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CHILDCARE SUFFICIENCY ASSESSMENT 2022

Childcare Sufficiency Assessment 2022

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1 Executive summary

1.1 Introduction

All Local Authorities are required to 'report annually to elected council members on how they are meeting their statutory duty to secure sufficient childcare, and make this report available and accessible to parents'. We have prepared this report in order to meet this duty. The report informs strategy going forward, and priorities for supporting and improving early education and childcare in the borough. The report is also a useful market research tool for new and existing providers in assessing the market for childcare in Newham and the findings are made available to all providers in the borough.

Having sufficient childcare means that families are able to find childcare that meets their child's learning and development needs and enables parents to make a real choice about work and training. This applies to all children from birth to age 14, and to all children with disabilities.

In this report, we have made an assessment of sufficiency using evidence about the need for childcare and the amount of childcare available and this includes both the views of local parents and childcare providers. We use information about childcare sufficiency to plan our work supporting the local childcare economy. The report maps the on-going impact of the Covid-19 pandemic and the cost of living crises on the demand and supply of childcare and makes recommendations to ensure a sustainable childcare offer that continues to meet the needs of Newham families. Sufficiency is assessed separately for early year's children (0-4) and for school aged children (5+) and analysis is made at borough and local ward level.

Newham's last childcare sufficiency assessment (CSA) was a snapshot of sufficiency in the autumn term of 2021 and we report back on the progress that was achieved against the priorities identified then at 1.2. The new 2022 assessment compares how the provision of childcare for under-fives and school age children has changed since our last report and takes a view on the current sufficiency of provision. The findings are summarised at 1.3, with a new action plan for 2023 detailed at 1.4.

The remainder of the report provides the underpinning evidence and data that the conclusions and proposed actions are drawn from. This further detail will be helpful to those developing or changing childcare services and includes ward level analysis of child populations, childcare places, future child population projections, parent views and current provider business challenges.

1.2 Progress delivered against Newham's CSA Action Plan 2021

A detailed action plan was developed against the seven areas for focus identified in the CSA 2021. Progress against the agreed actions were regularly reviewed by Officers and progress updated on a monthly basis over the course of 2022.

1.2a. Covid Recovery actions delivered in 2022

- Partnerships with health have strengthened due to involvement in the 50 Steps strategy and SEND working parties.
- Dissemination of CSA findings and market trends to childcare providers and partners via forums, newsletter and website

- Dissemination of information on Government business support following the pandemic including reductions in business rates and grants.
- Maintaining a termly risk register of settings and providing regular support visits and guidance.
- Continued Covid recovery support through monitoring of sector, and engagement with DfE projects
- Supporting the successful implementation of the Holiday and Food Programme (HAF) with engagement from out of school providers.

1.2b Workforce actions delivered in 2022

- Consultation with providers has enabled us to understand issues and to feed these back to DfE. Recruitment and retention remain a national issue, so it has been important to liaise with policy makers.
- Continued professional development support to Managers to ensure robust recruitment and retention of staff.
- Successful Stronger Practice Hub bid by Sheringham Nursery to ensure strategy going forward will include workforce development.
- Commissioning of Hempsalls to deliver a solution focused early year's workforce recruitment and retention workshop for Newham providers

1.2c Quality actions delivered in 2022

- Quality Improvement strategy implemented including delivery of the Quality audit, Statutory setting support programme and Quality Improvement tool (Pathway to Quality), has ensured an Ofsted profile has sustained 98% good and outstanding.
- CPD programme has ensured effective implementation of revised EYFS and understanding of New Ofsted Education Framework.
- Projects successfully undertaken in response to Communication and language need identified Post- Covid.
- All service level agreements have been reviewed following consultation with Mentors.
- It has been agreed that only support for communication project, network meetings and Manager Forum will be provided and a yearly transition fayre.
- CPD offer reviewed in response to Providers consultation and identified need.
- Increased capacity in the QI team by recruitment/ secondment of additional Early Years Advisory Teachers
- Strategic planning and smooth transition of Early Education practitioners in house has enabled strong support for Childminders, and ensured Ofsted profile sustained at 97%
- Childminder induction programme supported new childminders in to the workforce.
- Collaboration with Maintained Nursery schools in delivery of EY conference

1.2d Sustainability actions delivered in 2022

- Providers have been informed about the demand patterns and trends for early education and childcare, have a better understanding of finance and funding and are better equipped to promote their services to maximise occupancy.
- Financial support for providers has been secured to help recovery from the pandemic. This was achieved through the submission of 71 successful bids to the additional restrictions grant fund totaling £ 177,495 and the distribution of a further £ 242,408 to 76 settings via Newham’s sustainability grant.
- New providers have been supported with start-up packs and briefings to support business viability and quality.
- Providers sustainability has been supported through higher participation in funded early education.
- Holiday and Food programme delivery has been successfully implemented by several Out of School providers.

1.2e Information actions delivered in 2022

- Updated Family Information Service website has made navigating information easier for users. Providers have been encouraged to update and develop their content for the site.
- Implementation of a refreshed communications plan for the funded entitlements including: increased use of social media, reestablishment of the parent champions’ scheme, promotion of Newham’s community early years language films and text, outreach to cultural and community groups, updated content on refreshed and relaunched “Local Offer” website <https://families.newham.gov.uk/>, briefings for professionals and introduction of text message invites for families. This has resulted in a recovered take up of funded early education and childcare places so that attendance is now higher than was the case pandemic.
- Distribution of monthly newsletter and other communications to all providers of funded early education, keeping them up to date with changing operational rules, guidance and support arrangements.
- Delivery of Tax Free Childcare briefings to support take up of this underutilised scheme helping to reduce childcare costs for working families.
- Greater outreach programme in place, now Newham Early Education practitioners are in house with a focus on childminder support and outreach.

1.2f. Funded Early Education actions delivered in 2022

Uptake continued to improve through:

- Engagement with vulnerable families due to greater outreach
- Parent champion programme improved engagement

- Directory of front line staff, greater engagement, including regular briefings
- Greater liaison with health through 50 steps programme
- Embedding the new “We are Two” application process for funded two year olds.

1.2g SEND actions delivered in 2022

- Parents are well informed and supported to access the range of services on offer, resulting in better customer experience and easy access to information being sought.
- Children receive the additional support that is their right, providers are supported to offer appropriate support, effective support from Area SENCO team.
- Launch of the early years inclusive practice guide in autumn term 2022, which will be reviewed following feedback throughout the 22/23 period.
- Successful capital bid scheme resulted in 3 providers being appointed to provide SEND resource provision places for children under 4. This will emerge over the course of the next year and be operational in 2023.
- Increase in early notification referrals to support children of SEND.
- Improved and embedded systems have ensured more accurate data capturing scale of SEND so that provision can match need, resulting in a consistent approach to the allocation of services and funding.

1.3 **Childcare Sufficiency Assessment Main Findings 2022**

1.3a National Context and Trends for Early Education and Childcare in 2022

- In the year from September 2021 to August 2022, there was an 8% decline in the number of childcare providers and a smaller 2% reduction in the number of childcare places available in England¹. Most of this overall decline is due to a fall in the number of childminders. In the year to August 2022, about 1,500 childminders have joined and 5,600 have left.
- As at 31 August 2022, 96% of childcare providers have been judged good or outstanding at their most recent inspection. This is slightly lower than last year (97%). The proportion of providers judged outstanding has decreased from 20% to 15% since 31 August 2019.
- Nationally, there has been a marginal decline in the overall quantity and quality of early education and childcare, reflecting the challenges brought about by Covid-19 and the current cost of living crisis. The sector has demonstrated a high level of resilience in overcoming the challenges faced over the last two years and the support put in place by Government and Local Authorities will have contributed to providers remaining sustainable.
- The childcare market remains very fragile nationally, with challenges around staff recruitment and retention, energy and operating cost inflation, changes to parent working patterns, the reduction of Covid-19 financial support and lower than inflation funded entitlement funding allocations from Government. The Government has acknowledged the national challenge around workforce recruitment and retention and has put in place the Early Years education recovery programme, focusing on workforce training,

qualifications and support.

- From a parent perspective, the cost of accessing childcare has increased, with families typically paying 3.5% more for a 3-4 year old place in 2022, compared to 2021, according to the Coram Family and Childcare Trust.
- The funded and subsidised early education and childcare schemes available to families remain largely unchanged and take up rates have recovered well, post pandemic. However, the number of low income/disadvantaged families eligible for funded early education at two is in decline as the threshold to allow a family to be eligible has not been uplifted for a number of years. On the other hand, the Government has given a three-year commitment to supporting the Holiday and Food Programme for school aged children from reception to year 11 (inclusive) who receive benefits-related free school meals.
- A national trend continuing in 2022 was the increase in children accessing SEN support, which increased to 12.6% from 12.2% in 2021.

1.3b Newham's Local Childcare Sufficiency main findings 2022

Newham's Childcare Sufficiency Assessment provides a snapshot of Newham's childcare sector and market conditions in the autumn term of 2022, and should be seen against the national context detailed above.

The childcare sector in Newham has proven to be resilient and adaptable in meeting the many challenges faced in 2022. Overall, there has been an improvement in the quality and quantity of provision available. This is to be celebrated, especially given the context of the aftermath of the Covid-19 pandemic and the continuing cost of living crisis, which has had a sustained impact on parent circumstances, the demand for childcare, the childcare workforce and the business health of settings.

The operating environment for childcare remains very challenging, and intensive work will need to continue to ensure providers are supported and enabled to provide the affordable high quality early education and childcare that Newham families need.

- In Newham Ofsted early years grades improved overall, compared to the CSA 2021, with 93.1% of inspected group care settings receiving a good or outstanding judgement and 98% of childminders. This is more fully explored at 3.9 and is a significant achievement given the context and is the result of strong partnerships between providers and the Local Authority.
- The number of early education and childcare places available to Newham residents has increased to 5,328 (+1.4%) compared to 2021, and is against the national trend. There has been some good improvement in availability of places in wards with the lowest availability. Over the last three years, those wards with the least places have seen places created, so that in 2022 the bottom four wards (East Ham South, West Ham, Green Street East and Boleyn) had a total of 438 early education and childcare places compared to 342 in the bottom four wards in 2020.
- Underneath the headline increase, there is a decline in places available with childminders and private, voluntary and independent (PVI) out of school providers in line with national trends.

- There continues to be more change in the market than was the case pre pandemic, including some closures, new settings and changes in ownership. Changes in provision has resulted in an increase of less experienced settings requiring support from early years advisors and the local authority support team.
- Take up of the funded entitlements dropped significantly in Newham and across the country during the pandemic, but these had bounced back well by 2022. In Newham take up of the funded early education for two year olds improved from 46% in January 21 to 60% (of 1,983 eligible children) by January 2022, with the gap to London take up average (62%) and England (72%) narrowing too. Take up of the universal entitlement in Newham also recovered from 79% in 2021 to 86% (of 10,552 eligible) by 2022 and is now above the London average of 82%. Take up of the 30 hours entitlement for children of working parents saw the highest take up to date in Newham in 2022. The number of places made available to the funded entitlement schemes from nurseries, pre-schools, schools and childminders has remained relatively stable in 2022 and overall there is provider capacity to accommodate higher take up than the peak recorded attendance for each scheme. Funded entitlement sufficiency is fully explored in section 3.12
- Overall occupancy in settings (comprising both funded and fee paying early education and childcare) has seen some improvement against that reported last year but remains below that achieved pre pandemic. Group care settings reported an average occupancy of 53% and childminders 49% in the autumn term of 2022. Both parents and providers report the lower take up of fee-paying hours and more demand for part time places and flexible provision. This is likely to be related to the continuation of hybrid working for some and cost of living budget constraints for many. A significant portion of parents in Newham’s survey said that they were not able to access all the childcare they needed within their budget (46%) and parents say they are using more informal childcare through friends and family.
- Fee paying childcare costs in Newham group care settings have increased by an average of 4.3% between autumn 2021 and autumn 2022, on top of the 11.4% increase reported last year. Childminder fees have increased by an average of 8.9% in Newham between autumn 2021 and autumn 2022. Fee rates are on a par with the outer London average, lower than inner London but higher than the England average. The cost of childcare, including comparisons to regional and national charges is fully explored in section 3.10. Many providers will be facing increasing costs. Staffing accounts for around three-quarters of providers’ total costs. As many staff earn at or around the minimum wage, a rising minimum wage has significantly affected providers’ finances. Other major budget lines, such as energy and rent, are also rising quickly.
- Parent satisfaction with the childcare services they access has remained stable in Newham, with 81% of surveyed parents saying they were satisfied overall with their childcare arrangements. Parents identify the affordability and flexibility of childcare as key concerns for them.
- Funded early education and other government subsidy schemes help parents to access affordable provision. Parent awareness of these schemes has historically been lower in Newham than nationally. Our parent survey indicates that recent improvements in awareness has been consolidated in 2022. Awareness is highest for the funded entitlements (2 year old scheme 83%, universal 3 and 4s 86% and 30 hours 76%). Awareness of the childcare subsidy schemes is lower and the tax-free childcare scheme is undersubscribed across the country. With seven types of childcare support being available depending on families’ circumstances, it is important that parents are informed

of the support available to allow them to benefit. Newham has a very diverse population where language barriers and high mobility can be a block on the sharing of relevant information.

- In a survey of Newham group care settings, the biggest business challenges identified were staff recruitment and retention, business cost inflation, cash flow and attracting new customers.
- Providers need to be able to afford, recruit, support and retain appropriately trained and experienced staff to meet the changing needs of children and families.
- With regard to business costs a recent study by the Institute for Fiscal Studies found that Economy-wide measures of inflation have recently understated the cost pressures facing childcare providers. 30% of the responders to Newham's provider survey reported that they currently operated at a loss. Childminders identified attracting new customers as their biggest challenge and many are empty or close to empty.
- The number of children identified with Special Educational Needs or disabilities (SEND) in Newham is increasing in line with the national trend. This has resulted in an increase of referrals for support made by early education and childcare providers in the borough.
- Over-fives provision in this CSA includes out of school services operating from schools, alongside PVI out of school clubs and childminders. Out of School providers are highly reliant on parental fees. Schools provide a range of activities, which may not be formally classed as childcare and are generally not required to be separately registered and are generally only for pupils of the school. However, they provide a significant contribution to care for children in this age range. Although this year's CSA gives a fuller picture of what is available, further work will need to be done to get a complete picture of provision as not all schools (53) responded to the CSA survey. The higher number of school responses means that recorded out of school care shown has increased (+12%), although the number of places available via PVI Out of School Clubs has declined. Some caution should be used in using this data, given the incomplete record of schools provision.
- 92% of inspected Out of School providers (including schools, childminders and PVI Out of School settings) are good, outstanding or met. There are a large number of providers awaiting their first inspection (32). There is wide variation in the quantity of recorded provision in each ward. The wards with the least recorded places per resident for over-fives are clustered around the centre the borough and include East Ham, East Ham South, Canning Town North and Green Street East.
- Recorded occupancy in school based out of school provision has recovered well and is similar to pre Covid levels (73%) in the autumn 2022. Occupancy for out of school care is at a much lower base level in PVI group care settings and childminders and occupancy has only partially recovered by autumn 2022 at 36% and 18% respectively. The government has confirmed funding for the Holiday Activities and Food Programme (HAF) over the next three years and there are opportunities for greater engagement from Newham Out of School providers.
- Charges for after school and breakfast services in Newham have increased and are on a par with London averages. Charges vary between provider types, with childminders and PVI Out of School Clubs often offering more hours and flexibility but making a higher hourly charge. Help with childcare costs and funded provision via the HAF programme is available for eligible parents to access at Ofsted registered provision and parents need

to be made aware of this, together with information on what provision and services are available.

- Looking ahead, GLA population estimates for the borough show a decline in 0-4 child population of 2.7% by 2027 and then an increase of 4.9% by 2032. The data source used for forecasting future child numbers in this report is the same as is being employed for Newham school place planning purposes. Future child population is determined by the interrelationship of birth rate, which is now falling, housing development and migration.
- Underneath the headline figure, significant changes are expected at ward level, reflecting the major housing developments that are planned over the next ten years. The wards of Royal Victoria, Stratford, and Canning Town North, see the biggest increases, while most wards will see modest declines, with the largest reductions predicted for Green Street East, Plashet and Plaistow North.
- Early education and childcare changes lives. Good quality early education and childcare improves outcomes for children, provides a safeguard, and lifts families out of disadvantage by enabling parents, and particularly women, to work or study. Childcare has an important role in supporting the local economy and improving local living standards.
- The CSA 2022 has found that overall there is enough funded and fee paying early education and childcare services to meet the needs of Newham's children and families and the Ofsted profile of provision has improved. While there remains pockets of need in particular wards, those wards with the least provision have seen an increase in childcare places.
- Demand for fee paying full time childcare has not recovered to pre pandemic levels in Newham and it now seems likely that there is a more permanent change in the working patterns and childcare arrangements for some families.

The local childcare sector has proven to be robust and agile in adapting to the challenges of the Covid-19 pandemic and the cost of living crisis. The sector continues to be under strain and there remain significant challenges in play for providers. These include higher operating costs, lower overall demand, maintaining and improving quality, workforce recruitment and retention and sustainability. The Local Authority will seek to support and retain agile, collaborative and good quality settings, encouraging them to adapt to parental needs and take advantage of any opportunities that are available to overcome the current market challenges.

1.4 CSA 2022 Gap analysis and recommended actions

This assessment of childcare sufficiency in the borough has found the challenges and gaps detailed below. Recommended actions are shown against each identified gap and a detailed action plan will be put in place against each recommendation.

1.4a Quality

The hard work and dedication of providers in partnership with the Local Authority and other partners saw the quality of early education and childcare in Newham continue to improve in 2022. The challenges outlined in this report in relation to workforce, funding and finance, changes in demand and higher numbers of inexperienced providers means that there is a potential risk to delivery of quality services in the future.

Quality Recommended Actions 2023

- Quality Improvement strategy Including universal and targeted support for Statutory settings and those due Ofsted
- CPD programme extended in line with consultation with providers and increase in capacity within the QI team.
- Continued commissioning of projects to support issues identified with communication and language and person, social and emotional development.
- Quality improvement tool pathway to quality in collaboration with health partners, aligned to Healthy Early Years London (HEYL)

1.4b Workforce

Workforce recruitment and retention is identified by Newham group care providers as their biggest business challenge and is acknowledged by the Department of Education as a national issue. Early education and childcare is a people based business and all providers rely heavily upon the quality and availability their workforce to provide a quality service.

Workforce Recommended Actions 2023

- To support and engage with the Stronger Practice Hub, led by Sheringham Nursery School, with the aim of increasing the quality and supply of the early year's workforce in Newham.
- To proactively engage with the DfE Early Years Education Recovery programme, alongside existing local workforce training and support strategies to ensure accessible and flexible offer of continuous professional development (CPD).
- To link to Job Centre Plus and local colleges and secondary schools to explore options for collaboration around apprenticeships and work pathways in early education and childcare
- To include in our communications plan a social media campaign to promote the early years sector and careers, and to develop a vacancy page for providers to promote vacancies in their settings deliver a solution focused early year's workforce recruitment and retention workshop for Newham providers, led by Hemsalls and capture attendee views on any suitable follow up to this.
- To participate in the DfE Recruitment and Retention strategy group.

1.4c Sustainability

Although the number of business closures has not been as high as might have been expected in Newham, the shock of the Covid-19 pandemic and the impact of the cost of living crisis has meant that many providers are now in poorer business health. This is not a uniform experience with many settings doing well, but many also report uncertainty about future operation and financial viability.

Sustainability Recommended Actions 2023

- To ensure childcare continues to be appropriately prioritised in the economic recovery plan of the Council.
- To continue to update and review Newham's Early Years risk register in order to monitor

and provide practical support and solutions for providers facing sustainability challenges, where possible.

- To provide termly updates on the demand and supply of childcare, sharing the findings with strategic leaders, childcare providers and partners.
- To ensure new starters are appropriately briefed about the current challenges in the childcare market and are made aware of the differing availability of childcare in each part of the borough.
- To gather intelligence and share information with providers on any funding opportunities and business support that is available.
- To ensure providers are made aware of changes to Covid-19 and energy cost support programmes put in place by Government.
- To develop and share case studies on changing demand in childcare with practical suggestions for providers to increase occupancy.
- To review the business support and guidance that is available to childminders in Newham, with a view to developing improved practical resources and support which can help the sustainability of good quality childminding.
- Create and implement a sustainability audit, analyse outcomes, and use this to inform CPD and support opportunities

1.4d Funded Early Education

There has been good progress in the recovery of attendance across the funded entitlements for children 2-4 age range in Newham during 2022. The Local Authority wants to build on this progress to ensure that all parents that are eligible understand the benefits of funded early education and can make informed choices about their children's participation.

Funded Early Education Recommended Actions 2023

- To work with providers to identify changing parental needs. Encourage a mix of delivery that includes part week delivery or stretched offers over the full year, where there is demand for this.
- To run a termly promotional campaign focusing on each of the three funded entitlements over 2023.
- To continue to refine and improve the "We are Two" application process for funded two year olds. Continue with a follow up process for families not taking up the offer and capture of reasons why some families choose not to participate.
- To write to all known Newham resident families that will be eligible for a universal funded place from autumn 2023 in the summer of 2023.
- To monitor the take up in wards with the least available funded early education places. To explore development opportunities in areas where there is clear and sustained need.
- To update the new starter packs for providers new to funded 2s or 30 hours early education. To deliver refresher briefings for staff administering the funded entitlements in early education and childcare settings.

- To monitor provider participation of the funded entitlements, ensuring there remains sufficient capacity to meet peak demand.
- To work with providers to ensure that when children transfer between providers a smooth transition is made in the best interests of the child.

1.4e SEND

The number of children presenting with SEND is increasing and includes a wide range of needs including autism, social communication needs and speech, language and communication delay. The Local Authority has a duty to support early year's providers in the borough to identify, plan and support provision for the increasing number of children with SEND. Parents are well informed and supported to access the range of services on offer, resulting in better customer experience and easy access to information being sought.

SEND Recommended Actions 2023

- Continue to develop and enhance the Local Offer, taking into account parents feedback.
- Continue to ensure children receive the additional support that is their right, providers are supported to offer appropriate and , effective support from the Area SENCO team, and through a relevant CPD offer
- Monitoring the implementation of SEND resource provision places for children under 4, that have received capital funding.
- Improved and embedded systems have ensured more accurate data capturing scale of SEND so that provision can match need, resulting in a consistent approach to the allocation of services and funding. Continue to collect data and use this to inform future planning and strategy.

1.4f Information

Awareness of funded early education and other help with childcare costs has improved in Newham in recent years and stabilised in 2022. Lack of awareness and misconceptions about the benefits of early education, eligibility and the choices available are barriers to take up. We will continue to benchmark against best practice and innovate to further improve resident awareness of early education and childcare options.

Information Recommended Actions 2023

- To refresh Newham's early year's communication plan, taking into account evidence from monitoring and research of what works in engaging and communicating with families including the most vulnerable.
- To review and further enhance the new "Local Offer" website to ensure parents are able to access suitable specific childcare information that meets their needs.
- To continually strive to simplify the parents' customer journey and offer handholding support where appropriate. Including increasing our use of social media, direct messaging, community language content, parent workshops and "Parent Champions" peer support.
- To continue to ensure that local sources of advice and support such as Families Information Service, Childcare providers, Health Visitors, Children's Centres, Job Centre Plus, and Workplace are aware of and disseminate the latest information. This will include

briefings to strategic leads as well as parent/ carer facing staff and will include the regular distribution of relevant marketing materials.

- To promote and raise awareness of the Tax Free Childcare scheme with parents, supporting the affordability of fee-paying childcare for working parents. To develop a listing of all Newham providers that offer the scheme.
- To promote the government's websites www.childcarechoices.gov.uk and www.gov.uk/childcare-calculator to parents and providers.
- To raise awareness of the range of childcare options that are available to meet different parent needs including the stretched offer, flexible care available through some childminders or partnership delivery and services available to shift and weekend working parents.
- To facilitate the sharing of provider information to parents with regard to how they support SEND, language development, cultural, faith and belief needs.

2. Demand for services

Factors that influence the take up of childcare are complex and interrelated. The population profile of the borough provides a baseline catchment of potential users of early education and childcare at borough and ward level. Parents may use childcare or not. Individual situations with regard to personal preferences, child needs, employment, work patterns, income, locality, family structure and support networks; information and knowledge of what is available all contribute to how many children use services. The key factors influencing the demand for services in Newham are considered in section 3 below.

2.1 Population Economic and social conditions

2.1a Population Profile

Newham has a young and ethnically diverse population, with over one-third of the population under 25 years old, 72% of our residents from Black, Asian and Ethnic Minority communities and over a hundred different languages spoken on our streets.²

The 2021 UK Census data recorded Newham's population as 351,100, which is a 14% increase from the 307,984 recorded in the census 2011. Data from the 2021 census is gradually being released and, at the time of this report, ward and child population age breakdowns are not yet fully available; Ward and child population datasets used in this report come from Greater London Authority Housing Led-Borough Preferred Option (BPO) Projections for 2022.³

Child population in each year

The early year's child population in each year is shown below in table 1 and these children may require early year's early education and childcare.

Table 1 Population number by age 0-4

Age	Number of children
Age 0	4,880
Age 1	4,936
Age 2	4,971
Age 3	4,928
Age 4	4,946
Total 0-4	24,661

Population of school age children

The school age children in each year are shown below in table 2 and these children may require childcare before and after school, and/or during the school holidays. There are 47,446 children are aged between 5 and 14 years old. The total child

estimate for 0-14 year olds is 72,107 in 2022.

Table 2 Population number by age 5-14

Age	Number of children
Age 5	4,815
Age 6	4,771
Age 7	4,615
Age 8	4,703
Age 9	4,815
Age 10	4,820
Age 11	4,757
Age 12	4,740
Age 13	4,665
Age 14	4,746
Total	47,446

Under 5s Ward Analysis and Future Projections

Table 3 shows projected under 5 populations at ward level over the period 2022 to 2032. It should be noted that forecasts are not certainties, as information and future trends are subject to change. The child population analysis shown is against the new ward boundaries that were introduced in May 2022. The number of wards has now increased from 20 to 24, as is shown in Map 1, and all ward boundaries have changed except West Ham ward, there are a number of new wards and some existing wards have new names. The change in ward boundaries means that ward level data cannot be directly compared with that reported in previous childcare sufficiency assessment reports.

Map 1

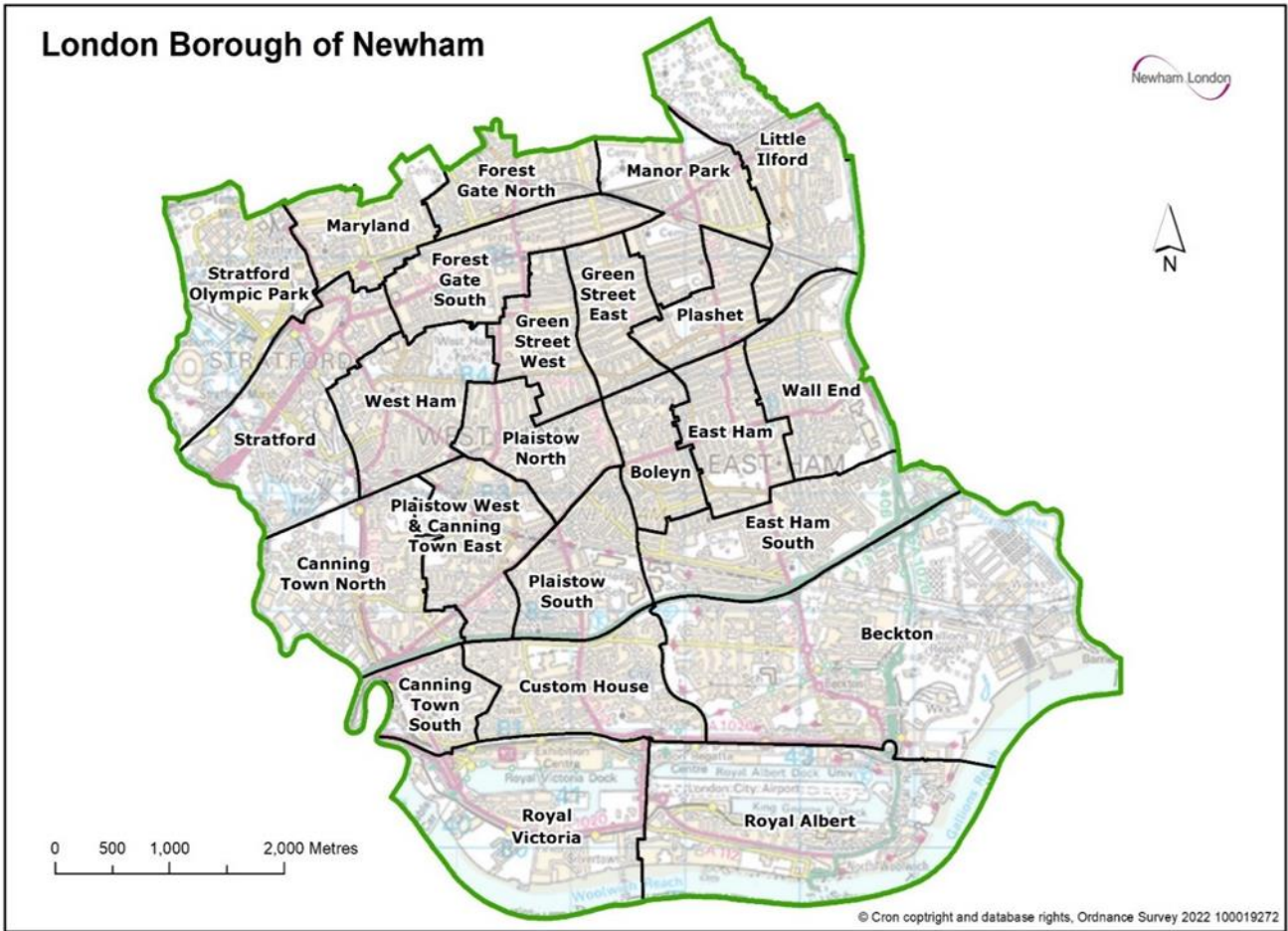


Table 3

GLA population projections for Newham Wards 0 - 4 Year Olds				Projected change	Projected change
Ward	2022	2027	2032	2027	2032
Beckton	888	925	1,060	37	172
Boleyn	1,115	1,041	978	-74	-137
Canning Town North	583	932	1,478	349	895
Canning Town South	405	409	439	4	34
Custom House	1,104	975	1,050	-129	-54
East Ham	1,244	1,232	1,305	-12	61
East Ham South	1,344	1,213	1,158	-130	-186
Forest Gate North	796	692	687	-104	-110
Forest Gate South	1,357	1,247	1,232	-110	-125
Green Street East	1,307	1,109	1,090	-197	-217
Green Street West	1,074	920	915	-154	-159
Little Ilford	1,451	1,305	1,276	-146	-175
Manor Park	1,209	1,087	1,076	-122	-132
Maryland	638	560	543	-78	-95
Plaistow North	1,267	1,106	1,075	-161	-191
Plaistow South	1,050	944	925	-107	-125
Plaistow West & Canning Town East	1,198	1,078	1,026	-119	-171
Plashet	891	728	683	-163	-208
Royal Albert	723	725	795	2	72
Royal Victoria	1,336	1,885	2,487	549	1,151
Stratford	948	1,240	1,961	292	1,014
Stratford Olympic Park	641	787	809	146	168
Wall End	1,152	1,000	965	-152	-187
West Ham	942	851	863	-92	-79
Grand Total	24,661	23,990	25,876	-671	1,215
% change against 2022		-2.7	4.9		

In the short term, the overall number of 0-4 year olds in Newham is projected to see a small decline. By 2027, overall numbers are expected to decrease by 671 (2.7%). Underlying this there is some significant fluctuation at ward level with expected increases in Royal Victoria (549), Canning Town North (349), Stratford (292) and Stratford Olympic Park (146), being offset by small falls in most of the remaining twenty wards. The falls are most significant in Green Street East (-197), Plashet (-163), Plaistow North (-161) and Green Street West (-154).

Looking further ahead to 2032, overall under five numbers are predicted to increase by 1,215 (4.9%) to 25,876. At this point, major increases in 0-4 children are expected

in Royal Victoria (1,151), Stratford (1,014) and Canning Town North (895). Sixteen of the twenty four wards are projected to see modest declines in 0-4 population, with Green Street East (-217), Plashet (-208), Plaistow North (-191) having the most significant reductions.

5 – 14 Ward Analysis and Future Projections

Table 4 shows projected shows projected populations for 5-14 year olds at ward level over the period 2022 to 2032.

By 2027, the overall number of 5-14 year olds in Newham is projected to decrease by -2.7% (-1,292) overall. At ward level there is some significant change with expected increases in Royal Victoria (741), Stratford (433), Canning Town North (415) and Stratford Olympic Park (323) being more than offset by mostly small declines in seventeen of the twenty four wards. The largest declines are seen in Wall End (-359), East Ham South (-320) and Little Ilford (-294).

The number of 5-14 year olds in Newham is projected to decrease by -5.4% by 2032. Major increases in 5-14 children are expected in Royal Victoria (1,431), Stratford (1,120) and Canning Town North (1,030). There are projected to be decreases in eighteen wards with the largest falls being projected for Wall End (-632), East Ham South (-607) and Little Ilford (-532).

Table 4

GLA population projections for Newham Wards 5 - 14 Year Olds				Projected change	Projected change
Ward	2022	2027	2032	2027	2032
Beckton	2132	1982	2005	-150	-127
Boleyn	2236	2111	1885	-125	-351
Canning Town North	1228	1643	2257	415	1030
Canning Town South	757	774	793	17	36
Custom House	2185	1962	1855	-223	-329
East Ham	2405	2414	2370	9	-34
East Ham South	3062	2742	2455	-320	-607
Forest Gate North	1435	1304	1196	-130	-239
Forest Gate South	2310	2201	1983	-109	-328
Green Street East	2617	2420	2218	-198	-400
Green Street West	2198	2007	1776	-192	-423
Little Ilford	3103	2809	2570	-294	-532
Manor Park	2431	2219	2054	-213	-378
Maryland	1393	1259	1091	-134	-302
Plaistow North	2408	2241	2012	-167	-396
Plaistow South	2053	1831	1701	-223	-353
Plaistow West & Canning Town East	2435	2292	2045	-143	-390
Plashet	1645	1495	1285	-151	-360
Royal Albert	1347	1410	1354	64	7
Royal Victoria	1179	1919	2609	741	1431
Stratford	1427	1860	2547	433	1120
Stratford Olympic Park	1102	1425	1383	323	281
Wall End	2586	2226	1953	-359	-632
West Ham	1772	1609	1484	-163	-288
Grand Total	47446	46154	44880	-1292	-2566
% change against 2022		-2.7	-5.4		

Fertility and birth rate

In line with many Boroughs, there had been a rapid increase in births up to 2012. This trend has now reversed, with births on a reducing trajectory nationally and locally. There was a fall in births in Newham by 784 to 5,442 births or -14% for the calendar year 2020 compared to calendar year 2015. There were 5,346 births recorded in Newham in 2021, a further 1.8% decline against 2020. Nevertheless, the fertility rate in Newham of 1.8 remains higher than for England, which is 1.61.

Population Mobility

Population churn is high in Newham. In 2019-20, 14.4% of the population migrated either in or out of the borough with other parts of the UK⁴. This is significantly higher than the 6.0% for all London Authorities. Additionally Newham continues to see high levels of international migration with an inflow of 11,443 and an outflow of 4,769 in 2019-20.

2.1b Prosperity and work

Based on the 2019 Indices of Deprivation (ID), Newham is the 12th most deprived area in England and the 3rd most deprived in London. Comparatively Newham is moving in a positive direction; however, Newham remains within the worst 10% in terms of deprivation in the country.

Two supplementary indices are produced in addition to the 2019 ID; one being Income Deprivation Affecting Children Index (IDACI). Newham ranked 35th in England and 10th in London.

21,538 children (0 to 15 years) in Newham were living in relative low-income families and 17,439 in absolute low income families based on data for 2019/20. 5,846 were aged 0 to 4 years, 7,573 were aged 5 to 10 years, 6,775 aged 11 to 15 years and 25,416 aged 0 to 19 years. 26% of children under the age of 16 years were believed to be living in relative low-income families in Newham (2018/19).

Employment

The use of childcare and particularly fee-paying childcare is strongly linked to work and the ability to pay.

Table 5 shows that of the Newham residents who were economically active in 2021/22, 77.3% were in employment. This is marginally higher than the in employment rate for either London (75.8%) or Great Britain (75.5%). For economically active women in Newham, the in employment rate was lower at 70%. The availability of affordable quality childcare is a barrier to work for women in particular. Unemployment rates in Newham were 4.9%, higher than London at 4.7%, or Great Britain 3.8%.

London's inactivity rate (the measure of those not looking and/or not available to work) was estimated at 20.7% in December 2021⁵. This group includes some students, people who are looking after family/home, and people who are too ill to work (most of whom are long-term sick). This was up 0.4% on the previous year, and is lower than the UK-wide estimate of 21.5%.

More turbulence for employment can be expected given the prospect of a period of economic recession.

Table 5: Newham economic activity 2021-22

Employment and unemployment (Jul 2021-Jun 2022)				
	Newham	Newham	London	Great Britain
	(Numbers)	(%)	(%)	(%)
All People				
Economically Active†	213,200	81.8	79.7	78.6
In Employment†	201,700	77.3	75.8	75.5
Employees†	168,000	64.8	64.3	66
Self Employed†	33,700	12.5	11.3	9.2
Unemployed (Model-Based)§	10,500	4.9	4.7	3.8

Females				
Economically Active†	93,400	75.8	75.4	74.7
In Employment†	86,500	70	71.6	71.9
Employees†	74,400	61.2	62.7	65
Self Employed†	12,100	8.9	8.5	6.6
Unemployed			4.9	3.7

Source: ONS annual population survey

Median earnings for Newham residents

The median full-time weekly income for Newham residents in 2021 was £567.4, lower than the London weekly average of £613.3 but higher than the average for England and Wales of £506.9.⁶

2.1c Ethnic Diversity

Newham is a highly diverse borough. The census 2021 shows that 85.2% of Newham's residents are from a background other than White British. The proportions of Black African, Pakistani, Indian and Bangladeshi residents are higher compared to London, with the Asian broad ethnic group accounting for 42.2% of residents, followed by White 30.8%, Black 17.5%, other ethnic group 4.9% and mixed/multiple ethnic groups 4.7%. The proportions these broad ethnic groups make up in Newham's population are not forecast to change substantially by 2030.

Table 6: Census 2021 Newham Population Ethnic groups

2021 Census Newham Population by Ethnic Group	Population 2021	% of Total Population 2021 Census	% of Total Population 2011 Census	% change between 2011 and 2021
White British	51,819	14.8%	29.0%	1.8%
White Irish	2,039	0.6%		
White Other	54,089	15.4%		
White Sub Total	107,947	30.8%		
White and Black Caribbean	4,253	1.2%	4.5%	0.2%
White and Black African	3,317	0.9%		
White and Asian	3,324	0.9%		
Other Mixed	5,525	1.6%		
Mixed / Multiple ethnicity Sub Total	16,419	4.7%		
Indian	38,642	11.0%	43.5%	-1.3%
Pakistani	31,216	8.9%		
Bangladeshi	55,677	15.9%		
Chinese	6,213	1.8%		
Other Asian	16,439	4.7%		
Asian Total	148,187	42.2%		
Black African	40,874	11.6%	19.6%	-2.1%
Black Caribbean	13,586	3.9%		
Other Black	6,842	1.9%		
Black Total	61,302	17.5%		
Arab	3,534	1.0%	3.5%	1.4%
Other Ethnic Group	13,641	3.9%		
Other Total	17,175	4.9%		
Total All	351,100	100.1%	100%	

The 2021 Census showed that 65.4% of Newham residents speak English as their main language. This is significantly lower than London at 78.4%, or England and Wales at 96.7%.⁷

There is a rich diversity of languages spoken in Newham. In the 2011 Census Newham was the second most linguistically diverse London borough after Hillingdon, with 103 languages recorded. The Newham Household Survey provides an update about languages spoken in the borough. Based on a representative sample of residents, Table 7 shows some changes to the top languages spoken since the 2011 Census, however the top five remain the same, being English, Bengali, Urdu, Gujarati, and Punjabi, Findings from Census 2021 will provide a further update when these are made available.

Table 7

Most Common Languages spoken in Newham			
% of residents surveyed	2013	2015	2017
English	40	39	41
Bengali	13	11	13
Urdu	6	5	6
Guajarati	5	5	5
Punjabi	3	2	3
Hindi	2	3	2
Portuguese	0	2	2
Somali	0	2	2
Polish	2	2	2

source: Newham Household Survey Wave 9 2017

Language can be a barrier to accessing early education and childcare services. Language barriers can result in a lack of awareness of what is available, particularly given the relatively complex entitlement arrangements for funded childcare in England.

In 2011, the proportion of residents in Newham identifying as having no religion was the lowest for any local authority in England & Wales. The Newham Household Panel Survey 2017 reports that a high proportion of residents describe themselves as belonging to a religion (81% compared to 58% in London and 50% in Great Britain).

2.1d Housing and Economic Regeneration

Newham is a multi-centric borough with major town centres located at Stratford in the north-west, and East Ham towards the east, and important district centres at Canning Town to the west, Forest Gate to the north, Green Street towards the centre, and East Beckton to the south-east.

Significant economic regeneration projects will continue to reshape the borough with a large supply of brownfield development to help meet its targets for new housing and economic growth. This is concentrated mainly in the 'Arc of Opportunity'. This area is the primary focus for new job creation, infrastructure development, new town and local centres, and the vast majority of new housing on large sites in Beckton, Canning Town North, Canning Town South, Royal Victoria, Royal Albert and Stratford Olympic Park wards. The revised draft of the London Plan (Dec 2019) published by the London Mayor's office has at target of 522,870 new homes to be completed across London over the next ten years. Newham has the second highest housing target of 32,800 homes.

2.2 Impact on demand – Post COVID-19 Pandemic considerations

The childcare market continues to be in a state of flux. Parental preferences, the external employment market, the internal childcare workforce, and the economy are all highly fluid.

While take up of the funded entitlements in Newham has now recovered to exceed pre pandemic levels, the overall occupancy, taking into account fee-paying places, has not. Newham providers report lower demand overall for full time places, while reporting higher demand for part time and flexible provision. Newham's early education and childcare parent survey 2022 identified the rising importance of costs and flexibility as key factors parents considered when choosing childcare.

There is evidence that changes in working patterns, brought about because of the pandemic are continuing post pandemic. Almost half of working adults were working from home at times during the coronavirus (COVID-19) pandemic. According to the Office for National Statistics – Business Insights and Conditions Survey 2022⁸ in February 2022, 84% of workers who had to work from home because of the coronavirus pandemic said they planned to carry out a mix of working at home and in their place of work in the future.

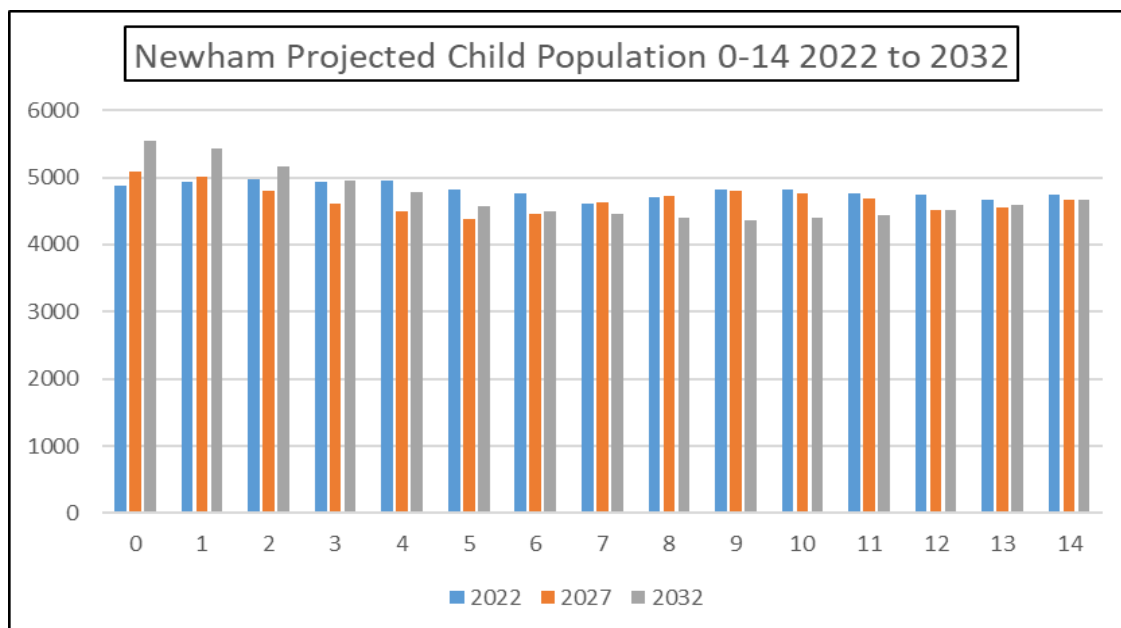
While the proportion of workers who planned to hybrid work at all has not changed much since April 2021, the hybrid working pattern has shifted more in favour of spending most working hours at home. The proportion who planned to return to their place of work permanently fell from 11% in April 2021 to 8% in February 2022. In March 2022, those who reported working from home in some capacity were asked why they had done so. The most common reason given was working from home being part of workers' normal routine (62%), suggesting they have adopted homeworking long-term. The ONS study also found that hybrid and homeworking increased by income bracket.

Working from home is likely to continue to a significant extent into the future. The action plan developed alongside this CSA will identify and track trends and share findings with providers, parents and interested parties.

2.3 Child age profile and geographical distribution

Figure 1 shows the individual year breakdowns by age for Newham over 2022 to 2032. Over the period, there remain more children in the younger age ranges. Relatively small changes in the number of children at each age are projected by 2027, with an increase in younger children being predicted by 2032.

Figure 1

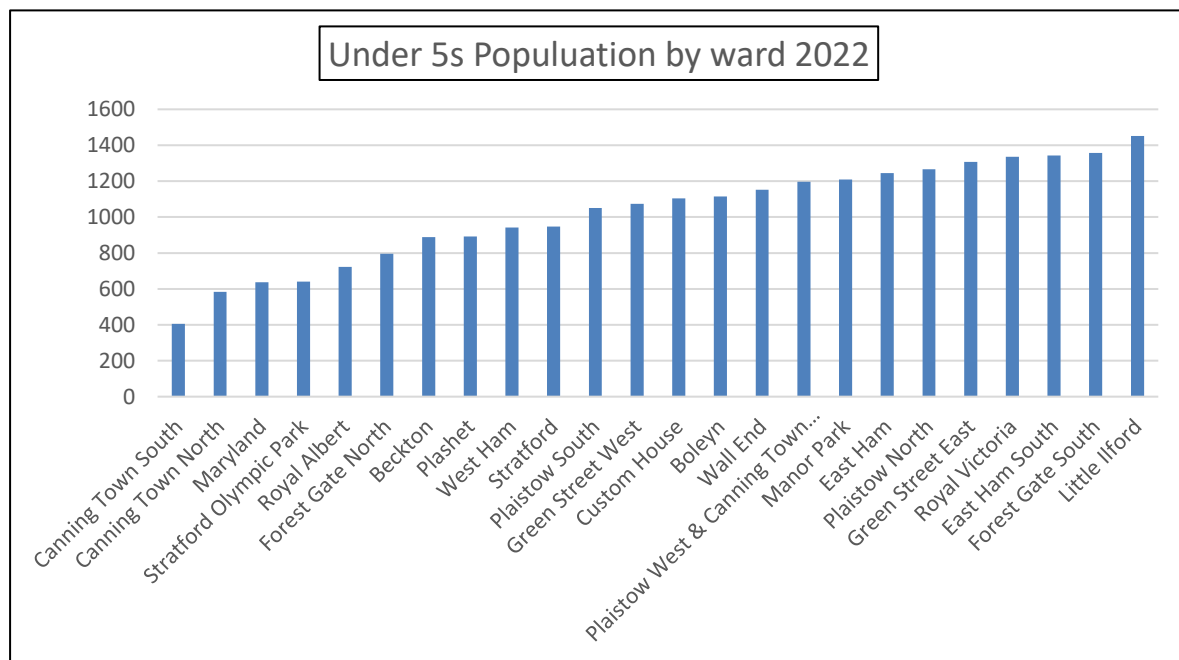


The borough is made up of 24 wards and sufficiency data that follows in this report is supplied at ward level.

The under-five population per ward is shown at Figure 2. The most populated wards are Little Ilford, Forest Gate South, East Ham South, Royal Victoria and Green Street East. There is a wide variation in the number of 0-4 children in each ward. There are more than three times as many 0-4 children in Little Ilford than in Canning Town South, the ward with the least 0-4 children. Other wards with lower numbers are Canning Town North, Maryland and Stratford Olympic Park.

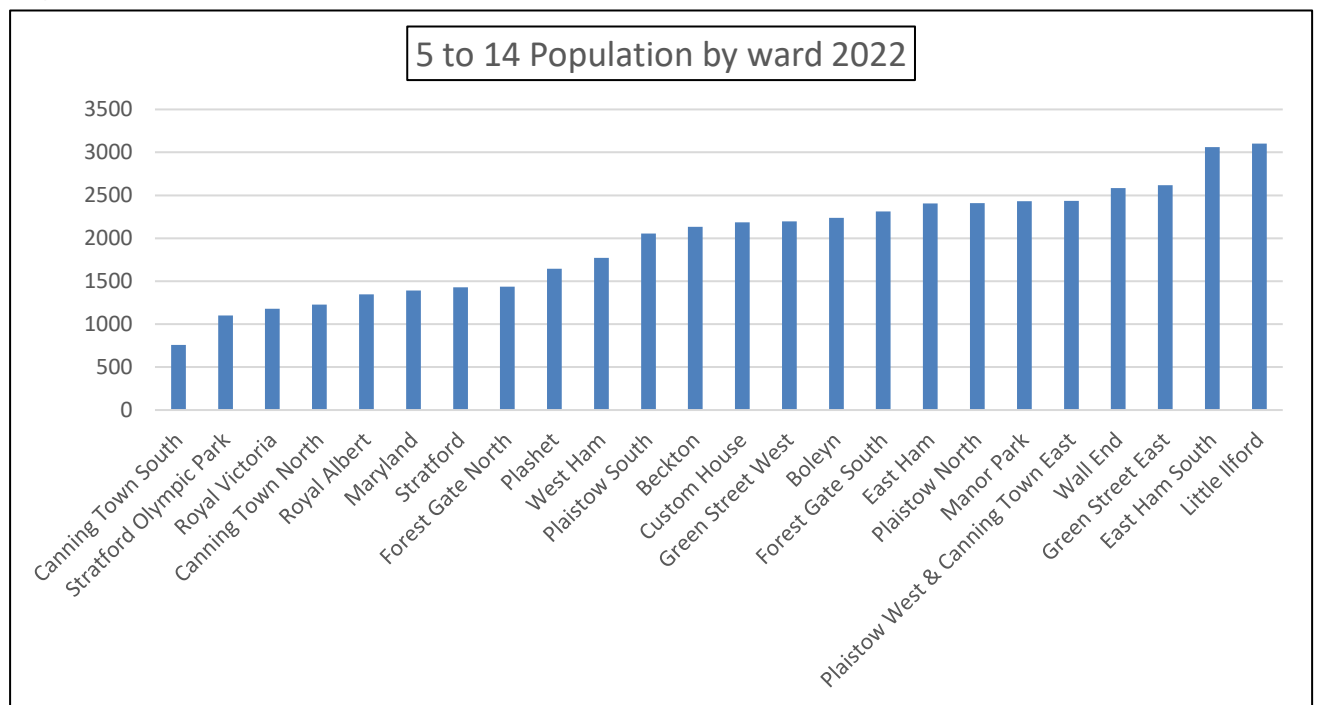
Redevelopment is projected to see significant increases in 0-4 children in Royal Victoria, Stratford and Canning Town North over the next ten years.

Figure 2



The 5 to 14 population per ward is shown at Figure 3. The most populated wards are Little Ilford, East Ham South, Green Street East, Wall End and Plaistow West and Canning Town East. The wards with the lowest numbers are Canning Town South, Stratford Olympic Park, Royal Victoria, Canning Town North and Royal Albert. On-going regeneration in Royal Victoria, Stratford and Canning Town North wards, will see growth in 5 to 14 population in these areas over the next ten years. Most other wards will see a decline.

Figure 3



2.4 Demand for Early Education and Childcare, Families of children with Special Education Needs or Disabilities (SEND)

Estimating the numbers of Newham children with SEND. Children and young people with SEND are entitled to support with childcare up to the age of 18. The number of children with an Education, Health and Care (EHC) plan in our local authority, as reported to the Department for Education in January 2022 is shown in table 8 below. The total number of children with an EHC plan increased by 25.5% to 1,491, with increases across the 0-15 age range.

Table 8 Children with EHC Plans or Statements Newham					
Age	Number of children 2022	Number of children 2021	Number of children 2020	Number of children 2019	Number of children 2018
Under age 5	76	63	37	22	7
Aged 5 to 10	700	521	419	209	144
Aged 11 to 15	664	553	424	285	260
Aged 16 to 19	51	51	334	300	300
TOTAL	1491	1188	1214	816	711

In addition a further 835 children aged 0-4 and 5,836 aged 5-19 were recorded as receiving SEN support but without an EHC plan at census 2022. The most common type of need for those with an EHC plan is Autistic Spectrum condition and for those with SEN support, Speech, Language and Communication needs.

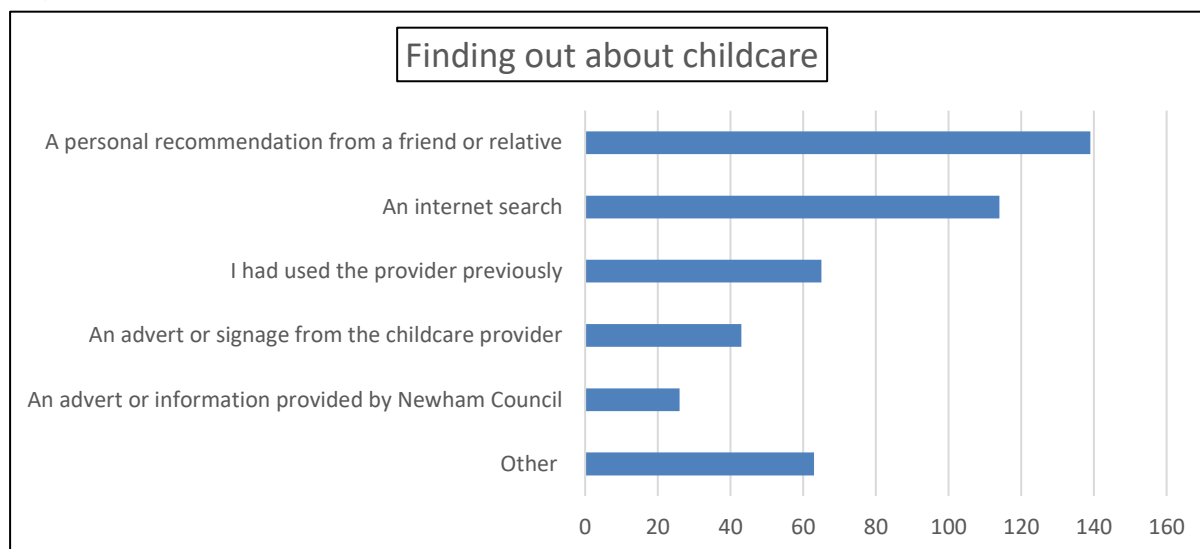
2.5 Parents views on the provision of childcare

Information on parents' views and access to services has been included from a survey of Newham parents, which was conducted in autumn 2022 and received 897 responses.⁹ This is the highest ever response to our annual parent survey. This is supplemented by findings from the most recent DfE national parent survey July 2022.¹⁰

2.5a Finding out about Childcare

In Newham, parents were asked what method they used to find out about childcare. The most common methods identified are shown in figure 4. Personal recommendations remain very important for parents looking to place their child with a setting. The internet and the use of social media is often an important first step for parents looking to identify their options. Previous experience of a childcare provider is also an important factor. Parents use a range of information sources during the process of finding out about and choosing the childcare that will meet their needs.

Figure 4



Similarly, the Department for Education survey identifies informal social networks, such as friends or relatives and other parents as the most used source of information about formal childcare. “Word of mouth was relied on by many parents as a trusted source of information about childcare – both for nurseries and childminders. The views and experiences of friends who were parents too and had gone through finding and using childcare were seen as a trusted source of information. Drawing on several sources in addition to word of mouth was also common. For example, the internet was widely used as an additional source, including general websites about childcare providers, a specific provider’s own website, and Ofsted reviews of local nurseries.

On the internet, again, the views of other parents were drawn upon, for example through reading reviews of nurseries on Google. These, however, were generally interpreted with a level of caution in case one particular parent left a negative review among overall many positive reviews.

Those keen to gather more information made use of open days and drop-in visits to nurseries to perceive the look and feel of some of the places they had seen online. This was true for parents who were more sceptical of online reviews and Ofsted reports.”

Some parents treated these reports as more of an indication and were wary that one good report did not necessarily translate into assurance for good quality.

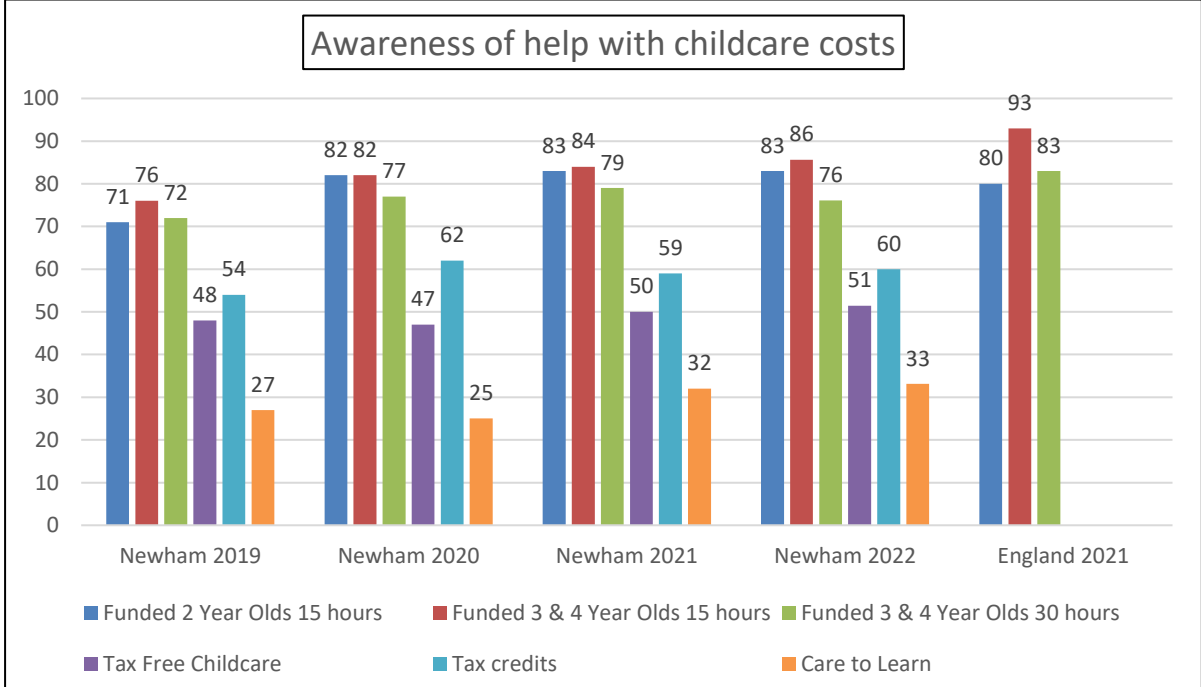
2.5b Awareness of help with Childcare Costs

Previous parent surveys carried out in Newham have highlighted that there was comparatively low awareness of the range of financial help available to help with costs. The Local Authority has put in a range of initiatives to raise awareness. The latest Newham parent survey asked parents about their awareness of specific free and subsidised childcare schemes and the findings show that awareness continues to improve overall as is demonstrated in Figure 5.

In 2022, 83% of Newham’s survey responders were aware of the two year old scheme, higher than was recorded nationally in 2021. 86% of Newham families were also aware of the universal offer for three and four year olds and 76% were aware of the 30 hours scheme for working families with three and four year olds. Awareness of these schemes has improved over time in Newham but are lower than the national awareness recorded in 2021.

Awareness remains lower with regard to childcare subsidy schemes, with 60% being aware of childcare element of universal tax credits, 51% were aware of tax-free childcare and 32% aware of the care to learn programme. In March 2022, around three quarters of the 1.3 million families eligible nationally for tax-free childcare were not claiming it. It should be borne in mind that parents completing the Newham survey were self-selecting and parents where English language is not strong would be less likely to have participated in the survey.

Figure 5



2.5c Reasons for choosing childcare

In Newham, parents were asked to identify and rank the factors they took into account when choosing childcare. The most important factors identified in order are shown below.

Factors in choosing childcare in Newham in order of importance

- The location is convenient for home or work
- The provider has a good reputation / Ofsted grade
- The cost / affordability of care
- The provider is able to offer the hours and weeks I need
- The provider can be flexible in changing the hours I use
- I have used or know the provider

- My child's siblings or friends attend the same provider
- I have confidence in the Covid-19 safety measures in place
- The provider offers a specialist service

An earlier DfE national survey found that provider's convenience (62%) and reputation (57%) were the strongest factors overall in choosing childcare, followed by the quality of the care given (51%) the opportunity for the child to mix with other children (51%) and financial considerations (41%).

There are differences between parents who choose different types of formal childcare. For parents choosing childminders for example, the factors of quality of care and trust are most significant, while for parents choosing day nursery and play groups the opportunity to mix is important.

While the Newham and DfE surveys are not directly comparable, there are similarities with the findings. The Newham survey is more recent and highlights factors likely to have been given new prominence to costs and flexibility because of post COVID working patterns and the cost of living crisis.

2.5d Use of childcare

Overall, in 2021, almost three in five (57%) children in England aged 0 to 14 had used some form of childcare (such as nurseries, childminders, breakfast clubs, after-school clubs, grandparents). Formal childcare was used by just over two in five (44%). This is a fall from 52% in 2018. The decline in the use of childcare may be due to COVID-19 impacts. For example, 26% of parents of 0-14-year-olds said that they did not use formal childcare because they rarely needed to be away from their child, a marked increase from 11% in 2018.

For children aged 0 to 4 years, a higher proportion (68%) had accessed childcare than among older age groups (57% among all children aged 0 to 14 years). This is a fall from 76% among 0 to 4 year olds in 2019 and the lowest percentage since 2010-2011. Again, these data should be viewed with caution in light of potential COVID-19 influences.

Around seven in ten (71%) mothers with children aged 0 to 14 were in work in 2021, in line with 70% in 2018. Working mothers reported that factors which helped them go out to work included having children at school (44%, up from 40% in 2018) and having reliable childcare (42%, in line with 44% in 2018).

In the Newham parent survey of autumn 2022, 47% of responders with children 0-14 had used childcare in the last 12 months, matching the take up rate recorded in the CSA 2021 and lower than the 51% reported in the previous year.

Informal childcare is an increasingly important part of the mix for surveyed parents with a significant portion of parents identifying friends, family or baby sitters as one of the childcare options they use. Those using informal childcare equated to 30% of responders in 2022, similar to 2021 but significantly up from the 20% recorded in 2020. This change which started in the pandemic seems to be continuing and may be the result of changes in working patterns and cost of living pressures on families.

In Newham, the majority of families surveyed said that they use childcare in order to work (79%), many recorded that they use childcare for their child's learning and development (46%) or to help with socialisation (39%).

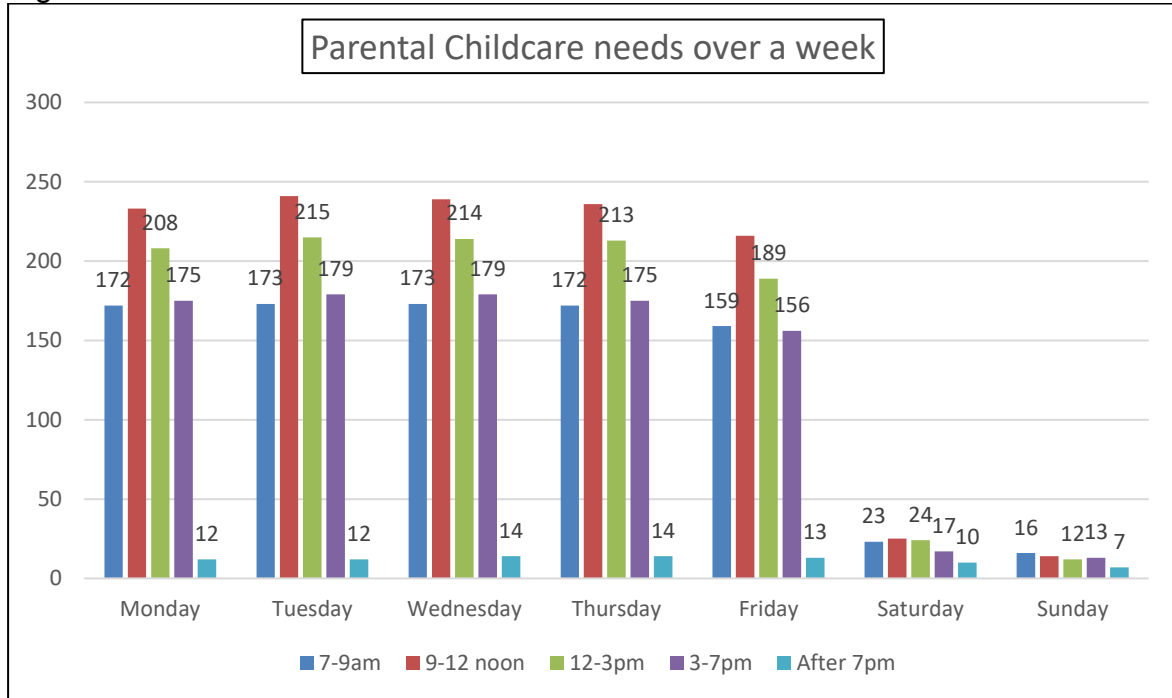
Newham parents were asked if they were able to access early year's registered good or outstanding childcare. The vast majority of responding parents indicated that they had been able to access good or outstanding provision (88%), but this is down from 2021(95%). A lower proportion of parents recorded that they had been able to access Ofsted registered out of school care services (77%), the same as in 2021.

Over three quarters of responding parents said that they were able to access the hours that fully met their needs from their childcare provider (78%), this represents an improvement against 2021 (74%). Over eight in ten of responding parents said that they had been able to receive childcare services from their preferred provider but this was also a small decline (82% down from 83% in 2021). With regard to affordability a narrow majority of parents said they had been able to access childcare priced within their budget (54% down from 55% in the CSA 2021), leaving a significant minority where affordability was an issue.

Over eight in ten (81%) of responders to Newham's survey 2022 say they are satisfied with their childcare arrangements overall. This is the same as recorded in the CSA survey 2021.

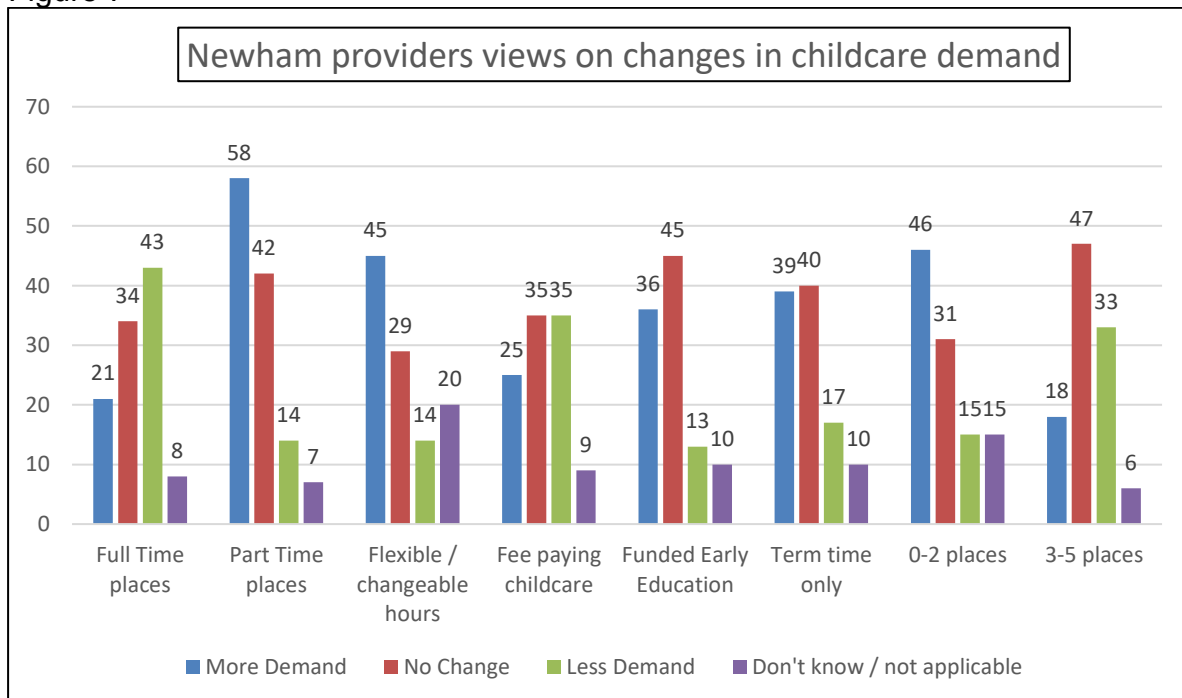
Newham parents were asked about their need for childcare places across an average week, figure 6 shows that highest demand for places was between Tuesday and Thursday, with a small decline on Monday and Friday. Demand for childcare is highest between 9am and 3pm, but is also significant between 7-9am and 3-7pm. There is also some limited demand for childcare in the evenings and at weekends based on this sample.

Figure 6



Newham childcare providers were surveyed about changes in childcare demand in autumn 2022, compared to autumn 2021. Figure 7 shows that for many providers there is more demand for part time places, for more flexible hours, children aged 0-2 and funded early education. Many providers have seen a drop in demand for full time places.

Figure 7



2.5e Factors influencing the take up of formal childcare

The DfE national parent survey 2019 found the following characteristics associated with children in receipt of formal childcare:

The child's age: children aged 3 and 4 were most likely to receive formal childcare (84% and 93% respectively) while children aged 0 and 1 were least likely to (11% and 36% respectively)

The deprivation level of the local area: 74% of children living in the least deprived areas received formal childcare, compared to 57% of children living in the most deprived areas

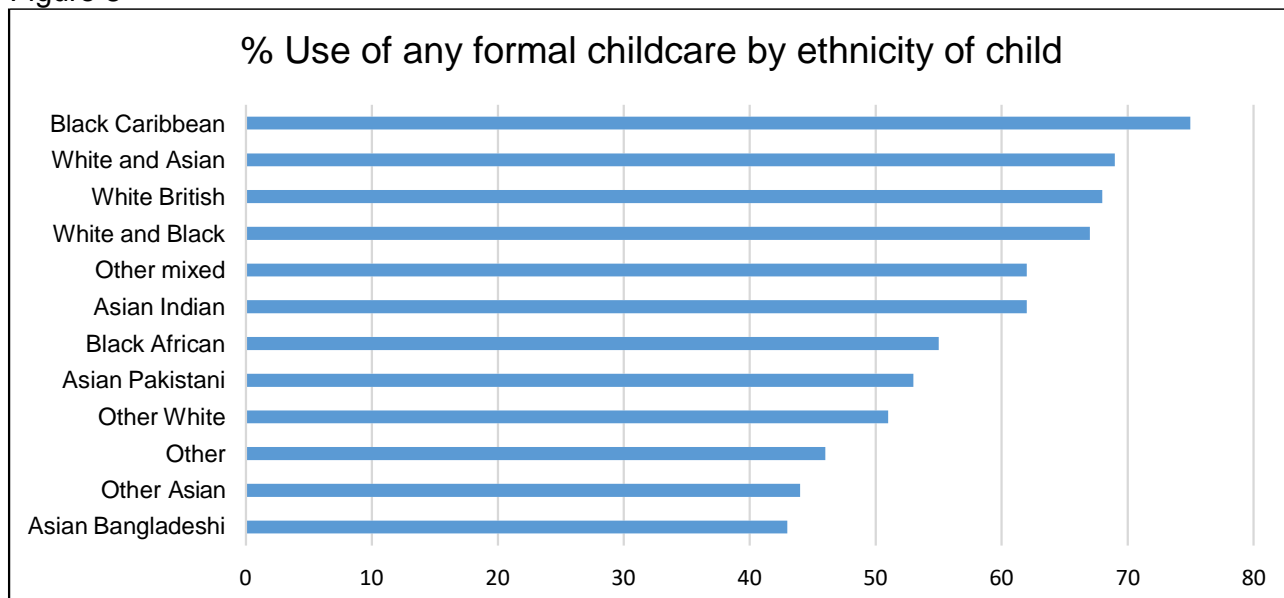
The family's (gross) annual income: 76% of children in families earning £45,000 or more received formal childcare, compared to 52% of those earning under £10,000

The family structure and work status: children in working lone-parent families (76%) and in dual-working couple families (73%) were most likely to receive formal childcare. Children in couple families with one parent in work (48%) and in couple families with neither parent in work (47%) were least likely to receive formal childcare.

A study of the take up of free early education entitlements identifies ethnicity and language as a contributing factors driving take up levels.¹¹ "Take-up was found to be lower among children from Bangladeshi, Gypsy/Roma/Traveller, Black African and Pakistani backgrounds in a study of take up among 3 year olds in 2010 (Campbell et al, 2018). Children who speak English as an additional language were found to be nearly three times as likely not to take up their full five terms of eligible preschool compared to children with English as their first language, in a study of 3 year olds (Campbell et al, 2018). These are important considerations in Newham where 45.4% of the population is Asian and the percentage of adults who speak English at home is 63% in 2018. The most common stated first languages in Newham are English (41%), Bengali (13%), Urdu (6%), Gujarati (5%), Punjabi (3%), Hindi (2%), Portuguese (2%), Somali (2%) and Polish (2%).

There are also differences in the take-up of all formal childcare according to ethnic background with highest rates among Black Caribbean, White and Asian, White British and mixed White and Black children, and lowest among children from Bangladeshi, other Asian and other backgrounds, identified by the national Childcare and Early Years Survey of Parents 2019 and illustrated in Figure 8.

Figure 8



Nationally children with special educational needs are less likely than those without to receive formal childcare (45% compared to 52%)¹². In a national study¹³, parents of children with SEND wanted to send their child to a provider that catered to their child's needs and identified reasons for not taking up the free entitlement as lack of awareness, inability to set up an EHC plan in time and having workplace childcare options instead. The same study summarises that lower take up of the free entitlements at local authority level is associated in particular with English as an additional language, population mobility and higher SEND levels.

A Newham survey asking families with SEND children to comment on their experiences of accessing funded early education was run in autumn 2022. The number of responses (14) was too low to draw firm conclusions. All those responders who were accessing funded entitlements stated they were satisfied with their funded early education arrangements, three parents reported that they were unaware of the funded entitlements.

3 Supply of services for under-fives

3.1 Types of registered provision

- The childcare market relies upon a diverse range of providers from the private, voluntary, independent (PVI) and maintained sectors.
- Day 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. Where maintained nursery schools or schools operate a full day care service these have been included in this category.
- Pre-schools 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.
- 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.
- 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.
- Where the term group care is used in this report, it describes the combination of day nursery, pre-schools and out of school provision. Where the term full time equivalent is used in this report, it relates to a place offered over fifty hours in a week.

3.2 Ongoing impact of Covid-19 Pandemic and the cost of living crisis on the supply of childcare in Newham

Covid-19 and the ongoing cost of living crisis has caused significant new challenges for many childcare providers. These include:

- Lower overall demand than pre pandemic for most, with some of those offering fee-paying places seeing a significant fall in income.
- Higher operating costs, in particular relating to staff and energy
- Managing cash flow and need to apply for government support schemes to remain sustainable
- Recruitment and retention of staff
- Managing and supporting parent and staff relationships in a period of change
- Maintaining quality and consistency of provision for children, in the context of the challenges identified.
- Tracking and adapting to new parental needs and preferences.

- Identifying and attracting new families to take up childcare

Although the overall number of childcare places has increased in Newham, there is a higher level of change in the market than has historically been the case. In 2022, six nurseries and pre-schools have permanently closed and one is temporarily closed. There are also eight new nurseries and pre-schools that have identified business opportunities and opened in the period. The furlough scheme, early education funding arrangements, rates relief and other Newham and Government support have contributed to many providers remaining sustainable.

Based on Newham’s provider survey the level of provider concern remains high for some. While the majority of providers responding to our survey were confident about the sustainability of their childcare business, a significant minority were not confident. This is more fully explored in the business challenges section at 4.13. To flourish in the longer term childcare providers will need to be agile and be willing to adapt to changing needs and preferences of parents. The Local Authority can play its part by offering information and support to help good quality proactive providers adapt.

3.3 Overall number of places available for under-fives

Table 9 Number of registered places available for under-fives in Newham 2022						
Type of Registered Provider	Newham Places 2018	Newham Places 2019	Newham Places 2020	Newham Places 2021	Newham Places 2022	% Change since 2020
Day care	3661	3577	3886	4220	4360	3.3
Out of School Clubs	281	364	314	322	295	-8.4
Pre School	352	322	218	199	216	8.5
Childminder / childcare on domestic premises	560	622	605	515	457	-11.3
Total	4854	4885	5023	5256	5328	1.4

The total registered places available for under-fives in autumn 2022 stands at 5,328, as shown in Table 9¹⁴. This is a marginal increase of 1.4% compared to 2021. Underneath the headline figure there continues to be a reduction in child minder places and there has also been a reduction in registered out of school places. This is counteracted by an increase in day care places that are now available. The drop in childminder places aligns with the national picture where Ofsted report that a drop of 4,060 registered childminders in 2022.

The number of registered places represents the maximum number of children who can attend at one time. The table records places for children who are attending full time, or for as many hours as the setting is open. Any Ofsted rated “inadequate” or “not met” providers have been excluded from the number of available places shown.

In addition to the above, most primary schools and all nursery schools in Newham

offer part time funded early education places for children aged three and four and in some cases at age two. Places available in these settings across Newham are shown in Table 10.

Table 10 Funded Places in Schools and Nursery Schools 2022		
Type of Provider	Number of providers	Number of places
Nursery units in primary schools	60	4,226
Maintained nursery schools	7	1,290
Total	67	5,516

Overall places across all providers, including both full time and part time, now total 10,844.

3.4 Number of places available in each ward for under-fives

3.4a Group Care places available in each ward

Figure 9

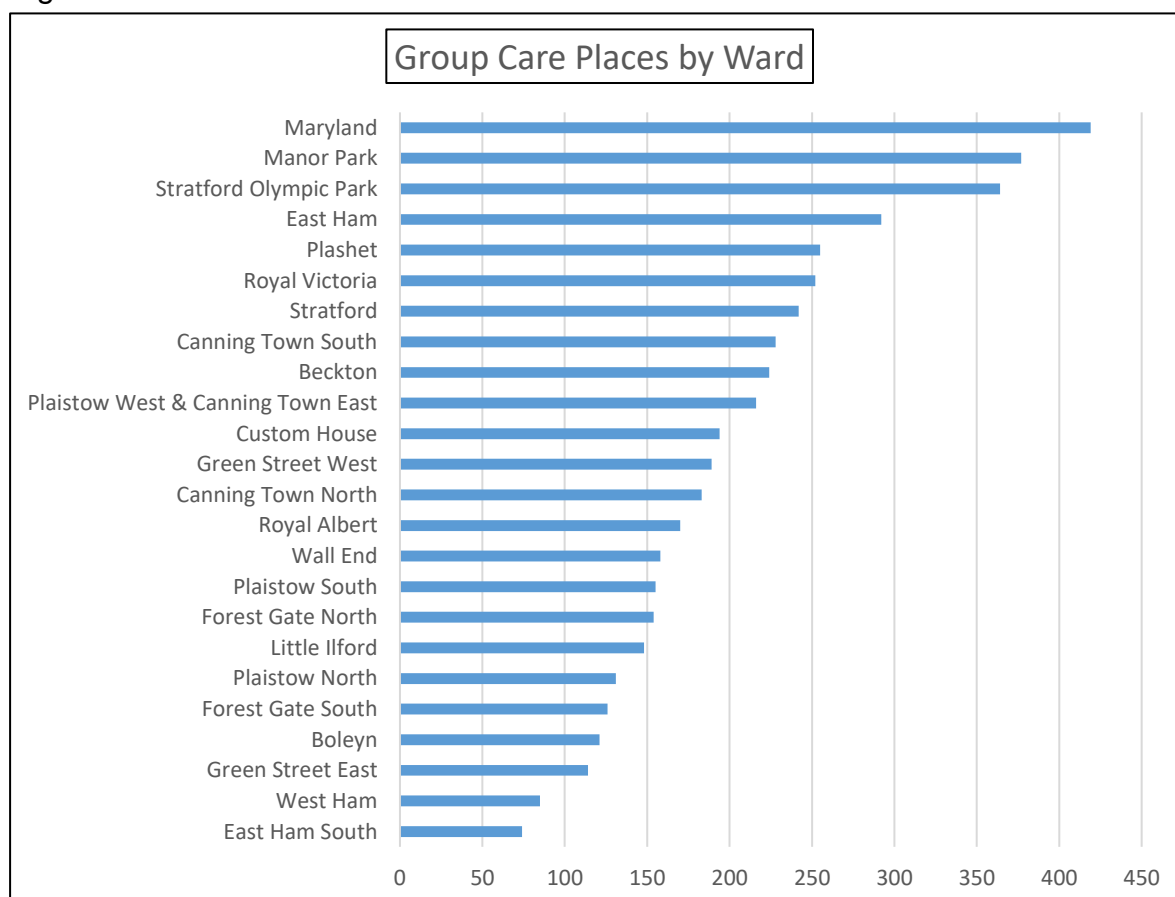


Figure 9 illustrates the distribution of group care places in the borough. It shows that the lowest number of places are in the wards of East Ham South (74), West

Ham (85) and Green Street East (114) and Boleyn (121). Maryland (419), Manor Park (377) and Stratford Olympic Park (364) have significantly more places than the borough average of 202 places per ward.

3.4b Childminder places available in each ward

Figure 10

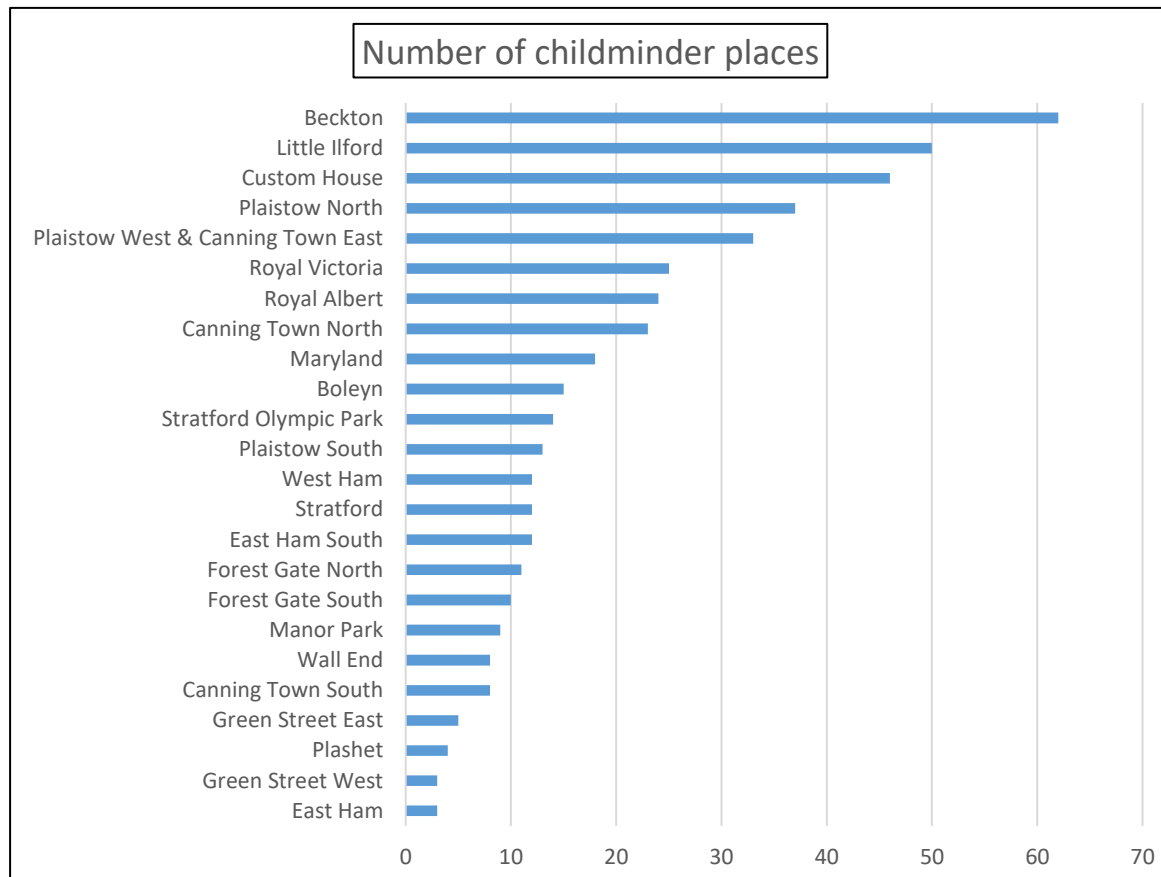


Figure 10 shows the distribution of childminder places. There are 5 or less places available in East Ham (3), Green Street West (3), Plashet (4) and Green Street East (5), Beckton has more places than any other ward at 62, significantly more than the borough average per ward of 19.

3.4c Combined places by ward.

Figure 11

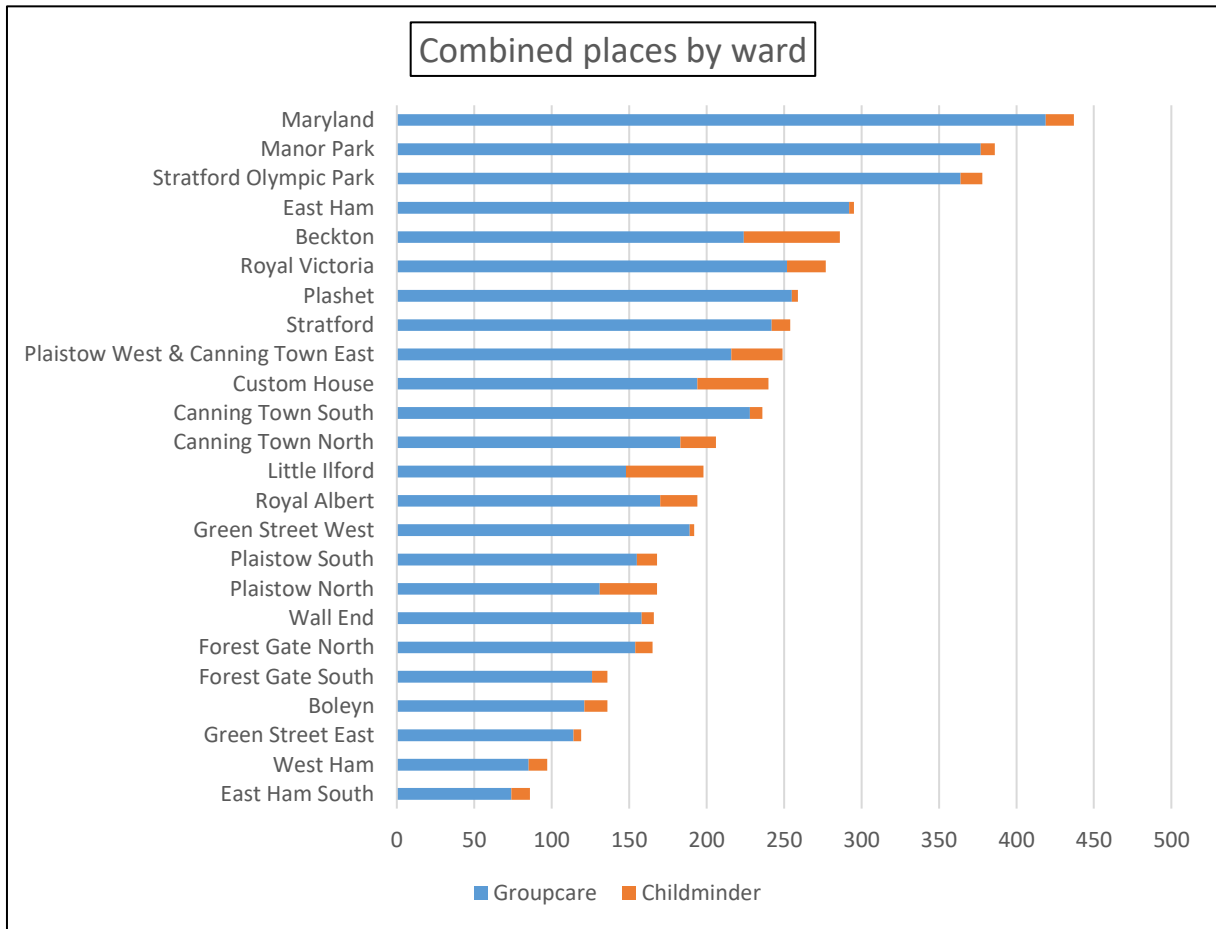


Figure 11 illustrates the overall distribution of under-five places across the borough. Two of the wards with the least places (East Ham South and Boleyn) have benefitted from new settings opening over the last year, reducing the place gap to wards benefitting from more place availability. The wards with 150 or less places are East Ham South (86), West Ham (97), Green Street East (119), Boleyn (136) and Forest Gate South (136). Maryland has the highest number of places (437), compared to the ward average of 222.

3.5 Number of places available per child in each ward

3.5a Overall place availability per child in each ward

Figure 12

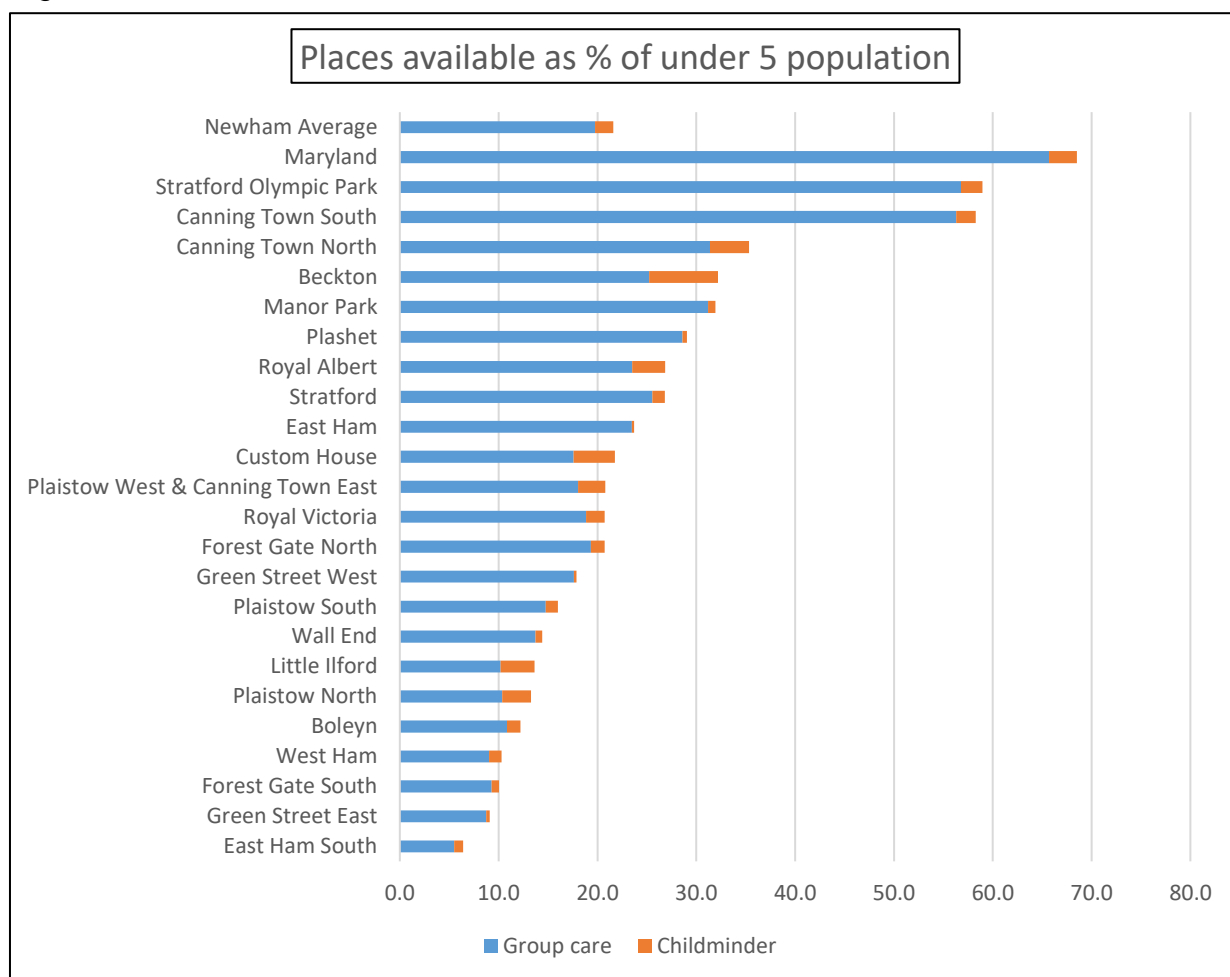


Figure 12 shows the number of all places as a percentage of the resident under-five population in each ward. The ward distribution of all places shown above translates to an average of 1 full time equivalent place for every 5 children in the age range across the borough, more precisely in 2022 this equates to 22% of under-five population overall. It should be noted that many children access part time places in early years so that, for example, 1 full time equivalent place may be occupied by up to children attending on a part time basis.

The variation in the number of places available per resident under-five in each ward has narrowed, with new places being created in some of the wards with least provision. There remains a significant variation, as illustrated in Table 11 where East Ham South has 1 full time place for every 17 resident child and Maryland has 1 place for every 2 children. The wards with the least places per resident child are congregated around the centre of the Borough and are East Ham South, Green Street East, Forest Gate South, West Ham and Boleyn.

The wards with the most places per resident child are Maryland, Stratford Olympic Park Canning Town South, Canning Town North and Beckton.

Table 11 Under 5s Full Time Places		
Rank	Wards are ranked by total registered places per resident child in each ward - rank 1 has the least places, 24 the most	
1	East Ham South	1 full time place for every 17 resident children
2	Green Street East	1 full time place for every 16 resident children
3	Forest Gate South	1 full time place for every 11 resident children
4	West Ham	1 full time place for every 10 resident children
5	Boleyn	1 full time place for every 9 resident children
6	Plaistow North	1 full time place for every 8 resident children
7	Little Ilford	1 full time place for every 8 resident children
8	Wall End	1 full time place for every 7 resident children
9	Plaistow South	1 full time place for every 7 resident children
10	Green Street West	1 full time place for every 6 resident children
11	Forest Gate North	1 full time place for every 5 resident children
12	Royal Victoria	1 full time place for every 5 resident children
13	Plaistow West & Canning Town East	1 full time place for every 5 resident children
14	Custom House	1 full time place for every 5 resident children
15	East Ham	1 full time place for every 5 resident children
16	Stratford	1 full time place for every 4 resident children
17	Royal Albert	1 full time place for every 4 resident children
18	Plashet	1 full time place for every 4 resident children
19	Manor Park	1 full time place for every 4 resident children
20	Beckton	1 full time place for every 4 resident children
21	Canning Town North	1 full time place for every 3 resident children
22	Canning Town South	1 full time place for every 2 resident children
23	Stratford Olympic Park	1 full time place for every 2 resident children
24	Maryland	1 full time place for every 2 resident children
	Newham Average	1 full time place for every 5 resident children

Some wards with lower places per child resident are next to others that have high numbers, which can then serve their population needs. For example, Royal Victoria (ranked 12 above) has boundaries with other better served wards of Canning Town South (ranked 22) Royal Albert (17) and Custom House (14).

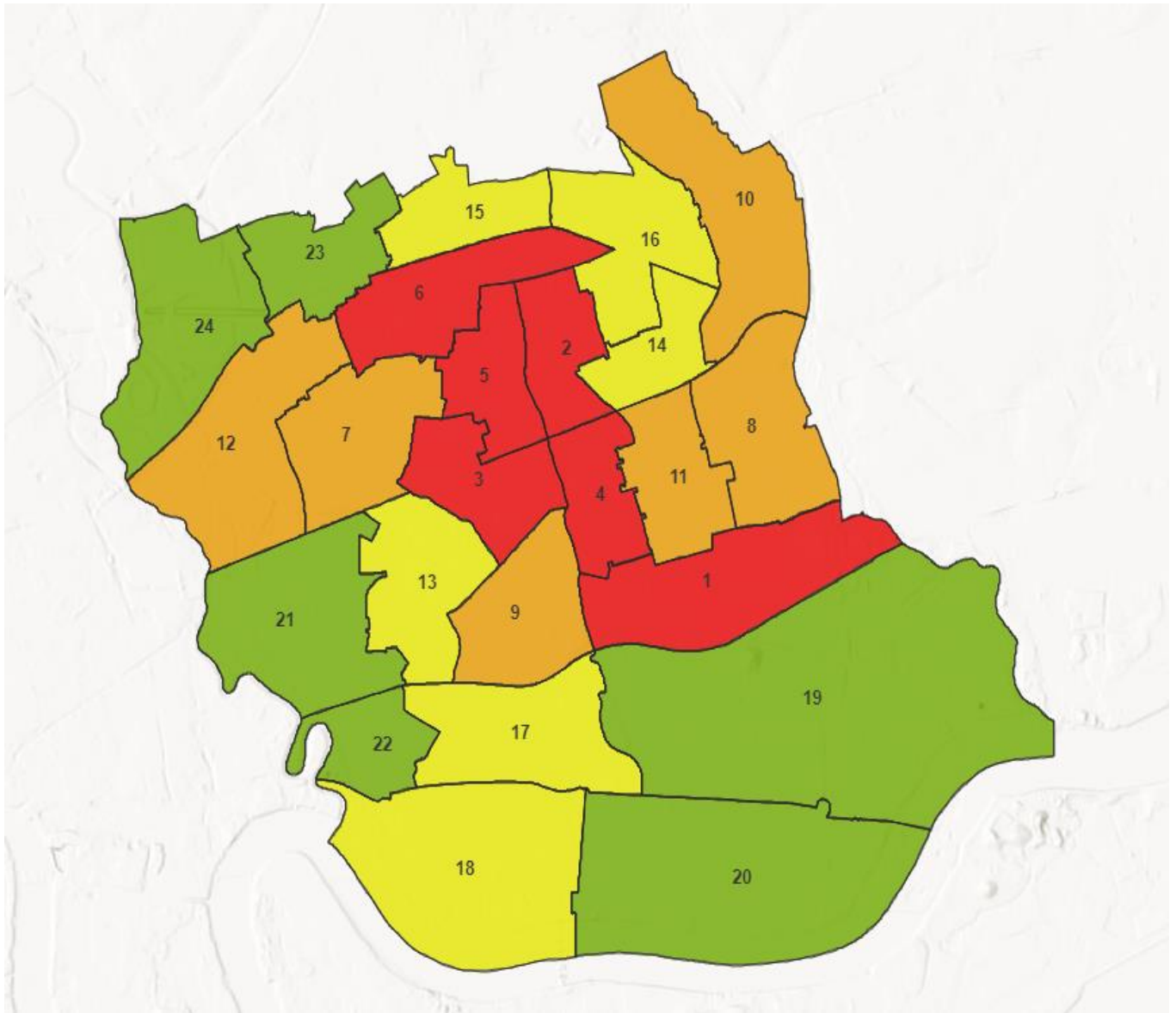
On the other hand, Plashet (ranked 18 above) has boundaries with lower ranked wards of Green Street East (2), Boleyn (5), Little Ilford (7), Wall End (8) as well as Manor Park (19).

A weighted analysis which reflects equally both the places per resident population in a ward and those of other wards with an adjoining boundary produces a slightly different ward ranking, with the majority of those wards with least provision per child clustered in the centre of the borough. The biggest movers using this analysis are Royal Victoria (improving from a rank of 12 to 18), Green Street West (deteriorating from a rank of 10 to 5) and Plashet (deteriorating from a rank of 18 to 14). The ward with the least places per resident child remains as East Ham South and Green Street East stays as

second. This revised ranking is set out in Table 12 with the geographical distribution shown in Map 3.

It should be noted that because the Stratford area is a major transport hub and employment centre, it is likely that this increases the demand for places in the wards of Stratford, Stratford Olympic Park and Maryland.

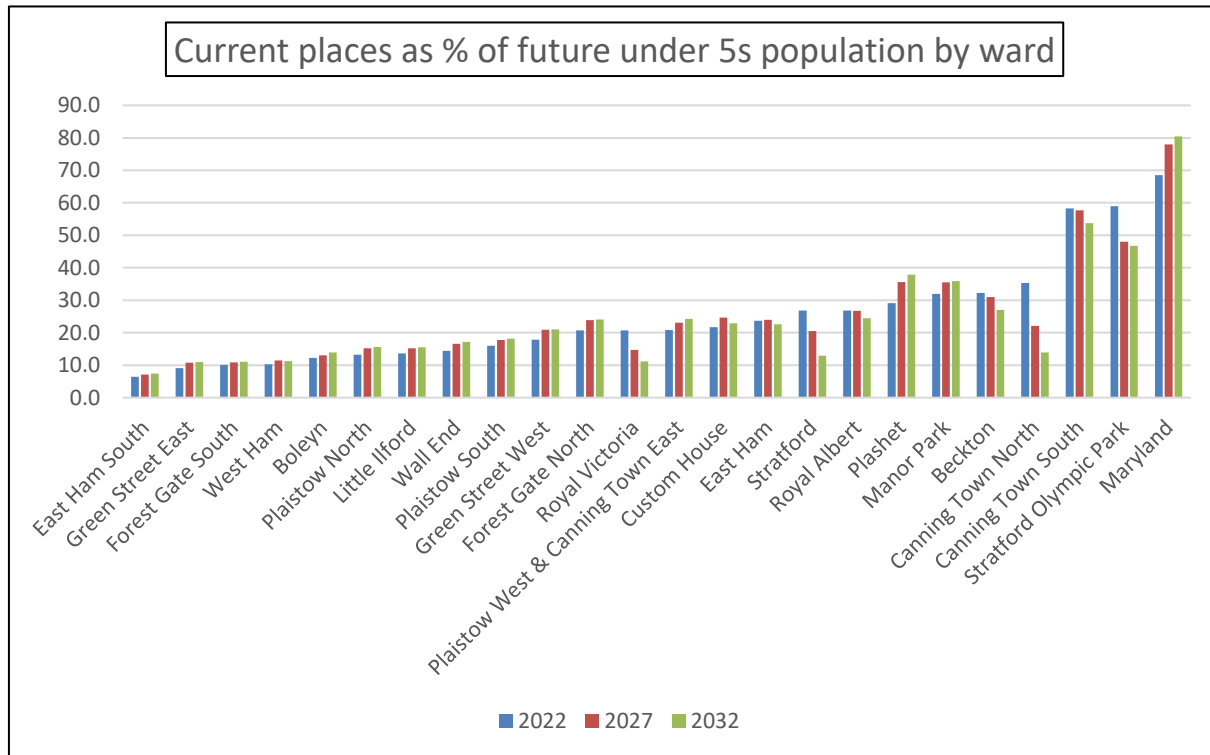
Table 12 Under 5s Adjusted Ward Rank	
Wards are ranked to reflect places per child in resident ward and in adjoining wards	
1	East Ham South
2	Green Street East
3	Plaistow North
4	Boleyn
5	Green Street West
6	Forest Gate South
7	West Ham
8	Wall End
9	Plaistow South
10	Little Ilford
11	East Ham
12	Stratford
13	Plaistow West & Canning Town East
14	Plashet
15	Forest Gate North
16	Manor Park
17	Custom House
18	Royal Victoria
19	Beckton
20	Royal Albert
21	Canning Town North
22	Canning Town South
23	Maryland
24	Stratford Olympic Park



3.6 Future Child Population Projections

Figure 13 shows the impact of predicted population changes on future sufficiency for under fives at ward level, assuming existing numbers of places available stays the same.

Figure 13



Overall Newham’s under-fives population is predicted to see a decline of 2.7% by 2027 but then increase by 4.9% by 2032. Using ward level population projections the wards with the least places per resident child in 2032 will be East Ham South, Green Street East, Forest Gate South and West Ham. The biggest change in place availability relate to Canning Town North which reduces the places available per resident child from the current 35% to 14% by 2032, Stratford which reduces the places available per resident child from the current 27% to 14% by 2032 and Stratford Olympic Park which reduces from the current 59% to 47%. Maryland is predicted to have falling child population and on this basis would increase the number of places available per resident child in the ward from the current 68% to 80% by 2032, assuming the number of childcare places remained the same.

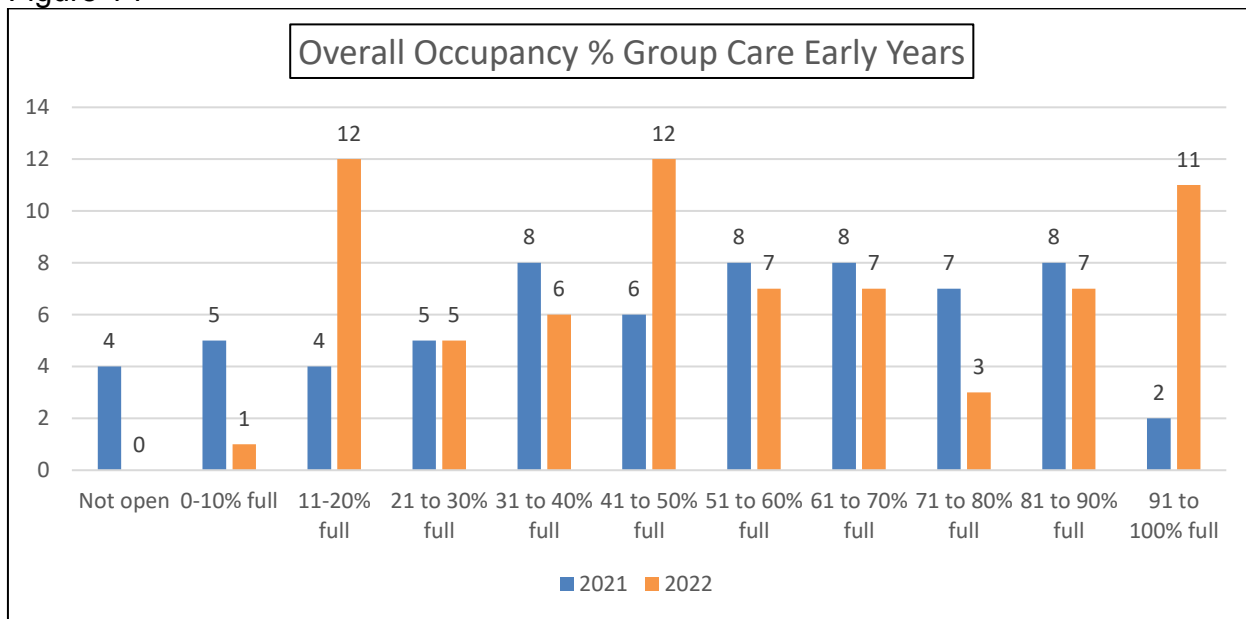
3.7 Occupancy levels in Newham

Group care providers and childminders were asked about overall occupancy levels in autumn 2021 and autumn 2022. Occupancy is a key driver in supporting sustainability. A CEEDA study on the cost of childcare in Newham identifies that occupancy is a major factor driving unit costs, as occupancy increases fixed costs such as rent, rates, utilities and management time are spread across more children, thus lowering the cost per hour delivered ¹⁵.

3.7a Group care place occupancy

There is a wide range of occupancy levels reported by providers with average occupancy of survey responders in autumn 2022 standing at 53%. This represents a marginal improvement against the 51% average occupancy reported for autumn 2021. The number of providers reporting very low occupancy of under 20% increased from nine in Autumn 21 to thirteen in Autumn 22, indicating that some settings are struggling, while others are recovering well. Average occupancy remains significantly below the 61% recorded in the CSA 2019 (pre-Covid), as a result of lower fee paying place take up.

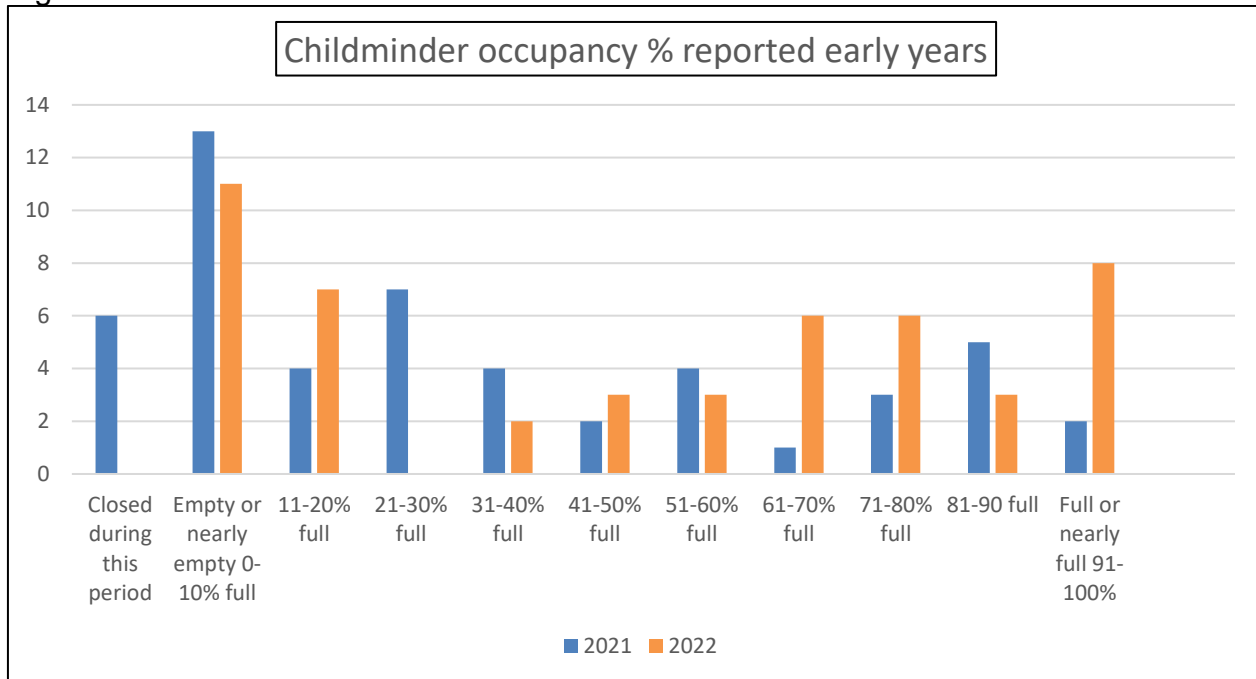
Figure 14



3.7b Childminder place occupancy

The average occupancy of childminder survey responders in autumn 2022 was 49%. This represents a recovery from the average 37% recorded in autumn 2021, when an additional six childminders reported they were not open. In autumn 2021 and autumn 2022, there is a significant proportion of childminders with very few children as is illustrated in Figure 15. The average occupancy rate recorded pre Covid, in the CSA 2019 was 45%.

Figure 15



3.8 Supply of services to children with Special Educational Needs or Disabilities

Children’s needs may be identified at birth or over time as they grow and develop. Provision for SEND children is provided by mainstream childcare settings and through a number of specialist services provided by both maintained and voluntary organisations.

Where needs are identified at birth, Health professionals have access to the early notification process so they can inform the LA and support can be provided for the child and family and in 2021/22, 400 notifications were received from Health.

Where needs are identified whilst a child is in an early education setting (private voluntary and independent nurseries (PVI), child minders (CM) or early years in schools, the setting will also use the early notification process. The SEND code of Practice (DfE, 2015:89) requires the LA to support early year’s providers and childminders in the borough to identify, plan and support provision and practice for children with SEND or potential SEND, so that they may reach their potential.

In 2021/22, 563 notifications were received from across the education sector. Where children attend a PVI or CM setting, they have access to the Area SENCO team who will develop teaching strategies and guide the setting through the process to access additional funding. In 2021/22, 303 referrals were made into the area SENCO team following an EN. 53 children were found an early years places following 2 year old discretionary funding being provided. 222 received support and 29 children received direct speech and language support. The targeted interventions provided by the setting are recorded on the Early Years support plan (EYSP) and the costed provision map details how funding

requested will be spent. Only a few children, will need to apply for a statutory needs assessment, which may or may not lead to an Education and Health Care plan being issued and the Area SENCO team will provide this support.

During 2021/22 the number of commissioned assessment places increased from 65 to 82, informed by the data from early notification. The nursery are required to identify children who require an EHCP and commence the statutory needs assessment process. The conversion rate is usually 10% of children moving from an assessment place to a statutory plan.

Early year's transition funding for 61 children, previously funded at assessment place funding/specialist funding was put into place. Schools will then need to start the EHC needs assessment process before the summer term for funding to continue.

The SEND profile for the 82 Assessment places are as follows: 16% have an autism diagnosis, 62% are on the social communication pathway awaiting diagnosis, 6% have a SLC need, and 13% have more complex SEND.

In 2021/22 of the 1,014 EN made, 76 children were referred into CNDS and 246 into LCIS. These figures in early years reflect the fact that Newham has a higher number of children with complex needs (1.9%) or who are on the autistic spectrum (18.7%), than national average (0.8% & 12.5% respectively).

3.9 Quality of early education and childcare in Newham

Ofsted inspection grades

All childcare providers open and offering childcare for two hours or more a day must register with and be inspected by Ofsted, who give them an overall grade for the quality of their provision. The Education Inspection Framework (2022) sets out Ofsted's principles and the main judgements that inspectors are required to make.

Inspection provides assurance to the public and to Government that minimum standards of education, skills and childcare are being met; that – where relevant – public money is being spent well; and that arrangements for safeguarding are effective.

The Education Inspection Framework

<http://www.gov.uk/government/publications/education-inspection-framework> sets out the principles and criteria for the inspection under these 4 headings

- quality of education
- behaviour and attitudes
- personal development
- leadership and management

There are four possible Ofsted grades: 'outstanding', 'good', 'requires improvement', and 'inadequate'. Ofsted have now moved to a six-year cycle, for all early year's providers, prioritising

settings graded less than good.

Ofsted is the sole arbiter of quality; however, Newham is committed to ensuring the highest possible quality of early education and childcare. There is evidence that high quality provision has a significant and sustained positive affect on outcomes for children. To this end, strategies are in place to support new settings, and those inspected as 'Requires Improvement', or 'Inadequate', to support them to achieve a Good or Outstanding Ofsted outcome. We also continue to provide universal support to all settings to ensure we continue to raise our Ofsted profile. A system leadership approach has been implemented to ensure Providers are resilient in collectively sharing and developing good practice through neighborhood networks.

The Local Authority Quality Improvement team has been responsive to the additional challenges brought about by the Covid 19 pandemic and the subsequent cost of living crisis, and strategies implemented to mitigate against risks identified in the previous CSA report have proved to be successful. This is borne out by the continued improving Ofsted profile, particularly among our new providers who showed commitment and resilience in opening during the pandemic.

New providers may still be awaiting their first full inspection. These providers are excluded from our Ofsted ratings but receive full support from our Quality Improvement team as part of our statutory responsibility in order to ensure they meet Ofsted requirements.

Table 12 shows a summary of early years Ofsted inspections grades in Newham as at March 2022.

During the Covid 19 pandemic, there was a higher level of change with multiple settings closing, opening or changing in ownership. This increased churn has continued into 2022, meaning that a high level of settings have yet to receive their first inspection, as shown in Table 13. This higher level of inexperienced providers, likely to need support, is a potential risk to future quality, which the Local Authority has identified and is successfully, taking steps to mitigate.

Table 13

Type of Provision	Number of inspected Providers	% Achieving good or outstanding March 2022	CSA 2021 comparison	Awaiting first inspection
Childminders	89	97.8	92.0	35
Childcare on domestic premises	2	100	100.0	0
Private Voluntary and Independent	58	93.1	94.0	40
Maintained Nursery Schools	7	100	100.0	0
Schools and Academies*	66	93.9	93.9	

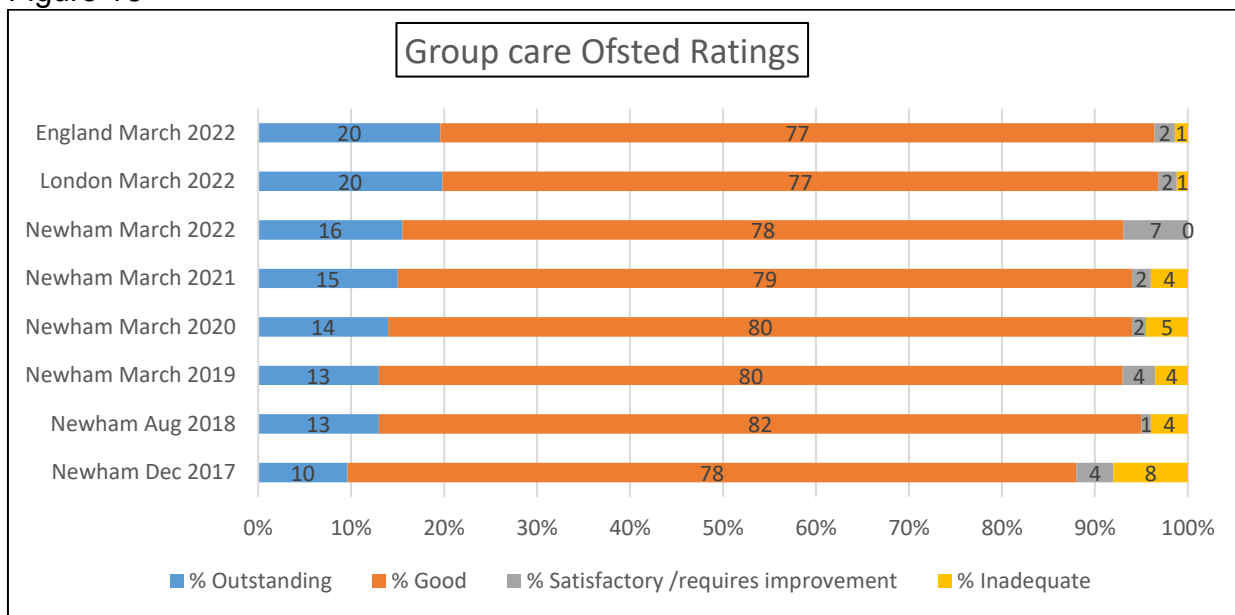
In order to ensure free early education places are offered at quality settings, part of the LA funding agreement stipulates that funding for 2 year olds is only available for Good and Outstanding PVI or childminding settings. Inadequate graded settings are unable to offer 2 year or 3-4 year funded places.

3.9a Group Care Ofsted Ratings.

Figure 16 shows the percentage of providers in each of the Ofsted inspection category ratings. There is some improvement against the ratings reported for Newham in the CSA 2021. The ratings achieved have significantly improved over time. In March 2022, the percentage of outstanding providers was 16% and the combined percentage of good and outstanding providers was 93.1%, with no inadequate inspection results. Despite the improvement in Newham over time, the good and outstanding percentage is lower than for London of 97% and England of 97%. Newham remains committed to improving Ofsted outcomes for all providers through a comprehensive Quality improvement strategy. This includes a professional development programme, which is responsive to the needs of our providers, and an effective quality improvement scheme, which is aligned to the Healthy Early Years London programme. We support a range of projects within the sector, and encourage joint practice development, in order to improve the resilience and skill of practitioners.

The Quality improvement team are committed to ensuring that quality provision is sustained. We continue to give intensive support to new settings and those rated less than good, including leadership and business support training.

Figure 16



3.9b Childminder Ofsted Ratings.

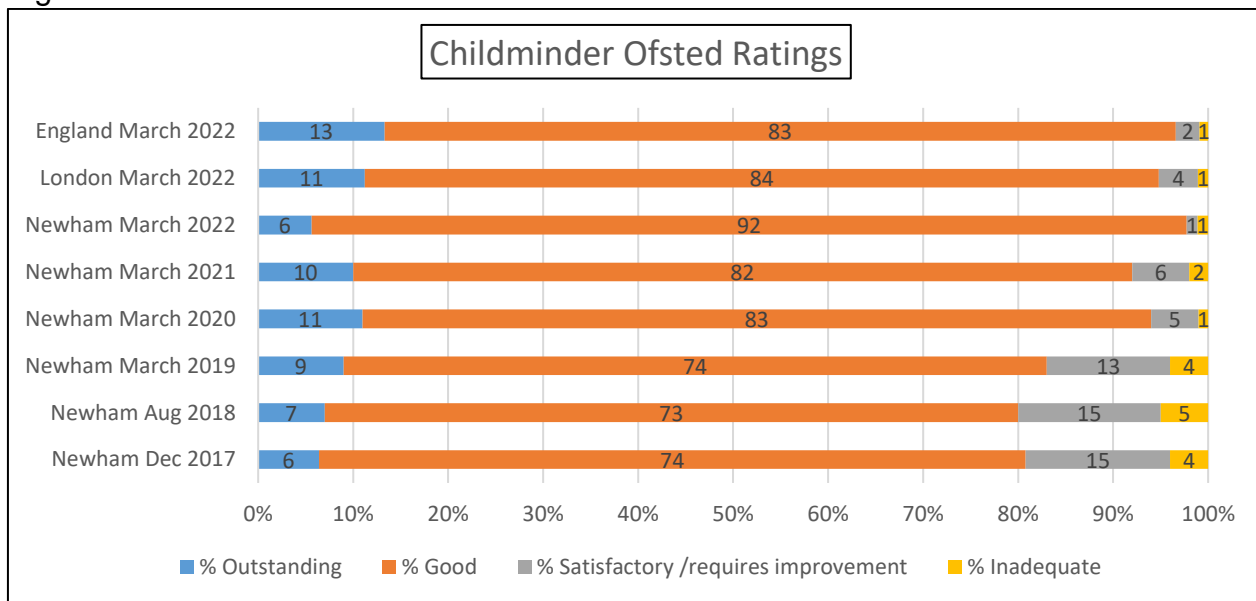
Figure 17 shows the percentage of childminders in each of the Ofsted Inspection category ratings. There is an overall improvement against the ratings reported for Newham in the CSA 2021.

Within Newham, the ratings achieved have improved significantly over time. Providers achieving good or outstanding have increased from 81% in 2017 to 98% by March 2022. Newham childminders are supported by early Education practitioners, who offer

network meetings and regular CPD and shared audits of quality. Challenges to maintain quality improvement during the pandemic were met by the team’s commitment to offering a whole suite of virtual CPD and support for our childminding sector.

Newham’s good and outstanding childminder ratings of 98% are now higher than London 95% and equivalent to England 97%. The continuing upward trend is a reflection of the commitment and flexibility from the Early Years Quality Improvement team and Early Education Practitioners to support the development of practice despite challenging circumstances.

Figure 17



3.10 Cost of early years childcare

For early year’s childcare outside the funded entitlements, we report on average prices per hour, reported to us by settings. There may be variations to prices based on the number of hours a family uses, with reductions for longer hours, or discounts for sibling groups. There may be additional payments for additional services, e.g. lunch and other meals, which are not included in these prices.

3.10a Charges Day Nursery settings.

Table 14 Average Day Nursery Full Fee paying Full Time 50 hours per week						
Age range	Newham weekly average 2021	Newham weekly average 2022	Newham per hour 2022	England weekly average 2022	Inner London weekly average 2022	Outer London Weekly average 2022

0-2	£290	£308	6.16	£274	£369	£303
2-3 no funded hours	£275	£286	5.72	£265	£347	£309
3-5 no funded hours	£247	£253	5.06			
2-3 fee after deducting 15 funded hours	£203	£205	£5.86			
3-4 fee after deducting 15 funded hours	£199	£204	£5.83			
3-4 fee after deducting 30 funded hours	£137	£153	£7.65	£102	£135	£112

Table 14 reflects the fact that full time fees in Newham have increased by 4.3% across the 0-5 age range since 2021, based on 73 survey returns from day-care nurseries, lower than the 11.4% increase reported last year. The 4.3% increase is below the inflation rate over the same period. Prices in Newham remain largely below the averages for London but are above the average for England. The Coram Family and Childcare Trust national childcare survey 2022 also found that prices for charged hours increased. Price increases since 2021 for a part time (25 hours) place in a nursery for children in Great Britain, was 2.5 per cent for those aged under two, 2.0 per cent for two year olds and 3.5 per cent for three to four year olds using the free entitlement.

Many providers will have incurred additional costs because of high general inflation, staff recruitment pressures, changes to the minimum wage and energy costs. While overall occupancy levels reported have continued to make a marginal recovery, they remain below pre pandemic levels and providers will need to continue adapting their business models to ensure they cover their costs and remain sustainable.

Some providers in Newham and across the country charge for lunch and activities. Providers cite funding gaps as a reason for introducing charging policies on food and activities. Most providers also offer part time places and commonly charge a higher hourly rate.

3.10b Charges for childminder settings

Table 15 Average Childminder Full Time 50 hours per week						
Age range	Newham Weekly Average CSA 2021	Newham weekly average 2022	Newham per hour (full time) 2022	England weekly average 2022	Inner London weekly average 2022	Outer London Weekly average 2022
0-2	£277	£297	£5.94	£238	£344	£294
2-3 no funded hours	£276	£284	£5.68	£236	£347	£292
3-5 no funded hours	£256	£300	£6.00			

2-3 fee after deducting 15 funded hours	£212	£220	£6.29			
3-4 fee after deducting 15 funded hours	£212	£217	£6.20			
3-4 fee after deducting 30 funded hours	£142	£131	£6.55	94	92	81

Table 15 shows that full time childminder prices in Newham have increased overall by an average of 8.9% since 2021, based on the 58 survey returns. Childminder average charges are closely aligned to average nursery fees in Newham, though there is significant variation between childminders in terms of pricing.

Newham childminder prices are above the national average but below the averages for both inner and outer London. Most childminders also offer part time places and commonly charge a higher hourly rate for this service.

3.11 Hours of Operation

3.11a Day nurseries

The most common number of hours offered by day nurseries is ten hours per day. The most common start and end times are 8am and 6pm. Longer hours are common and on the increase. The earliest start time is 7am and 23 settings start earlier than 8am. The latest end time is 7pm and 17 providers have a later end time than 6pm. All operate Monday to Friday.

3.11b Childminders

Overall, childminders have a greater capacity to accommodate out of hours or changeable childcare needs. The most common start times are 7am and 8am. Over half (51%) of childminders have a start time of before 8am. The earliest start time is 6am. The most common end time is 6pm, but around a third (33%) offer later end times and the latest end time is 9.30pm. Sixteen childminders recorded that they offer a weekend service.

3.12 Free Early Education Sufficiency

Some children are entitled to free childcare, funded by the government.

- All children aged three and four are entitled to 15 hours per (if accessed in term time only) until they start reception class in school (570 hours over a year)
- Children aged three and four where both parents are working, or from lone parent families where that parent is working, are entitled to 30 hours per week (if accessed in term time only) until they start reception class in school (1140 hours over a year)
- Children aged two whose families receive certain benefits (including low income families in receipt of in-work benefits), or those who meet additional

non-economic criteria, are entitled to 15 hours per week. Nationally, about 40% of two year olds are entitled to this offer, but the proportion varies by area. (570 hours over a year)

Parents do not have to use all the hours of their funded entitlement. They may choose to split them between providers. With the agreement of their provider, parents may also spread them across the year – for example, rather than taking 15 hours for 38 weeks a year they could take just under 12 hours for 48 weeks a year.

Take up of funded early education overview

The proportion of eligible children taking up funded two and universal three and four year old early education in Newham according to DfE January census is shown in Table 15, together with comparisons against previous years, London, and England for 2022.

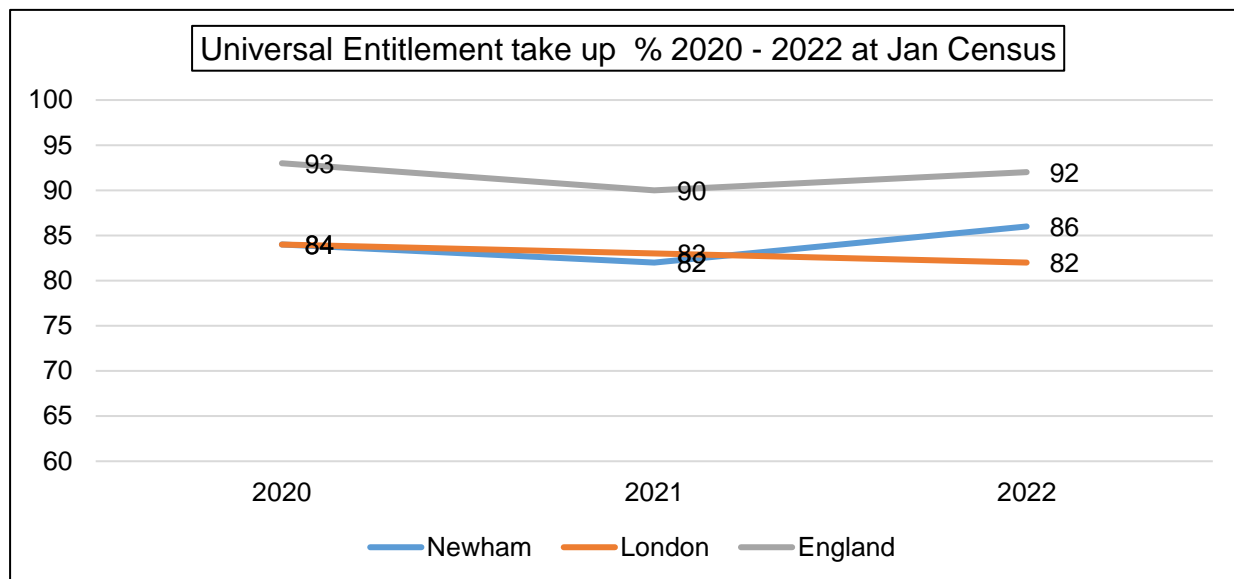
Take up of the funded entitlements dropped across the board in Newham, London and England in January 2021, but have recovered in Newham and across the country by January 2022.

Table 16

% of eligible children taking a funded place (DfE January Census)	Newham Jan 17	Newham Jan 18	Newham Jan 19	Newham Jan 20	Newham Jan 21	Newham Jan 22	London Jan 22	England Jan 22
Age 2	43%	50%	52%	53%	46%	60%	62%	72%
Age 3 and 4 (universal 15 hours)	82%	82%	82%	83%	79%	86%	82%	92%
Age 3 and 4 Number of children receiving extended "30 hours		900	1129	1267	1206	1420		

With respect to the universal fifteen hours early education for three and four year olds, Figure 18 shows that Newham has now overtaken London in terms of the percentage of eligible children accessing the universal offer.

Figure 18



Newham’s take up of the funded thirty hours scheme for working parents has grown by 12% since 2020, while in London and England the total number of applicants remains at around the 2020 level.

The DfE commissioned a research report looking at the take up of free early education in 2018

¹⁶. This provides evidence about the reasons for the lower take up rates in London and the decline in the universal 3 and 4 year old in recent years. The report concludes “language, population mobility of children aged 0 to 4 years and SEND may be particularly important for explaining take up rates. In London, the super diversity of the population and its higher population mobility, in combination with higher costs to provide childcare, appeared to contribute to lower take rates.” The DfE commissioned report also reviews a range of actions used by Local Authorities to support take up. These include:

- Marketing and messaging approaches to improve parent’s awareness including targeted marketing, using specific languages, tailored messaging and utilising provider marketing.
- Direct approach to those likely to be eligible and making them aware of the entitlement and its benefit such as “golden ticket”, door knocking, outreach and parent champions, volunteers and advocates.
- Partnership working with professionals and volunteers engaged in targeting eligible parents including health, social care and job centre advisors
- Improving the infrastructure of the application process to make it easier for parents to apply through on line applications, introduction of early year’s hubs and engagement with parents of SEND children.

These areas of focus were included were included in the CSA action plan 2021 and have been implemented as far as possible, subject to Covid 19 operating restrictions. Some good progress has been made in terms of recovering take up. The DfE review of the benefits of the approaches continues to inform the gap analysis and action plan

for 2022 detailed at 1.4.

3.12a Free Early Education for two year olds scheme

Take up of the two year old entitlement in Newham had recovered significantly by January 2022 and though it remains below the London and England averages, the gap is narrowing as is shown in Figure 19. While Newham still has over 1,700 children eligible for a funded two year old place, the number of families eligible to benefit from funded 2-year-old places is in decline, as the benefits income threshold for the scheme has not been uplifted. The number of children eligible in England has declined by 9.2% since 2020.

Figure 19

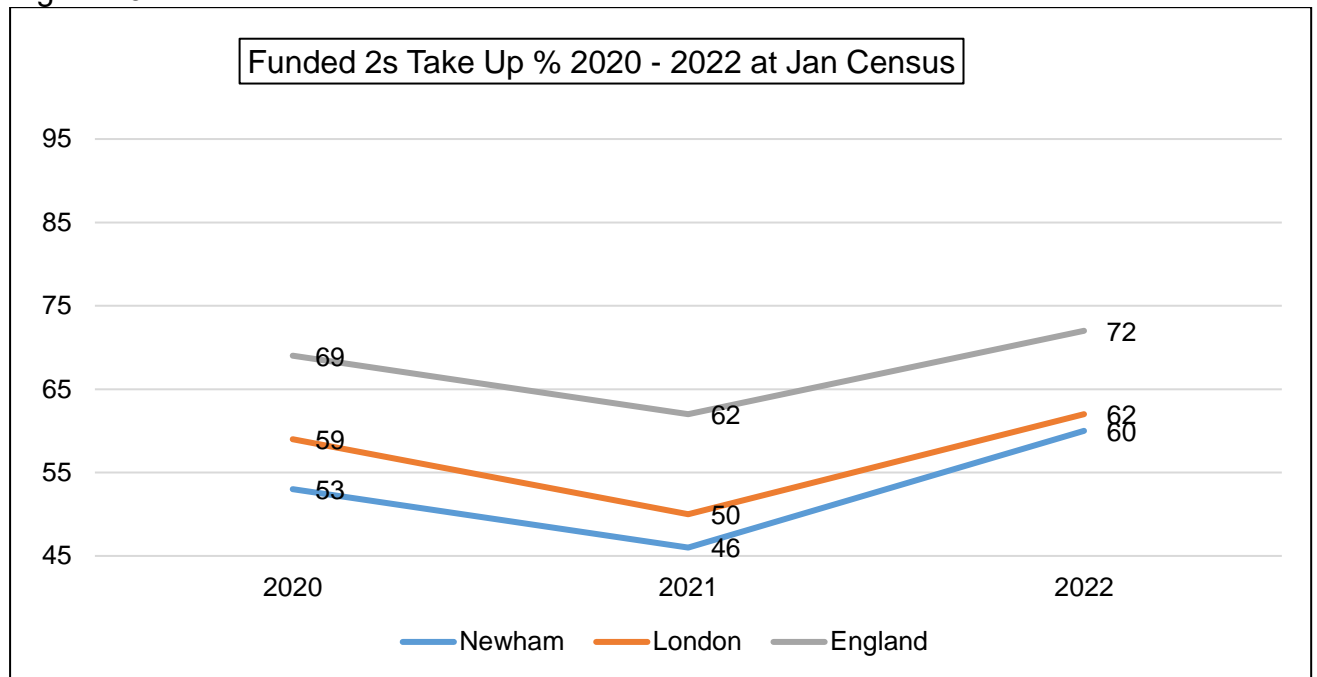
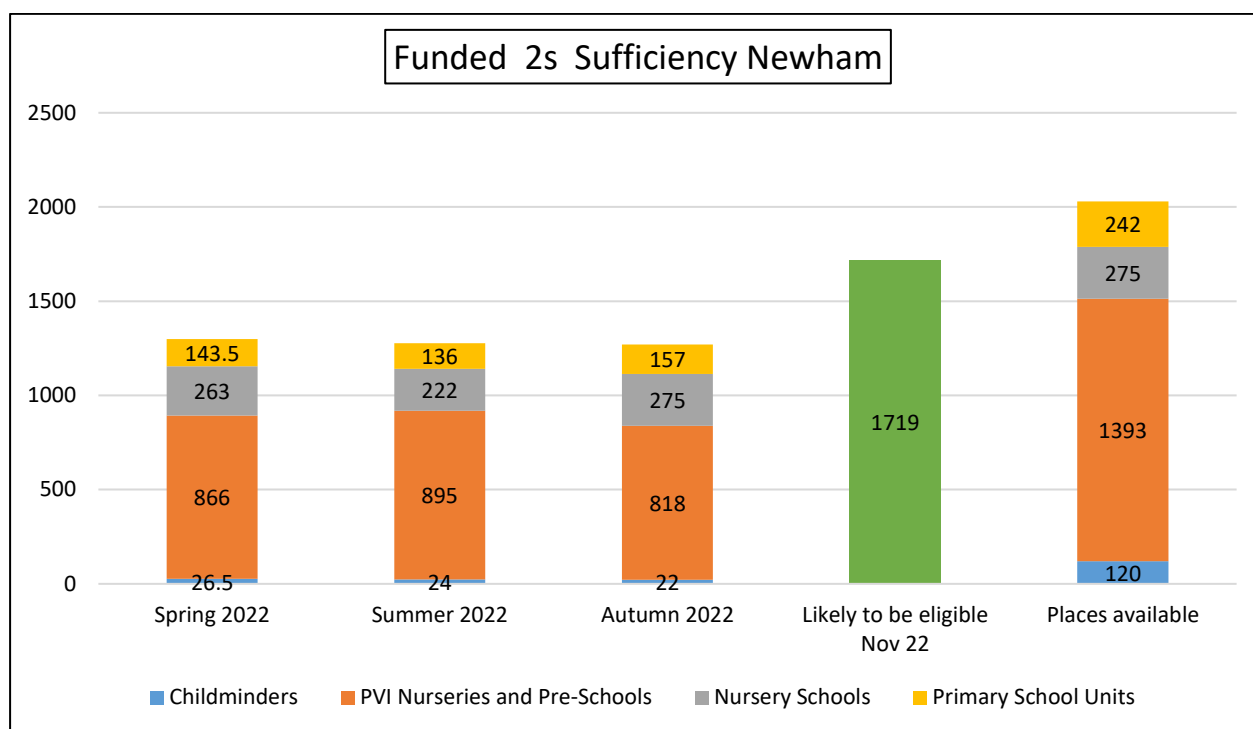


Figure 20 Funded 2s Early Education Sufficiency in Newham



The number of children taking up 2-year-old funded early education places has remained stable over 2022, at just below 1,300. With the number of families eligible for the scheme in decline, the percentage of eligible families taking up their places has increased to 74% by autumn 2022. The number of places available to the scheme in autumn 2022 is 2,030, more than the 1,719 families eligible. PVI nurseries and pre-schools offer the largest number of places to the scheme at 1,393. Nursery school places are popular with parents and operate at close to capacity. There is unused capacity in PVI nurseries and pre-schools, schools and childminders. Total unused places available to the scheme in autumn 2022 was 759, up from 546 reported in the CSA 2021 and overall, there are sufficient places to meet demand.

There are however particular wards with low capacity and low numbers of unused places as is shown in figure 18.

Figure 21

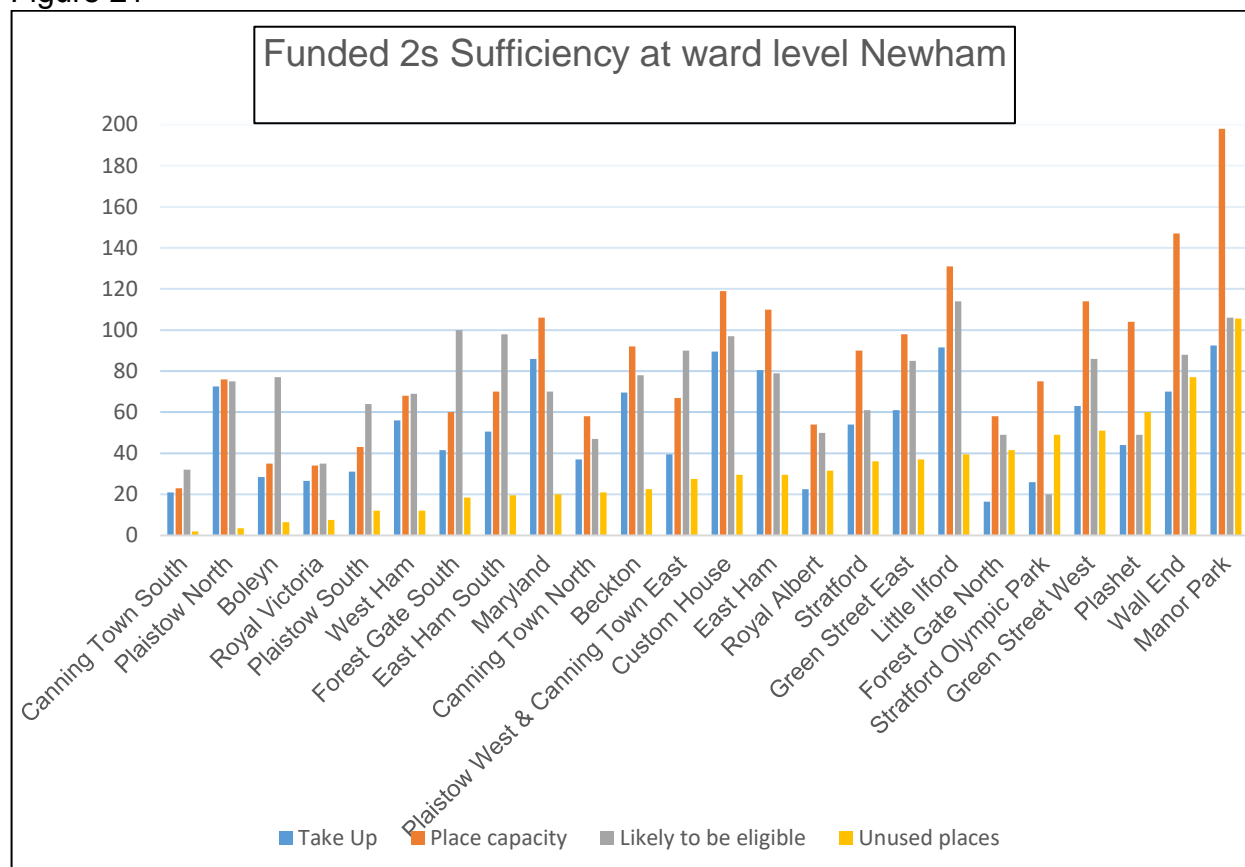


Figure 21 illustrates the pattern of take up, capacity and eligibility at a ward level in Newham. Those wards with the smallest number of unused places are Canning Town South (unused places 2), Plaistow North (4), Boleyn (7), Royal Victoria (8), Plaistow South (12) and West Ham (12). In practice, some providers have been able to provide more places than they had indicated where demand has been high. This can be achieved by bringing in capacity earmarked for other age ranges. Those wards with the most unused places are Manor Park (105), Wall End (77), Plashet (60), Green Street West (51), Stratford Olympic Park (49) and Forest Gate North (42).

The total number of providers offering places in autumn 2022 was 147 (marginally down from 148 in 2021). This includes 78 PVI nursery and pre-schools, 12 Schools, 7 Nursery Schools, and 50 childminders.

3.12b Free Early Education for three and four year olds.

Figure 22

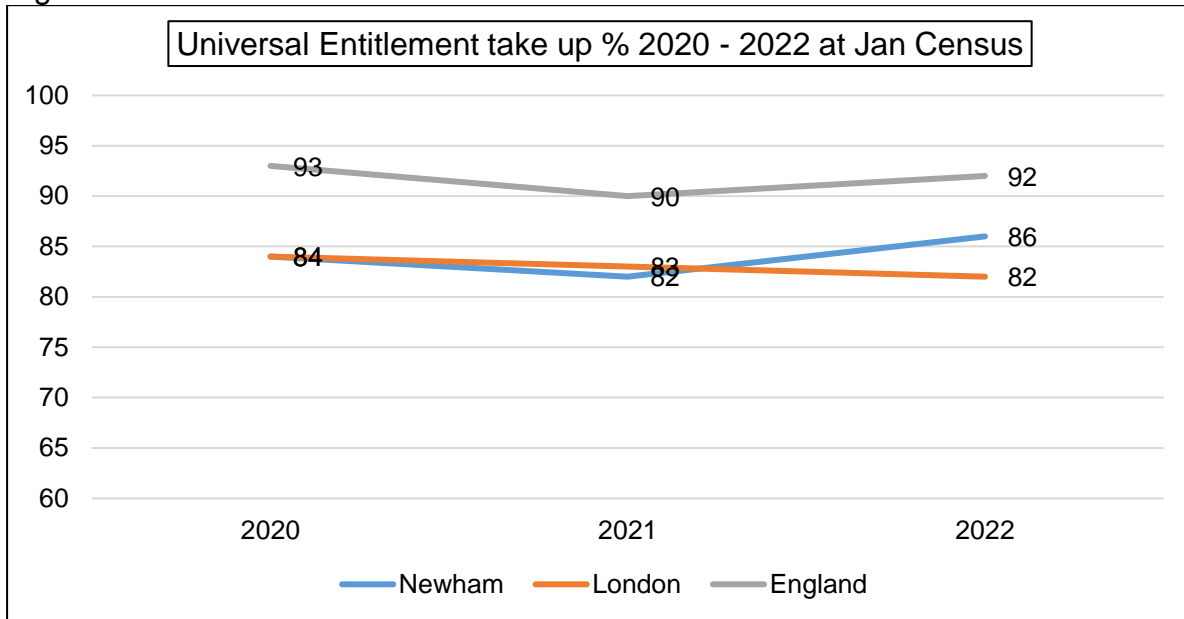


Figure 22 shows that Newham’s take up of the universal three and four year old free entitlement over the period 2020 to 2022 and provides a comparison with take up rates across London and England.

In 2021 there was a decline in take up during the pandemic across the country. Take up has now recovered well in Newham (86%) and has now overtaken the London average and has narrowed the gap to the England average in 2022.

Figure 23

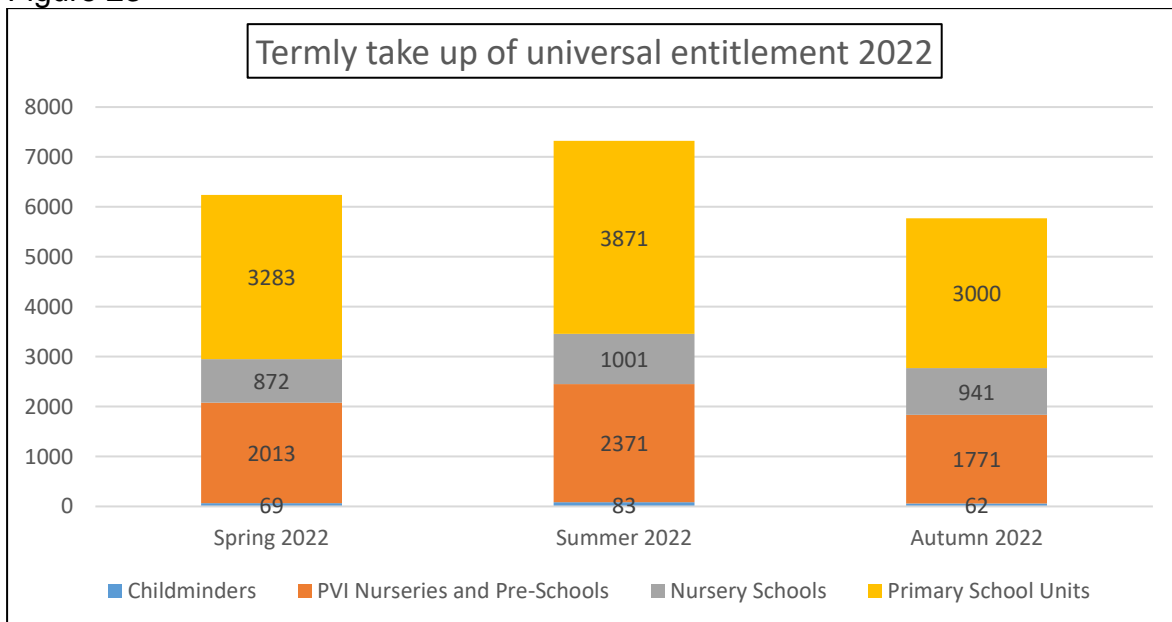


Figure 23 shows that the delivery of the universal offer is shared across all types of provider. Schools are the biggest provider type delivering the offer in Newham at 53% of all places across the three terms of 2022. PVI group care deliver 32%,

nursery schools 15% and childminders 1%.

Child attendance fluctuates during the year, reflecting the single entry point to school each September. In a normal year, the summer term has the highest occupancy and the autumn the lowest.

The autumn term 2022 child attendance of 5,774 is marginally up on the 5,703 that were attending across all providers in autumn 2021.

There are now also 71 providers offering a “stretched” free entitlement, so that parents can access their annual entitlement of free hours across the year, this is an increase from the 60 that were reported last year.

3.12c 30 Hour offer for Working Parents

This scheme giving working parents an entitlement to extended 30 hours of free early education and childcare for their 3 and 4 year olds was introduced in September 2017. This means a total of 1,140 hours of free childcare per year for eligible families; 570 through the existing early education entitlement for all three and four year-olds, and 570 through the new entitlement.

Eligibility. The conditions for eligibility include:

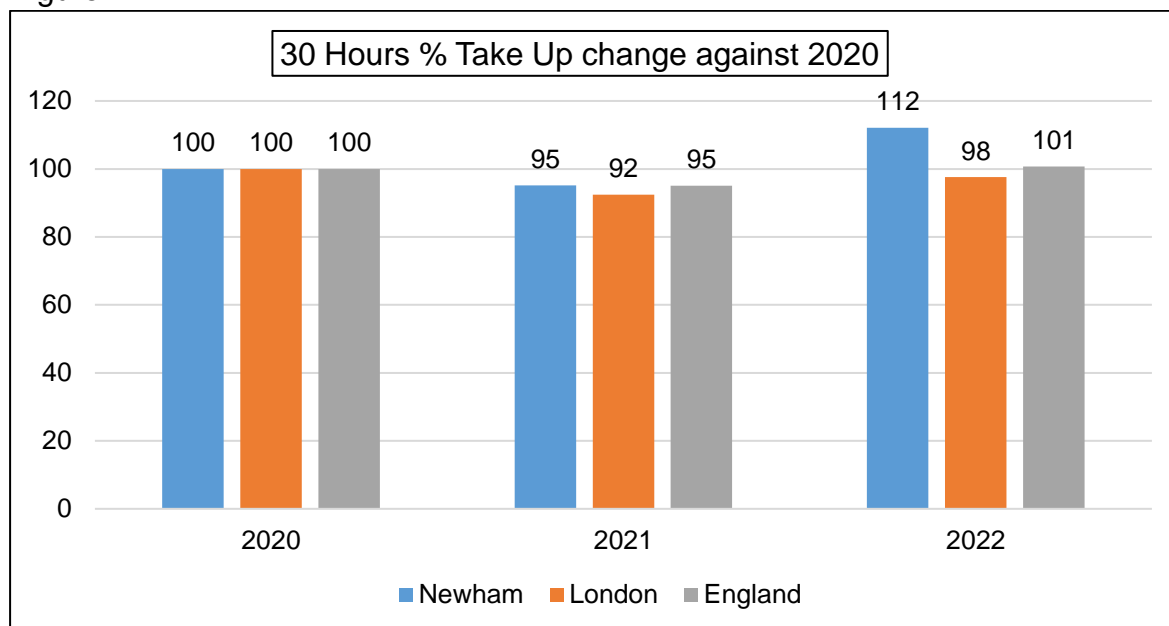
- working parents with children aged three and four;
- parents working part-time or full-time – each parent must earn at least the equivalent of 16 hours per week at the national minimum wage and below £ 100,000 per annum;
- parents who are employed or who are self-employed; and
- lone parents who are working the equivalent of 16 hours per week at the national minimum wage and below £ 100,000.

Assessing demand for 30 hours places

It is more difficult to assess demand for 30 hours places than for either 2-year-old funded entitlement or the universal funded entitlement for 3 and 4 year olds. This is because eligibility is dependent on individual employment circumstances, income and the personal situation of parents. 30-hours childcare has now been in place for five years and data on take up over this period provides a baseline for forecasting possible demand in 2023.

Figure 24 shows that Newham’s take up of the funded thirty hours scheme for working parents has grown by 12% since 2020, while in London and England the total number of participants remains at around the 2020 level, according DfE census data.

Figure 24



A seasonal pattern to place take up, linked to entry to School reception each September, means that attendance is highest in the summer term and lowest in the autumn term. In summer 2022 Newham had its highest ever number of families on the scheme at 1,719. Figure 25 shows take up and capacity by provider type for the summer 2022 in Newham. At this point Nursery Schools were close to capacity. However, here is unused capacity in all other types of provision. Overall, there were 634 unused places in the summer term, with places available in most types of setting.

Figure 25

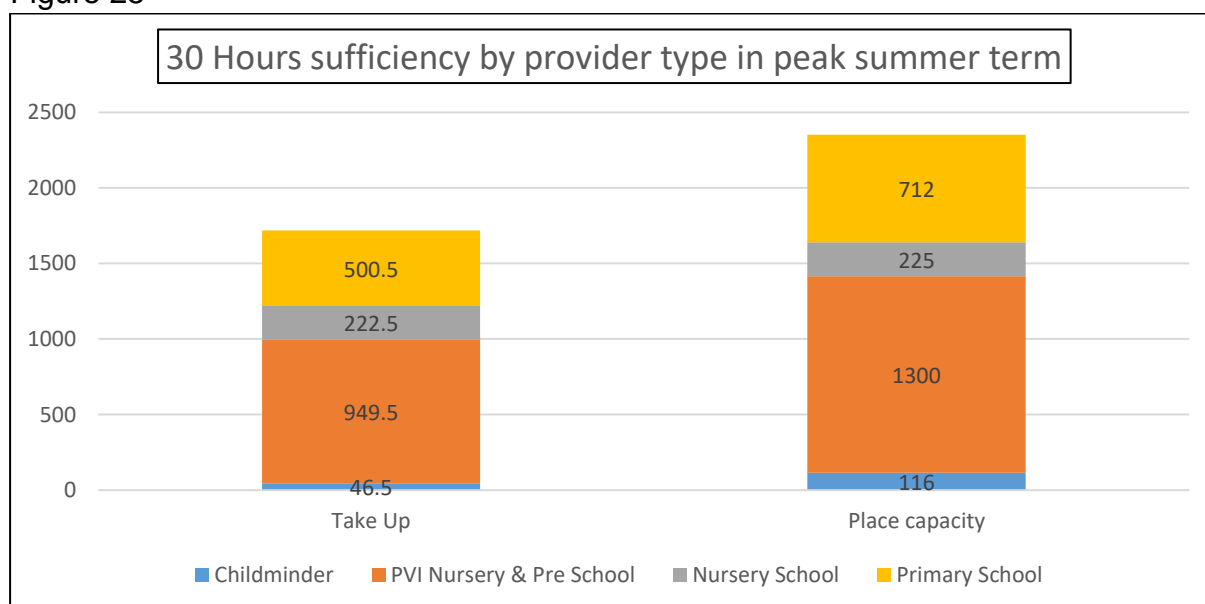
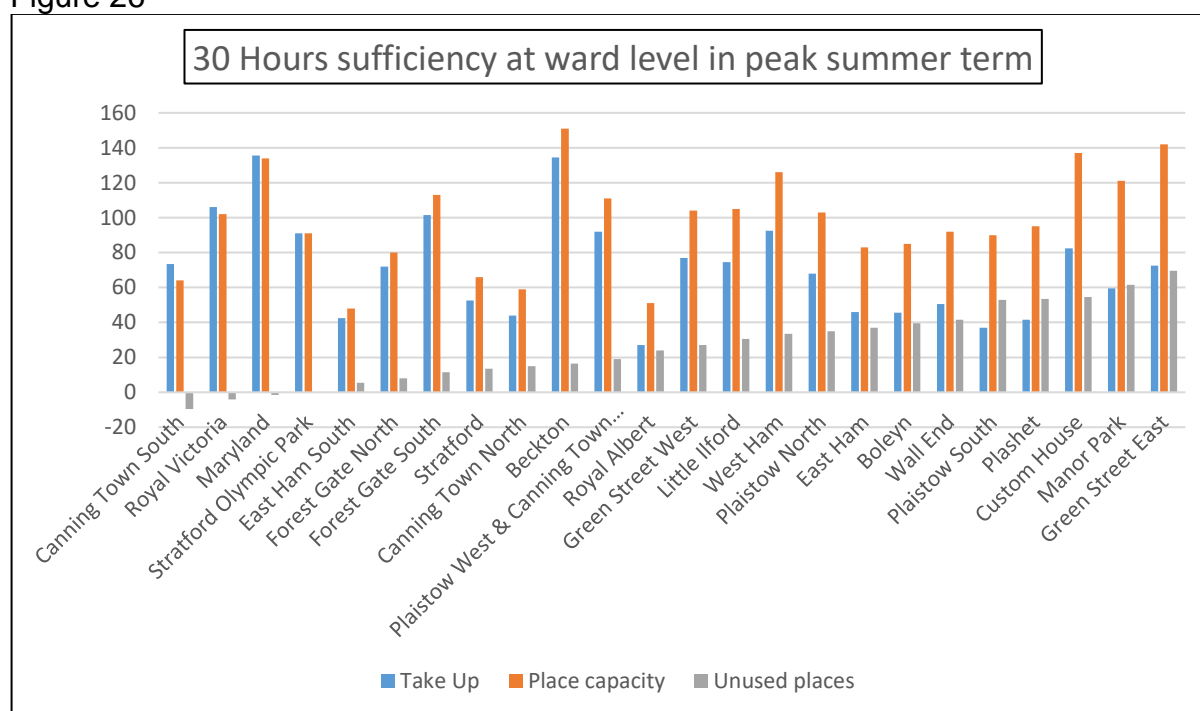


Figure 26 provides an analysis of sufficiency at ward level in summer 22. Ward level data indicates that some wards may come under supply pressure in future peak summer terms, indeed 3 wards show as having more 30 hours children in attendance than the capacity that was reported to the Local Authority in summer 22. Some settings will have the flexibility to change child numbers in different age ranges at times of high pressure. The wards most under pressure in the peak summer term are Canning Town South (above reported capacity by 9), Royal Victoria (above capacity 4), Maryland (above capacity 1), Stratford Olympic Park (0 unused places) and East Ham South (6 unused places).

The wards with the highest take up were Beckton, Maryland, Royal Victoria, Forest Gate South and West Ham. Take up was lowest in Royal Albert, Plaistow South, Plashet, East Ham South and Canning Town North.

Figure 26



3.13 Business challenges

Newham providers were asked to rank their top business challenges in a provider survey in autumn 2022. The results are shown in Table 17.

For PVI Nurseries and pre-schools the identified biggest challenges are shown in Table 15. Staff recruitment and retention was ranked the biggest challenge by 32 of the 74 responders to this question.

The majority of responders identified the first four listed challenges as the biggest challenges. A study by the Institute for Fiscal Studies¹⁷ substantiates provider concerns about cost inflation and found that one of the biggest challenges facing early year’s providers now is the impact of rising costs. “Last year (2021–22), prices facing childcare providers were 11% higher than they had been three years earlier, before the pandemic. By comparison, over the same period, consumer prices had risen by 7%, while the prices in the economy as a whole had risen 9%.”

Table 17

Top Ten Business Challenges in order of importance to Newham PVI Group Care settings	
1	Staff recruitment and retention
2	Business cost inflation
3	Cash flow
4	Attracting new customers
5	Understanding changing patterns of childcare needs
6	Staff wellbeing and morale
7	Developing business plans to adapt to new circumstances and parental preferences
8	Staff training
9	Ensuring appropriate public health standards
10	Managing relationships with parents

In relation to the recruitment of staff, providers were asked to identify their challenges. Figure 27 shows that lack of finding suitable candidates and inability to meet candidates salary demands were identified as the biggest issues.

Figure 27

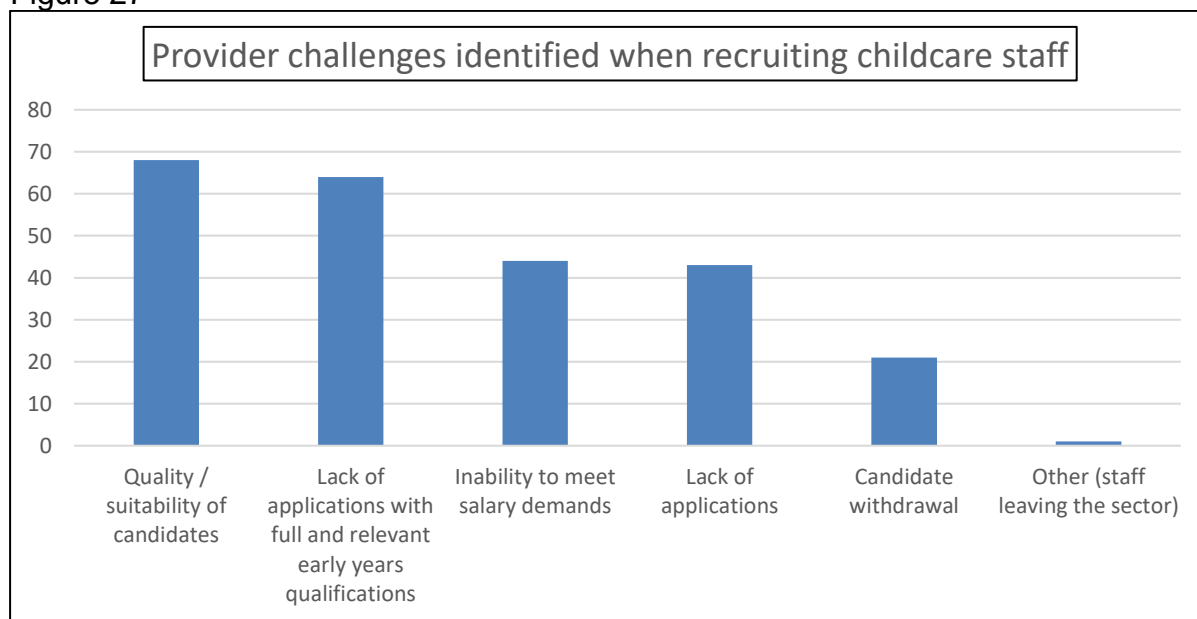
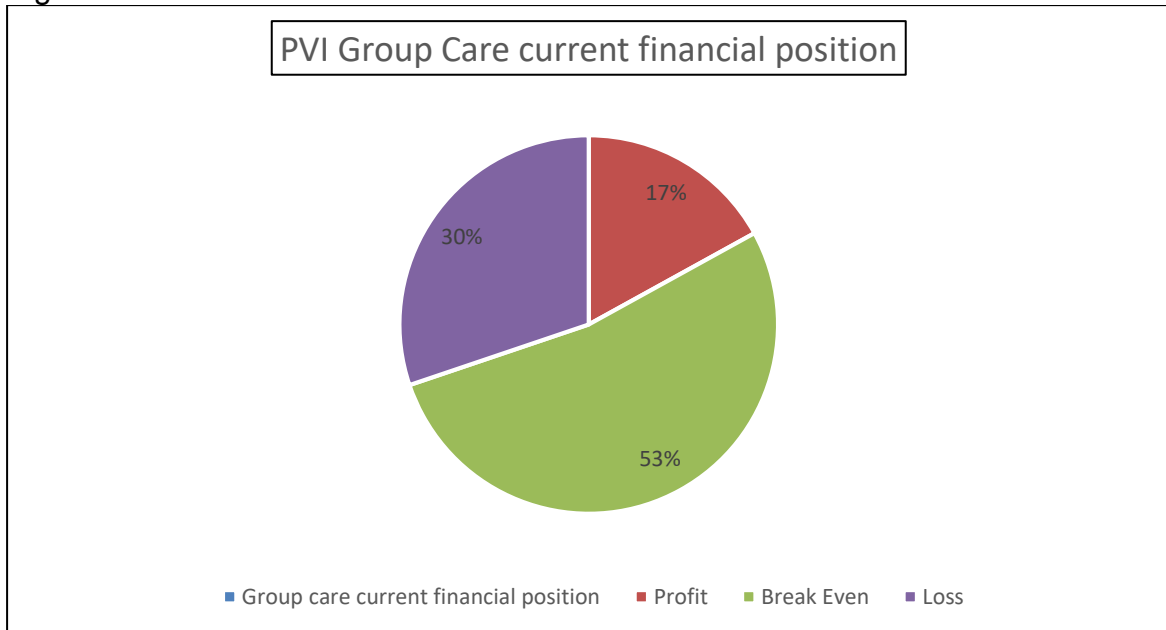


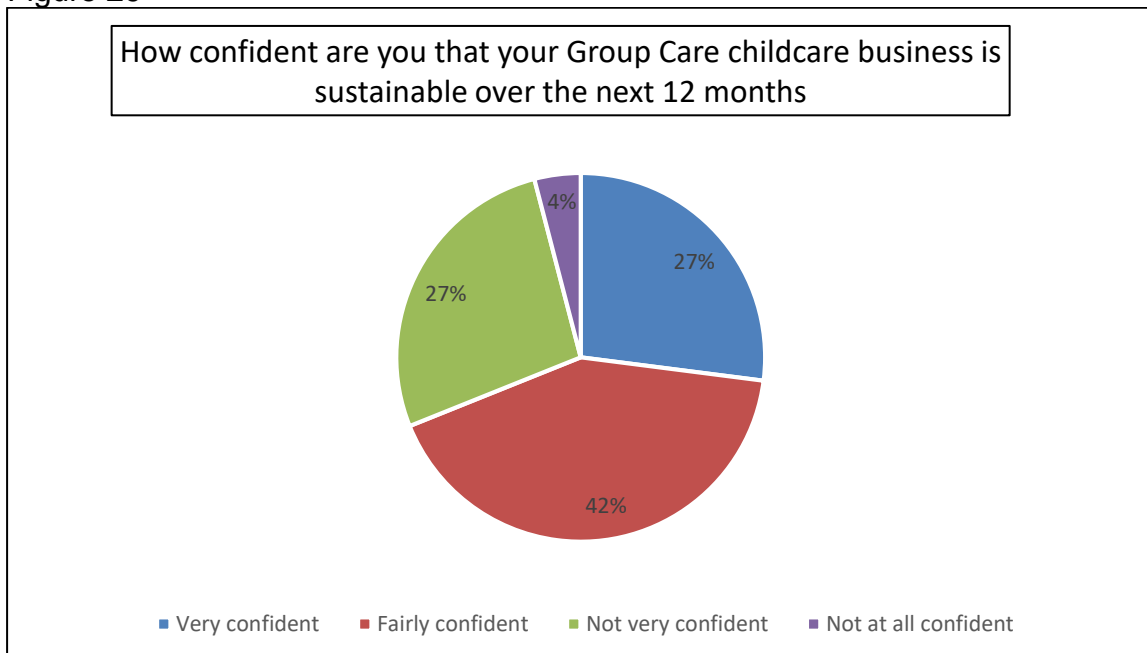
Figure 28 shows that off the 53 PVI group care settings that were able to answer, 70% reported as operating at break even or profit, with 30% reporting they currently operated at a loss. A further 22 survey responders said they did not know.

Figure 28



When asked about sustainability over the next 12 months 69% of the 74 PVI group care responders said they were either very confident or fairly confident of their continuation, 27% were not very confident and 4% (3 settings) not at all confident.

Figure 29



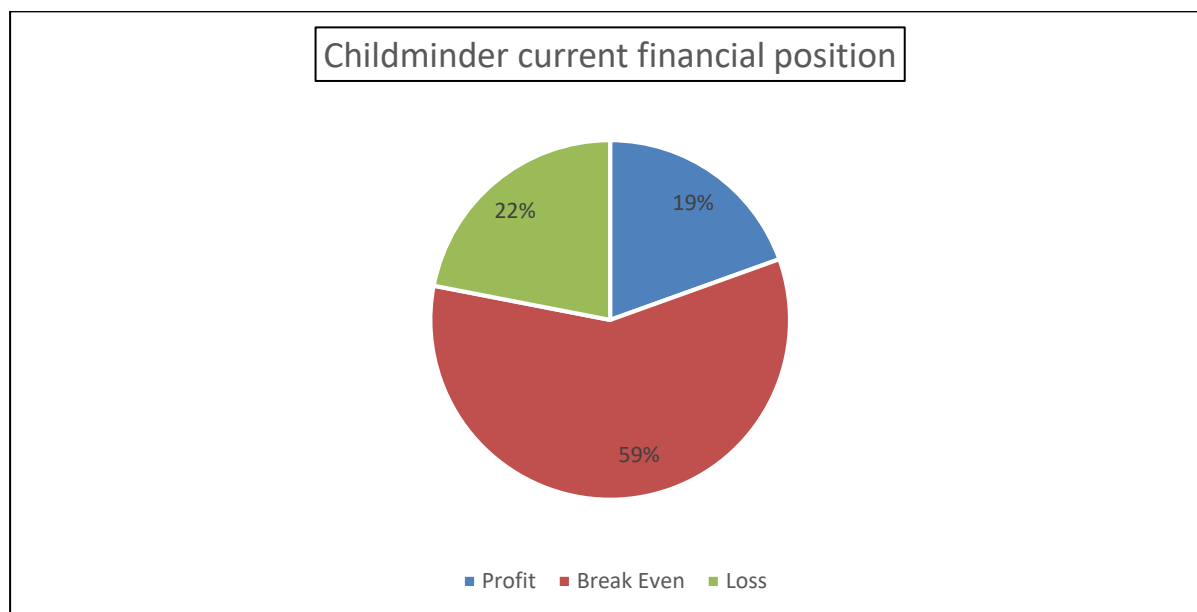
For childminders, the challenges that were identified as the most significant are shown in table 18.

Table 18

Top Ten Business Challenges in order of importance to Newham Childminders	
1	Attracting new customers
2	Business cost inflation
3	Understanding changing patterns of childcare needs
4	Cash flow
5	Staff training
6	Managing relationships with parents
7	Wellbeing and morale
8	Ensuring appropriate public health standards
9	Staff recruitment and retention
10	Developing business plans to adapt to new circumstances and parental preferences

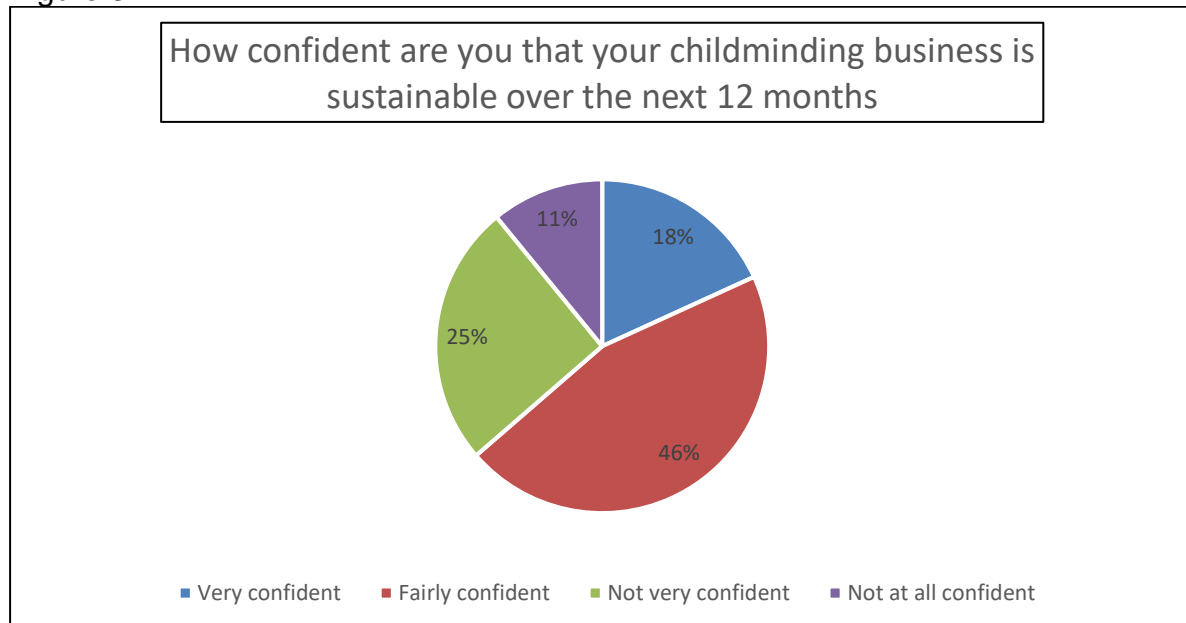
Of the 41 childminders that were able to answer, 19% reported as operating at a profit, 59% at break even and 22% at a loss. A further 8 responders said they did not know.

Figure 30



When Newham childminders were asked about sustainability over the next 12 months 64% of the 55 responders said they were either very confident or fairly confident of their continuation, 25% were not very confident and 11% (6 childminders) not at all confident.

Figure 31



The impact of COVID-19 and the cost of living crisis continues to have a strong link to the business challenges that have been identified.

According to an Institute of Fiscal Studies report,¹⁸ Covid-19 is likely to have significantly damaged the finances of many childcare providers who rely on income from parent fees. This will have included private, independent and voluntary nurseries, out of school settings, childminders and some pre-schools. Despite major government support programmes, the study finds that between a quarter and fifth of all private nurseries would have run at a significant deficit during lockdown.

Newham providers were invited to provide observations about the sufficiency of childcare in the borough and ways in which they could be supported to meet parental needs. Table 19 shows the responses that were received and these are grouped in the themes that emerged. There are a mix of experiences and opinions, but many providers call for additional funding to reflect higher costs, requests for additional help with marketing, staff recruitment, training and support, including SEND.

Table 19

Provider observations about the sufficiency of childcare in Newham and ways in which providers could be supported to meet parental needs.

Funding and Finance
financial support for childcare providers who struggling to fill up spaces
Providers need to be paid at a reasonable rate to provide the funded hours otherwise smaller settings will not afford to offer this. We can only have a few children and often half our uptake is made up of funding this does not line up with current costs of salaries for minimum wage to pay quality assistants, rising rents and mortgage or energy bills and cost of food.
Parents find childcare expensive and therefore are reluctant to bring their child to childcare, which is affecting our business. Also since parents work from home we are not getting children to provide childcare services to. Things have really been challenging since the pandemic. I hardly have children as I use to before the pandemic.
Monthly payment for the funding hours will help the providers to be paid on time, then parents will have more childcare providers available
making childcare places free for all under 5s as the qualification criteria puts some children at disadvantage
Childcare providers need to be able to earn a living decent wage, this can only happen with more financial support for the settings and / or the parents to pay the childcare setting a decent fee for the service they provide.
More help financially and training
Cost of food and bills making it difficult to offer meals all day, making a loss due to rising prices
All of our costs continue to increase - pensions, salaries, food, running costs yet we do not receive additional support from the government. How are we expected to continue to offer good quality care if we are treated so badly when it comes to funding. More settings will close if this is not addressed. We should not pay business rates and we should receive direct government sustainability funding to meet our ever increasing costs.
Direct funding to childcare providers - we should not pay business rates
Would like to see Increase in rate per hour for nursey education grant, increase SEN fund, EYPP funds, increase in other grants
Would like to see increase in funds. i.e. SEN, EYPP and Grants
Increment in funding to meet minimum wage
need in increase funding for, SEN children, EYPP, grants
increase childcare cost
Increase in rate per hour for nursey education grant, increase SEN fund, EYPP funds, increase in other grants
Flexibility funding
NMW is increasing but 15 hour rates remain the same how will it be possible to support the vulnerable when we are at a financial loss? Paid childcare is far more profitable
The grants have been welcome. I would prefer for the funding to be higher instead of the grants, as this is more work for both parties, although may be the only way to provide access to/gain these funds, which is appreciated. An improved portal for accessing training would make training easier to access and therefore raise standards with a good curriculum. Training quality from the LA has improved over the last 12 months, and so has support for SEN. The admin burden is quite high from the LA, one way this could be improved is by reducing the chasing and resultant anxiety this causes for managers. Richard manages his list well and only emails those that are yet to complete his requests, it would be great if all other parties could speak to him about his system.

More Funding to support resources , increase early years in funding
To look into the rate for funding so that we can offer good rate of pay to staff as what the applicants are asking for we are unable to match it. Getting quality staff will help in providing quality care for the children which will meet the needs of what the parents are asking for. Quality childcare. to the demands of the staff
More support with settings approach Government
Many parents, particularly the under 2s are struggling. Increasing funded hours for under 2s will help them significantly.
Meals for funded children should be paid for by the government
Funding rates need to be increased. We receive enquiries from fee paying and funded only parents, it becomes hard when funding does not cover the costs that we have. We have a lot of under 2 enquiries too, those children become 2 and already in nursery with us, making it harder for us to offer 2 year funded places.
We have many parents comment on the need for HAF style provision during termtime. Funded after school services offering a hot meal and activity for vulnerable children would be helpful for parents who are skipping meals as a result of the Cost-of-Living Crisis.

Marketing and awareness raising

Lack of demand for full time childcare
Help with filling up spaces
Regular meeting with parents to find out their needs
Most of the parents don't know the importance of childcare, or where to find them, to relay or trusting the systems. So many parents got the free child are grant but don't send their children to settings. !!
By providing more information to parents about their SEN children's needs to meet parent's needs living cost and knowledge about early years provision given to the parents.
More regular help strategies for parents in need
Directory of providers in children centres, libraries and baby groups

Staff Recruitment and Retention

Lack of quality and quality staff for full time positons. Most staff want to do Term Time only between 9 and 3 to fit with their family and childcare needs
would be beneficial for Newham nurseries to have free access to local staff bank, as nurseries struggling to find the staff, experiencing loss of not having staff and must pay huge fees for agencies and online staff recruitment pages with little/no success.
Jobs and flexible hours for parents
Most do not have maths and English GCSE grade C or equivalent!
not enough qualified applicants
Help and support with staff recruitment an d funding

Training

level L2 and L3 early years training needs improving. Need good training providers
I need to attend more mandatory training for free
More trainings on weekends or online for childminders

SEND

We have had more children with additional needs joining the nursery so Early Years SENCo support and SEND training for staff is even more crucial.
--

Childcare Market Management

Schools to stop taking settled children.
--

Other

I would like to know about play groups that Childminders can attend for all children please.
--

Support childminders and parents

There is more parents looking for childcare for 1 year old or under which is difficult to cater for.
--

Expand the eligibility criteria so that more parents or families can qualify
--

4 Supply of services for over- fives

4.1 Types of registered provision for over 5s

Out of School provision includes breakfast, after school and holiday care. Not all out of school provision has to be Ofsted registered and there is no legal requirement to inform the Local Authority of operation, therefore it is difficult to determine the exact number of places available to parents. Included in this report are:

- Childminders who are registered to look after children in their own home. Childminders are often flexible about the hours they work. Many offer a school pick up and collection service from local schools.
- PVI registered out of school provision provide a range of breakfast, after school and holiday care. Many offer a school pick up and collection service from local schools, nurseries and pre-schools. They can be run on or off a school site and may be operated by private, voluntary or independent groups. Included here are also day care settings where they are registered for over 5s and are known to offer out of school services.
- Out of School activities operated by Primary Schools. Many schools provide extended services for children including after school activities, such as homework clubs, film clubs etc. which may not be formally classed as childcare but which still provide a safe and fun environment for children whilst parents/carers are at work or studying. A survey of Newham's Primary Schools, Academies and Nursery Schools was undertaken to map the services that are available. This resulted in 60 responses, with 46 (72% of responders) recording out of school activities. It is likely that we have under counted the provision of breakfast, afterschool and holiday clubs at Schools because of the improved, but incomplete, response from the school survey. Care should therefore be taken in drawing conclusions from the incomplete data set.

4.2 Overall number of registered places available for over 5s

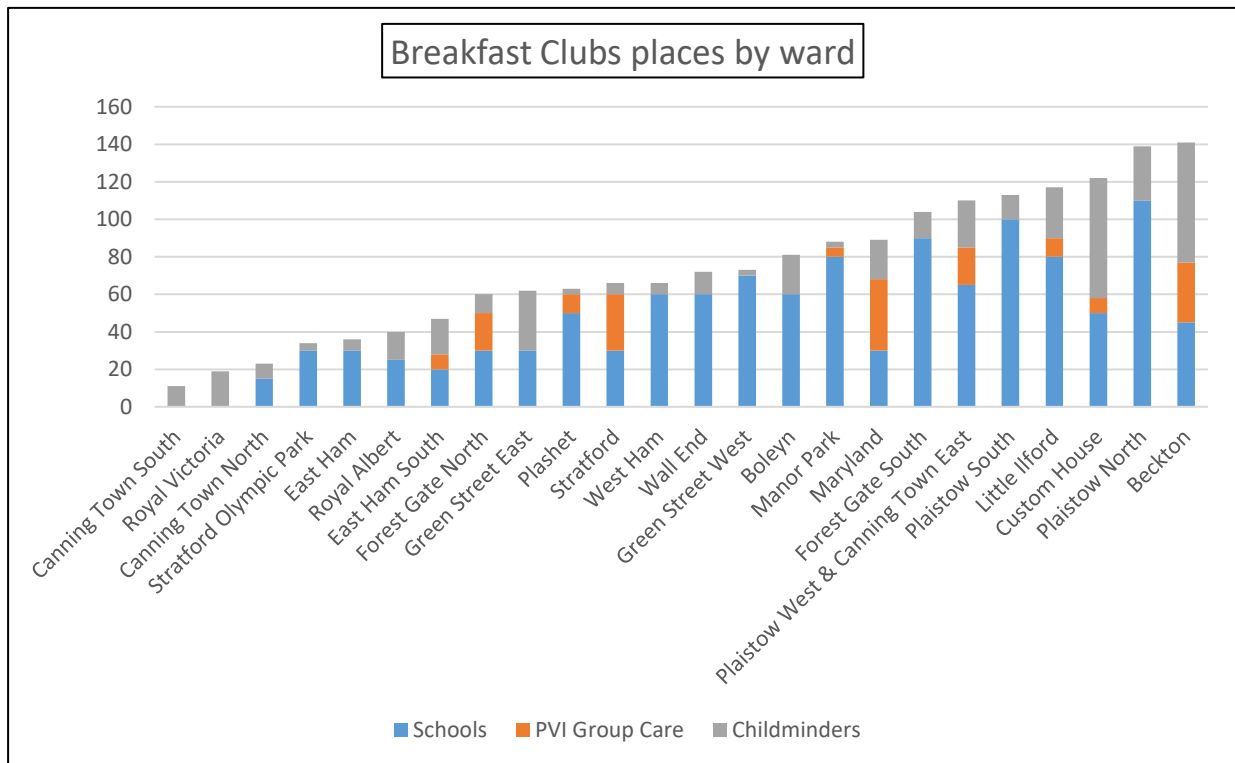
Table 20 shows that in total, there are 188 recorded providers of childcare for school age children during term time. Of these 117 are childminders, 25 are PVI out of school clubs or PVI nurseries that also offer out of school services and 46 are schools. The number of places shown overall is higher than last year; more school places are recorded but PVI Out of School places have declined. All schools that responded to a question on admissions said that their out of school services were open to pupils of the school only. Of the 188 providers overall, a reduced 51 also offer childcare for children of school age during school holiday periods.

Table 20 Providers and places by type of provision 2022	Provider Number	Places Offered	CSA 2021
Childminders	117	435	426
PVI Out of School Services	25	659	771
Schools	46	1265	905
Total	188	2359	2102

4.2a Breakfast Club Number of places available in each ward over 5s

Figure 32 shows that the distribution of the 1,776 recorded breakfast club places across the 24 wards. Schools are the biggest provider of breakfast club places (1,160), alongside childminders (435) and PVI Out of School (181), the average number per ward is 74. There is wide variation between wards. Beckton (141), Plaistow North (139), Custom House (122), Little Ilford (117) and Plaistow South (113) have the most places. The least recorded places are in Canning Town South (11), Royal Victoria (19), Canning Town North (23), Stratford Olympic Park (34), and East Ham (36).

Figure 32

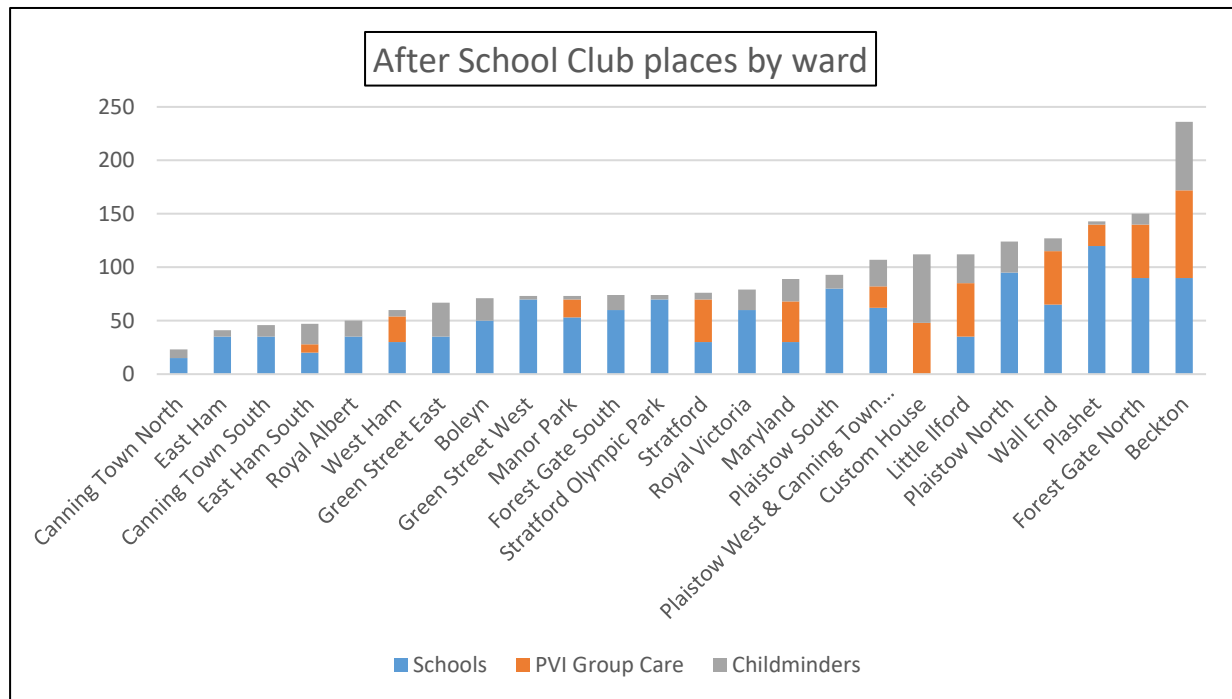


4.2b After School Club Number of places available in each ward over 5s

Figure 33 shows that the distribution of the 2,147 recorded after school places across the 24 wards. Schools are the largest provider of after school places (1,265),

second are PVI Out of School providers (447), alongside childminders (435). The average number per ward is 89. There is wide variation between wards. Beckton (236), Forest Gate North (150), Plashet (143), Wall End (127) and Plaistow North (124) have the most places. The least recorded places are in Canning Town North (23), East Ham (41), Canning Town South (46), East Ham South (47) and Royal Albert (50).

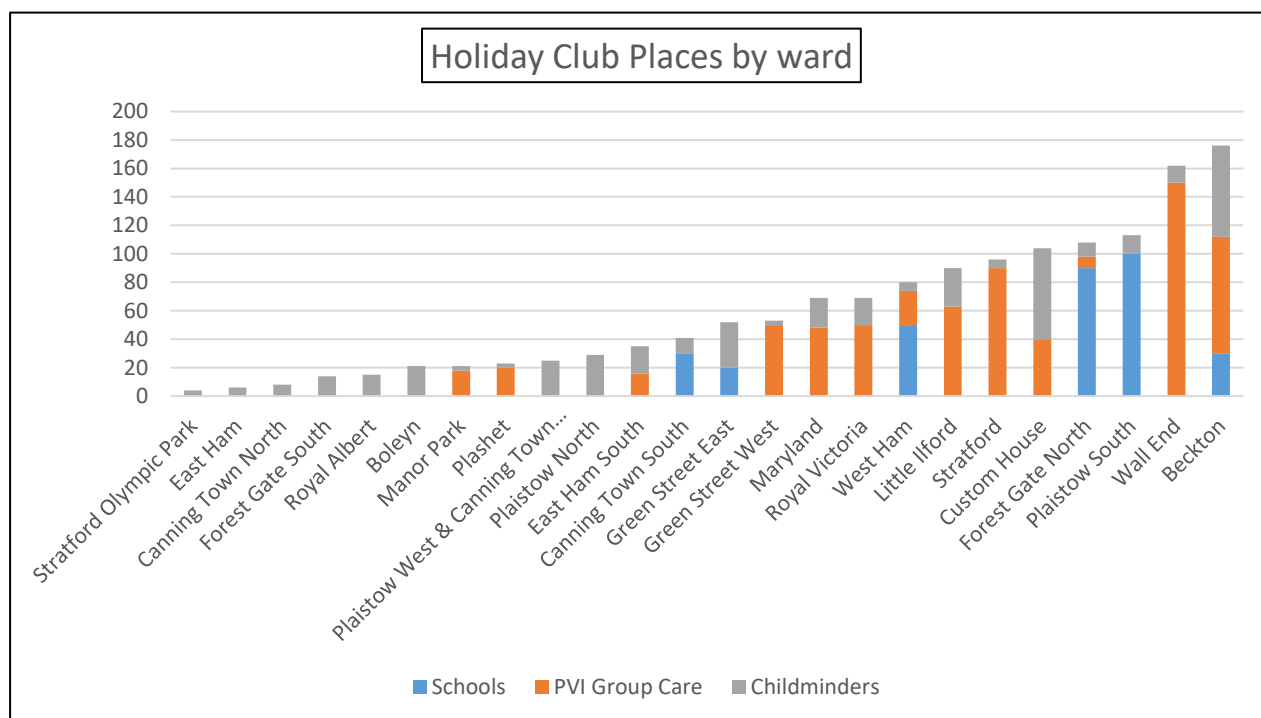
Figure 33



4.2c Holiday Club Places available in each ward over 5s

Figure 34 shows that the distribution of the 1,414 recorded holiday club places across the 24 wards. PVI out of school settings are the biggest provider of holiday club places (659), second are childminders (435) with a minority of schools also offer places (320). The average number per ward is 59. There is wide variation between wards. Beckton (176), Wall End (162), Plaistow South (113), Forest Gate North (108) and Custom House (104) have the most places. The least recorded places are in Stratford Olympic Park (4), East Ham (6), Canning Town North (8), Forest Gate South (14) and Royal Albert (15). Eight wards have only childminder places available to support childcare in the holiday periods.

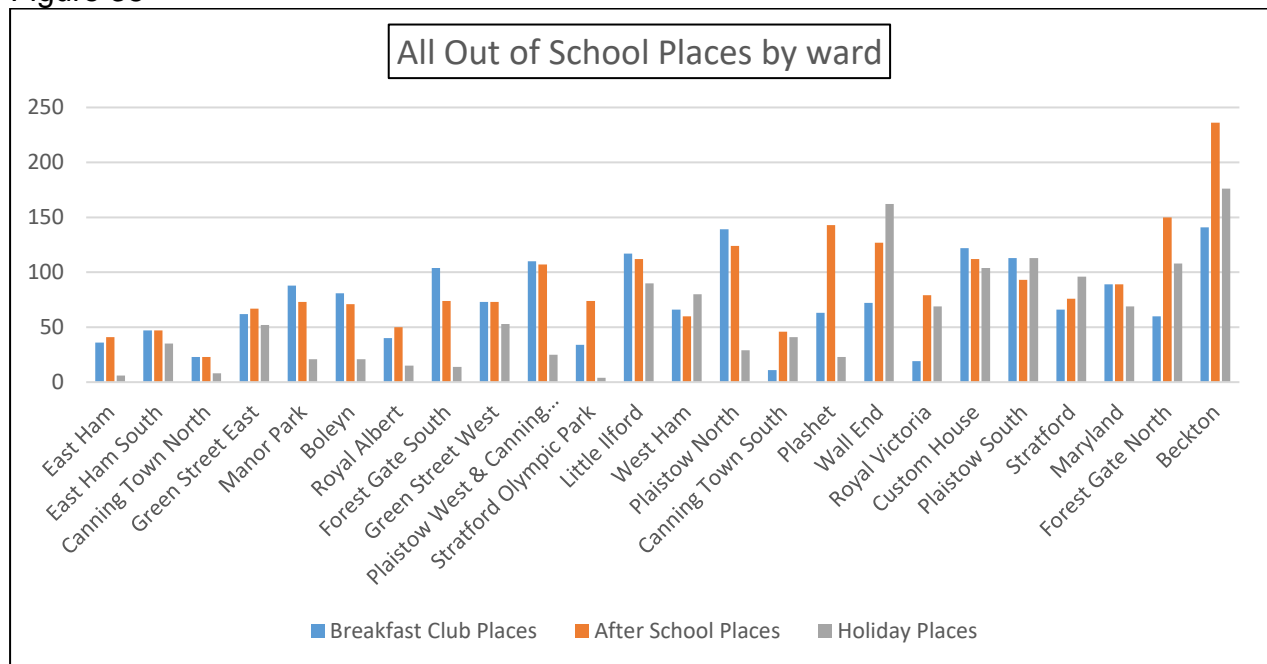
Figure 34



4.2d All Out of School Places available in each ward over 5s

Figure 35 shows all the breakfast, after school and holiday places that have been identified for each ward. The overall places available has been compared against the 5-14 age range population for each ward and ranked, so that the wards on the left have the least number of places for the resident 5-14 population. These include East Ham, East Ham South, Canning Town North, Green Street East and Manor Park. Those wards to the right have the most places for children resident in the ward and include Beckton, Forest Gate North, Maryland, Stratford and Plaistow South.

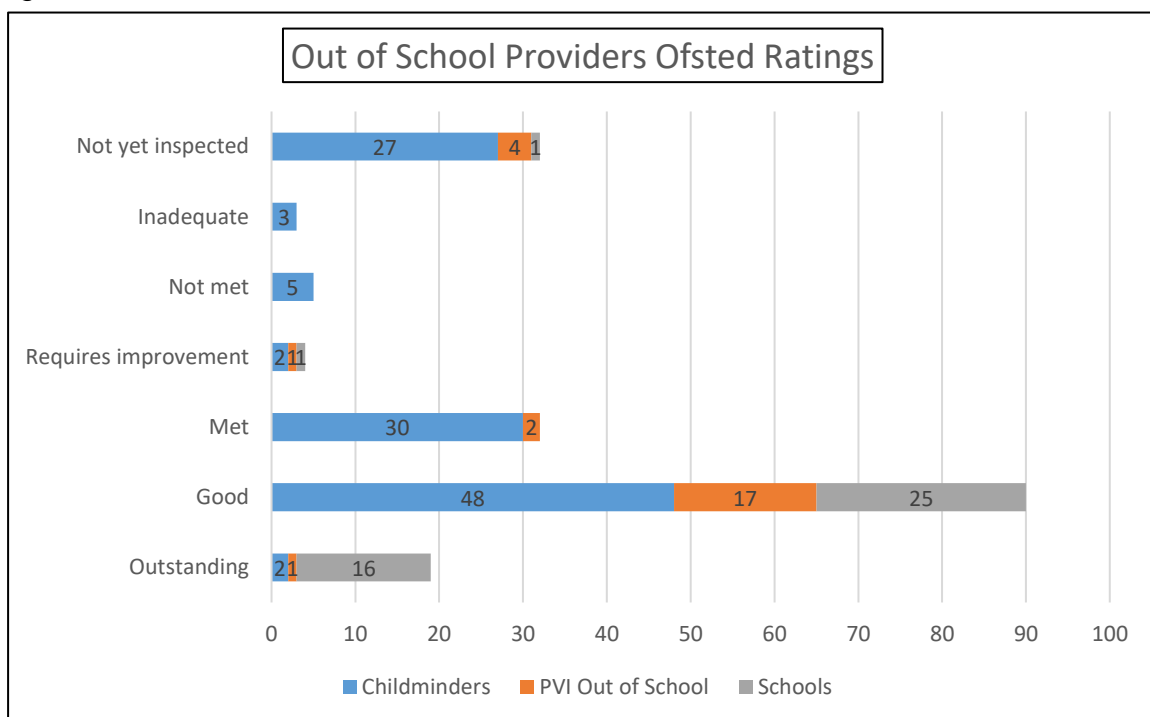
Figure 35



4.3 Provider Quality over 5s

Figure 36 summarises Ofsted ratings for Newham’s Schools, PVI Group care and childminder out of school providers that deliver places for over 5s in autumn 2022. 92% of settings that have received an Ofsted judgement are good, outstanding or met. There are 32 new providers awaiting their first inspection.

Figure 36



4.4 Cost of childcare for over 5s

Out of School services are generally financed through parental fees. Some parents are able to access some help with childcare costs through schemes such as tax free childcare, universal credits or tax credits.

Table 21 shows that services for over 5s are more expensive per hour when delivered by a childminder rather than a PVI group care provider or via schools. Childminder services commonly include pick up or drop off, and may be able to offer greater flexibility with hours. Some of the schools surveyed do not charge for their breakfast or after school activities and the average number of hours are less.

Where comparison can be made, average charges in Newham for group care and childminders are above the average for England and are more aligned to London averages.

4.5 Occupancy of childcare for over 5s

According to Newham's provider survey, Out of school services in schools were relatively full in autumn 2022 at 73%, similar to the 75% reported in 2021.

Occupancy for out of school care is at a much lower base level for childminders. Childminders reported an average occupancy of only 18% in autumn 2022, dropping marginally from the 22% in autumn 2021.

PVI out of school group care occupancy stood at 36% in autumn 2022, lower than the 39% reported for autumn 2021. Settings set up specifically for out of school reported higher occupancy rates than the nursery settings that offer out of school services as an add on to their core business.

4.6 Hours of operation

According to the Newham provider survey 2022 the average childminder hours for breakfast clubs is 10 hours per week, for group care it is 12 hours per week and for Schools 5 hours. Across all individual providers the range of hours offered is between 3 and 15 hours per week.

The average childminders hours for after school care is 15 hours per week, for group care it is 16 hours and for schools it is 11 hours. The range of hours offered across all individual providers is between 4 and 25 hours per week.

The average childminder hours for holiday care in Newham is 39 hours, for group care it is 47 hours and for schools it is 27 hours. The range of hours offered across all individual providers is from 30 to 60 hours per week.

Table 21

Average Weekly costs & Occupancy of Out of School Provision for over 5s						
Provider Type	Newham average hours per week	Newham average hourly rate	Newham average weekly rate	Inner London	Outer London	England
Out of School Group care						
Breakfast	12	£5.63	£65			
After School	16	£5.24	£82	£65	£87	£67
Holiday Scheme	47	£4.49	£213	£161	£157	£148
Average occupancy autumn 2021			39%			
Average occupancy autumn 2022			36%			
Child minder Service						
Childminder breakfast / drop off	10	£6.38	66			
childminder pick up / after school	15	£6.87	102	£107	£93	£71
Childminder full day	39	£5.95	229			
Average occupancy autumn 2021			22%			
Average occupancy autumn 2022			18%			
Out of school by Primary School						
Breakfast	5	£2.23	£12			
After School	11	£3.60	£39			
Holiday (4 Schools only)	27					
Average occupancy autumn 2021			75%			
Average occupancy autumn 2022			73%			

[Newham Childcare Provider Survey 2022](#), [Coram Family and Childcare Trust Childcare Survey 2022](#), [Holiday Childcare Survey 2022](#)

4.7 Newham Holiday Activities and Food Programme

School holidays can be a particularly difficult time for some families because of reduced income or increased costs relating to food and childcare. For some children this can lead to a holiday experience gap, with children from disadvantaged families less likely to access organised out-of-school activities and more likely to experience 'unhealthy holidays' in terms of nutrition and physical health. These children are also more likely to experience social isolation. Free holiday club places, funded by this grant, are a response to this issue.

In November 2020, to respond to this issue, the government announced the

expansion of the Holiday Activities and Food (HAF) Programme across the whole of England. The programme is targeted at school-age children, who are eligible for and in receipt of benefits- related free school meals. A small number of children who are considered 'otherwise vulnerable' can also access the programme.

The council's 2022 HAF programme has been delivered in partnership with schools, the Voluntary community and faith sector (VCFS) and other organisations. The fully inclusive programme has created free places at holiday clubs across the borough during the Easter, summer and Christmas holidays. The programme is an opportunity for the Out of School providers to contribute to the outcomes of the programme and support their own sustainability.

The programme, which forms part of the council's Young People and Food Security Strategy is helping to tackle food poverty and holiday hunger faced by around one third of Newham's children and young people. It also aims to ensure children:

- eat more healthily over the school holidays
- are more active during the school holidays
- take part in engaging and enriching activities,
- are safe and not socially isolated
- have a greater knowledge of health and nutrition

In addition, it helps their families to:

- develop their understanding of nutrition and food budgeting
- access other information and support, for example, housing, health and employment

The Easter programme attracted 2585 children and young people, an increase of almost 30% on the previous year, while the summer programme was able to reach 4263 children, which is an increase of almost 15% on 2021's attendance. At the time of this update, the Christmas programme had just started and attendance data will not be available until the end of January 2023. During the summer HAF Programme alone, 46,570 meals were provided to the children and young people who attended, as well as 1762 hours of physical activity and 214 hours of nutritional education for parents and families.

The government's Autumn Budget and Spending Review confirmed over £200 million a year, until 2024, for the continuation of the nationwide programme. The Department for Education has now confirmed Newham's grant allocation for 2023 of £2,057,160.

Report Sources

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- ³ <https://data.london.gov.uk/dataset/housing-led-population-projections> 2022
- ⁴ Office for National Statistics Local Area Migration Indicators UK September 2021
- ⁵ [London Labour Market Update \(airdrive-secure.s3-eu-west-1.amazonaws.com\)](https://airdrive-secure.s3-eu-west-1.amazonaws.com/London%20Labour%20Market%20Update)
- ⁶ Earnings by Place of Residence, Borough Office for National Statistics (ONS)
⁷ [https://www.ons.gov.uk/peoplepopulationandcommunity/culturalidentity/language/bulletins/languageenglandandwales/census2021#:~:text=Main%20points,-This%20page%20is&text=In%202021%2C%2091.1%25%20\(52.6,49.8%20million%2C%20in%202011\).](https://www.ons.gov.uk/peoplepopulationandcommunity/culturalidentity/language/bulletins/languageenglandandwales/census2021#:~:text=Main%20points,-This%20page%20is&text=In%202021%2C%2091.1%25%20(52.6,49.8%20million%2C%20in%202011).)
- ⁸ <https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/employmentandemployeetypes/articles/ishybridworkingheretostay/2022-05-23>
- ⁹ Newham on line parent survey conducted September – December 2022
- ¹⁰ <https://www.gov.uk/government/statistics/announcements/childcare-and-early-years-survey-of-parents-2022>
- ¹¹ Take up of free early education entitlements Research Report Department for Education 2018
- ¹² DfE Childcare and Early Years Survey of Parents 2019
- ¹³ DfE Take up of free early education entitlements Research Report Department for Education 2018
- ¹⁴ Newham Child view Dataset November 2022
- ¹⁵ Ceeda Counting the cost of childcare delivery in Newham 2017
- ¹⁶ DfE Take up of free early education entitlements Research Report September 2018 Nat Cen Social Research & Ask Research
- ¹⁷ <https://ifs.org.uk/sites/default/files/2022-11/Early-years-spending-update-the-impact-of-inflation-R229.pdf>
- ¹⁸ IFS Report R175 Challenges for the childcare market: the implications of COVID-19 for childcare providers in England, Sept 2020

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