pm weekdays operate between 48 and 51 weeks a year. Others offer day care (under 4 hours) for children aged between 2- and 5-years during school term. Some groups may also offer linked morning and afternoon sessions or places during school holidays.</p> <p>LA Maintained Nurseries provide full or part-time day care for children aged from birth to 5 years, although not all-day nurseries are registered to care for children aged under 2 years. Most are open from at least 8am - 6pm weekdays and commonly operate between 48 and 51 weeks a year.</p> <p>School Based Nurseries are provisions situated on a school site. Some are open from at 8am - 6pm weekdays operate between 48 and 51 weeks a year. Others offer day care (under 4 hours) for children aged between 2- and 5-years during school term. Some groups may also offer linked morning and afternoon sessions or places during school holidays.</p> <p>Childminders are registered to look after children in the childminders own home. Childminders are often flexible about the hours they work. Many offer a school pick up and collection service from local schools, nurseries, and pre- schools.</p> <p>Out of School provision can include breakfast, after school and holiday care. Many offer a school pick up and collection service from local schools, nurseries, and pre-schools.</p>
<p>II. <b>Find out what childcare you could be entitled to via the <a href="#">online checker</a>.</b></p>	<p>30 hours childcare for eligible working families in England – available for children aged 9 months to 4 years.</p> <p>15 hours for 2-year-olds receiving support – for children aged 2 years. 15 hours early learning for families in England receiving some additional forms of support.</p> <p>15 hours childcare for all families in England – for all children aged 3-4 years.</p> <p>Universal Credit Childcare – for all working families claiming Universal Credit.</p> <p>Tax-free Childcare – if you are a working parent or carer, you can get a £2 top-up for every £8 that you pay towards childcare.</p> <p>Study support – for families where one or both parents are studying.</p>
<p>III. <b>Find a provider inspection report via the <a href="#">OfSTED website</a>.</b></p>	<p>You can find reports on schools, PVI's, childminders and more in England.</p>

<b>IV. Find out about the <a href="#">Children's Health 0-19 Service</a>.</b>	Receive support from professionals there to listen and guide you if you have concerns about your child's health or development.
<b>V. Find out about <a href="#">Start for Life (0-2 years)</a>.</b>	Start for Life Antenatal and maternity support and digital resources for the first 730 days.
<b>VI. Find out about <a href="#">Start for Life (3-5 years)</a>.</b>	Start for Life Antenatal and maternity support, and digital resources from 730 to 1,001 days.
<b>VII. Visit our <a href="#">Family Information Service</a> page.</b>	The Family Information Service provides information and signposts to services that support families in Newham, including details of local childcare and early years provision.
<b>VIII. Visit our <a href="#">Special Education Needs &amp; Disability (SEND) Local Offer</a> page.</b>	The SEND Local Offer is your guide to find clear and accessible information about support available for children and young people with Special Educational Needs & Disabilities aged 0-25 years in Newham.
<b>IX. Find out about the <a href="#">Disability Access Fund (DAF)</a>.</b>	Your child's early years provider could get additional funding to help with their education and support if your child receives Disability Living Allowance for children in one of three funded categories.
<b>X. Find out about the <a href="#">SEN Inclusion Fund (SENIF)</a>.</b>	Early years settings can apply for SENIF to support them in providing special educational provision for children who have difficulty in one of the four areas of SEN or a medical condition that significantly affects their access to, or development in, one or more of the prime or specific areas of the EYFS in comparison to the age-related expectations.
<b>XI. Find out about the <a href="#">Holiday Activities and Food (HAF) Programme</a>.</b>	Fun, food, and friendship for 4- to 16-year-olds - Newham's HAF programme over Easter, Summer and Winter is packed with activities for children and young people. Each holiday period is designed to help children and young people to stay active, make new friends, learn new skills, and enjoy a healthy meal.
<b>XII. Find out about <a href="#">Early Years Pupil Premium (EYPP)</a>.</b>	The Early Years Pupil Premium (EYPP) is additional funding given to early years providers to improve the education they provide for some eligible children.

## Appendix 2b: Statutory guidance and Local policies

Directory of links	Further details
<p>I. Find out about the <a href="#">Statutory Framework</a>.</p>	<p>The standards that schools and childcare providers must meet for the learning, development and care of children from birth to 5.</p>
<p>II. Find out about the <a href="#">Early Years Foundation Stage</a>.</p>	<p>The early years foundation stage (EYFS) sets standards for the learning, development, and care of your child from birth to 5 years old.</p> <p>All schools and OfSTED-registered early years providers must follow the EYFS, including childminders, preschools, nurseries, and school reception classes.</p>
<p>III. Find out about the <a href="#">Education Inspection Framework</a>.</p>	<p>This framework sets out OfSTED's inspection principles and the grades that inspectors give.</p>
<p>IV. Visit <a href="#">Best Start in Life</a> website.</p>	<p>Advice and support for child development.</p>
<p>V. Find out about <a href="#">Identifying and Supporting Children with Additional Needs in the Early Years</a>.</p>	<p>Advice and support available during the first 1,001 days of a child's life to identify and address any development or behaviour concerns.</p>
<p>VI. Find out about <a href="#">Becoming a Childminder or setting up a Childcare Business</a>.</p>	<p>Information about registering as a childminder or childcare provider, and how to set up a childcare business.</p>

## Appendix 3: CSA Methodology

This section summarises the data sources and approach used for the assessment. Links to the data sources where available have been provided in the different paragraphs and sections of the document including key details and analysis of the various surveys undertaken.

The data methodology has informed the local authority's childcare sufficiency assessment which has helped identify gaps and a set of action plans for 2026-27 on notable areas for improvement.

### Data sources

- Census 2021 - Office for National Statistics.
- GLA 2023-based Demographic Projections produced in April 2025.
- English Indices of Deprivation 2025 (IoD25) constructed for the Ministry of Housing, Communities & Local Government.
- Spring 2025 and 2026 School census from LBN Performance and Business intelligence service.
- Early years Spring 2025 and 2026 headcount from our Early years education and childcare service.
- 2024 and 2025 Newham Early Education and Childcare Provider and Parent Surveys.
- Newham's Early Notification Service digital front door- MIS return.
- Newham Family Information Service and Local Offer website.
- Eligibility Checking System (ECS). Code Validation Rate through the DfE's View your education data.
- CORAM Childcare 2025 survey.
- Eequ Summer 2025 HAF parents' survey.
- Newham HAF total programme list attendance data.
- Newham Winter 2025 HAF parents' survey.

### Notes

1. **Projected changes in the population** are calculated using the Borough Preferred Option (BPO). This housing-led projection includes components of change (births, deaths and migration data) and reconciles it with future population growth with assumed future housing supply. This provides an understanding of how differences in future housing supply might impact population change.
2. **Take up funded entitlements:** derived from the EY Spring 2025 and Spring 2026 Headcounts. Value difference worked out by comparing the number of hours taken up by age and entitlement take up by provider type.

3. **Demand for School-age childcare:** using the school age population from the 2025 and 2026 census and the number/percentage of providers who offer out of school provision to work out demand for breakfast clubs, wrap around care and also incorporating the percentage of children living in income-deprived families to ascertain children who are likely to require access to after school provision.
4. **Demand for childcare for children with Special Educational Needs and Disability (SEND):** Comparison of EN numbers against the total number of notifications received in the year they were born with the year they enter reception.
5. **Access and Inclusion:** We calculated the number of inclusive childcare providers by accounting for those who have recorded specialist provisions and those who received the Disability Access Fund in the Spring 2026 Headcount
6. **Demand for holiday periods, broken down by age and time:** HAF Eligibility derived from Free School Meal data captured as part of the school census and take up calculated from signup information from Eequ, HAF commissioned places and Participation rates over the three holiday periods.
7. **Supply of childcare for school-age children:** Assessment drawn from Wraparound Childcare lists, the Newham Childcare Provider Survey and Childcare Providers and Inspections MIS data from the Department for Education and percentage calculated from the total number of school-age childcare providers we have in the borough and each ward.
8. **Supply for holiday periods, broken down by age, provider type, time:** Data derived from total commissioned places and supply calculated by looking at the number of providers per ward that delivered a range of services for different age groups.
9. **Affordability and costs:** CORAM survey was used to establish average costs across England, Inner London and Outer London. This was then compared to average weekly costs per entitlement funded and where available hourly costs/week were worked out using responses received from our provider survey on costs.  
Assessment of affordability is based on responses from our parents' survey of those who provided a response to the question of whether they thought their provision was affordable.