

Childcare Sufficiency Report

2024 - 2025



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Introduction



The Childcare Act 2006 (section 6) places a duty on Local Authorities to secure, so far as is reasonably practicable, sufficient childcare to meet the requirements of parents in their area who require childcare to enable them:

- to take up or remain in work, or
- to undertake education or training which could reasonably be expected to assist them to obtain work.

Alongside this, section 11 of the Childcare Act 2006 states that Local Authorities have a duty to assess whether the childcare provision in their area is sufficient to meet demand and to keep those assessments under review which also includes reporting on holiday care, quality of provision and affordability.

2025 to 2026 will continue to see a significant expansion of childcare entitlements across England.

Childcare expansion for **working parents** has taken place since 2024:

- April 2024: two-year-olds became eligible for 15 hours funded entitlement
- September 2024: this extended to children from 9 months old for 15 hours
- From September 2025 this will double to 30 hours for working parents.
- The National Wraparound Programme continues to provide grant funding to expand before and after school childcare for primary school-aged children.

<http://www.legislation.gov.uk/ukpga/2006/21/contents>



Methodology

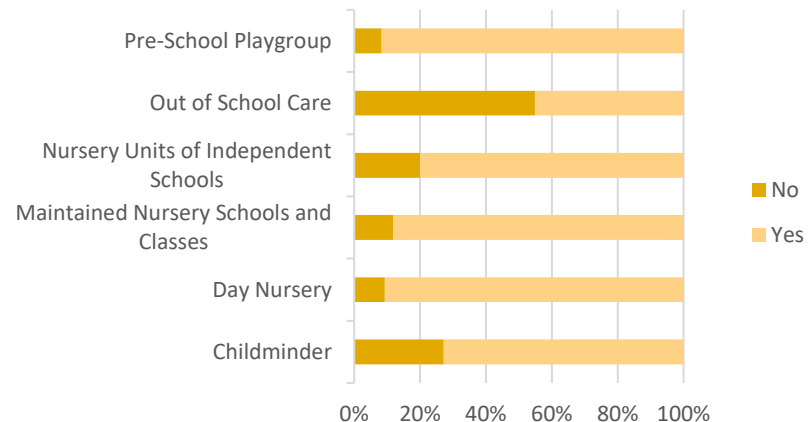


This report is based on information collected by Newcastle City Council, Newcastle Child Health Information Service, Ofsted, Office of National Statistics (ONS) and the Department for Education (DfE). Its primary aim is to assess whether Newcastle has sufficient childcare to meet the needs of families.

Alongside data from the above sources, audit information has been collected from early years and childcare providers once every academic term. Key questions in each data collection remain the same with a secondary set of questions drilling down into a key area. For this academic year, the key areas of focus have been:

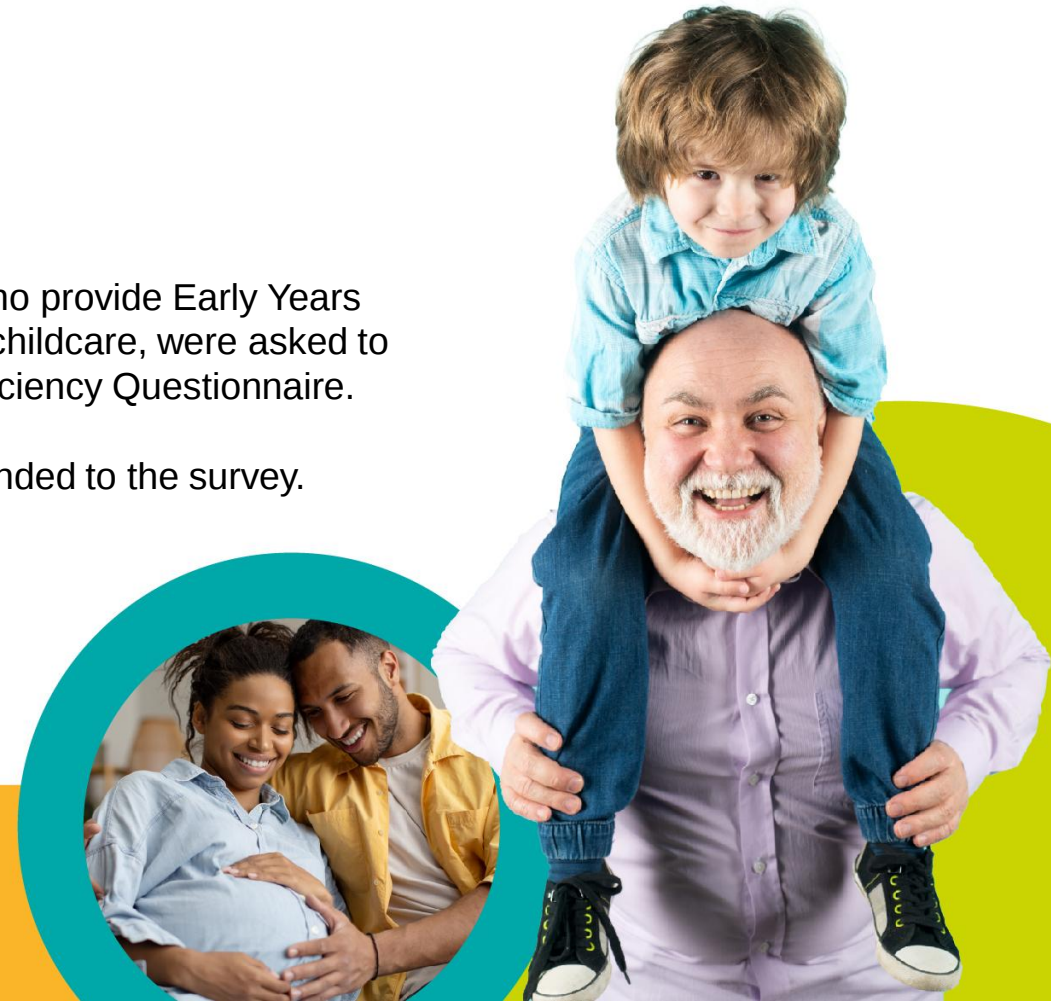
- Autumn term – Funding rates
- Spring Term – Data accuracy
- Summer term – Expanded entitlements readiness for September

Figure 1: Return Rate of Providers



All schools and settings who provide Early Years Childcare or Wraparound childcare, were asked to complete a Childcare Sufficiency Questionnaire.

80% of all providers responded to the survey.

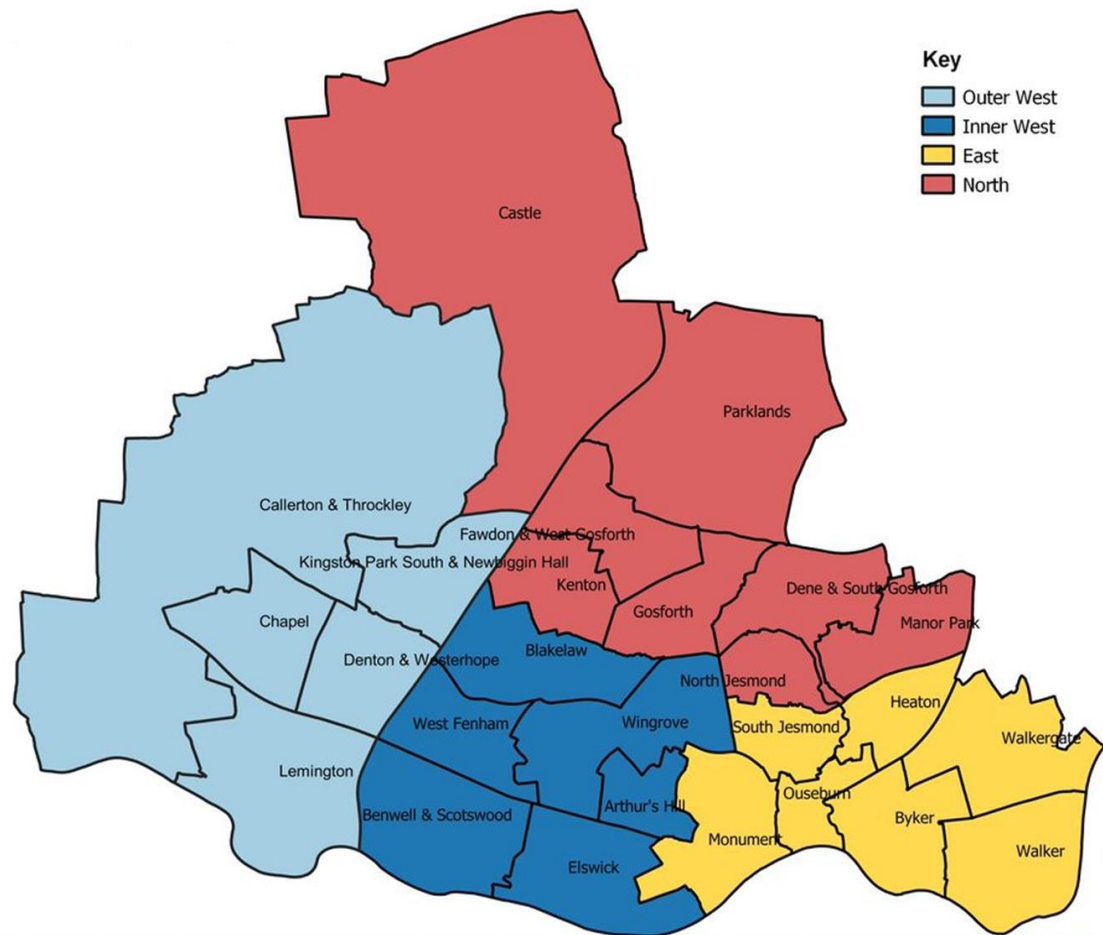


Demand



City Profile

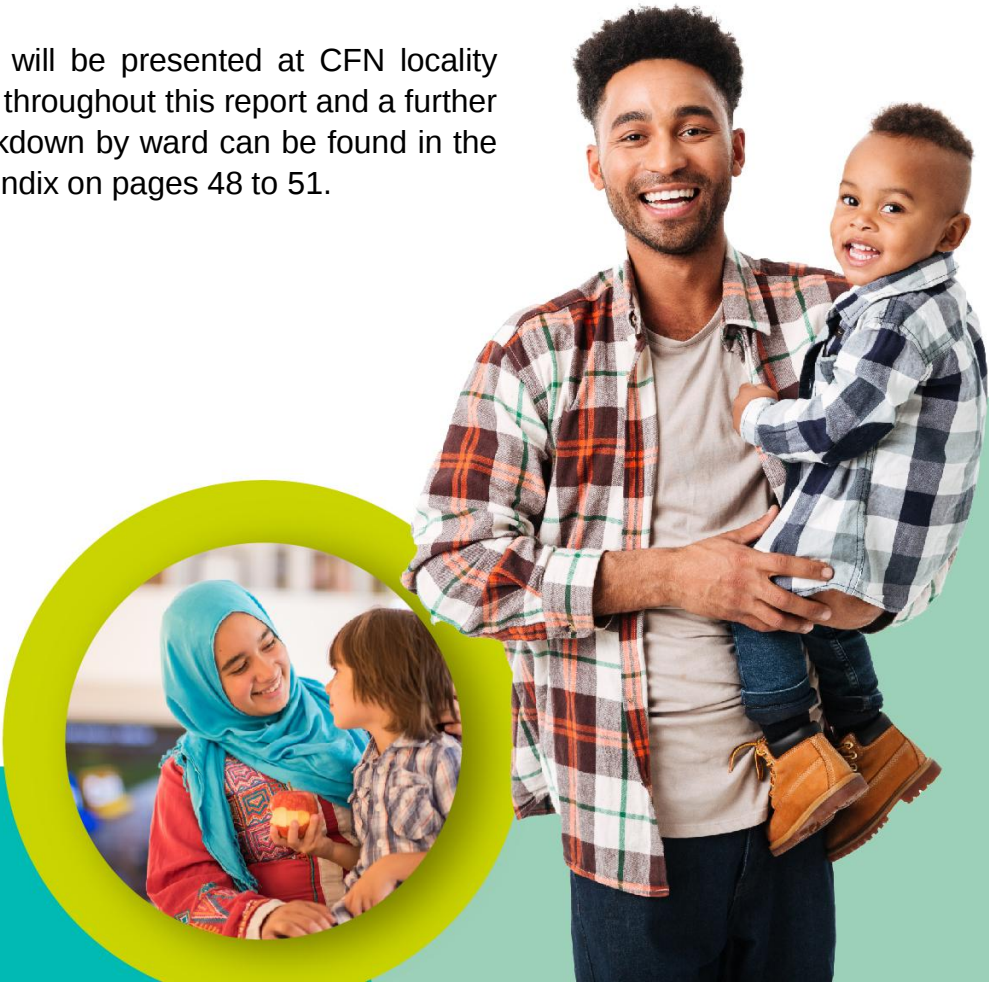
Figure 2: Map of Newcastle by CFN locality and ward



Newcastle consists of 26 wards, which are grouped into four Children and Families Newcastle (CFN) localities, as shown on this map.

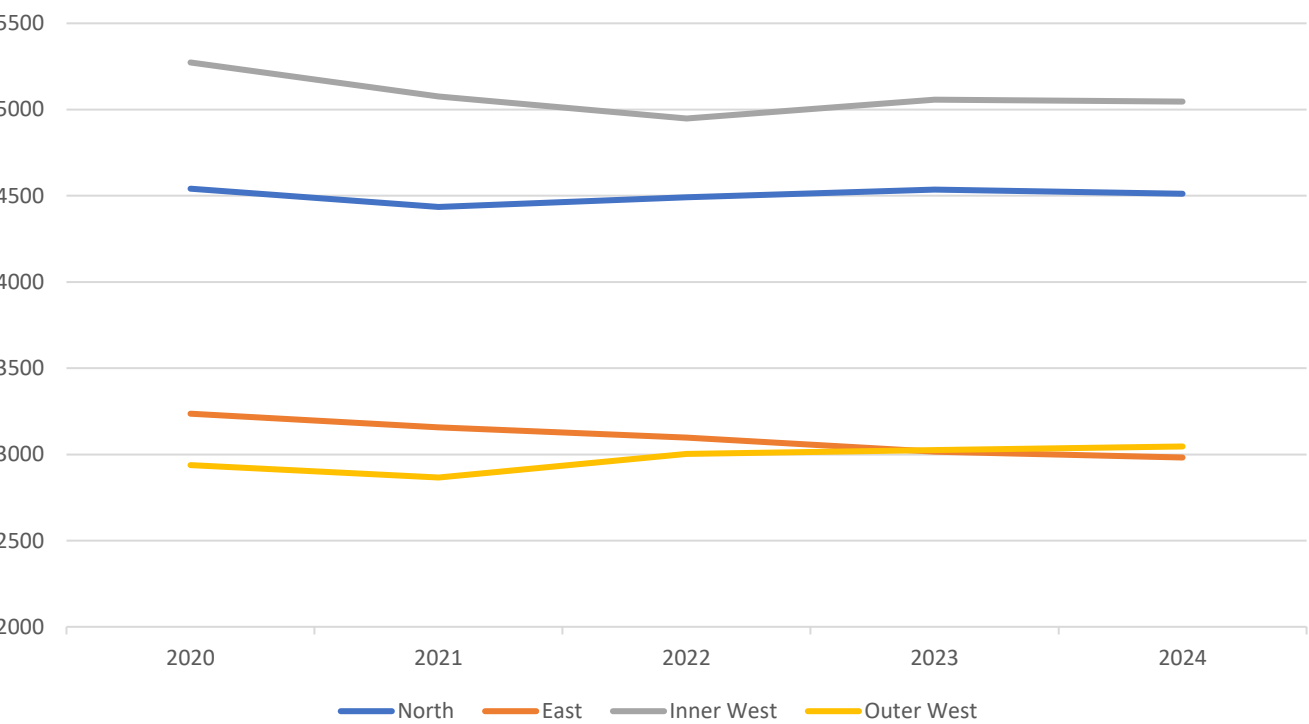
Outer West	Inner West	East	North
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Data will be presented at CFN locality level throughout this report and a further breakdown by ward can be found in the appendix on pages 48 to 51.



Population change

Figure 3: GP registrations, 2020 to 2024



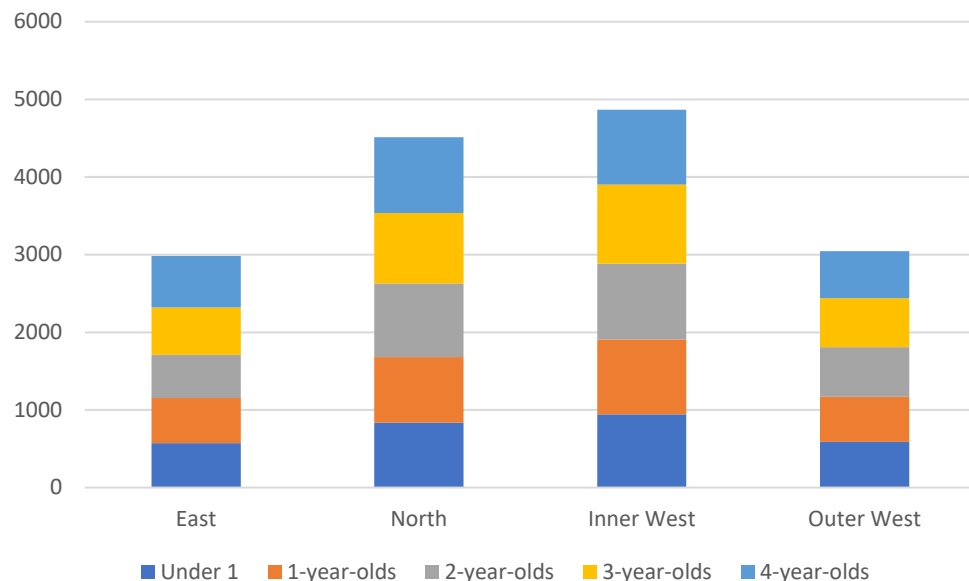
Data provided by Informatics and Insights Team

Local GP registration data tells us that the citywide population of children under five decreased slightly (less than 1%) between 2023 and 2024. The 2024 under five population is around 400 children lower than it was in 2020.

Looking at GP registration data over time by locality shows that there has been a slight decrease in the under-five population in all areas except the Outer West of the city from 2023 to 2024.



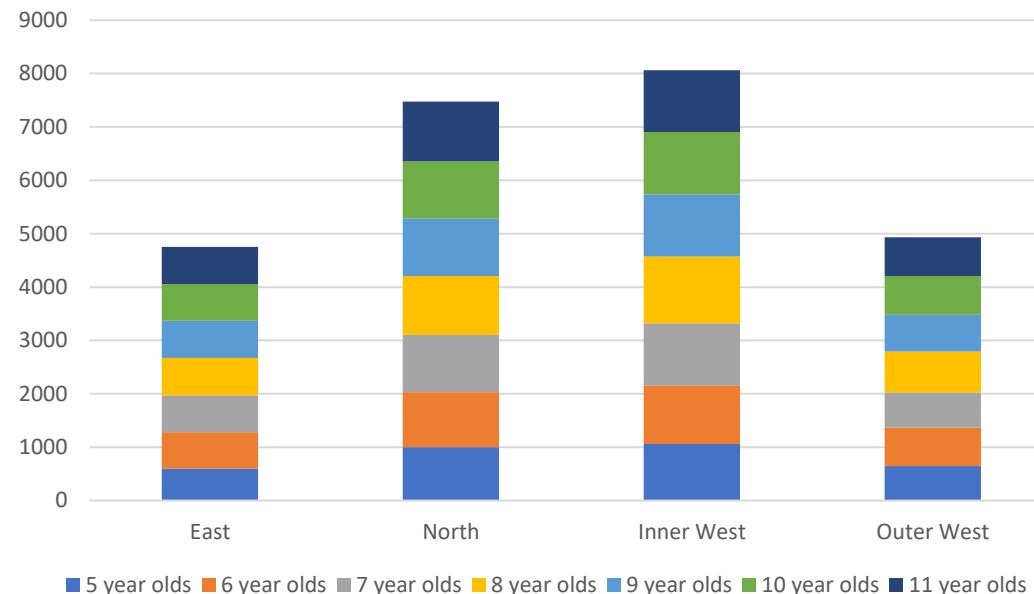
Figure 4: City Wide Population Data - Under 5



The table above shows that the under-five population split across CFN localities is as follows; 32% of under-fives live in the Inner West, 29% live in the North, 19% in the East and 20% in the Outer West.

This table also shows that the number of children in each age group broadly increases with the age of the children.

Figure 5: City Wide Population Data – Primary age



The table above shows that the split of primary school population across CFN localities is similar to that in the under-five population. While there are around 200 fewer school-age children than in 2023, there continues to be growth in the city. The population of usual residents in Newcastle rose by 2.3% between 2023 and 2024, mainly due to net international migration. This meant that Newcastle upon Tyne's rate of population change placed it among the 10 percent fastest growing local authority districts in England and Wales.

ONS Population estimates for England and Wales: mid-2024

Gap analysis

In collaboration with Coram Hemsall's, Newcastle City Council have undertaken a review of the number of places available to support the expansion of funded early education for Autumn Term 2025.

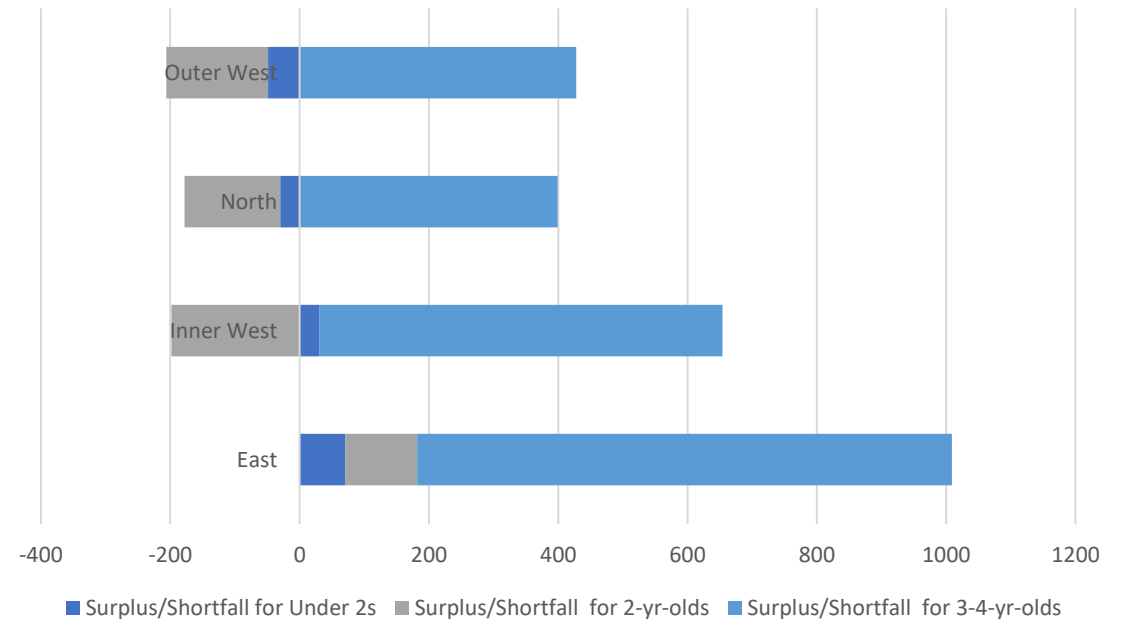
The gap analysis opposite compares surplus against shortfall of early places across the city. It is based on providers working at 85% of their Ofsted registered places due to real-life limitations, such as, staffing or space.

The data shows that there is an overall surplus of 1909 early years places across the city.

- Across all four localities, there is a surplus of places for 3-4-year-olds
- It shows there is no shortfall of places for any age group in the East
- The shortfall in places for under-twos and 2-year-olds is most prevalent in the Outer West, shortly followed by the Inner West
- Overall, the greatest shortfall is in places for 2-year-olds.

To calculate potential demand for places, the EY and Schools Census (Spring 2025) was used to gather data on the take-up of working parent entitlement across the early years age ranges. Places were calculated according to DfE distribution ratios for different provider types which, when applied, give an indication of the number of places available per age range. Please see the Appendix for full details on the methodology used.

Figure 6: Gap analysis - operating at 85% of registered capacity



Supply



Providers

Early Years (Under-fives)

The following data tables show the number of early years and childcare providers and childcare places available in each CFN area. A further breakdown by ward, including maps of each locality, can be found in the Appendix on pages 48 to 51.

Table 1: Number of Providers (under-fives, including childminders) by CFN locality

CFN locality	Childminder	Day Nurseries	Pre-school playgroups	Nursery Schools and Classes	Total
East	8	14	2	19	43
Inner West	11	16	9	20	56
North	35	15	10	17	77
Outer West	16	8	4	15	43
Total	70	53	25	71	219

By the end of the 2024/25 academic year there were a total of 219 providers offering 7236 places to children under five years old. Childminders, who can provide both full day care for children under five, and out of school care for school age children are included in this figure. Special schools and independent schools are included in Table 1, however, their places have not been included in Table 2 as capacity is often adapted based on need.

Ofsted registered providers and places as of August 2025, and provider survey responses.

The overall number of providers offering childcare to under-fives has fallen by seven since 2024. There are 10 fewer childminders, one less playgroup and five more day-nurseries. One more playgroup will be closing in the next academic year.

While overall childminder numbers continue to fall, this decline is smaller than in 2023. Seven new childminders were recruited this year, and 11 childminders now have at least one assistant, enabling them to offer more places. This is not enough to replace the childminders leaving the profession, but it is a positive step towards filling this gap in provision.



Places

Early Years (Under-fives)

Table 2: Number of Places (for under-fives, including childminders) by Children and Families Newcastle locality.

CFN locality	Childminder	Day Nurseries	Pre-school playgroups	Nursery Schools and Classes	Total
East	46	1091	108	755	2000
Inner West	66	738	270	784	1858
North	246	1071	280	452	2049
Outer West	120	580	106	523	1329
Total	478	3480	764	2514	7236

In 2024, the Early Years Sector Support (EYSS) Team have increased the support offered to those interested in becoming a childminder. Short introductory briefing sessions are available prior to the free childminder registration course. These are advertised on social media channels and at recruitment events. The sessions are delivered as group sessions where possible but can be individual if required. This has led to an increase in the number of people completing the registration course and more registered childminders are now starting to come through. 37 potential childminders have attended briefings and four have completed the registration course.

Ofsted registered providers and places as of August 2025 and provider survey responses.

Two pre-school playgroups have closed since 2024. Most pre-school playgroups are now offering longer hours to enable parents to take up all funded hours in one setting. There are also some providers now choosing to care for younger children and trialling summer playschemes.

The number of day nurseries has increased by five: three in the North, one in the Inner West and one in the Outer West of the city. As expected, providers, especially day nurseries, have expanded this year. 339 places were created this year from new settings opening, and 171 places were lost. Overall, there are 168 more childcare places for under-fives than in 2024. There are currently bids underway to expand more settings across the city which will also lead to an increase in places for under-fives in the coming year.



Key Findings

- The number of childminders has decreased again, however there has been an increase in potential childminders attending briefings.
- The number of day nurseries is growing.
- The number of pre-school playgroups is falling; however, some providers are changing their offer to meet demand.



Providers and places

Out of school and holiday childcare

By the end of the 2024/25 academic year there were a total of 61 providers offering 2292 before school places, 62 providers offering 2397 after school places and 26 providers offering 726 holiday club places. That serves the nine first schools, 63 primary schools, four middle schools, one through school and five independent schools with primary age children. These figures do not include childcare offered by childminders (see above) or childcare that is not registered with Ofsted, for example provision for children over eight or nannies. These figures also do not include the 38 free breakfast clubs offered by schools throughout the city.

Figure 7: PVI Run OOSC Providers

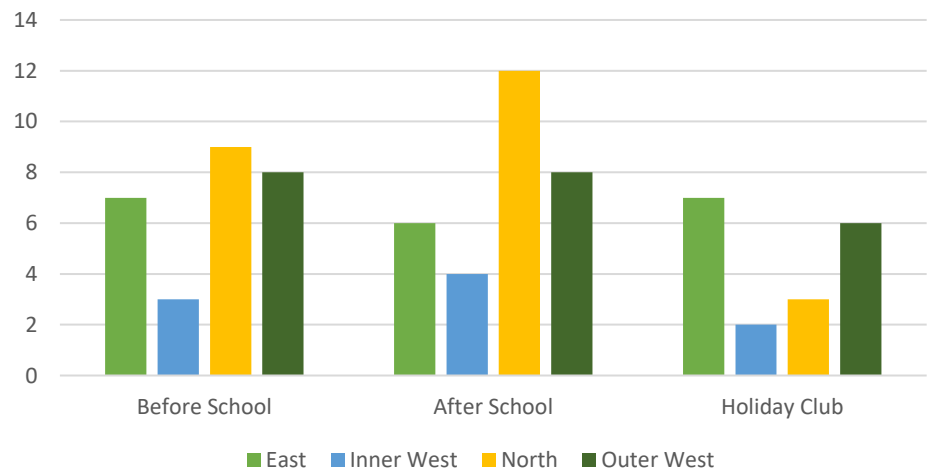


Figure 8: PVI Run OOSC Places

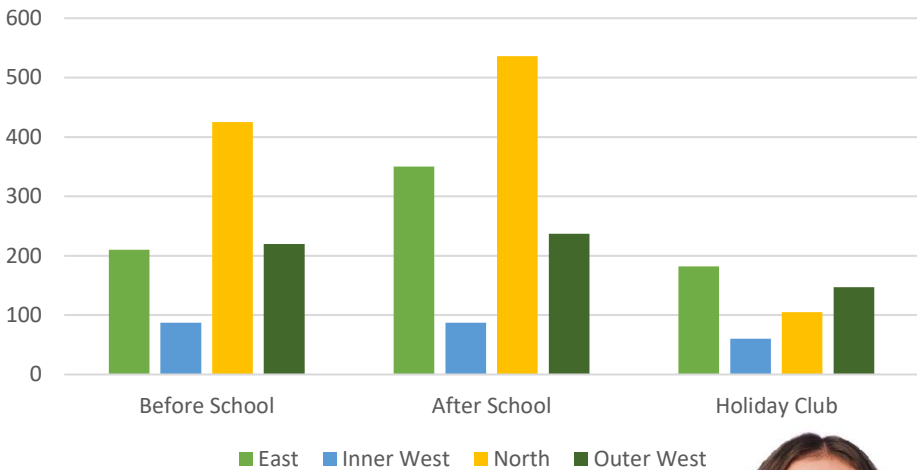


Figure 9: School Run OOSC Providers

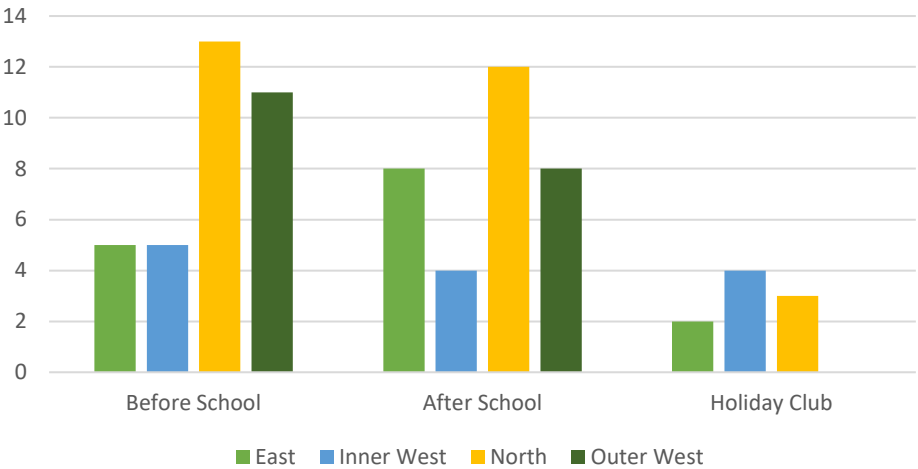
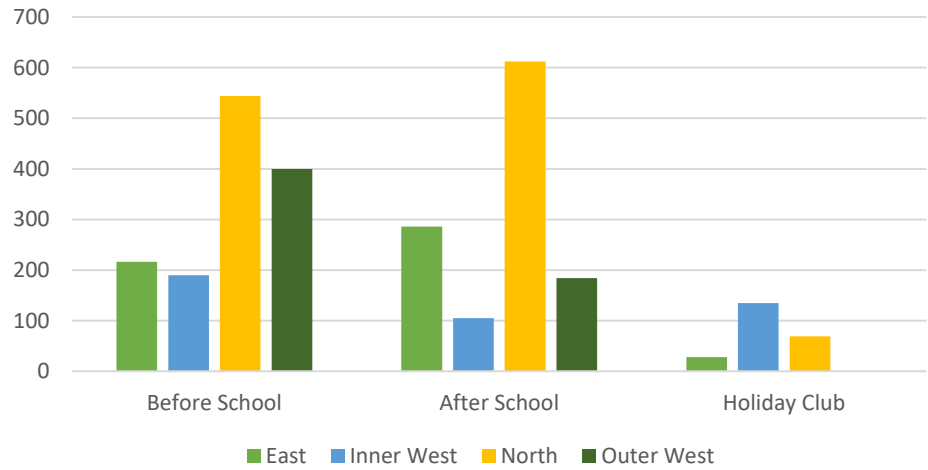


Figure 10: School Run OOSC Places



Due to the [Wraparound Childcare Programme](#), more detailed data is now held about out of school club provision. This means it is possible to report on ‘Full wraparound’ and ‘Partial wraparound’ at individual school level.

- ‘Full wraparound’ – from 8am before school and until 6pm after school (or equivalent, for example 7:30am to 5:30pm)
- Partial wraparound – does not offer ten hours in total including the school day.

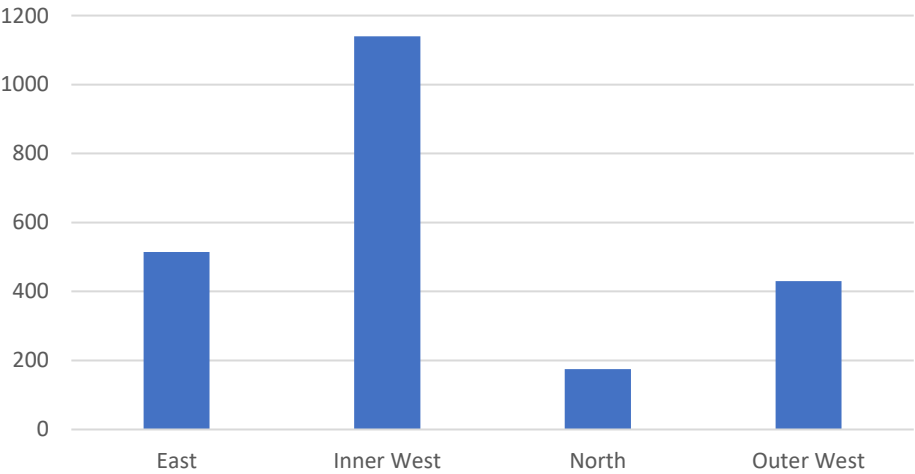
For some schools in the city the wraparound offer is delivered by a combination of providers, for example a school run breakfast club, and a PVI run after-school club. In some cases, more than one provider offers care to the same school, and some providers offer care to multiple schools.



It is now possible to draw a distinction between wraparound childcare and extra-curricular clubs. Where some schools initially reported running an after-school provision, the data shows that in some cases this referred to extra-curricular clubs which have an earlier finishing time and may not be available to all year groups, Monday to Friday. While families may use this as informal childcare, it cannot be classed as reliable childcare for working parents and therefore is not included in the data for after school care.

It is also now possible to report on the free breakfast provision across the city. 50% of schools with primary school-aged children offer a free breakfast club. Two schools are taking part in the Department for Education’s Breakfast clubs early adopter scheme. 31 schools receive funding from Greggs and three schools receive funding from the National School Breakfast Programme through Family Action. Figure 11 shows the availability of free school breakfast clubs. The number of places is likely to be considerably higher, as this data was taken from provider survey responses, where 80% of schools responded. As we now have more data on free breakfast clubs, Figure 10 only includes before school provision that is paid for by parents.

Figure 11: Free Breakfast Club Places



Provider survey responses, Summer 2025



Figure 12: Funded Wraparound Providers

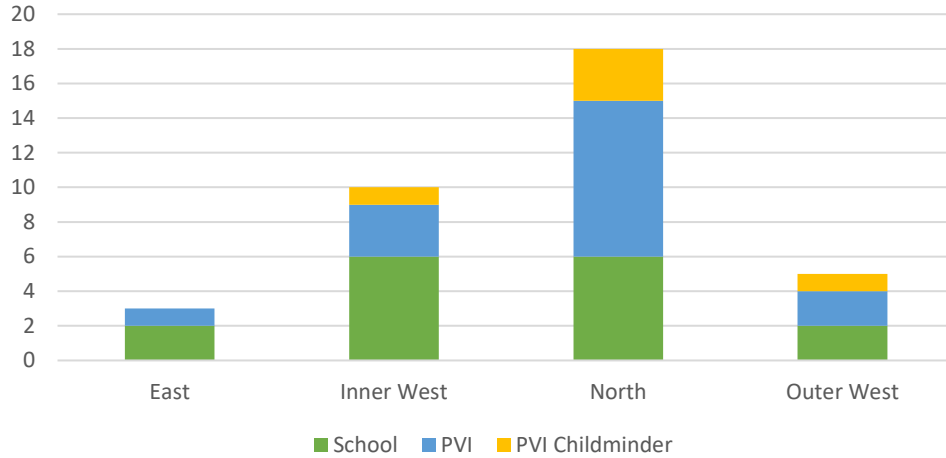
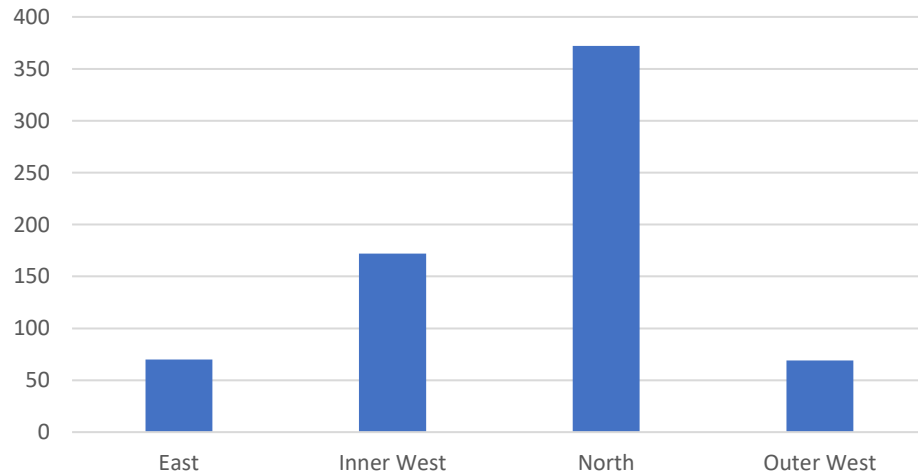


Figure 13: Funded Wraparound Places



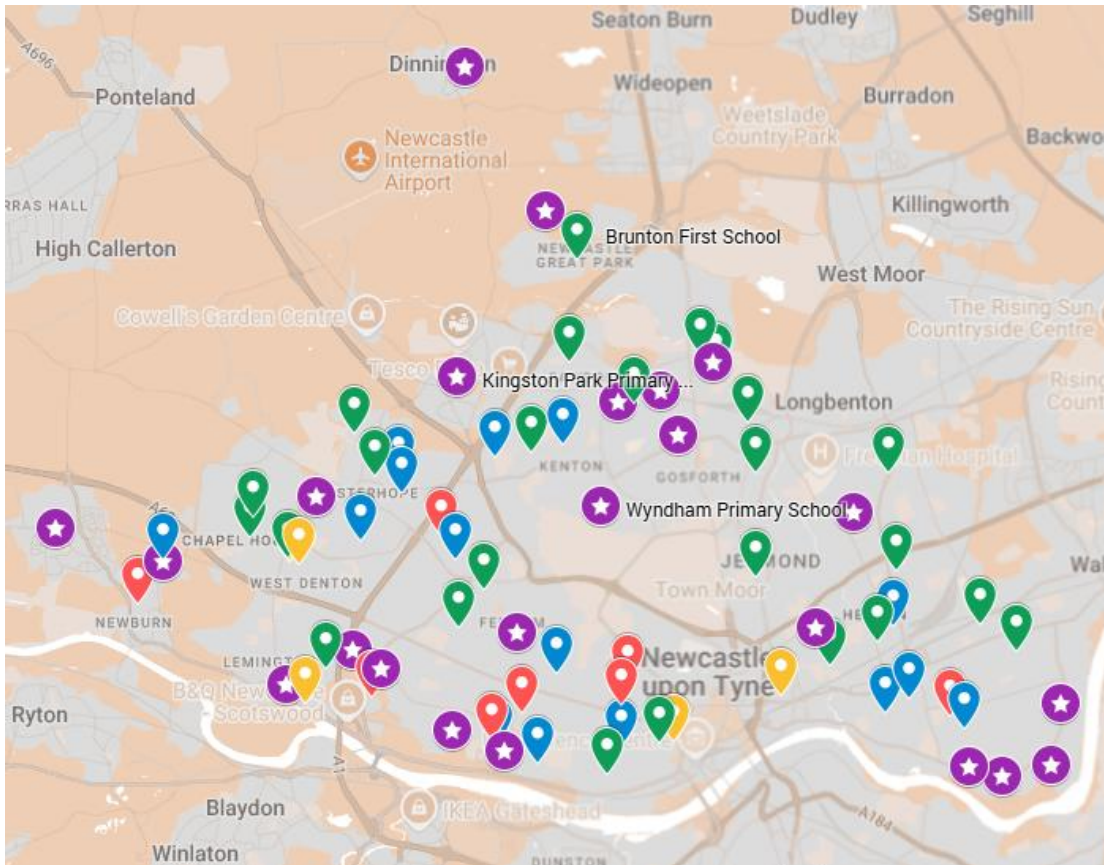
In September 2024, of the 77 state funded schools with primary school age children:

- 38 schools (50%) offered full wraparound
- 12 schools offered partial wraparound that included a paid for childcare element
- 27 schools had a free offer but no paid for childcare element.

Over £1 million of revenue funding was allocated by the Department for Education as part of the Wraparound Childcare Programme. Alongside this, over £80,000 of the Childcare Expansion Capital Grant was allocated to expanding wraparound care. Since September 2024, wraparound grant funding has been awarded to 36 providers, and 683 new wraparound places have been created.



Figure 14: Map of wraparound provision in 77 maintained schools and academies with primary aged children



To aid this expansion, the wraparound team have:

- Facilitated in-person and online briefings to share information and engage providers
- Visited providers on-site to support the application process
- Used data collected to target gaps in provision
- Used data collected to assess the sustainability of new provision

The EYSS team will continue to visit funded providers to advise on quality and sustainability going forward.

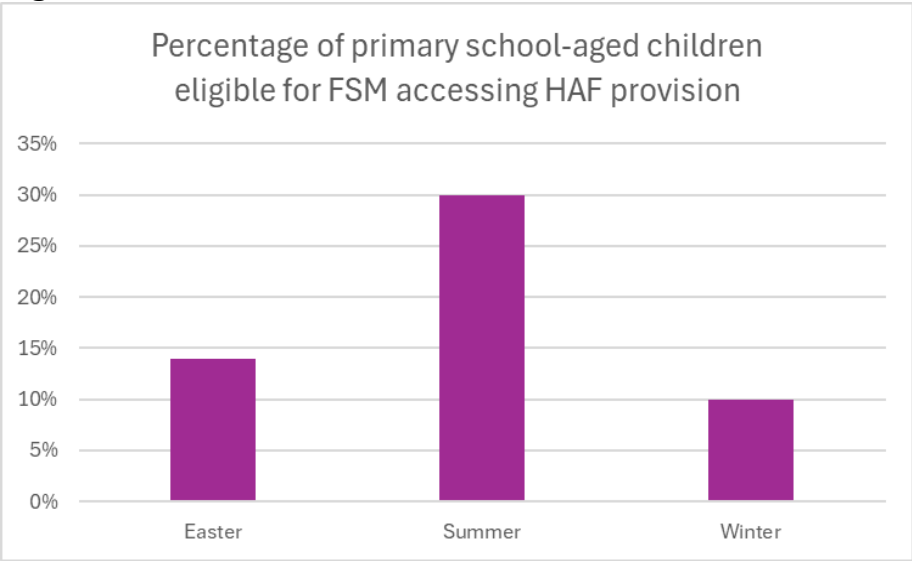
Purple = Funded full wraparound
Blue = Full wraparound planned
Green = Full wraparound
Orange = Partial wraparound
Red = Free breakfast club only



Holiday Activities and Food Programme (HAF)

The Holiday Activities and Food Programme (HAF) is funded by the Department for Education for children who are eligible for benefits-related free school meals (FSM) or in need. It is designed to help children, young people and their parents in Newcastle have fulfilling, active, fun-filled and healthy experiences during the Easter, Summer and Christmas school holidays. Local authorities have discretion to use up to 15% of their funding to provide free or subsidised holiday club places for children who are not in receipt of benefits-related FSM but who the local authority believe could benefit from HAF. The HAF programme runs from Reception to Year 11, but for the purposes of this report, only figures for Reception to Year 6 are included.

Figure 15



Key figures

- 1769** Total number of children who accessed HAF in Easter 2024
- 5275** Total number of children who accessed HAF in Summer 2024
- 1306** Total number of children who accessed HAF in Winter 2024/25
- 1052** Total number of children with SEND who accessed HAF in 2024/25
- 8350** Total number of children who accessed HAF in 2024/25

Research has shown that the school holidays can be pressure points for some families. For some children that can lead to a holiday experience gap. Children from low-income households are:

- less likely to access organised out-of-school activities
- more likely to experience ‘unhealthy holidays’ in terms of nutrition and physical health
- more likely to experience social isolation

The HAF programme is a response to this issue.

While the primary aim of HAF provision is not to provide childcare, it forms part of the wider picture of school-aged childcare. In the coming year, the EYSS team will continue to foster links between HAF providers and wraparound care to investigate opportunities for provision to be more joined up.



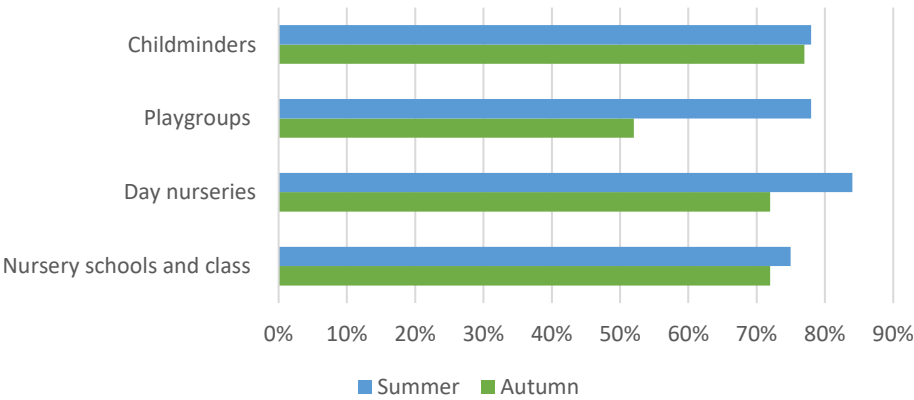
Occupancy

Providers were asked to identify which statement best described their occupancy across the academic year 2024/25. In each term providers were asked to report if their setting was:

- under 25% occupied
- 25% -50% occupied
- 50% - 75% occupied
- 75% - 100% occupied
- Full or oversubscribed.

The table below shows us that occupancy in early years increases across the academic year as more children become eligible for funded early education and childcare.

Figure 16: Occupancy of 75% or more in 2024/25



47% of day nurseries reported occupancy of 75% or over consistently across the academic year. This means parents may not be able to get a place on their preferred days or at their preferred times at these settings. This does however also mean that there are places available in over 50% of day nursery settings. 44% of playgroups (compared to 50% in 2023-24) reported occupancy of 75% or over consistently across the year, which means they have more vacancies than over the same period in 2023-24. 6 out of 25 playgroups reported that demand has been lower in the past 12 months than in the previous year.

50% of childminders reported their occupancy was 75% or over in the summer term, with 40% reporting they are either full or over-subscribed. This again means that although some are consistently busy, there is some availability in all areas of the city.

Provider survey responses Autumn 24, Summer 25



43% of nursery schools and classes reported occupancy of 75% or over consistently throughout the year. While seven nursery schools and classes reported occupancy of under 50% in Autumn 2024, all these settings reported occupancy of 50% or over by the summer term. Summer term survey data tells us that 46% of nursery schools and classes had vacancies.

In the out of school club sector, where full wraparound is offered by the school, 21 schools (60%) reported occupancy of 75% or more for their before-school clubs. This means that in these schools, parents might struggle to get a place on their preferred days. However, 30% of schools who reported being full or oversubscribed for before-school provision have secured funding as part of the National Wraparound Programme to expand their places from September 2025. Similarly, 56% of school-run after-school clubs now report occupancy of 75% or above, suggesting that there are places available in almost 50% of clubs.

Of the schools where full wraparound is offered, six fewer schools reported occupancy of 75% or more compared to Summer 2024, suggesting that the expansion of wraparound places is having an impact.

In comparison, only 30% of PVI out of school clubs reported 75% or over occupancy for Summer 2025 for before-school club, and 53% for after-school club. Only one PVI before-school club is reported as full and no PVI run after-school clubs are reported as fully occupied. Most providers reported the demand over the past year to be about the same, some reported it as higher.

There are some childminders in every area who said they offered wraparound care to school age children and had occupancy rates of less than 75% in the summer term. This means that there is some capacity in every area, particularly where out of school clubs are very busy. One ongoing focus for the wraparound team is to build capacity in areas where there is low demand for larger group provisions, so childminders play a vital part of the out of school childcare provision.



Key Findings

- Over 50% of PVI early years settings and nursery schools and classes report some occupancy of less than 75% during the academic year 2024/25.
- Fewer out of school clubs are reporting as full or oversubscribed.
- Some childminders in every area have capacity to take on new children in the summer (busiest) term.



SEND specific support



Early Years Inclusion Fund

Newcastle's Early Years Inclusion Fund is jointly funded from Early Years and High Needs budgets. Funding and support is available for settings to help meet the needs of children with additional emerging needs as well as high needs, promoting both early identification and intervention. Each application is assessed individually, and appropriate (often bespoke) support is offered. Support is given to meet both the needs of the child and the needs of the provider in order to plan and deliver each child's tailored provision. This can take the form of support from staff resource, equipment, training, or funding for higher staff ratios. The emphasis is always on settings offering a whole setting approach to the inclusion of individual children. There has been a noticeable improvement in the quality of Early Years Inclusion Fund applications.

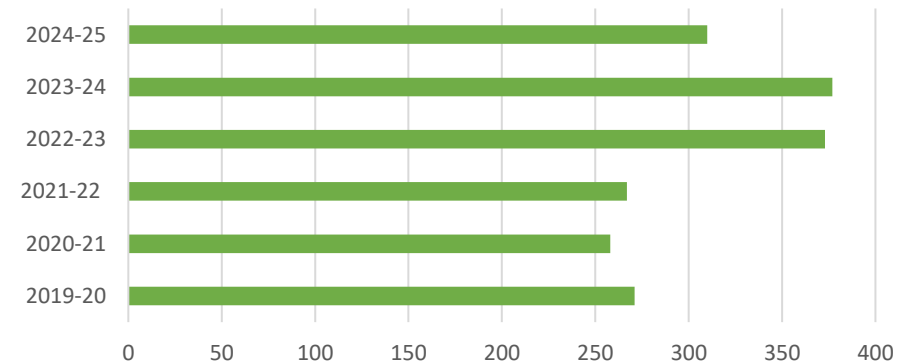
Before 2024 EYIF only had to be provided for eligible three and four years olds (although in Newcastle some disadvantaged two-year-olds were supported) following the expansion of early years funding to some children from 9-months the Inclusion Fund and Disability Access Fund now covers all eligible children from 9 months instead of three years.

Where Inclusion Worker or Nursery Nurse time is allocated, these specialists will not only provide direct support to children, but also model high quality inclusive practice with the aim of up-skilling staff in the setting to ensure the provision is able to meet individual needs.

Support for Early Years SENCOs is under constant review, some examples of recent changes are:

- The 'Universally Available Guidance for Early Years Settings' has been reviewed and evidence of its use is being seen in practice.
- The Early Years Assessment Screen has been re-written and can now be used as a developmental tracking tool
- The new SEN Support Plan is being used widely now and the quality is improving significantly. A QA audit was carried out during 2024-25
- EY Descriptors of Need have been co-produced with SENCOs and these can be used to support practitioners with their EYIF applications.
- The Level 3 Early Years SENCO Award is delivered in annually. Professionals visiting settings where SENCO have gained the award have noticed a significant positive impact in the quality of SEN provision.

Figure 17: Children Supported Through Early Years Inclusion Funding



Local Offer

The **Local Offer** is the **central signposting tool** for information about assessments and access to services for children and young people with special educational needs and disabilities (SEND). We know that access to the right information at the right time is crucial to supporting children and young people, their families and those who work with them through their SEND journey. The Local Offer is therefore a key focus of the SEND systems and high needs review project team and will, over the coming months, be redesigned and relaunched.

The redesign project will transform the current online platform into a clear, accessible, and user-friendly resource for children and young people with SEND, their families, and professionals. It will provide accurate, up-to-date information that is easy to navigate and written in plain language, reducing complexity and improving user experience.

The project will align content with the SEND Code of Practice, remove outdated material, and establish clear governance through Terms of Reference, inclusion criteria, and a content maintenance plan. Co-production is central to the approach, ensuring that parents, carers, and professionals are actively involved in shaping the design and content. Feedback loops and usability testing will guide continuous improvement throughout the process.

Key deliverables include a revised site structure, risk register, performance indicators, and training materials to support consistent content management. We hope that the redesign will deliver significant benefits, such as:

- parents and carers will experience reduced stress and improved access to support
- professionals will gain confidence in the reliability of information, enabling faster interventions
- young people will benefit from better access to services and smoother transitions.

The project is already underway, with some new content available. You can find this by visiting: [SEND local offer | Children and Families Newcastle](#)

If you have any thoughts or feedback, or would like to be kept up-to-date on the project, please email LocalOffer@newcastle.gov.uk





Quality and Workforce

Ofsted grades and setting support

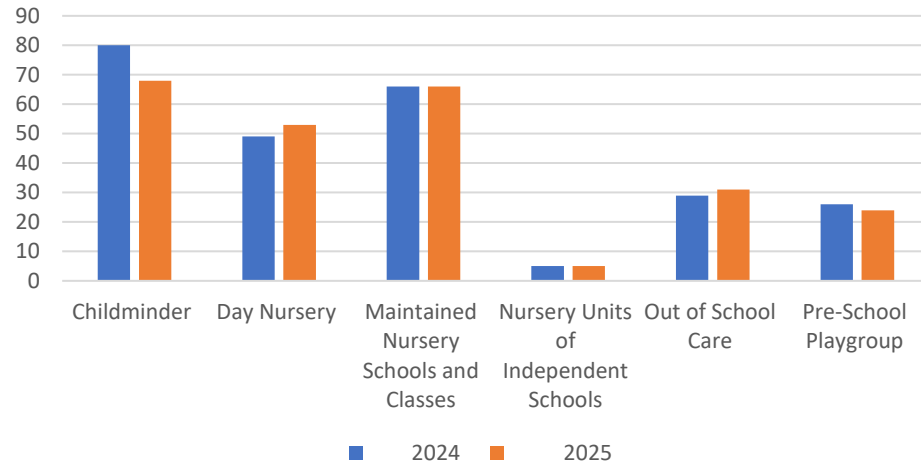
As of March 2025, the national picture showed:

- 60,400 childcare providers were registered with Ofsted, down by 1,370 (2%) since 31 March 2024. Most of this decline was due to a fall in the number of childminders.
- the number of childminders registered with Ofsted had decreased by 1,250 (5%) since 31 March 2024, to 25,300 childminders. The percentage decline seen was in line with the previous financial year
- 1.29 million childcare places were offered by providers registered on the Early Years Register (EYR), up by 17,400 (1%) since 31 March 2024. Most of this increase was due to a rise in the number of places offered by childcare on non-domestic premises providers
- 98% of childcare providers had been judged good or outstanding at their most recent inspection, an increase of less than 1 percentage point since 31 March 2024

[Main findings: childcare providers and inspections as at 31 March 2025 - GOV.UK](#)



Figure 18: Providers by type in 2024/2025

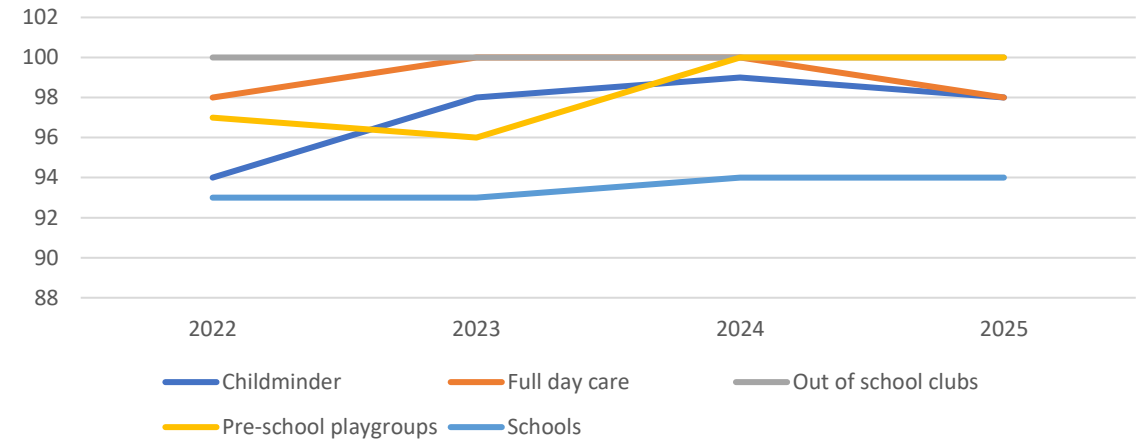


In response to the declining trend of childminders, the Early Years Sector Support (EYSS) Team have increased the support offered to those interested in becoming a childminder. Short introductory briefing sessions are now available prior to the free childminder registration course. These sessions are delivered as group session where possible but can be individual if required. This has led to an increase in the number of people completing the registration course and more registered childminders are now starting to come through. 30 potential childminders have attended briefings and 10 have completed the registration course.

We have also introduced initial visits to those childminders and settings who are waiting registration to support them through the process.

From 1 September 2024, graded inspections of state-funded schools no longer receive a judgement of overall effectiveness, in this instance we have averaged their gradings across all four judgement areas

Figure 19: Ofsted Grading of Good or Higher by Provider Type



NB: This data does not include providers awaiting their first inspection i.e. those within 30 months of opening.

By the end of the academic year 2024/25, 98% of all providers and 100% of Out of school clubs and Pre-school playgroups were rated good or better.

In the PVI sector the EYSS team have continued with a robust structure of support. This has meant that all providers who received a support visit prior to inspection received a good or better judgment at inspection.



Support offered by the team includes:

- Annual quality assurance visits to all settings. Specific focus on curriculum, teaching and learning, and leadership and management.
- Individual support to settings before an inspection to work through any concerns or development needed to help raise the standards. This support is offered to all settings due to be inspected and is delivered in the setting.
- Support for providers with a less than good Ofsted judgement. This support begins with a visit to the provider to talk through their experience and concerns. From there an individual action plan is put in place around the inspection recommendations. The team offers continuous support to all providers with less than good judgements.
- Individual support for newly established settings across the city. The EYSS team visits new settings and develops a bespoke package of support, delivered to managers and their teams to help them prepare for their first inspection.
- The delivery of the DfE's experts and mentor programme which was part of the Covid recovery package available for providers. It was a great success within Newcastle. To build on this, the EYSS team have devised an Inspiring Leaders Programme (ILP). Within the programme, settings were able to access bespoke support from an Early Years Sector Support officer. Support was provided in person, at the setting and virtually for a term. The setting selects their own modules and are given training, advice and guidance. The EY support officer worked with the setting on an area they identified for improvement or change.
- A training programme is offered to all early years providers. This covers all aspects of early years development and management, for example Leadership and Management, and Child Development. This training supports managers and practitioners with their continuous personal development to improve the delivery of quality care. Where issues and concerns are identified bespoke training and support is delivered to individual providers to support their needs and development.
- The EYSS works closely with the School Improvement team and their Early Years advisors. They meet regularly with PVI providers and cover topics such as communication, personal and social development and physical development. These meetings are an opportunity for the sector to come together to discuss issues and provide support and advice to each other.
- Childminder Networks are held termly across all localities to encourage childminders to come together to meet other childminders and enjoy fun group sessions with their children. The session aims to share good practice and help to develop childminders continuous professional development around delivery of the EYFS. It is also an opportunity for childminders to find out all relevant information around quality childcare, safeguarding and updates from Ofsted.
- A termly newsletter, with training, and a variety of topics, support providers to keep their knowledge up to date and refreshed.

Key Findings

- 98% of PVI setting-based provision are rated as good or better by Ofsted.
- 100% of Out of school clubs and pre-school playgroups are rated as good or better by Ofsted.



Staff recruitment and Financial Incentive

Providers have been struggling to recruit sufficiently qualified and experienced staff to fill vacancies in their workforce. This is a national issue. Providers have reported a number of issues for this including low pay and staff feeling increasingly demoralised by expectations within the Early Years sector.

The Government has introduced a number of initiatives to support recruitment and retention. These include;

- Amendments to the ratios for 2-year-olds from 1:4 to 1: 5
- Experienced based route for early years staff
- Financial incentive

Newcastle City Council was selected as one of the eligible local authorities to be part of the Department for Education's Financial Incentive pilot. The pilot's aim is to help childcare providers in Newcastle upon Tyne attract staff and fill vacancies. This was done by paying an incentive payment of £1,000 (after Tax and National Insurance contributions) to eligible individuals who took up a position with them.

Eligible individuals needed to be:

- New to a career in early years,
- Returning to a career in early years (has not worked in childcare for at least 6 months),
- Position is permanent but it can be full or part time,
- Be working directly with children for at least 70% of their working day.

The pilot was delivered between April 2024 and December 2024. 21 staff have benefited from the scheme.

The DFE have launched a new round of financial incentive, to commence September 2025.



Funded entitlements



Changes to funded entitlements

Before April 2024	Three-and four-year-olds All (universal): 15 hours Working parent entitlement: 30 hours Additional funding available: deprivation funding, Early years pupil premium (EYPP), Disability Access fund (DAF) and SEND funding Two-year-olds Families receiving additional support (FRAS):15 hours
From April 2024	Two-year-olds Working parent entitlement: 15 hours Additional funding available: Deprivation, EYPP, DAF, SEND From nine-months-old Deprivation funding introduced for under-twos
From Sept 2024	From nine-months-old Working parent entitlement:15 hours
From Sept 2025	From nine-months-old up to Reception age Working parent entitlement: 30 hours

Between 2024 and 2026 early years funding for early education and childcare will double. This includes additional free childcare for working parents, which is now available for children from 9 months, and families in receipt of certain additional benefits and support (FRAS). Although the expansion looks like it focusses on working parents, funding is available for families receiving some additional forms of support from an earlier age.

To support the expansion, we have:

- Provided one off payments and Capital and Revenue grants
- Reviewed how we look at supply and demand of places
- Supported providers to update their charging policies
- Worked with parents to improve processes for queries over free hours and charges

Preparing for Autumn 2025

Since the initial phase, the Early Years Sector Support team have begun new work on:

- Communication strategy with more targeted approach including new social media posts; posters for professionals/ providers; parent survey; new early years funding brochure (Ollie leaflet) including a focus on reconfirmation of codes and school-age childcare.
- Investigating issues of take-up for places, for example, failure to apply or reconfirm codes in time, codes not being used at all, take up for two-year-old FRAS entitlement.
- Guidance to parents and providers on new charging policies requirements (following new government statutory guidance) in preparation for January 2026

Measuring Success in the expansion of Working Parent Entitlement

- Validation rates of codes in Newcastle are consistently higher than England and North-East averages
- Estimates from DfE (December 2023) suggested 909 two-year-olds and 795 under twos would become eligible for working parent entitlement. The take up in Newcastle is 41% higher than the estimate for under-twos and 20% higher for twos.

Three & Four-year-olds Universal Entitlement

Table 3: Termly numbers of three-and-four-year-olds for 2023/24 and 2024/25

School Year	Autumn		Spring		Summer		Total
	3-4YO (15 hr)	3-4YO (WPE/30hr)	3-4YO (15 hr)	3-4YO (WPE/30hr)	3-4YO (15 hr)	3-4YO (WPE/30hr)	All 3-4YO
2024/25	1801	1648	2217	1790	2547	2118	12121
2023/24	1923	1343	2329	1804	2618	2074	12091

According to these figures, take-up is almost identical as 2023-24, in fact, it is 0.2% higher.

The DfE is moving from Annual EY Spring Census to a termly full EY Census to determine funding and measure take up.

Table 4: Take up of three-and-four-year-olds funded early education place

CFN Locality	Autumn 2024		Spring 2025		Summer 2025	
	3-4YO (15 hr)	3-4YO (WPE/30hr)	3-4YO (15 hr)	3-4YO (WPE/30hr)	3-4YO (15 hr)	3-4YO (WPE/30hr)
East	334	193	425	266	491	305
Inner West	662	244	823	322	958	402
North	383	517	460	664	534	785
Outer West	284	276	363	376	423	437
OOA	138	118	146	162	141	189
Total	1801	1648	2217	1790	2547	2118

OOA Out of area
3-4YO (15hr) Three-and-four-year-olds universal entitlement (15 hrs)
3-4YO (WPE/30hr) Three-and-four-year-olds working parent entitlement(30hrs)



Two-year-olds (working parent entitlement and families receiving additional support)

Table 5: Annual take up rates for two-year-old receiving additional support

Year	Newcastle Take-up	National Average	% above the national average	Ranking out of 152 Councils
2025	82.5%	65.2%	17.3%	6th (top 4%)
2024	90%	75%	15%	12th
2023	88%	74%	14%	20th
2022	85%	72%	13%	22nd
2021	72%	62%	10%	36th
2020	81%	69%	12%	25th
2019	85%	68%	17%	9th

As shown in Table 5, take-up for two-year olds of families receiving additional support in Newcastle remains much higher than the national average. Despite this, the EYSS team continue to focus on ways to improve take up.

When comparing take up rates, it's important to note that since the introduction of the WPE for two-year-olds, families who meet both criteria might choose to claim 30 hours of WPE rather than 15 hours (FRAS entitlement). Therefore, take up rates for 15 hours (FRAS) may fall.

Table 6: Number of two-year-olds accessing a funded early education place

CFN Locality	Summer 2024		Autumn 2024		Spring 2025		Summer 2025	
	2YO (FRAS)	2YO (WPE)	2YO (FRAS)	2YO (WPE)	2YO (FRAS)	2YO (WPE)	2YO (FRAS)	2YO (WPE)
East	239	102	227	128	214	130	189	127
Inner West	321	178	333	205	323	202	311	189
North	104	384	117	435	120	430	109	412
Outer West	180	215	165	239	167	231	149	227
OOA	33	143	27	120	34	134	32	133
Total	877	1022	869	1127	858	1127	790	1088

2YO (FRAS) Two-year-olds receiving additional support
2YO (WPE) Two-year-old working parent entitlement

Two-year-olds (working parent entitlement and families receiving additional support)

Table 7: Totals of two-year-olds accessing a funded early education place

Scheme	Summer 2024	Autumn 2024	Spring 2025	Summer 2025
WPE	1022	1127	1127	1088
FRAS	877	869	858	790
All (WPE& FRAS)	1899	1996	1985	1878

The number of two-year-olds (FRAS entitlement) is declining year on year, as shown in Tables 6 and 7. The numbers of two-year-olds eligible for WPE has increased slightly since Summer 2024. The lower figures in both summer terms may indicate a lack of places for this cohort. However, take up was 6.5% higher in Summer 2025 than Summer 2024. The EYSS team will continue to monitor take up in 2025/2026 and the effect of the WPE increase to 30 hours.

The introduction of the working parent entitlement for children from 9 months to two-year-olds, while benefiting several thousand families in Newcastle, risks creating a disadvantaged gap for the equivalent children of families who do not meet the criteria for WPE. This will have been further impacted by the extension of the working parent entitlement to 30 hours while the FRAS entitlement remains at 15 hours.

Crucially, the maximum income threshold has remained at £15,400 since September 2014, which means the number of families eligible falls year on year. However, as minimum wage has increased annually, the hours a family can work and still be eligible has reduced, and therefore the number of eligible children has reduced proportionately.

Table 8: Effect of static income threshold £15,400 since 2014 on numbers eligible including min. wage and maximum works hours

Change since introduction	Minimum Wage	Max work hours for a couple on NMW	Number eligible children for this period
April 2015	£6.70	44 hours	1646
April 2025	£12.21	24 hours	859
Difference	£5.51(82%) higher	20 (45.5%) fewer	787 (48%) fewer

To help address this issue, Newcastle is considering increasing the hourly rate paid to providers for two-year-olds (FRAS) to encourage more providers to check eligibility and potentially increase take up.

Working Parent Entitlement for under-twos

The numbers of WPE under-twos did not follow the trends of WPE for two-year-olds. The first term was the highest, the numbers then declined in Spring and increased again in Summer. However, the numbers are lower than in Autumn term. We will need more than three terms of data to see if this is significant. As all groups will be eligible for working parent entitlement from September 2025, the EYSS team will investigate the difference in take-up across the age groups.

Table 9: Number of children under two accessing a Working Parent entitlement early education and childcare place

	Autumn 24	Spring 25	Summer 25
CFN Locality	Under twos (WPE)	Under twos (WPE)	Under twos (WPE)
East	167	141	145
Inner West	201	179	171
North	401	386	382
Outer West	239	224	257
OOA	166	154	156
Total	1174	1084	1111



Key Findings

- Take-up of working parent entitlement for three & four-year-olds has increased from 43.2% in 2024 to 45.8% in 2025
- Take-up for two-year-olds receiving additional support (FRAS) remains above the national average
- Take-up for FRAS is lower than last year (both locally and nationally) which may be a potential consequence of the new working parent entitlements.



Deep dive: Expanded entitlements readiness September 2025

The provider survey for Summer 2025 took a deep dive into the new entitlements for working parents. As the expansion from 15 to 30 hours for 9-month-olds begins in September 2025, below are some of the key findings for provision for under-twos.

Thinking about families **currently using childcare for under-twos**:

- 59% of respondents were able to meet all requests for increased hours.
- 19% of respondents were able to offer a different session or time than was originally requested.
- 11% of respondents were unable to offer the increased hours requested.
- Less than 1% of respondents reported families left due to not being able to access the increased hours requested.

Of the 62 providers who could meet all requests for current families, 16 have turned away new families because they couldn't accommodate their requests. 13 of these providers were childminders – who each offer a smaller number of places - and three were day nurseries.

This suggests that there may be some areas in which there are some shortages of places. However, this is not significant, as places can be sought in other areas of the city.



Pricing and flexibility



Childminders remain the most flexible in terms of opening times, some are open from 6:30am and some remain open until 7pm. 90% of childminders open before 8am in the morning and 80% open until at least 6pm in the evening. In comparison, 62% of day nurseries open before 8am in the morning and 73% open until at least 6pm in the evening. One childminder is registered to operate at weekends and three are registered to care for children overnight.

Most day nurseries offer year-round care, or close to year-round care: 17% of day nurseries are open term-time only, 8% are open 39-49 weeks of the year, 52% are open 50-51 weeks of the year and 23% are open every week of the year. In comparison, 68% of playgroups are open term-time only, and the other 32% are open for 39 weeks of the year.

As demand for childcare changes, the offer from providers also changes, for example, there are now very few traditional pre-school playgroups offering sessional care, term time only. 20 out of the 25 playgroups are now open five days per week, and only five providers offer fewer than six hours continuous care per day. It is expected that this trend will continue as the number of funded hours increases and the age at which children can access funding lowers.

Changes to opening hours and age range to meet the needs of working parents are necessary and it's positive to see the sector flex to meet this changing need. It is however also important to remember that some children will not be eligible for the working parent entitlements. Some families will not be eligible for any funding when a child is two, others will be eligible for 15 hours only. Similarly, some three-and-four-year-olds from families who are not eligible for working parent entitlements will get 15 hours and not 30 hours. It is therefore also important to ensure that these families can access an early education place that meets their needs.



Figure 20: Average Cost by Locality

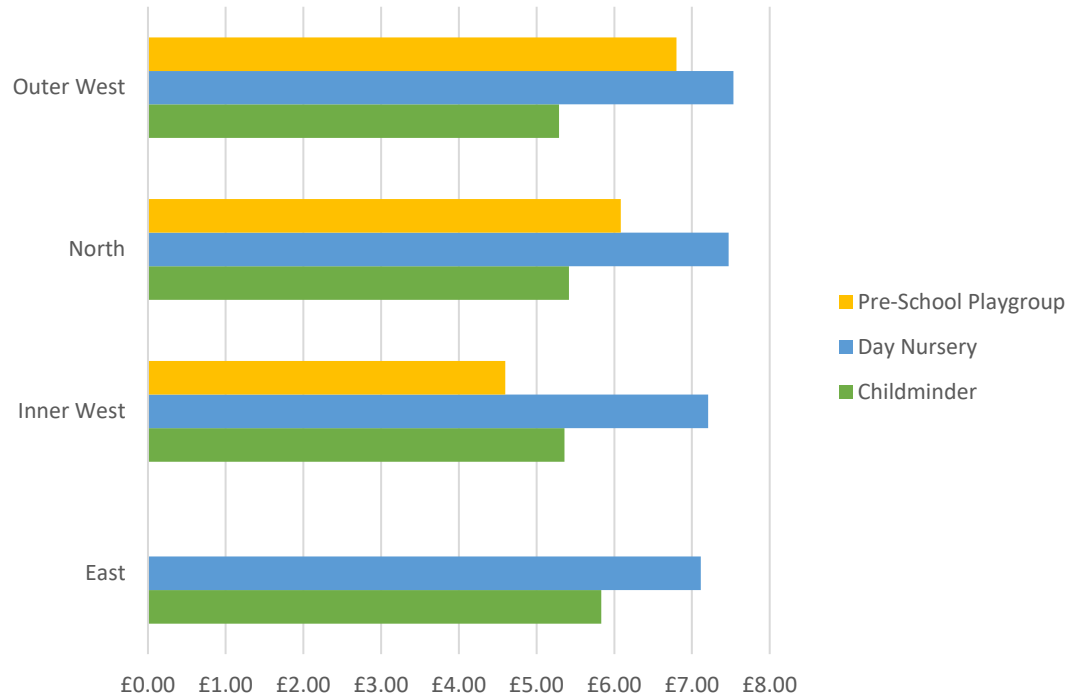
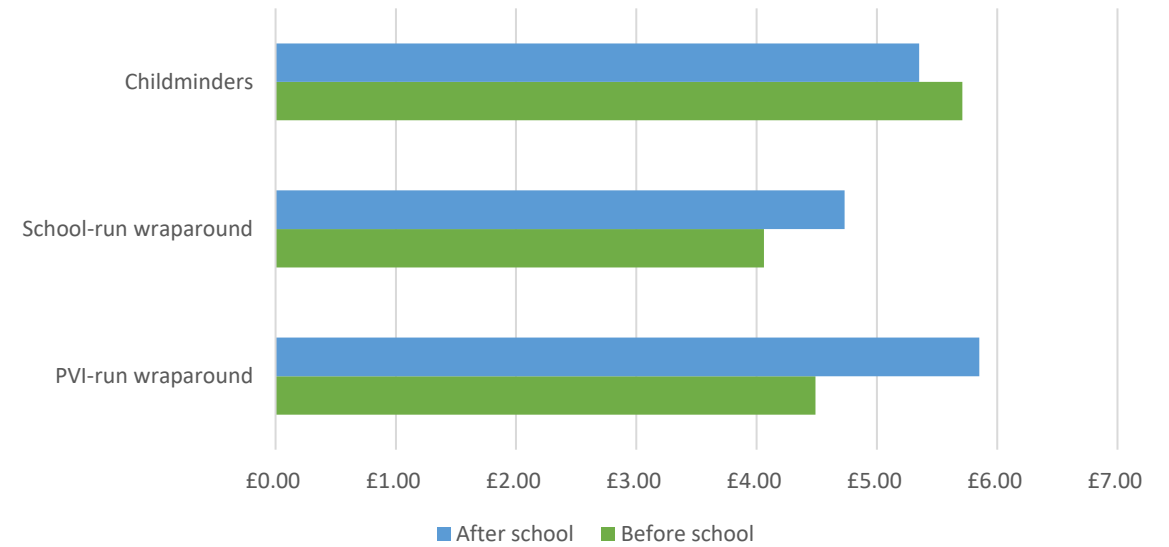


Figure 21: Average Wraparound Costs by Provider



It is worth noting that additional charges for e.g. food, nappies and trips are not always included in the hourly rate. This means that the true hourly rate for some providers could be higher. Over 50% of schools who offer provision for under-fives, do not have any extra charges.

Provider survey responses, Summer 25





Conclusion and Next steps



- Overall, there are more early years places compared to last year. Day nurseries, in particular, have expanded to meet new entitlements and are continuing to do so with the help of further expansion grants from the government. The next phase of the Department for Education's School Based Nursery scheme may also lead to an expansion of places in the coming year.
- Out of school care has also expanded since last year, and will continue to do so, with applications for the National Wraparound Programme still underway.
- While the number of places (both for early years and out of school care) has increased overall, the number of childminders has fallen, as has pre-school playgroups. The take-up of the two-year-old 15 hours entitlement for families receiving additional support has also fallen this year. The EYSS team will monitor these trends to investigate how we can mitigate the unintended impact of the new working parent entitlements.
- Further next steps include: improving sufficiency data relating to children with SEND; exploring connections between the Holiday activities and food (HAF) programme and paid for school-age childcare.





Appendix

Data in this section is presented by ward and broken up into Children and Families Newcastle Localities.



CFN Locality – East

Providers - Under-fives including, Childminders (Summer 2025)				
Ward	Childminder	Day Care	Nursery Schools & Classes	Total
Byker	1	2	2	5
Heaton		2	2	4
Monument		4	2	6
Ouseburn	1	2	2	5
South Jesmond		4	4	8
Walker	4		5	9
Walkergate	2	2	2	6
Total	8	16	18	43

Places - Under-fives, including Childminders (Summer 2025)				
Ward	Childminder	Day Care	Nursery Schools & Classes	Total
Byker	6	118	68	192
Heaton		199	93	292
Monument		408	52	460
Ouseburn	6	104	65	175
South Jesmond		287	26	313
Walker	22		376	398
Walkergate	12	83	75	170
Total	46	1199	755	2000

GP Population data - October 2024 <i>Provided by Informatics and Insights NCC</i>						
Ward	Under 1	1-year-olds	2-year-olds	3-year-olds	4-year-olds	Total Under-5
Byker	151	150	150	145	162	758
Heaton	78	76	53	73	80	360
Monument	49	29	32	36	41	187
Ouseburn	44	49	47	45	45	230
South Jesmond	27	44	30	35	25	161
Walker	128	130	142	162	169	731
Walkergate	93	107	101	113	141	555
East Total	570	585	555	609	663	2982

Number of children attending a Funded Early Education and Childcare Place (Summer 2025) <i>N.B. Some children are counted more than once where they attend more than one setting.</i>						
Ward	Under 2s	2-year-old (D)	2-year-old (WPE)	3–4-year-old (15 hours)	3–4-year-old (30 hours)	Total
Byker	15	58	16	152	45	286
Heaton	49	9	35	31	64	188
Monument	8	9	7	40	10	74
Ouseburn	15	8	17	30	29	99
South Jesmond	20	1	11	23	22	77
Walker	15	76	10	162	62	325
Walkergate	23	30	32	55	73	213
Total	145	191	128	493	305	1262

CFN Locality – North

Providers - Under-fives including, Childminders				
Ward	Childminder	Day Nursery	Nursery Schools & Classes	Total
Castle	5	5	2	12
Dene & South Gosforth	1	3	1	5
Fawdon & West Gosforth	9	6	5	20
Gosforth		4	3	7
Kenton	8	3	4	15
Manor Park	1	1	1	3
North Jesmond			1	1
Parklands	11	1	1	13
Grand Total	35	24	17	76

Places - Under-fives, including Childminders (Summer 2025)				
Ward	Childminder	Day Nursery	Nursery Schools & Classes	Total
Castle	36	231	52	319
Dene & South Gosforth	6	190	26	222
Fawdon & West Gosforth	57	385	143	585
Gosforth		346	26	372
Kenton	63	90	140	293
Manor Park	6	21	26	53
North Jesmond		54		54
Parklands	78	34	39	151
Total	246	1351	452	2049

GP Population data - October 2024						
Provided by Informatics and Insights NCC						
Ward	Under 1	1-year-olds	2-year-olds	3-year-olds	4-year-olds	Total Under 5
Castle	239	241	275	241	283	1279
Dene & South Gosforth	83	89	111	90	120	493
Fawdon & West Gosforth	84	69	106	90	107	456
Gosforth	71	96	93	95	99	454
Kenton	137	129	135	135	128	664
Manor Park	85	70	98	93	92	438
North Jesmond	29	33	25	41	32	160
Parklands	108	118	103	122	117	568
Total	836	845	946	907	978	4512

Number of children attending a Funded Early Education and Childcare Place (Summer 2025)						
N.B. Some children are counted more than once where they attend more than one setting.						
Ward	Under 2s	2 year old (D)	2 year old (WPE)	3-4 year old (15 hours)	3-4 year old (30 hours)	Total
Castle	104	9	129	96	234	572
Dene & South Gosforth	45	6	58	51	73	233
Fawdon & West Gosforth	24	39	28	77	74	242
Gosforth	48	4	56	73	92	273
Kenton	51	42	42	111	96	342
Manor Park	23	10	33	52	73	191
North Jesmond	21	3	13	24	34	95
Parklands	66	4	53	52	109	284
Total	382	117	412	536	785	2232

CFN Locality – Inner West

Providers - Under-fives including, Childminders (Summer 2025)				
Ward	Childminder	Daycare	Nursery Schools & Classes	Total
Arthur's Hill	2	3	2	6
Benwell & Scotswood	2	4	6	12
Blakelaw	1	5	2	8
Elswick	1	7	5	13
West Fenham	3	4	2	9
Wingrove	2	2	3	7
Total	11	25	20	55

Places - Under-fives, including Childminders (Summer 2025)				
Ward	Childminder	Daycare	Nursery Schools & Classes	Total
Arthur's Hill	18	64	78	172
Benwell & Scotswood	18	148	249	417
Blakelaw	0	216	71	264
Elswick	6	318	282	597
West Fenham	12	127	52	263
Wingrove	12	135	52	275
Total	66	1008	784	1988

GP Population data - October 2024						
Provided by Informatics and Insights NCC						
Ward	Under 1	1-year-olds	2-year-olds	3-year-olds	4-year-olds	Total Under-5
Benwell & Scotswood	153	190	188	176	171	878
Denton & Westerhope	109	131	129	135	136	640
Elswick	315	272	281	268	252	1388
Lemington	107	97	103	119	101	527
West Fenham	109	115	131	139	125	619
Wingrove	150	161	145	178	179	813
Total	943	966	977	1015	964	4865

Number of children attending a Funded Early Education and Childcare Place (Summer 2025)						
N.B. Some children are counted more than once where they attend more than one setting.						
Ward	Under 2s	2-year old (D)	2-year old (WPE)	3–4-year old (15 hours)	3–4-year old (30 hours)	Total
Arthur's Hill	5	36	6	126	15	188
Benwell & Scotswood	48	50	63	153	98	412
Blakelaw	41	52	35	131	83	342
Elswick	17	85	15	298	44	459
West Fenham	32	51	36	107	87	313
Wingrove	28	42	37	141	75	323
Total	171	316	192	956	402	2037

CFN Locality – Outer West

Providers - Under-fives including, Childminders (Summer 2025)				
Row Labels	Childminder	Daycare	Nursery Schools & Classes	Total
Callerton & Throckley	2		3	5
Chapel	6	3	1	10
Denton & Westerhope	2	4	4	10
Kingston Park South & Newbiggin Hall	2	2	4	8
Lemington	4	3	3	10
Total	16	12	15	43

Places - Under-fives, including Childminders (Summer 2025)				
Ward	Childminder	Daycare	Nursery Schools & Classes	Total
Callerton & Throckley	12	143	155	310
Chapel	48	208	39	295
Denton & Westerhope	12	122	117	251
Kingston Park South & Newbiggin Hall	12		130	142
Lemington	42	213	82	337
Grand Total	126	686	523	1335

GP Population data - October 2024						
Provided by Informatics and Insights NCC						
Ward	Under 1	1-year-olds	2-year-olds	3-year-olds	4-year-olds	Total Under-5
Callerton & Throckley	191	166	163	150	155	825
Chapel	62	70	87	76	75	370
Denton & Westerhope	109	131	129	135	136	640
Kingston Park South & Newbiggin Hall	118	119	156	150	141	684
Lemington	107	97	103	119	101	527
Total	587	583	638	630	608	3046

Number of children attending a Funded Early Education and Childcare Place (Summer 2025)						
N.B. Some children are counted more than once where they attend more than one setting.						
Ward	Under 2s	2-year old (D)	2-year old (WPE)	3-4 year old (15 hours)	3-4 year old (30 hours)	Total
Callerton & Throckley	72	31	56	96	85	340
Chapel	40	5	50	30	72	197
Denton & Westerhope	60	39	48	91	108	346
Kingston Park South & Newbiggin Hall	40	55	33	123	96	347
Lemington	45	19	41	83	76	264
Total	257	149	228	423	437	1494

Three & Four-year-olds Universal Entitlement

The 2025 DfE annual take-up rates for universal three-and-four-year-olds has been produced with new methodology for population, and all previous take-up rates have been changed in line with this adjusted retrospectively. See Table 10.

Table 10: Take up rates for three-and-four-olds universal funded entitlement

Year	2025 SFR Newcastle Take up %	2025 SFR National Take up %	2025 SFR +/- national ave.	SFR 2024 Newcastle Take-up %	SFR 2024 National Take-up %	2025 SFR +/- national ave.
2025	89.6%	93.1%	-3.5%			
2024	90.7%	93.6%	-2.9%	94%	94%	0
2023	92.1%	94.6%	-2.5%	93%	94%	-1%
2022	95.6%	96.0%	-0.4%	94%	92%	2%
2021	94.6%	94.2%	0.4%	92%	90%	2%
2020	98.9%	97.0%	1.9%	96%	93%	3%
2019	95.9%	97.1%	-1.2%	96%	93%	3%

Following the DfE amending their methodology, backdated to 2011, we have amended our data collection accordingly. Newcastle take-up was last year at the national average of 94%, now take up for the same period is reported 5% lower and 3.5% below national average. Especially when take-up for disadvantaged two-year-olds is 90% and 15% above the national average. Newcastle six-year average went from 1.5% above to 1% below average. Meanwhile if we take registered three-and-four-year-olds at Census (4007) and local population data for this cohort (4239.67) this would be take up rate of 94.5%. We will remain alert to the effect of these changes.

