



Childcare Sufficiency Assessment 2025/26

January 2026

Summary Headline Data

- Latest figures (ONS 2024 Mid-Year Estimates) shows there are **17,858 children aged 0-4** in the BCP area, a decrease of 317 (1.7%) compared to 2023.
- BCP currently has **43,600 children aged 5-14**, comprising 20,974 aged 5-9 and 22,656 aged 10-14. The number of 5–9 year-olds fell by 63, while the overall 10–14 age group increased by 178 in the last 12 months.
- The total population is projected to grow by approximately **17,000 people (+4%)** over the ten-year period from 2022 to 2032. The most significant increase is expected among residents aged 65 and over, with an estimated rise of 15,000 people (17%).
- In contrast, the number of children aged **0 to 15 is forecast to decline by 8,600 (14%)**, reflecting a broader trend of falling birth rates in the area.
- Between 2024/25 and 2029/30, **the total number of Primary pupils is projected to fall** by approximately 3,000 (an 11% decrease), from 26,298 to 23,337. **The number of Secondary pupils (excluding sixth form) is expected to remain high** peaking at 20,931 in 2026/27.
- There is a total of **281 childcare providers in the BCP Council area, offering a maximum of 7,771 places** at any one time. This is a fall of 11 providers overall since summer 2024, 8 of which were childminders.
- Overall, **the number of early years places has increased by 74 in the last 12 months**. The most significant increase was in day nursery and school nursery places. Childminder places continues to fall with 53 fewer childminders overall compared to 2021.
- The latest summer term occupancy figures show occupancy rates at childminders was 90%, PVI settings was 84% and school nursery settings was 82%.
- In Summer 2025 1,518 children aged under 2 accessed FEE in BCP, compared to 1,621 entitlement codes validated. This increased to 1,686 codes validated in Autumn 2025.
- **Disadvantaged take up of 2-year-old Funded Early Education (FEE) shows a sharp decline**. This is due, however, to fewer parents meeting the qualifying criteria but also parents migrating to the new working family entitlement for 2 year olds. Summer 2025 shows 2,158 2-year-olds were accessing FEE in BCP. 445 of these were disadvantaged 2-year-olds.
- BCP funded 5,422 3 and 4-year-olds in the summer term 2025. **There is a gradual decline in the take up of universal 3&4-year old FEE due to falling birth rates**, however the number of children accessing working family extended entitlement is increasing.
- In Summer 2025, 374 early years children were recorded as receiving additional SEND Support. This trend contrasts with the continued increase in children receiving SEND support and with an EHCP in the primary and secondary phases.
- **Childcare costs have risen year-on-year across all settings**, with sharper increases in the past two years. From summer 2024 to 2025, the average hourly rate rose from £6.01 to £6.20 - a 3% increase, following a 8% rise the previous year.
- There has been a small change in the overall number of registered out-of-school provisions in the BCP area between 2024-25. Overall, the total number has decreased by four provisions.

Focus Areas

The 2025/26 childcare sufficiency analysis and the broader understanding of the sector has highlighted several areas of focus. These are highlighted below.

Bearwood and Merley

Housing development in this ward continues to grow, with nearly 1,000 additional properties expected by 2032. This raises concerns about the availability of childcare for both existing families and those moving into the area. Earlier this year a preschool and school nursery merged, and brand new wraparound childcare for primary-aged children was introduced. This compliments an earlier establishment of a new day nursery. However, as housing developments progress, further provision will likely be needed to meet demand. BCP Council has seen significant interest from existing businesses and new entrants to the childcare sector seeking information on areas of need and potential properties, which is very encouraging. Bearwood and Merley should be considered by any provider looking to expand. It is also recommended to seek developer contributions, such as through Community Infrastructure Levy (CIL) funding made available by the Council

Mudford, Stanpit and West Highcliffe

In 2025, this ward experienced a significant change in childcare provision when the lease of a major preschool provider ended. The provider relocated to neighbouring Highcliffe, and many families chose to travel there to maintain access to the high-quality, reliable service. As a result, this ward now has the lowest number of places per 100 children aged 0–4, according to this sufficiency assessment. Introducing all-year-round provision within the ward would greatly benefit working families who are unable or unwilling to travel outside their local area. However, prospective providers should consider the existing provision in neighbouring wards when assessing potential sites (at the time of writing a new day nursery registration in this ward is being proposed but not yet confirmed).

Boscombe West, East Cliff & Springbourne, Bournemouth Central

Our summary of early education funding for children aged 0-4 draws attention to several wards. For baby places, there is a marked difference in take-up between more affluent areas and wards with higher levels of disadvantage, including parts of Bournemouth Central and Boscombe West. A similar pattern is seen for working family two-year-olds, with low engagement also evident in East Cliff & Springbourne. It is particularly concerning that, under the 15 hours per week entitlement for disadvantaged two-year-olds, families in these three wards are not accessing the offer as much as those in other areas. Possible reasons include limited availability of places (to be investigated further); barriers to travel; and lack of awareness about eligibility. Accessing a funded place as a disadvantaged two-year-old, before the universal entitlement at age three, offers significant benefits and helps give children a stronger start in life. This year, we will strengthen marketing and communications to parents across BCP, but with a targeted focus on these three wards. We will monitor the impact of these efforts and report progress accordingly (at the time of writing a new day nursery registration in Boscombe West is being proposed but not yet confirmed).

Day Nurseries and Preschools

The conurbation has seen little change in the overall number of registered providers, which is encouraging. While some providers have exited the sector, new provision has emerged, and many more are exploring opportunities. Our summer 2025 provider survey revealed that some providers reported fewer children attending compared to the previous year. With government-funded childcare entitlements now extended to include working families with children aged 9 months to 2 years (approximately 3,200 children in this assessment), it is important for current providers to review their age range for childcare and early education. Providers offering care only for 3–4 year olds, or 2–4 year olds, should consider that parents with an eligible child from 9 months old are unlikely to move their child to another provider at age 2 or 3 if they are satisfied with the quality and their child is settled. To support providers, the DfE-commissioned Childcare Works 'HUB' offers guidance on expansion, business strategies, research models, and more.

Childminders

The Council's supply of childminders has been a key focus for several years, particularly since the 2020 pandemic, when numbers began to decline significantly. Comparing the number of active childminders in 2020 with those active today, the Council has 35% fewer childminders, compared to a 32% reduction nationally. To support this part of the sector, the government has introduced measures including increasing the number of people who can work together under a single registration from three to four; and allowing childminders greater flexibility to operate outside their home for longer periods. A recruitment campaign, 'Be part of something big...', has also been launched, targeting several sectors including childminders. Locally, the Council has commissioned the development of a dedicated webpage to encourage recruitment and retention in the childcare sector, which will be live and publicised soon.

Expanded Entitlements

Government-funded childcare has now expanded to include some children of working parents aged 9 months to 2 years. This phased rollout concluded in September 2025, increasing entitlement to 30 hours per week, term time. To support this expansion, the DfE provided each council with capital funding to create additional places for 0–2 year olds. We are pleased to report that this funding has enabled the addition of 366 new places, including provision from at least five brand-new providers across the conurbation. This achievement meets the target set by the DfE at the start of the programme when the grant was issued to the Council. The first term of full entitlement (autumn 2025) has been successful, with no known parents informing us that they cannot secure a place for their eligible child. This suggests BCP Council currently has sufficient childcare places for those who want one. However, we recognise that demand typically increases throughout the year, with the summer term being the busiest. We will continue to monitor take-up and vacancies each term, identifying trends and wards that may benefit from new businesses or expansion of existing provision.

Demographic Summary

KEY FINDINGS – Declining and shifting 0-4 population and high demand for school age childcare which will gradually ease.

Two main (but contrasting) factors are currently shaping demand for early years childcare:

- 1 Declining and shifting 0–4 population:** The number of children aged 0–4 has been steadily falling since 2017 due to lower birth rates in recent years. This is altering the age profile of young children, with fewer infants and toddlers entering the early years system.
- 2 Expansion of funded childcare entitlements:** At the same time, government policy is significantly increasing access to funded childcare. This expansion is expected to increase demand for places, particularly for under-3s.

0-4 Population

- Latest figures (ONS 2024 Mid Year Estimates): There are 17,858 children aged 0-4 in the BCP area, a decrease of 317 (1.7%) compared to 2023.
- Age breakdown (2024 vs 2023): Under 2s fell by 195 to 6,544; 2 year olds fell by 258 to 3,515, and 3&4 year olds rose by 136 to 7,799 largely due to higher levels of migration.
- Long-Term Trend (ONS 2016-2024 Mid Year Estimates): From 2016-2020, the number of children aged 0–4 in BCP fell by about 2,300, a decline of roughly 600 per year. From 2020-2024, this downward trend continued at a slower pace with a further drop of 1,200, about 300 less children per year.
- Live births: Births in BCP have declined steadily since 2011/12, apart from a small post-Covid increase in 2020/21, falling to just 2,905 2024/25. This compares to 3,213 in 2023/24 and 3,387 in 2022/23, Population projections suggest births are likely to continue to fall over the next decade.
- Forecast (ONS 2022 based sub-national population projections): Over the next 5 years to 2030 the number of 0-4 year olds is projected to fall by around 1,000 children (6%). 3&4 year olds will see the largest decrease by around 600, 2 year olds by 150, and under 2s by around 300.
- Geographical distribution (NHS Digital GP registrations Oct 2025): The number of 0-4 year olds vary significantly by ward. Wards with the highest 0–4 population are Newtown & Heatherlands (917), Kinson (849), Alderney & Bourne Valley (816). Wards with the lowest 0–4 population are East Southbourne & Tuckton (273), Highcliffe & Walkford (220), and Canford Cliffs (189).

5-14 Population

- Current demand for school age childcare is high, with over 43,000 school-age children potentially needing some form of childcare or supervised provision.
- Geographic variation matters as wards with the largest child populations may face persistent or increased pressure on places, even as total numbers decline.
- Demand will gradually ease after 2025, especially for 5-11 year olds, but providers may still see short-term pressure due to high numbers in 2025 and localised population concentrations.
- Childcare demand for 10-14 year olds is likely to remain relatively stable in the next couple of years before falling later in the decade.

Total Population (Mid-year estimates):

- The 2024 Mid-year estimates show the total population for BCP Council is 408,967¹. This represents an increase of 0.6% (2,341 more residents) since mid-2023.

¹ Mid-Year Estimates 2024

- The most populated wards are: Bournemouth Central, Newtown & Heatherland, and Kinson. The least populated wards include: Canford Cliffs, Highcliffe & Walkford, and Burton & Grange.

Census Population (2021)

- The 2021 Census results for BCP give a resident population of 400,300 in March 2021. This is an increase of 5.7% compared with the 2011 Census. The age groups showing the biggest increase in BCP include 70–79-year-olds, 50–59-year-olds and 5–14-year-olds. Age groups experiencing the biggest fall in numbers since 2011 include 0–4-year-olds (-9.4%), 25–29-year-olds and 45–49-year-olds.

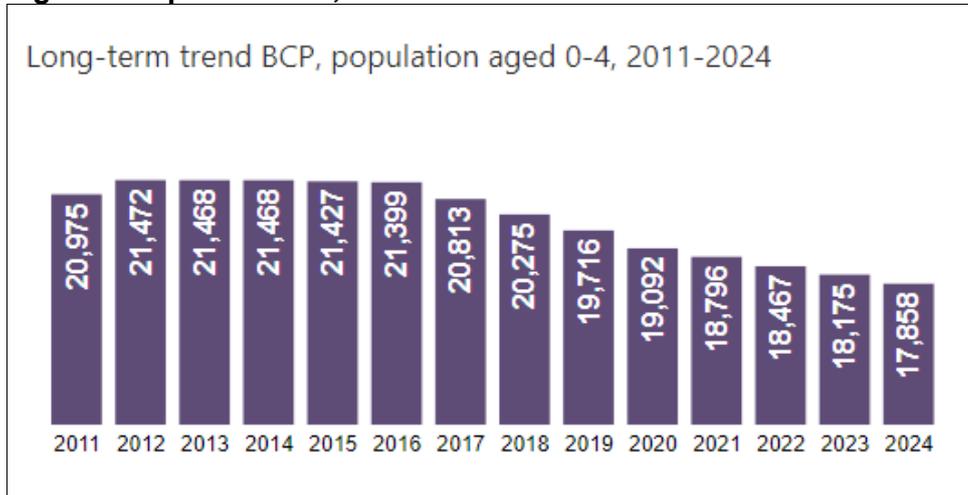
Index of Multiple Deprivation (IMD) 2025

- BCP Council ranks 169th out of 296 English local authorities in the national Index of Multiple Deprivation (IMD 2025), where 1 represents the most deprived.
- According to the English Indices of Deprivation 2025, around 2,200 children aged 0–4, and 5,300 children aged 5-14 live in the 24 LSOAs that are among the 20% most deprived areas in England.

Population 0-4

The latest 2024 mid-year estimate population figure show there are **17,858 0–4-year-olds** in the BCP area.

Figure 1 Population 0-4, 2011-2024



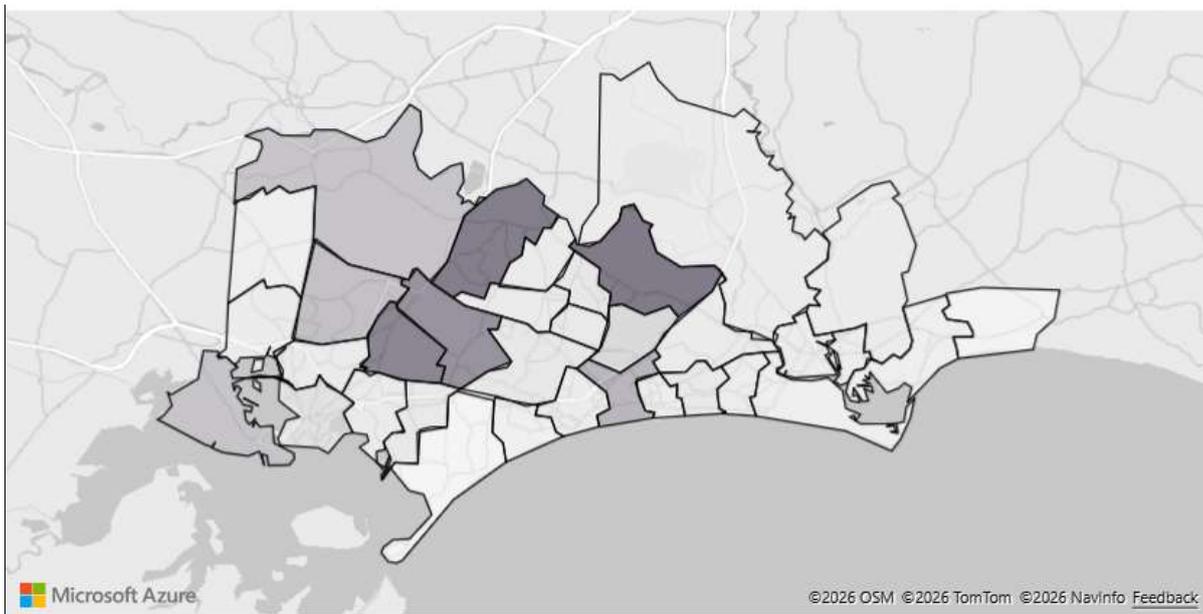
The pre-school age population in BCP is declining, primarily due to a falling birth rate. The number of children **aged 0–4 dropped from 18,467 in 2022 to 18,175 in 2023, and further to 17,858 in 2024** (Mid-year estimates). This represents a decrease of 317 children (1.7%) between 2023 to 2024. While there is some variation across wards, the overall trend is one of consistent population. In the last 10 years (Census 2011-2021) this age group has seen a **fall by 10.5%** 2011-2021.

Table 1: 0-4 population by age (2022-2024 Mid-Year Estimates)

Age Group	2022	2023	2024	Change 2023-2024
0	3,433	3,266	3,217	-49
1	3,726	3,473	3,327	-146
2	3,688	3,773	3,515	-258
3	3,773	3,801	3,876	75
4	3,837	3,862	3,923	61
Total	18,467	18,175	17,858	-317

October 2025 GP registrations show the number of 0-4 year olds in the BCP area is 16,800. The map below shows the distribution of this age group in the BCP area. The darker colour the ward, the greater number of 0-4 year olds.

MAP 1: 0-4 year-olds by Ward, GP registrations October 2025



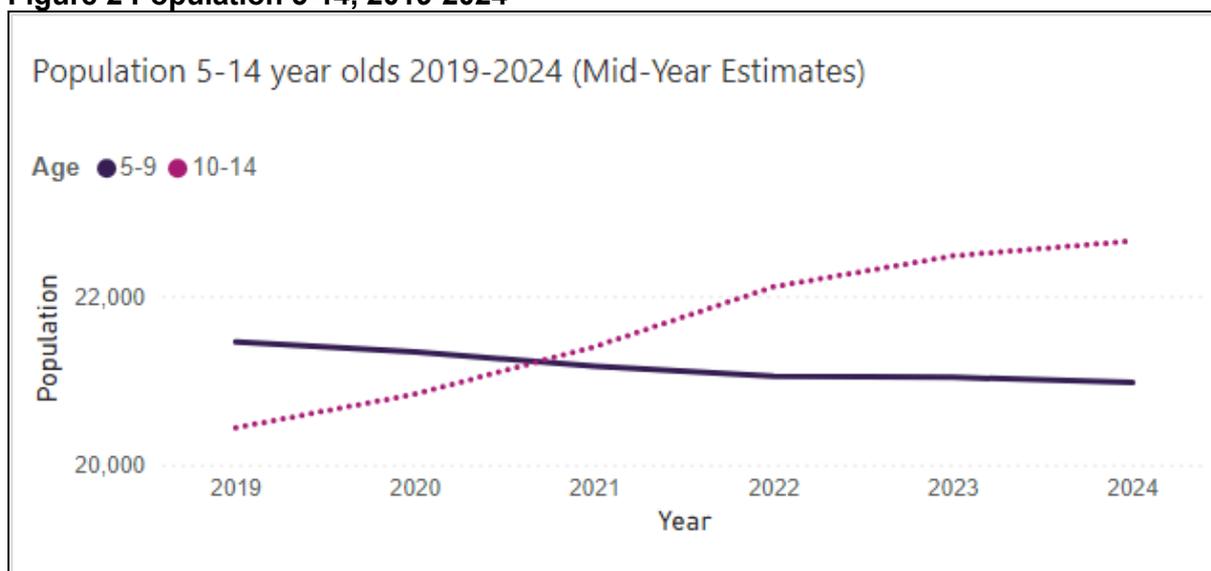
Wards with the highest population of 0-4 year-olds are Newtown & Heatherlands, Kinson and Alderney & Bourne Valley. Wards with the fewest number of 0-4 year-olds are Canford Cliffs, Highcliffe & Walkford, and East Southbourne & Tuckton.

Population 5-14

BCP currently has **43,600 children aged 5-14**, comprising **20,974 aged 5-9** and **22,656 aged 10-14** (2024 Mid-Year Estimates). These children may require wraparound childcare (before/after school), holiday provision, or activity-based care.

Compared to 2023, the **number of 5–9 year-olds fell by 63**, while the overall **10–14 age group increased by 178**.

Figure 2 Population 5-14, 2019-2024

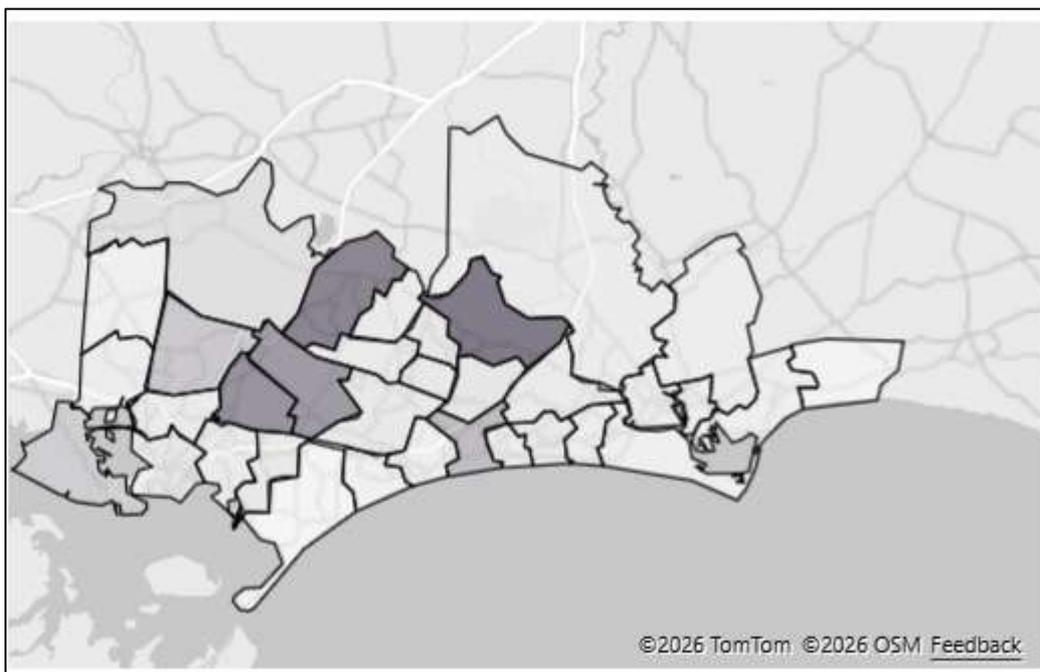


Ward-level data from the October 2025 GP Register show the highest concentrations of 5–14 year-olds in:

- Muscliff & Strouden Park 2,467
- Kinson 2,384
- Newtown & Heatherlands 2,248

The map below shows the distribution of this age group in the BCP area. The darker colour the ward, the greater number of 5-14 year olds.

MAP 2: 5-14 year-olds by Ward, GP registrations October 2025



Medium-term outlook (2025-2030)

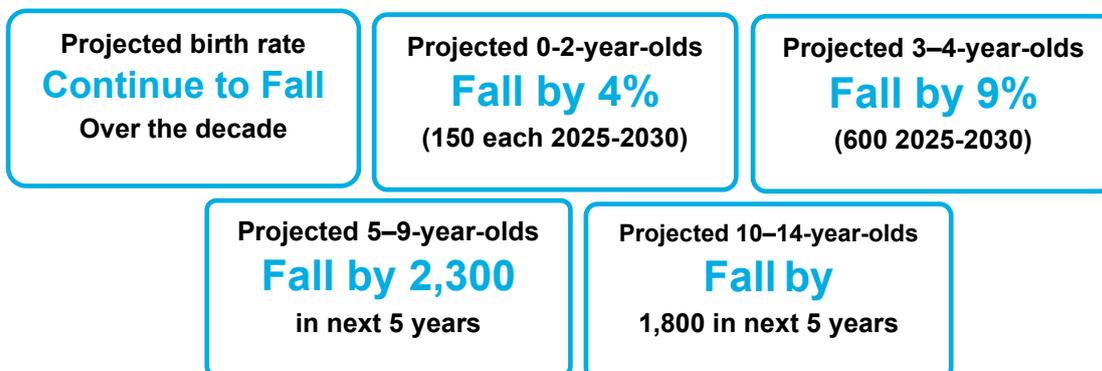
Overall school-age numbers are projected to decline by around 4,000 children (-10%).

The 5–9 population is expected to fall by 2,266, reducing demand for after-school clubs and holiday schemes targeted at younger children.

The 10–14 population is projected to fall by 1,787, gradually easing demand for older-age provision such as enrichment activities, and holiday programmes for early teens.

Population Projections

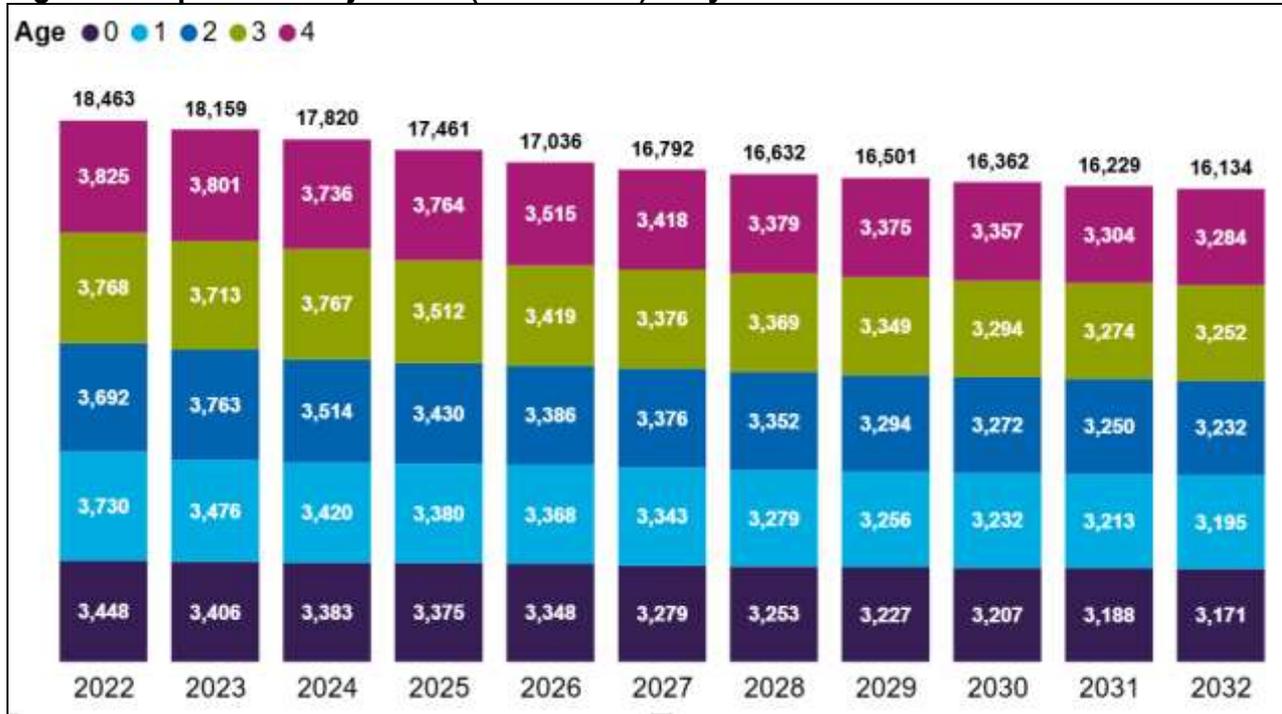
The 2022-based population projections were published in June 2025.



- The total population is projected to grow by approximately **17,000 people (+4%)** over the ten-year period from 2022 to 2032.
- The most significant increase is expected among residents aged 65 and over, with an estimated rise of 15,000 people (17%).
- In contrast, the number of children aged **0 to 15 is forecast to decline by 8,600 (14%)**, reflecting a broader trend of falling birth rates in the area.
- The latest projections suggest that **births will continue to decrease** throughout the decade.

- The number of **0, 1 and 2 year olds** are forecast to **decline by approximately 150 (4%), each**.
- The number of **3-4 year olds**—all of whom are eligible for at least 15 hours per week of council-funded early years childcare—is expected to **fall by around 600 (-9%) 2025-2030**.
- The number of children **aged 5 to 14 is expected to fall by approximately 4,000 (10% decrease)** between 2025 and 2030.
- The number of **5-9-year-olds is set to fall by 2,300** over the next five years 2025-2030.
- The population of **10-14 year-olds is projected to decline by approximately 1,800 2025-2030**.

Figure 3: Population Projections (2022-based) 0-4 year-olds



Since the 2020/21 academic year, there has been a noticeable decline in the demand for Primary school places across the BCP area. This trend is expected to continue at least until 2029/30. The primary driver is a 30% drop in birth rates since 2012/13, which has led to reduced demand for Reception places starting from 2017/18.

- Between 2024/25 and 2029/30, the total number of Primary pupils is projected to fall by approximately 3,000 (an 11% decrease), from 26,298 to 23,337.
- As a result, surplus Reception places are expected to rise from 13% in 2024/25 to about 20% by 2029/30, with a slight temporary increase in demand in 2025/26.

The number of Secondary school pupils in BCP began to rise from 2017/18, reflecting the earlier increase in Primary pupils, but with a six-year delay. This upward trend is expected to continue until 2027/28, after which pupil numbers are projected to decline.

- According to the 2025 BCP pupil forecasts, the number of Secondary pupils (excluding sixth form) is expected to remain high—around 20,800 and 20,900—until 2027/28, peaking at 20,931 in 2026/27.

Figure 4: Reception year forecasts

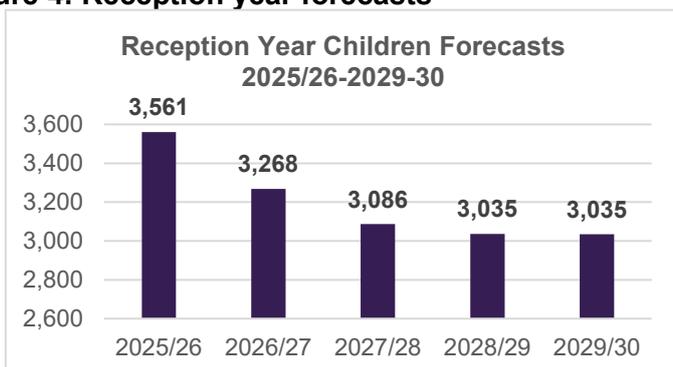


Table 2: Reception-year 6 forecasts

Forecast Year	Reception-Year 6
2025/26	26,049
2026/27	25,469
2027/28	24,661
2028/29	23,906
2029/30	23,337

Childcare Provision

KEY FINDINGS - Childcare capacity and gaps in provision in BCP

1. The BCP area has 47 registered childcare places per 100 children aged 0–4 roughly one per every two children. For under-5s eligible for Funded Early Education (FEE), there are 77 places per 100 children. No universal benchmark exists for ‘sufficient’ childcare supply, but some suggest areas with fewer than 60 places per 100 children may face unmet demand or waiting lists.
 2. Provision is unequal across the area: eight wards offer fewer than 30 places per 100 children, and at least half of these include neighbourhoods with high levels of deprivation.
 3. Most recent occupancy rates at 84% suggest there is spare capacity in BCP. but, places for under 2s are in demand with 40 providers stating they had waiting lists for this age for Autumn 2025.
 4. There remains limited provision outside of standard hours, and wrap-around care is not consistently available or affordable for all families.
- At September 2025 there are 281 registered childcare providers in the BCP Council area. These offer a maximum of 7,771 places at any one time.
 - Although there are 11 fewer providers than in 2024, the number of childcare places has increased by 74, however this increase is localised and driven by a large, newly registered day nursery in Broadstone.
 - Day nurseries: 4,173 places (+49 places 2024-25, and +92 2023-24)
 - Pre-schools: 1,876 places (-63 places 2024-25, and -58 2023-24)
 - Childminders: 917 places (-7 2024-25, and -81 2023-24). Total reduction of 23 childminders since 2022.

281 registered childcare providers offering maximum **7,771** places at any one time

Active registered **childminders** have **fallen by 8** in the last 12 months

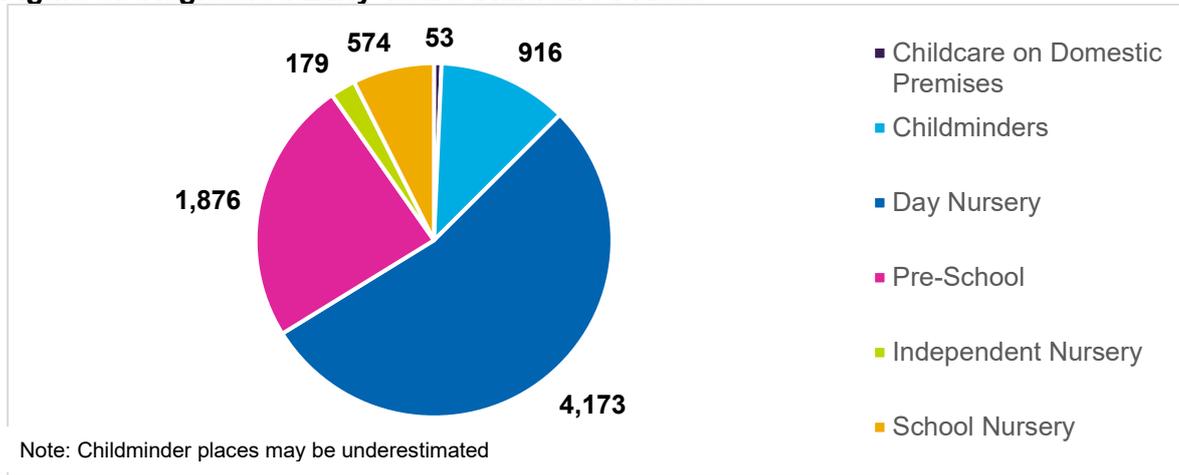
Day Nursery places have **risen** and **Pre School** places have **fallen** since the 2024 analysis

There is a total of **281** childcare providers in the BCP Council area, offering a maximum of **7,771** places at any one time². As of September 2025, the total number of registered childcare places has increased by 74, rising from 7,697 in September 2024 to 7,771 now. But this masks significant differences both at ward level and by provision type. Overall, the number of childminders has fallen by 53 since the 2021 analysis, losing a further 8 childminders in the last 12 months.

- Day nursery places rose by 92 in 2024–2025, building on a previous increase of 49 in 2023–2024. There was notable variation across wards.
- School nursery places increased by 66 overall during 2024–2025, with no change in 2023-24.
- The number of registered childminders continues to decline, with 7 fewer places in 2025 compared to 2024. This reduction is less severe than the 81 drop recorded in 2023–2024.
- Pre-school places declined by 58 between 2024 and 2025, following a similar drop of 63 the previous year (2023–2024).

² Note that data is at 1 September 2025, this can fluctuate throughout the year with provision closing and new providers opening. Some settings may also change their status type thus affecting the individual provider type figures. Comparisons are made with September 2024 figures to show consistency.

Figure 5: Registered Early Years Childcare Places



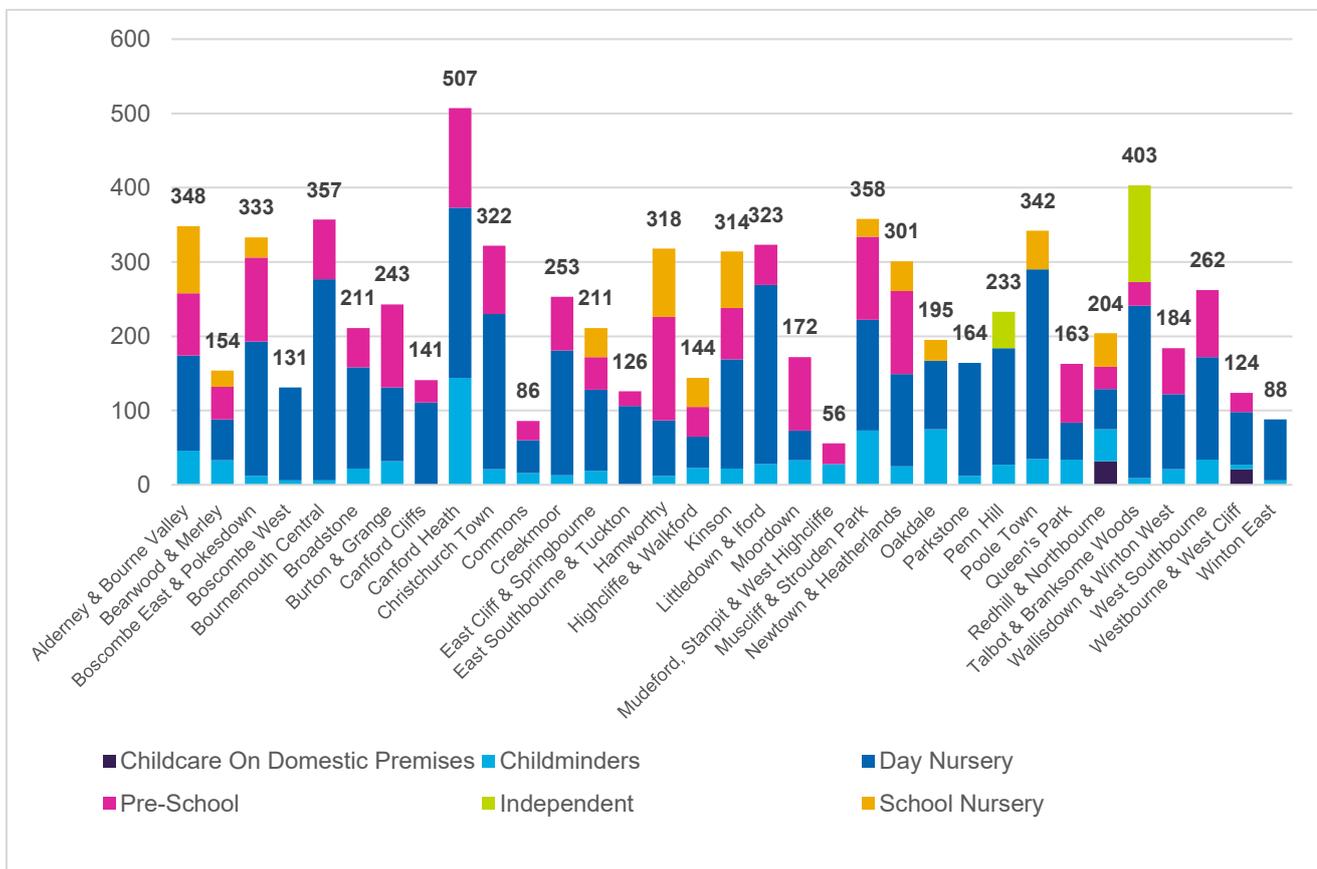
54% (4,173) of places are in Day Nursery settings, 24% (1,876) of places are in Pre School settings and 12% (916) of places are at Childminders. There are 179 Independent Nursery setting places and 574 places at School Nurseries.

- The highest number of childcare places are in Canford Heath 507 places, Talbot & Branksome Woods 403 places and Muscliff & Strouden Park 358 places
- The lowest number of childcare places are in Winton 88 places, Commons 86 places and Mudeford, Sandpitt & West Highcliffe 56 places.

In Bournemouth, Christchurch and Poole (BCP), childcare is most commonly provided during standard working hours. Typical opening times range from 7:30am to 8:30am, with closing times between 5:00pm and 7:00pm.

- 4% of early years settings and childminders open before 7am. A further 35% open before 8.00am.

Figure 6: Early years places by type and ward (September 2025)



Summary of Childcare Provision - Changes 2024-2025

- The total number of registered childcare places has increased by 74, rising from 7,697 in September 2024 to 7,771 now.
- Day nursery places rose by 92 in 2024–2025, building on a previous increase of 49 in 2023–2024.
- Pre-school places declined by 58 between 2024 and 2025, following a similar drop of 63 the previous year (2023–2024).
- Overall, the number of childminders has fallen by 53 since the 2021 analysis, losing a further 8 childminders in the last 12 months.
- School nursery places increased by 66 overall during 2024–2025, with no change in 2023-24.
- **Broadstone** ward has seen the greatest increase in places.
- **Poole Town** ward has seen the greatest decrease in places.

99% of childminders, preschools and day nursery settings have signed up for

Tax-Free Childcare.

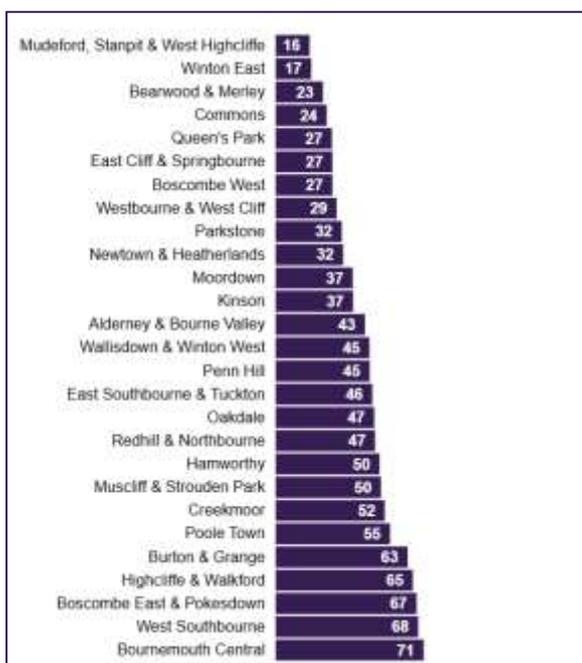
Day nursery and preschool sign up is **100%** (where known) and childminders has increased to 98.5%

The number of families who have used tax free accounts continues to **increase** year on year. The number of families who have used tax free accounts between 2024-25 has increased by **10% in England, 9% in the South West** and **7% in BCP**.

Supply of early years places per 100 population aged 0-4

There are large disparities in rates of early year places per 100 children aged 0-4 across wards. Early years paces per 100 children aged 0-4 year in BCP is 47.

Figure 7: Rate of early years places per 100 children aged 0-4 by ward



Mudford, Sandpit & West Highcliffe and Winton East have the lowest rates of provision at 16 and 17 places per 100 children, compared to Christchurch Town with the highest rates of provision at 103 places per 100 children.

It should be noted that new day nursery provision is, at the time of writing, proposed for Mudford and Boscombe West and not reflected in these figures.

The latest **occupancy figures** available are for Summer 2025 (64% response rate to survey).

Occupancy rates at **childminders** is **90%**

Occupancy rates at **PVI settings** is **84%**

Occupancy rates at **school nursery settings** is **82%**

Special Educational Needs and Disabilities (SEND)

KEY FINDINGS- Children with Special Educational Needs and Disabilities (SEND) have been increasing steadily both nationally and in BCP.

1. The number of early years children with SEND support in BCP peaked in Summer 2023 at 442, but have fallen slightly over the last two years to 374 since the introduction of new SEND support eligibility criteria in 2024.
2. This trend generally contrasts with the continued increase in children receiving SEND support and with an EHCP in the primary and secondary phases.

Early Years

All registered childcare providers are required to submit their individual SEND offer for inclusion. This supports parents and carers in identifying suitable providers. Childcare settings must also have an inclusion policy and a named SENCO.

4 1-year-old & **48** 2-year-old children received additional SEND funding support in a BCP provider (Summer 2025)

322 3 & 4-year-old children received additional SEND funding support in a BCP provider (Summer 2025)

In Summer 2025, **374** children were recorded as **receiving additional SEND Support**.

28 (7.5%) of children receiving additional SEND support are in Tier 1, 131 (35%) are in Tier 2 and 215 (57.5%) are in Tier 3.

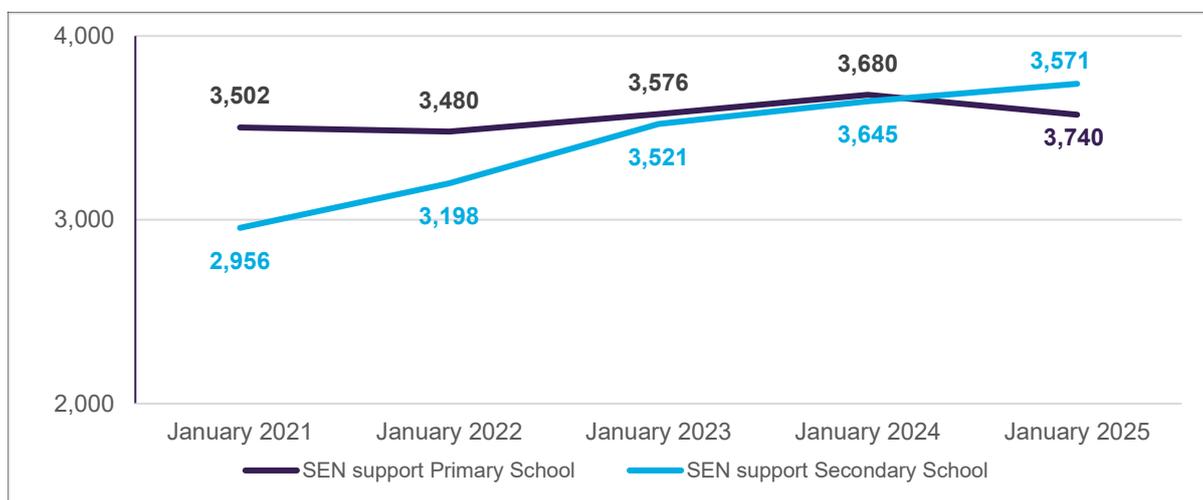
Of the 374 children receiving additional SEND funding in Summer 2025:

- 124 (33%) received the Early Years Pupil Premium, compared to 14% of all children.
- 192 (51%) received the Deprivation Supplement, compared to 21% of all children.
- 135 (42%) of 3-and-4 year olds received Extended Entitlement, compared to 57% of all children.
- Additionally, 95% of children receiving SEND funding who attended an inspected provider were placed in a setting rated good or outstanding.

School Age Children

In January 2025 the schools census recorded **1,345 EHCPs for primary schools** and **1,328 for secondary schools**. A total of **7,311** primary and secondary school children received SEN support, a similar number to that reported in January 2024.

Figure 8: School age children that receive additional SEN support



Quality Of Provision And Hourly Rates Of Provision

KEY FINDINGS- High quality provision and equal to or better than national rates.

1. The quality of early years provision in BCP is high, with 98% of inspected settings rated 'Good or Outstanding' at 1 Sept 2025.
2. Performance is stable over time and better than or equal to national benchmarks.

KEY FINDINGS - Affordability Challenges with high childcare costs remaining a barrier

1. **Financial pressures on providers:** national evidence shows childcare providers are under growing financial strain due to falling private income, rising operational costs, and insufficient government funding. This has led to widespread fee increases and the introduction of voluntary additional charges against government funded hours at some settings.
2. **Rising costs in BCP:** childcare costs have increased across all settings in BCP, with sharper rises in the past two years. Coram's childcare survey indicates BCP's costs align with national averages
3. **Affordability challenges:** high childcare costs remain a barrier, especially for families not eligible for funded entitlements. While expanded government support has reduced costs for parents of children under 3, families with 3&4 year olds are absorbing full cost increases as entitlements for them remain unchanged. Many families still face additional charges for items like meals, nappies, and activities. These fees help providers stay afloat but must be optional, clearly itemised, and not tied to access to funded hours.
4. **Cost disparities:** families not eligible for new entitlements—such as those not in work or earning below the threshold—face significantly higher costs. A part-time place for a child under two can cost around £100 more per week for these families
5. **Emerging two-tier system:** the expansion of funded childcare is primarily benefiting working families, raising concerns that disadvantaged children and those with SEND are being left behind due to lower eligibility for support

The percentage of P&V* settings who have a quality rating of "good" or "outstanding" has **remained the same**

ALL childminders have a quality rating of "good" or "outstanding"

The % of P&V* settings and childminders with a rating of 'good' or 'outstanding' in BCP is **slightly lower** than the National average

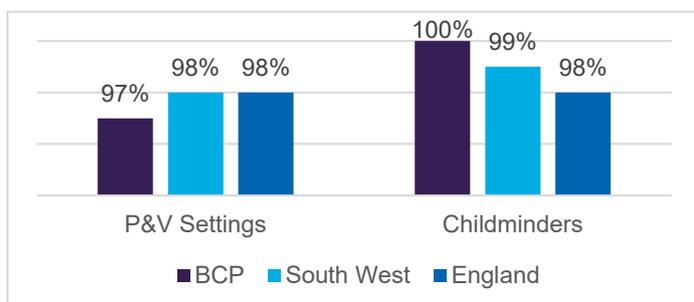


Figure 9: Ofsted rating 'good or outstanding' (March 2025)

97% of private and voluntary settings have a quality rating of 'good' or 'outstanding' (those with an Ofsted rating), the same as reported in 2024.

ALL childminders in the Local Authority who have a quality rating are rated as 'good' or 'outstanding'.

The quality of out-of-school provision in BCP has improved since 2024. In 2025, two settings were rated as 'requires improvement', compared to four rated 'requires improvement' and one rated 'inadequate' in 2024.

From 10 November 2025, Ofsted inspections of early years settings will change. The single overall grade will be replaced by five rating levels across six assessment areas, designed to highlight strengths and areas for improvement rather than relying on one overall judgement

Hourly Cost Of Early Years Childcare

The average price per hour is

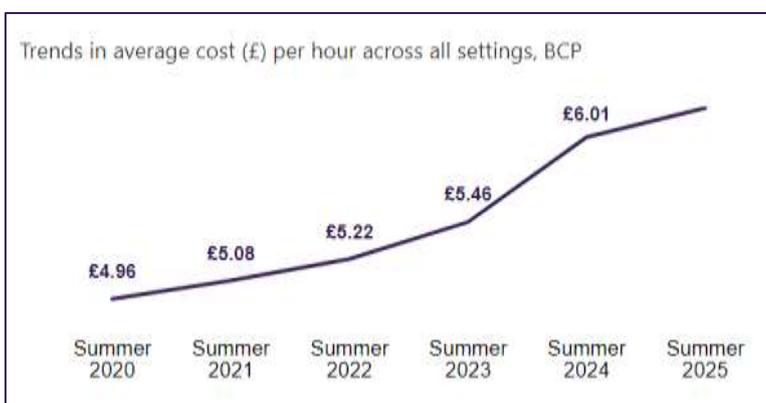
£7.36 at a day nursery

£6.10 at a pre-school

£5.94 at a childminder

- Childcare costs have risen year-on-year across all settings, with sharper increases in the past two years. From summer 2024 to 2025, the average hourly rate rose from £6.01 to £6.20 - a 3% increase, following a 8% rise the previous year.
- 2020-2025 have seen significant cost increases, the highest being at day nursery settings showing 27% rise (+£1.58 per hour).
- Parents with children under 3 have seen reduced costs due to expanded government-funded entitlements. For 3&4 year-olds, families are absorbing the full cost increases as entitlements remain unchanged.

Figure 10: Average Cost Per Hour (All Settings)



- The average price per hour at a day nursery is £7.36. The most expensive settings are in **Westbourne & West Cliff ward and Queens Park ward**.
- Charges at pre-schools average £6.10 per hour. The most expensive pre-schools are in **Moordown ward & Muscliff & Strouden Park ward**. The cheapest pre school is **Moordown ward**.
- The average price per hour at a childminder is £5.94, a 25% increase since 2020.

Cost of 25 hours per week childcare in nurseries for 3 & 4 year-olds (without working family entitlements) (Coram 2025 Childcare Survey)

£64.09 ENGLAND

£60.92 SOUTH WEST

£66.93 BCP

Funded Early Education (FEE) For Children 9 Months - 4 Years

From 1 April 2024, 15 hours government funding is available for 2- year-old children of working families, in addition to the existing funding for disadvantaged 2-year-olds.

From 1 September 2024, the 15 hours FEE entitlement is extended for eligible working parents of children aged 9 months - 2 years of age

From 1 September 2025, eligible working parents of children aged 9 months and above will be able to access 30 hours (over 38 weeks a year)

KEY FINDINGS- Under 2-Year-Olds

1. **Demand for FEE for under 2's has increased** after expanded eligibility. 40 providers reported waiting lists for children under two for Autumn 2025 (2025 Providers Survey)
2. **Ward variation:** 61% take-up in Broadstone vs. 21% in disadvantaged wards (Boscombe West, Bournemouth Central)
3. **Implication:** Equity concerns as expansion favours working families. Monitoring needed with demand for under-2 provision rising - capacity and workforce implications.

KEY FINDINGS- 2-Year-Olds

1. **In Summer 2025 BCP funded early education for 2,158 two-year-olds** (65% of the population).
2. **Disadvantaged take-up shows a sharp decline** from 770 (93%) 2023 to 445 (68%) 2025. Key drivers are frozen income thresholds, rising living costs, and overlap with working parent entitlement.
3. **Ward variation:** Working FEE take up ranges from 81% in West Southbourne to under a third in Bournemouth Central, East Cliff & Springbourne, and Boscombe West. Disadvantaged take-up is also low in these latter three wards.

KEY FINDINGS- 3&4-Year-Olds

1. **Universal entitlement take-up remains strong** at 97%, but overall numbers are falling due to declining births and resulting drop in population. Extended entitlement continues to grow.
2. **Ward variation:** Wards with the lowest overall take-up and low extended entitlement suggest persistent gaps for disadvantaged families. Bournemouth Central: 80% overall take-up; 35% accessing extended FEE. Boscombe West: 83% overall take-up; 40% extended FEE.

Under 2-Year-Olds

Under 2's accessing working FEE BCP (Summer 2025)

1,518

- **Demand for FEE for under 2s in BCP has increased**, following the expansion of eligibility from 15 hours childcare starting Sept 2024 to 30 hours from Sept 2025.

- In Summer 2025 1,518 children aged under 2 accessed FEE in BCP, compared with 1,703 codes issued and 1,621 codes validated. This suggests 100+ children living in BCP validated codes at providers in neighbouring LAs, mainly in Dorset and the New Forest.

The number of eligibility codes issued to parents in BCP has risen from 1,703 in Summer 2025 to 1,797 in Autumn 2025. While codes issued to parents applying for FEE, are not a perfect measure, they serve as a useful proxy for gauging demand.

Overall, 38% of under 2s resident in BCP accessed government-funded childcare, with significant variation at ward level: 21% in Boscombe West and Bournemouth Central compared to 61% in Broadstone.

This points to a potential two-tier system emerging, where the expansion of funded childcare mainly benefits working families. This raises concerns that disadvantaged children—those who stand to gain the most from early years provision—are being left behind due to limited eligibility.

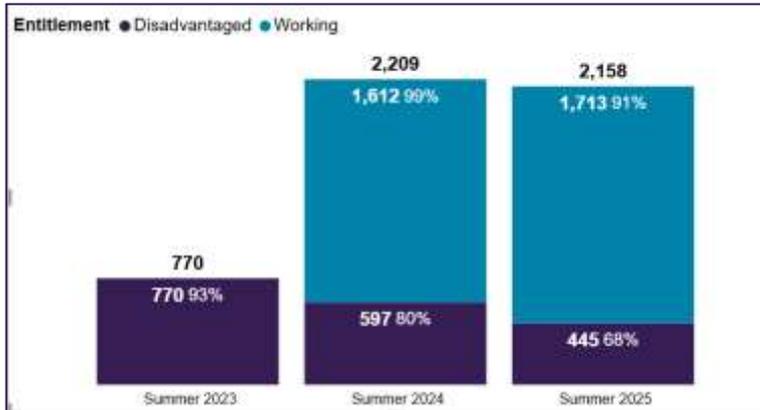
% under 2-year-olds accessing FEE in the same ward as their home address

31%

- In BCP under a third (31%) of under 2 year olds access childcare in the same ward as their home address. But this varies considerably between areas, from 63% of under 2 year olds in Burton & Grange to just 3% in Commons ward.

2-Year-Olds

Figure 11: Number and (%) take up of 2-year-old disadvantaged and working family FEE in BCP



- Summer 2025 shows 2,158 2-year-olds were accessing FEE in BCP. 445 of these were disadvantaged 2-year-olds.
- 1,713 2-year-olds accessed the working family FEE in Summer 2025.

% 2 year-olds accessing any FEE in BCP Summer 2025

64%

- **Disadvantaged families** - Take-up remains much lower and has declined from 770 children (93%) in Summer 2023 to 445 (68%) in Summer 2025. National rates have also fallen, from 75% in 2024 to 65% in 2025.
- **Key drivers of the decline in disadvantaged take-up:**
 - The total disadvantaged cohort has shrunk. Eligibility is based on income thresholds that have been frozen since 2014, and inflation and rising living costs mean fewer families qualify. The 2 year old population has also declined due to declining births.
 - Misclassification of children eligible for both entitlements under the working-family category, may have also artificially lowered disadvantaged take-up rates.

% 2-year-olds accessing FEE in the same ward as their home address

37%

- In BCP 37% of 2 year olds access childcare in the same ward as their home address. But this varies considerably between areas, from 69% of 2 year olds in Highcliffe & Wakeford to 15% in East Cliff & Springbourne ward.

3 and 4-Year-Olds

3&4 year-olds accessing Universal FEE in BCP (Summer 2025)

2,324

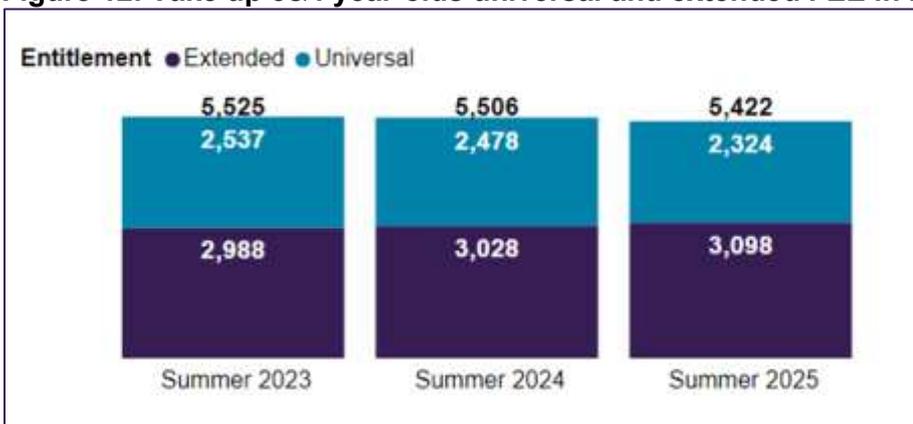
3&4 year-olds accessing Extended FEE in BCP (Summer 2025)

3,098

% Accessing Extended FEE in BCP (Summer 2025)

57%

Figure 12: Take up 3&4 year-olds universal and extended FEE in BCP



- **Universal Entitlement:** The falling population of 3 & 4 year olds has reduced the absolute number accessing FEE. But overall participation remains strong, 97% accessed the universal 15-hour entitlement in 2025, up from 92% (2023) and 94% (2024). This contrasts with the national decline to 93% in 2025.

- **Extended Entitlement (Working Parents):** 57% of children accessing FEE also received the extended entitlement in 2025, up from 54% in 2023. This growth may indicate increased parental employment, particularly among mothers, and greater awareness of the entitlement.
- **Implications:** The number of 3 & 4 year olds is falling, but there is strong overall participation. Significant local disparities remain, possibly requiring targeted outreach and support in disadvantaged wards.

% 3&4-year-olds accessing FEE in the same ward as their home address

41%

- In BCP 41% of 3&4 year olds access childcare in the same ward as their home address. But this varies considerably between areas, from 70% in Hamworthy to 21% in Boscombe West and Winton East wards.

- The location where children access funded early education is an important consideration for policy, equity, and planning. Limited capacity can restrict access, but other factors such as parental preferences, work patterns, and awareness can also influence uptake.

Out Of School Provision

KEY FINDINGS- localised pressure on school age childcare supply

- 1 **Current supply broadly matches overall need at the BCP wide level, but localised shortages are evident. Short-term access issues are likely in hotspot wards** for both breakfast/after-school clubs and holiday schemes, particularly following the reductions in breakfast clubs in 2024–25.
- 2 Wards with high demand but minimal or no supply: **Newtown & Heatherlands, Alderney & Bourne Valley, East Cliff & Springbourne, and Moordown.**

In the PVI Sector there are

19 Breakfast Clubs &
39 After School Clubs

There are additional school-run clubs

36 Breakfast Clubs &
30 After School Clubs

There are **41** Registered
Holiday Schemes

Throughout the Local Authority several providers, including schools, offer a variety of childcare services and activities outside of normal school hours which support working families. Increasing the 8am to 6pm wraparound places offered to working families is a key local and national priority. With the use of the DfE's Wraparound Care Programme Delivery Fund, BCP Council is working with schools and private providers to ensure that a term-time 8am to 6pm offer is in place at every primary school, where there is a need.

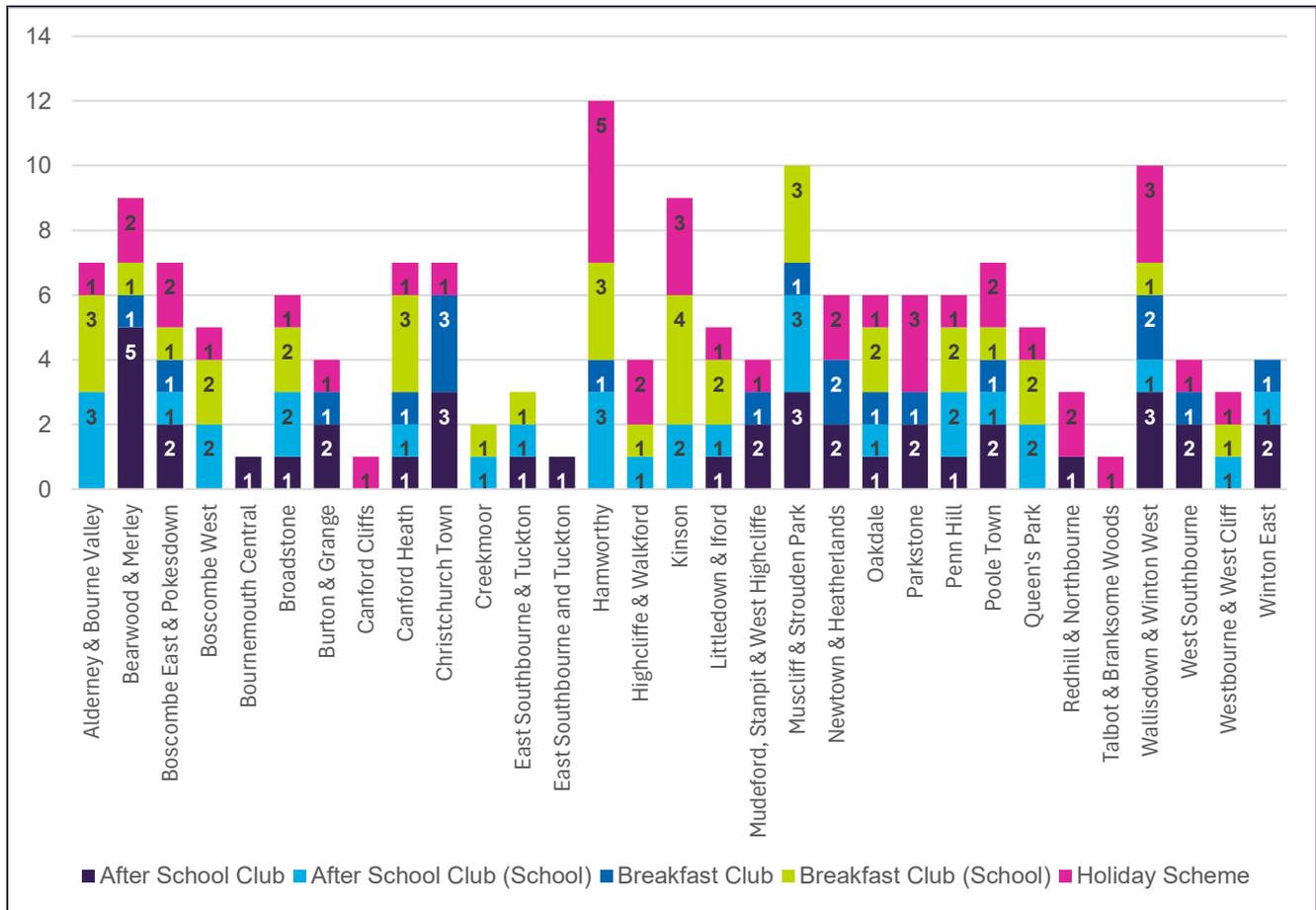
- Overall, there are 55 breakfast clubs and 69 after school clubs. There are also 41 registered holiday schemes.
- **Changes since 2024-2025**
 - There has been a small change in the overall number of registered out-of-school provisions in the BCP area between 2024-25. Overall, the total number has decreased by four provisions.
 - There is a small increase in some areas and reductions in others. Breakfast clubs have experienced the largest decline with 3 fewer PVI settings in 2025 compared to 2024.
 - **Newtown & Heatherlands** and **Alderney & Bourne Valley** have each lost one breakfast and after-school club. In addition, **Newtown & Heatherlands** has seen the closure of one holiday scheme. These reductions are significant given that both areas are adjoining and have one of the highest populations of school-age children in BCP, making the loss of provision especially impactful.

- **Geographical variation**

- There is notable variation in the availability of out-of-school provision across the area. Some wards with a high population of children aged 5–14 - such as **Newtown & Heatherlands** have **relatively low levels of provision** leading to likely unmet demand for both wraparound and holiday provision.
- **Alderney & Bourne Valley** has a sizeable child population and local capacity is likely to be pressured, especially during term time.
- **Eastcliff & Springbourne and Moordown**, currently have no registered provision at all leading to a potential gap for both wraparound and holiday scheme

- Childminders will continue to play an important role for older children in the area.

Figure 13: Out of school provision by ward



Glossary of Terms

- BCP Bournemouth, Christchurch and Poole (Council)
- DfE Department for Education
- EHCP Education Health Care Plan
- EY Early Years
- FEE Funded Early Education
- HAF Holiday Activities and Food Programme
- IMD Index of Multiple Deprivation
- LSOA Lower Super Output Area
- OfSTED Office for Standards in Education, Children's Services and Skills
- PVI Private, Voluntary and Independent Early Years Settings
- P&V Private and Voluntary Early Years Settings

Further information

For further information regarding this report please contact the [Research & Consultation Team, BCP Council](#)