

Report subject	Childcare Sufficiency Assessment 2025-26
Meeting date	26 March 2026
Status	Public Report
Executive summary	<p>The Council has a statutory duty to provide working families of children aged 0-14 (18 with SEND) enough childcare places in its area, where reasonably practicable. Each year Research and Children’s Services colleagues assess the position of the market, providing parents, councillors, schools and private businesses ward level information as a planning tool to support access or expansion of places, while highlighting areas of focus or concern.</p> <p>With significant government expansion of early years childcare now fully embedded this information and data is vital for private businesses seeking to enter the market and help the Council fulfil its ongoing statutory duties and the content of the assessment concludes that the Council is meeting its statutory duties.</p> <p>In addition to a briefing report (appendix 1) the data that helped form the assessment is accessible here.</p>
Recommendations	<p>It is RECOMMENDED that:</p> <p>Cabinet approve the content of the annual review and the priorities (areas of focus) as set out in the Childcare Sufficiency Assessment 2025-26 Briefing Report.</p>
Reason for recommendations	To fulfil the Council’s statutory duty to annually assess and publish the position of its childcare market.
Portfolio Holder(s):	Councillor Richard Burton, Children and Young People
Corporate Director	Cathi Hadley, Corporate Director for Childrens Services
Report Authors	Tanya Smith, Head of Places, Admissions and Capital Darren Buckley, Senior Childcare Sufficiency and Funding Officer
Wards	Council-wide
Classification	For Decision

Background

1. Local Authorities are required to report to elected council members on how they are meeting their statutory duty to secure sufficient childcare before making the annual assessment available to parents, schools and businesses. This ensures full transparency and accountability, enabling councillors to understand how childcare needs are being met across the area and to support informed decision-making. Publishing the assessment widely also provides families and childcare providers with clear, accessible information about local provision, helping them plan effectively for childcare arrangements or future service development.
2. The annual review has become an increasingly valuable planning tool for Children's Services, and potential new providers, with reports that the assessment's data has supported confident, well-informed decisions that lead to sustainable new childcare businesses.
3. Local Authorities are required by legislation to: Secure sufficient childcare in its area, so far as is reasonably practicable, for working parents, or parents who are studying or training for employment, for children aged 0-14 (or up to 18 for disabled children). There is also a duty to ensure enough government funded early education places are available for all 3 and 4 year olds and eligible 9 month to 2 year olds.

The annual sufficiency assessment

4. Guidance allows local authorities to determine an appropriate level of detail for their assessment; this report is structured at ward level. It is designed to be updated regularly and supports planning and development within early years services, including potential expansion by existing or new providers.
5. Several factors have been considered within this review including:
 - The state of the local childcare market/supply and demand
 - The state of the labour market
 - The quality and capacity of childcare providers
 - The number of funded early education places required
 - The number of school aged children
 - The needs of disabled children
 - The demand for school holiday care for children
 - The demand for 30 hours extended entitlement for eligible children
6. Overall, BCP Council is meeting its statutory duty to ensure there are enough suitable early education and childcare places available. There is a good choice of childcare facilities available to families delivered through the private, voluntary, independent and schools' sector across the conurbation. We have also improved, year on year, our Early Years Pupil Premium take-up for 3 and 4 year olds to 17% (up from 6% in 2020), reaching our most disadvantaged children (there are no published statistics to measure EYPP performance, however).
7. Developments since 2024-25:
 - a. At the time of writing the assessment, there were a total of 281 childcare providers in the BCP Council area, offering a maximum of 7,771 places. This is a fall of 11 providers (8 of which were childminders) however a gain of 74 places overall, since summer 2024 (place expansion with current providers mitigated the loss of places from those that closed).

- b. While some group providers closed, other providers were supported by Children's Services, where possible, in acquiring those sites to protect availability of those places for their community.
- c. Brand new group provision has opened in Hamworthy, Westbourne & Westcliff, Boscombe East & Pokesdown and Broadstone, supplying a combined 220 new early years places.
- d. In summer 2025 the number of children with SEND support had decreased by 5% to 374. The fall is linked, however, to the introduction of new SEND support eligibility criteria in 2024. A total of 7,311 primary and secondary school children received SEN support, 14 children less than recorded in January 2024 (-0.2%).
- e. The latest occupancy figures, at the busiest point of the year, show occupancy rates at childminders was 90%, PVI settings was 84% and school nursery settings was 82%. Each sector having a decrease in occupancy year on year.
- f. Overall, the number of registered out-of-school provision has increased by 4, to 165 sites, in the last 12 months.

8. Areas of focus for 2026:

- a. **Bearwood and Merley:** Housing development in this ward has continued to grow, with nearly further 1,000 new properties due in the area by 2032, which is concerning in terms of the availability of childcare for existing parents and those that will be new to the area. A preschool and school nursery merged this year and new all year round early years provision and new wraparound provision for primary school aged children has previously been introduced to the area. It is felt that, as developments progress, additional provision will still be required to sustain need as families move to the area. BCP Council does have a significant number of existing businesses, or those new to the sector, enquiring about areas of need or potential property, which is very welcome and Bearwood and Merley is an area that any provider should consider. Seeking developer contributions to create new provision is also recommended, such as via the Community Infrastructure Levy funding made available by the Council.
- b. **Mudford, Stanpit and West Highcliffe:** This ward saw a change in provision in 2025 whereby the lease of a significant preschool supplier ended. That provider did secure alternative premises within the neighbouring ward, Highcliffe, and many parents have travelled with the preschool to continue using the quality, reliable service provided. As a result of this change this particular ward, in terms of data in this sufficiency assessment, shows as the ward having the least number of places per 100 0-4 year old children. All year round provision in this area will benefit working families that are unable or unwilling to travel beyond their home ward for childcare, but incoming providers should be mindful of provision that is supplied under neighbouring wards when researching potential sites (at the time of writing a new day nursery registration in this ward is proposed, but not yet confirmed).
- c. **Boscombe West, East Cliff & Springbourne, Bournemouth Central:** Our summary of early education funding across 0-4 year olds highlights these wards in particular. For baby places, we demonstrate a large difference in take-up

between areas of affluence and some wards with disadvantaged families, that includes parts of Bournemouth Central and Boscombe West, and similar for working family 2 year olds to also include East Cliff & Springbourne. It is concerning to note that, under the 15hrs per week 2 year old disadvantaged funding, residents of these three wards do not seem to be engaging with the offer as much as with other wards. Part of this may be due to available places which will be investigated further, or inability to travel, but part may also be due to a lack of understanding of their child's entitlement. Accessing a government funded place as a disadvantaged 2 year old prior to a universal entitlement as a 3 year old is a valuable benefit to this cohort of children and provides them with a better start in life. This year we'll enhance our marketing and communications to parents broadly across BCP, but with a particular focus on these three wards, monitoring any impact and reporting progress hereon (at the time of writing a new day nursery registration in Boscombe West is proposed, but not yet confirmed).

- d. **Childminders:** The Council's supply of childminders has been an area of focus for several years, and especially since the 2020 pandemic where numbers began to change more significantly. Overall, considering the number of active childminders in 2020 versus those active this year the Council has 35% fewer childminders. Nationally the figure is 32% fewer childminders. With an aim to support this part of the sector the government had increased the number of people that can work together under a single registration from three to four, and childminders are given more flexibility to operate outside their home for more of the time. A recruitment campaign has also been underway 'Be part of something big...' with emphasis on several sectors including [childminders](#). Locally the Council has commissioned the creation of its own webpage to encourage recruitment and retention into the childcare sector which should be live and publicised soon.
- e. **Day Nurseries and Preschools:** Year on year the conurbation has encouragingly seen very little change in terms of the overall number of registered providers. Several providers have left the sector while brand new provision has joined with many more seeking opportunities. During our summer 2025 provider survey we found that some providers said that they had less children in attendance year on year. As the government funded childcare entitlements have grown to now include some working family children of 9 month to 2 year olds (approximately 3,400 children per this assessment) it's important for current providers to consider their own age range of childcare and early education. All providers that currently serve only 3 and 4 year olds, or 2 to 4 year olds should consider that in most circumstances parents, with an eligible child from 9 months old, are unlikely to move their child to another provider when the child turns 2 or 3 years old if they're happy with the quality of their provider and their child is settled. The DfE commissioned Childcare Works 'HUB' was specifically created to support all types of provider with guides on expansion, business support strategies, research models and much more.
- f. **Expanded Entitlements:** Government funded childcare has expanded to include some working parents of 9 month olds to 2 year olds. The phased

expansion concluded in September 2025 with an increase to 30 hours entitlement per week, term time. The DfE supplied each Council with capital funding to increase the number of available places for 0-2 year olds, and to date we're pleased to report that this funding has supported the addition of 366 brand new places, including those at least five brand new providers across the conurbation. This met a target raised by the DfE at the beginning of the expansion. The first term of fully expanded entitlement, autumn 2026, has been successful with no known parents informing us that they couldn't find a place for their eligible child, which tells us that BCP Council have sufficient childcare places for those that want one. We are conscious however that demand for places builds over the year, with summer term being the busiest. Take-up and vacancies across the conurbation will be closely monitored each term, seeking trends in wards that might benefit from new business or expansion of existing provision.

9. The childcare sector has continued to face significant pressures since the pandemic, particularly around funding levels and the ongoing challenges of recruiting and retaining staff on salaries that reflect the responsibilities of educating young children. Although the number of available places has gradually declined over several years (with 2025-26 being an exception), this has so far been offset by a falling birthrate. There are encouraging signs within the government's recent funding reforms: the rate for children aged 9 months to 2 years is competitive with, and in many cases higher than, the private fees previously charged by providers. However, the funding rate for universally entitled 3 and 4 year-olds continues to be a concern with many providers reliant on additional voluntary contributions from parents to supply a high quality sustainable offer. It should be noted that the DfE have increased its funding levels paid to LAs, particularly for this age group for 2026-27 and, if approved by School's Forum and Council, our providers should see a 9% year on year increase for 3 and 4 year old childcare and early education.
10. Whilst the Council is currently meeting its duty to secure sufficient childcare, it is anticipated that 2026 and the years beyond may present new challenges as demand evolves. Although the government previously suggested that childcare places in BCP could be insufficient from September 2025, this did not materialise. As that term passed, the Council received no reports from parents who were unable to secure a place independently or with support from our Family Information Service, and there remained adequate capacity across the local childcare market. In response to projected pressures the Council continues to expand provision for babies and 2-year-olds through the targeted distribution of capital funding, an approach that is ongoing at the time of writing, albeit with a small remaining budget.
11. Councillors should be aware that the childcare sector may increasingly seek political support to facilitate its ongoing development, including assistance with planning applications and the potential leasing of Council-owned property. In addition, some providers are expected to continue lobbying for business rates relief, reflecting the wider financial pressures facing the sector and their efforts to secure long-term sustainability.

Options Appraisal

12. None.

Summary of financial implications

13. Local authorities are required, by statutory guidance, to maximise families' take up of government funded early education. The government introduced, from April 2024, a new 15 hours per week entitlement for some working families of 2 year olds. Expanding that to 9 month old children from September 2024 and doubling the entitlement to 30 hours per week from September 2025. This may have a financial impact on existing provision as many eligible parents will move from paying privately at a provider set rate to receiving funded entitlement at a local authority rate. It should be noted however that the local authority funding rate for 9 month to 2 year olds is often higher than that charged privately by providers.

Summary of legal implications

14. The Local Authority has a duty to secure sufficient childcare for working parents, parents who are studying or training for employment, for children aged 0-14 (or up to 18 for disabled children)(Childcare Act 2006). An annual review and reporting on the local picture enable us to fulfil this requirement.

Summary of human resources implications

15. None.

Summary of sustainability impact

16. None.

Summary of public health implications

17. None

Summary of equality implications

18. Through this assessment, the Council is equipping private businesses with the insight and publicly available datasets they need to make informed decisions about where to expand or establish new childcare provision. By presenting clear, ward-level intelligence on supply, demand, and local needs, the assessment serves as a strategic planning resource for providers considering investment in the sector. As Children's Services is not directly involved in private business decision-making, and because childcare funding entitlement for families is governed entirely by Department for Education criteria with no local discretion, a separate Equality Impact Assessment has not been produced

Summary of risk assessment

19. The Council will need to continue working proactively to ensure that parental demand for both early years childcare and school-aged wraparound provision is fully met through a combination of private sector and school-based services. If sufficient provision is not available, some parents may be unable to take up employment or increase their working hours, which could have wider social and economic implications for local families. While it is essential to support availability across all age groups, Children's Services will place particular emphasis on addressing the needs of disadvantaged 2-year-olds and children with SEND when engaging with providers on opportunities for expansion. This targeted focus reflects the Council's

commitment to ensuring equitable access to high-quality childcare for the children who stand to benefit most.

Background papers

20. This report is produced using the Childcare Sufficiency Assessment 2025-26 Briefing Report, which is provided as Appendix 1. The source data (an interactive PowerBI) cannot be formed as an appendix, but is available online [here](#) and will be published on the Council's Childcare Sufficiency webpage, along with the briefing report, upon conclusion of this democratic process.

Appendices

Appendix 1: Childcare Sufficiency Assessment 2025-26 Briefing Report