Childcare Sufficiency Statement 2024

North Tyneside Council

North Tyneside Childcare Sufficiency Statement 2024

Contents

Executive Summary

- Overall, the borough has maintained a diverse and comprehensive childcare offer, which delivers sufficient childcare places.

- The quality of provision is high, with the overwhelming majority of places delivered in settings rated 'good' or 'outstanding' by Ofsted.

- The number of children requiring childcare is likely to remain static in the short term.

- The proportion of children with SEND accessing the Government funded entitlements are broadly in line with regional and national averages.

- The proportion of eligible children taking up their funded early years entitlements remains high.

- The local authority has launched a new Early Years Inclusion Service.

- A minority of settings reported that they were concerned about their financial sustainability, as costs continue to rise.

- Staffing remains an issue across group providers.

- Phase 1 and phase 2 of the expansion to the working families entitlement have been successfully delivered.

Introduction

North Tyneside Council has a statutory duty to ensure formal childcare is available for working families, parents / carers who are studying or training, and disabled children up to the age of 18 years. The local authority must also secure free early years provision for eligible children aged 9 months to 4 year olds. North Tyneside's Childcare Sufficiency Statement considers whether sufficient childcare is available to meet the needs of families who live and work in the borough.

The 2023 Spring Budget announced a significant expansion of the free early education entitlements offer. From September 2025, all eligible working parents of children aged nine months and over will be entitled to 30 hours free childcare per week up until their child starts school. The expansion has been phased, with eligible 2 year olds of working families receiving 15 funded hours from April 2024, and eligible children of working families aged 9+ months, receiving 15 hours from September 2024.

The sufficiency statement considers whether North Tyneside's childcare network can provide the places required by families. Wider socio-economic determinants of childcare demand are considered, alongside factors that shape the childcare decisions of families, such as quality, choice and accessibility. North Tyneside's childcare sector faces challenges such as recruitment of qualified staff and rising costs, as it prepares for the next phase of the planned expansion of childcare entitlements. The local authority will continue to work with families and providers to meet the childcare needs and preferences of North Tyneside's residents now and in the future.

Ofsted Registered Childcare in North Tyneside

North Tyneside has maintained a diverse network of childcare providers able to deliver sufficient, high quality provision to meet parents and carers' needs. However, the sector has faced significant pressures in recent years, and it is important to understand the impact on the number of registered childcare providers and the places they offer.

Number of Childcare Providers

The table below shows the total number of Ofsted registered childcare and early years registered providers in North Tyneside between March 2022 and March 2024.

	March 2022	**March 2023**	**March 2024**
Non-EYR providers	26	25	30
EYR providers	171	154	147
Total providers	**197**	**179**	**177**

The number of Ofsted registered childcare and early years providers in North Tyneside has declined from 197 in March 2022 to 177 in March 2024, which reflects national trends. This represents an 10% reduction in the number of providers. The number of providers on the early years register has reduced from 171 to 147 in the same period. It is important to understand which types of providers have exited the sector.

Childcare Providers by Type

Families have a range of childcare needs and preferences, particularly during the early years. A diverse mix of provider types is therefore better able to meet familial needs and preferences. The table below shows the provider numbers between March 2019 and March 2024 by type.

	March 2019	**March 2021**	**March 2022**	**March 2023**	**March 2024**
Childcare on Non-Domestic Premises	74	74	72	72	78
Childminder	127	124	111	96	90
Home Childcarer	18	18	14	11	9

North Tyneside has experienced a decrease in the number of childminders between March 2019 and March 2024, from 127 to 90, which is a 29% decrease. The rate of decline has slowed in the past year, however the trend remains downward. The number of childcare providers operating on non-domestic premises has increased in 2024.   The continued decline in the childminding sector reduces parental choice and flexibility within the childcare sector. This could have implications for families wishing to access the extended childcare entitlements, if the decline continues.

Childcare on Non-Domestic Premises

The table below shows the breakdown of childcare providers operating on non-domestic premises by provider type.

	Definition	March 2022	March 2023	March 2024
Full Daycare	Providers offer 3 or more hours of childcare per day, 5 days a week or more per week and 45 weeks or more per year.	46	48	50
Out of school daycare	Out of school childcare provide care exclusively for children at the beginning or end of the school holidays or during holiday periods.	13	12	14
Sessional daycare	Providers operating for less than 3 hours per day, less than 5 days per week or less than 45 weeks per year.	12	11	13

The majority of non-domestic childcare is delivered in daycare nurseries, with sessional daycare and out of school care also available. The number of full daycare providers rose between March 2023 and 2024 from 48 to 50, with the number of sessional providers also increasing from 11 to 13. There was also 2 more out of school daycare providers in March 2024 compared to the previous year. North Tyneside maintains a strong full daycare offering which is important for families with early years children. There is currently sufficient diversity in the sector to meet a variety of needs.

Number of Early Years Places

Number of Ofsted Registered Early Years Places

The table below shows the number of Ofsted registered early years places in North Tyneside (including estimates).

	March 2019	March 2021	March 2022	March 2023	March 2024
Number of Ofsted registered early years places	4,108	4,174	4,057	4,059	3,964

The number of Ofsted registered early years places has declined between March 2023 and March 2024. Childcare providers do not always work to their published admission number, which may result in an overestimate of capacity.

The table below shows the number of registered early years places in each locality, by provider type.

Locality	Provider Type	Number of Early Years Places 2023	Number of Early Years Places 2024
North West	Full Daycare	903	931
	Sessional	45	30
	Out of School Care	162	136
	Childminders	270	234
	Total	**1380**	**1331**
North East	Full Daycare	455	406
	Sessional	66	66
	Out of School Care	198	198
	Childminders	162	123
	Total	**881**	**793**
South West	Full Daycare	652	537
	Sessional	44	44
	Out of School Care	0	0
	Childminders	52	46
	Total	**748**	**627**
South East	Full Daycare	826	826
	Sessional	80	80
	Out of School Care	0	0
	Childminders	144	126
	Total	**1050**	**1032**

Quality of Childcare in North Tyneside

Ofsted Rating

Families want high quality childcare provision for their children, with quality particularly important during the formative early years of a child's life. The table below shows the number of providers by their Ofsted rating, between March 2022 and March 2024.

Ofsted Judgement	All childcare providers 2022	Percentage of providers 2022	All childcare providers 2023	Percentage of providers 2023	All childcare providers 2024	Percentage of providers 2024
Outstanding	27	14%	24	13%	23	13%
Good	116	59%	111	62%	101	57%
Requires Improvement	3	2%	1	1%	0	0%
Inadequate	0	0%	1	1%	0	0%
Not applicable or did not receive a judgement	51	26%	42	23%	53	30%

In 2024 all childcare provision with a rating is rated 'Good' or 'Outstanding'.
A further 53 providers are awaiting an OFSTED inspection.

Quality of Childcare places

The table below shows the number of places available by their Ofsted 'overall effectiveness' judgement

Overall Effectiveness	Places
Outstanding	698
Good	2401
Requires Improvement	0
Inadequate	0
N/A	865

This demonstrates that childcare provision in North Tyneside is of a high standard overall.

Ofsted Deprivation Rating

Childcare must be accessible to all communities to ensure sufficiency of provision. The following table shows the total number of providers by Ofsted deprivation band, which are then broken down by provider type.

Ofsted Deprivation	Total 2022	Total 2023	Total 2024	Provider Type	2022	2023	2024
Least Deprived	61	54	53	Full Daycare	7	7	8
				Sessional	6	5	5
				Out of School Care	6	7	6
				Non domestic – other	1	0	1
				Childminders	37	33	31
				Home Childcarers	4	2	2
Less Deprived	32	33	31	Full Daycare	4	5	5
				Sessional	1	2	2
				Out of School Care	2	2	1
				Childminders	19	20	21
				Home Childcarers	5	4	2
Average	33	30	29	Full Daycare	10	11	12
				Sessional	3	3	4
				Out of School Care	3	2	2
				Childminders	12	10	9
				Home Childcarers	5	4	2
Deprived	33	31	29	Full Daycare	8	8	8
				Sessional	1	1	2
				Out of School Care	1	2	3
				Childminders	23	20	16
				Home Childcarers	0	0	0
Most Deprived	38	31	36	Full Daycare	17	17	17
				Sessional	1	0	0
				Out of School Care	1	0	3
				Childminders	14	13	13
				Home Childcarers	5	1	3

North Tyneside's childcare provision operates in a range of socio-economic contexts. 84 providers are based in local super output areas classified as 'least deprived' or less deprived. This is a reduction from 2022, when the total number in 'least' or 'less' deprived areas was 93. 65 operate in localities classified as 'deprived' or 'most deprived', compared to 71 in 2022. North Tyneside has a reasonable distribution of childcare, across all communities.

The table below shows the number of places by Ofsted deprivation band, which are then broken down by provider type.

Ofsted Deprivation	Provider Type	Number of Early Years Places 2023	Number of Early Years Places 2024
Most Deprived	Full Daycare	1089	1084
	Childminders	78	72
	Total	**1167**	**1156**
Deprived	Full Daycare	521	531
	Sessional	24	24
	Out of School Care	97	97
	Childminders	142	118
	Total	**784**	**770**
Average	Full Daycare	516	557
	Sessional	40	50
	Childminders	54	54
	Total	**610**	**661**
Less Deprived	Full Daycare	202	202
	Sessional	56	56
	Out of School Care	75	75
	Childminders	138	132
	Total	**471**	**465**
Least Deprived	Full Daycare	508	446
	Sessional	115	115
	Out of School Care	188	162
	Childminders	216	195
	Total	**1027**	**912**

There is a distribution of places across all socio-economic contexts, with the most deprived and least deprived areas, having the greatest number of places. Only the localities classed as experiencing 'average' deprivation levels recorded a net gain in places.

North Tyneside Demographics and Economic Profile

Socio-economic factors shape demand for childcare. This section considers the impact of North Tyneside's changing population and economy on the childcare sector.

Demographics

The size of the 0-4 year old population is an indicator of demand for early years childcare. The 5-14 population can act as an indicator of demand for school wraparound childcare provision.

Population estimates and projections from the Office for National Statistics (ONS) can be seen in the following table below. This data suggests that the 0-4-year-old population will remain static until 2027 before showing signs of recovery.

The 5-14-year-old population is expected to decline from 2024. The reduced demand could improve sufficiency in the short term, but a prolonged decline may result in sustainability issues for some providers, which in turn impact upon wider sufficiency in the future.

Population estimates and projections from the Office for National Statistics (ONS):

	Estimates					Projections					
AGE GROUP	**2019**	**2020**	**2021**	**2022**	**2023**	**2024**	**2025**	**2026**	**2027**	**2029**	**2030**
0-4	11,419	11,261	10,856	10,701	10,407	10,585	10,582	10,581	10,588	10,604	10,611
5-14	23,923	23,997	24,049	24,272	24,339	24,120	23,893	23,663	23,489	23,021	22,874

Source: ONS via NOMIS – population mid-year estimates and projections (22/10/2024)

The demographic structure of wards and localities can indicate demand, although North Tyneside is a small borough and many families access provision outside of their locality. The ONS mid-2022 population estimates by ward can be seen in table below. Across North Tyneside, 30% of the 0-14 population are aged 0-4 years.

Ward	Age 0 - 4	Aged 5 to 14
North East	**2,093**	**5,559**
Cullercoats & Whitley Bay South	509	1,191
Monkseaton	387	1,054
New York & Murton (c 1/2 NE)	245	630
St Mary's	425	1,223
Whitley Bay North	527	1,461
North West	**2,438**	**5,029**
Backworth & Holystone	812	1,494
Camperdown	456	956
Killingworth	388	915
Shiremoor (c 1/2 NW)	262	610
Weetslade	520	1,054
South East	**2,684**	**6,150**
Chirton & Percy Main	762	1,800
New York & Murton (c 1/2 SE)	245	630
North Shields	550	1,068
Preston with Preston Grange	421	881
Shiremoor (c 1/2 SE)	262	610
Tynemouth	444	1,161
South West	**3,482**	**7,572**
Battle Hill	499	1,241
Forest Hall	456	1,016
Howdon	639	1,508
Longbenton & Benton	677	1,287
Wallsend Central	574	1,190
Wallsend North	637	1,330

NB data are for best-fit LSOA wards as data are not yet available for the new 2024 ward boundaries

Source: ONS mid-2022 population estimates

Within the Local Plan two strategic housing sites have been identified at Killingworth Moor and Murton.

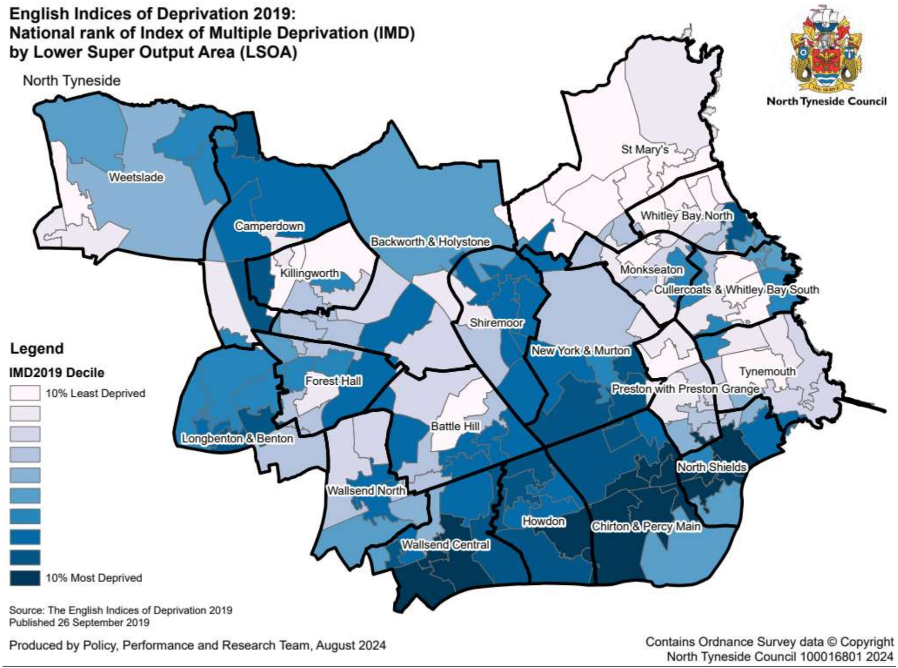
Across North Tyneside 26% of households had dependent children.

ONS data (ethnicity by age) shows that between 2011 and 2021 the percentage of those aged 0-4 from BME groups has reduced, whilst the percentage aged 5-14 from BME groups has increased.

Deprivation

High levels of deprivation are associated with reduced demand for paid childcare. The national 'Childcare and Early Years Survey of Parents 2023' found that the deprivation level of the local area was key determinant of the use of formal childcare. 74% of children aged 0 to 4 years living in the least deprived areas received formal childcare compared to 57% in the most deprived areas. The family's (gross) annual income was also a key determinant, 4% of children aged between 0 and 4 years in families with an annual gross income of £45,000 or more received formal childcare, compared to 55% of those in families with an annual gross income of under £10,000.

The map below shows the geographical distribution of deprivation in North Tyneside, using the National Rank of Index of Multiple Deprivation by Lower Super Output Area.



North Tyneside's least deprived communities are in the coastal areas, in the east of the borough. These communities would be expected to display strong local demand for formal paid childcare, working families entitlements and paid wraparound care. Higher deprivation levels in the North-West of the borough and the communities running along the Tyne, will reduce demand for formal paid childcare in these localities. Eligibility for the funded 2 year old entitlements, for families receiving additional government support will be higher in areas experiencing greater deprivation. Areas with high deprivation will also have demand for universal 3 and 4 year old funded placements. It is important that funded early years places are available in deprived communities, as high quality early years provision can significantly enhance the life chances of children experiencing deprivation.

The Economy

The ONS Annual Population Survey estimates suggest that, between the years July 2020 to June 2021 and July 2023 to June 2024, there may have been has been a fall in the percentage of people aged 16-64 in North Tyneside who are in employment; from 73.3% (June 2021) to 69.5% (June 2024). This differs from the broadly unchanged comparative regional estimates (70.6% and 71.1%). The picture nationally is of increased employment, from 74.8% to 75.7%. NB there is an increased level of uncertainty around Annual Population Survey estimates for local authority areas.

The employment rate in North Tyneside, regionally and nationally can be seen in the following table. A reduction in paid employment could potentially reduce the demand for paid for childcare and working families entitlements, however, this will depend on whether fewer families with children are economically active.

Employment rates

The table below shows employment rates (June 2024) in North Tyneside, compared to the England and North East averages.

Employment rate	North Tyneside	England	North East
Aged 16-64	69.5	75.7	71.1
Aged 16-19	*43.4*	*32.6*	*38.2*
Aged 20-24	*44.3*	*66.1*	*65.7*
Aged 25-34	*73.5*	*84.6*	*76.6*
Aged 35-49	*84.8*	*86.1*	*83.8*
Aged 50-64	*65.5*	*71.9*	*65.5*

Overall employment in North Tyneside is lower than national for all age ranges other than 16-19 where it is higher. North Tyneside employment rates are similar to regional rates, other than the higher rate for aged 16-19 and much lower rate for aged 20-24. NB local authority Annual Population Survey estimates have a high level of uncertainty for age groups.

Childcare Sufficiency Survey 2024

This section of the report outlines the findings that were obtained from the electronic survey undertaken in June 2024.

Overall provider response rate for PVI and Childcare was high. (n=138 responses)

Changes in Number of places offered in the last 12 months:

Provider Type	Responses	Increased	Kept the Same	Reduced
Childminders	74	16.2%	75.7%	8.1%
Daycare Provision	47	4.3%	89.4%	6.4%
Holiday Clubs	20	20.0%	80.0%	0.0%
Out of School / Wraparound	21	4.8%	95.2%	0.0%
Sessional	16	18.8%	81.3%	0.0%
All	**136**	**12.5%**	**80.9%**	**6.6%**

- More than 93% of providers of any type, report that they have increased or maintained the number of places offered over the last 12 months.
- Childminders and Daycare providers are the most likely to report a decrease in numbers.
  - 3 Daycare providers report reducing provision (one in the North West and two in the South East).
  - 6 Childminders report reducing their provision. Including three in the North East of the borough.

Most providers have maintained their place numbers, with a significant minority increasing places, this will help ensure sufficiency of places.

Demand for Paid Hours

Providers were asked how demand for paid hours of childcare had changed during the preceding 12 months. The table below shows the responses broken down by provider type**.**

Provider Type	**Responses**	**Increased to some extent**	**No change**	**Decreased to some extent**
Childminders	64	25.0%	60.9%	14.1%
Daycare Provision	46	54.3%	37.0%	8.7%
Holiday Clubs	19	47.4%	36.8%	15.8%
Out of School / Wraparound	21	47.6%	42.9%	9.5%
Sessional	16	50.0%	37.5%	12.5%
All	**124**	**35.5%**	**53.2%**	**11.3%**

- Most Childminders have seen no change in demand for paid hours this year.
- Demand for paid hours has increased for around half of other provider types.

Most providers reported that demand for paid hours has increased or remained stable. Only a minority reported a decrease in demand for paid hours. Increased demand for paid hours should support provider sustainability. The Local Authority will work with partners to understand how the expansion in the Government funded early years entitlements will impact on demand for paid hours. Further monitoring is required to understand if demand for paid hours will change as the expansion of early years entitlements takes place.

Demand for Government Funded Places

Providers were asked how demand for Government funded childcare places had changed during the preceding 12 months. The table below shows the responses broken down by provider types.

Provider Type	Responses	Increased to some extent	No change	Decreased to some extent
Childminders	68	64.7%	29.4%	5.9%
Daycare Provision	47	95.7%	4.3%	0.0%
Holiday Clubs	17	70.6%	29.4%	0.0%
Out of School / Wraparound	19	78.9%	21.1%	0.0%
Sessional	15	73.3%	26.7%	0.0%
All	**126**	**73.8%**	**23.0%**	**3.2%**

- Most of all provider types report an increase in demand since the expansion of government funded childcare.
- Only four Childminders report a decrease in demand (and that decrease was not reported as "significant").
- Most of the Daycare provision reported an increase in demand.
- More providers in the North and South West of the LA reported an increase in demand than those in the East of the LA.

This will help support the sustainability of these providers, providing funding rates are appropriate. The expansion of the Government funded early years entitlements from April 2024, will further significantly increase demand.

Demand for childcare during school holidays

Providers were asked how demand for childcare during the school holidays has changed during the past 12 months. The table below shows the responses by provider type.

Provider Type	**Responses**	**Increased to some extent**	**No change**	**Decreased to some extent**
Childminders	61	24.6%	60.7%	14.8%
Daycare Provision	36	25.0%	72.2%	2.8%
Holiday Clubs	20	35.0%	50.0%	15.0%
Out of School / Wraparound	18	38.9%	50.0%	11.1%
Sessional	10	40.0%	40.0%	20.0%
All	**107**	**24.3%**	**64.5%**	**11.2%**

- Demand in School Holidays has remained broadly the same over the last 12 months.
- A significant minority of Holiday clubs, Out of School providers and sessional providers report an increase in demand over the holidays.

The results show that demand for holiday childcare has varied across settings. Most provider types reported no change in demand. Further monitoring of the situation is required.

Current Financial Sustainability

Providers were asked to rate their financial sustainability on a 10 point scale from 1 (weak) to 10 (strong). The table below shows the responses:

		Childminders	Day Care	Holiday Activity Clubs	Out of school	Sessional	All
	N=	73	45	20	21	16	133
Weak	1	0.0%	2.2%	5.0%	4.8%	6.3%	0.8%
	2	1.4%	4.4%	0.0%	0.0%	0.0%	2.3%
	3	15.1%	6.7%	10.0%	9.5%	6.3%	10.5%
	4	5.5%	0.0%	0.0%	0.0%	0.0%	3.0%
	5	11.0%	11.1%	5.0%	9.5%	12.5%	12.0%
	6	17.8%	8.9%	15.0%	9.5%	25.0%	16.5%
	7	20.5%	20.0%	35.0%	33.3%	25.0%	20.3%
Strong	8	13.7%	22.2%	10.0%	9.5%	12.5%	17.3%
	9	5.5%	8.9%	10.0%	9.5%	12.5%	6.8%
	10	9.6%	15.6%	10.0%	14.3%	0.0%	10.5%
	Mean	6.3	6.9	6.7	6.8	6.3	6.5

- No provider type is significantly more likely to report poor financial stability then the average.
- 14% of providers report their financial stability as weak (0-3) whereas 35% of providers report their financial stability as strong (8+).
- The lowest rates of financial stability are found amongst Childminders in the South East (6 of 17 report weak stability), and Holiday Clubs in the South West (3 of 7 reporting weak stability). Although these represent a small number of providers.
- The highest rates of financial stability are found in the North East amongst Daycare, Holiday Clubs and Out of School providers.

Financial sustainability varies across settings and provider types. A minority of settings report weak financial sustainability. Overall financial sustainability appears to be reasonable, given the significant challenges facing the sector. A few settings are, however, reporting weaknesses that could potentially result in sufficiency issues. The local authority will need to continue monitoring the situation to ensure sufficient provision is available in the future.

Recruitment in the next year

Providers were asked to what extent they found it difficult to recruit high quality childcare staff to their setting. The table below shows the responses by provider type.

Provider Type	**Responses**	**Difficult to some extent**	**Easy to some extent**	**Don't know**
Childminders	23	17.4%	21.7%	60.9%
Daycare Provision	45	88.9%	6.7%	4.4%
Holiday Clubs	20	90.0%	5.0%	5.0%
Out of School / Wraparound	20	85.0%	10.0%	5.0%
Sessional	15	80.0%	6.7%	13.3%
All	**81**	**69.1%**	**9.9%**	**21.0%**

- By far the most common response was to agree with the difficulties of recruiting staff, except that most childminders reported that they do not know.

The overwhelming majority of providers agreed to some extent that recruitment was difficult. Recruitment difficulties can stop providers from expanding if demand increases and could also lead to reductions in capacity within the sector.

Planned Changes in Business Offer

Provider were asked whether they plan to change their business model in the next 12 months. The table below shows the responses by provider type.

	Childminders	Day Care	Holiday Activity Clubs	Out of school	Sessional	All
Reduce the size of the provision	44.4%	0.0%	0.0%	0.0%	0.0%	30.0%
Expand the size of the provision	37.0%	66.7%	80.0%	80.0%	83.3%	50.0%
Relocate to new premises	3.7%	0.0%	0.0%	0.0%	0.0%	2.5%
Close the setting	7.4%	22.2%	0.0%	0.0%	0.0%	10.0%
Open an additional early years provision	3.7%	11.1%	20.0%	20.0%	16.7%	5.0%
Open additional school wraparound provision	3.7%	0.0%	0.0%	0.0%	0.0%	2.5%

- Two Childminders and two Daycare settings report that they are planning to close a setting.
- 12 Childminders (of 27 responses -44%) report that they plan to reduce the size of their provision.
- Most other providers plan to expand their provision, and two providers plan to open new provision: one Childminder and one Daycare that offers all provision types.

Expanding or Opening New Provision

Those providers that responded they were planning to expand or open new provision were asked to estimate the number of new places they expected to offer. Where a provider was unsure of the age range of the new places the total was split across their current age profile.

Total		How many places do you expect to create for the following age groups:			
	n=	**Under 2 year olds**	**2 year olds**	**3-4 year olds**	**School age**
Childminders	10	13	14	18	7
Day Care	7	24	31	55	20
Holiday Activity Clubs	4	6	35	49	70
Out of school	4	6	43	49	50
Sessional	4	18	49	58	50
All	**19**	**49**	**68**	**88**	**77**

- A total of 205 places for under 4s are planned by survey respondents in 2024-25.

SEND Provision

Providers were asked the extent to which they agreed that their setting can meet the needs of children with SEND.   The table below shows the responses broken down by provider type:

Provider Type	**Responses**	**Agree to some extent**	**Disagree to some extent**	**Don't know**
Childminders	62	82.3%	3.2%	14.5%
Daycare Provision	46	82.6%	17.4%	0.0%
Holiday Clubs	19	84.2%	10.5%	5.3%
Out of School / Wraparound	21	85.7%	9.5%	4.8%
Sessional	16	93.8%	6.3%	0.0%
All	**122**	**83.6%**	**8.2%**	**8.2%**

- Daycare providers are most likely to report that they disagree they can meet the needs of children with SEN, with 8 providers disagreeing with the statement.

- Childminders are most likely to report that they do not know.

- However, most providers report that they agree, or strongly agree, that they can meet the needs of children with SEND.

The overwhelming majority of responding providers agreed that their setting can meet the needs of children with SEND. This suggests that most providers are confident that they can access support that will enable children with SEND to access provision.

Extended Early Years Entitlements

Providers were asked a series of questions about the expansion of the early years entitlement's impact on demand for childcare.

Providers were asked initially if they currently delivered government funded early years entitlement places

	Responses	Yes	No
Childminders	72	94.4%	5.6%
Day Care	48	97.9%	2.1%
Holiday Activity Clubs	20	70.0%	30.0%
Out of school	21	81.0%	19.0%
Sessional	16	93.8%	6.3%
All	**135**	**91.1%**	**8.9%**

- Over 90% of providers currently deliver funded provision.

Children new to setting

Providers were asked to estimate the percentage of children accessing the new 2 year old entitlement for working families that were new to their setting:

	Responses	Average (%)
Childminders	62	3.9
Day Care	44	13.2
Holiday Activity Clubs	13	10.2
Out of school	16	8.5
Sessional	14	26.3
All	**113**	**9.3**

- Childminders saw the fewest new children due to the changes in funding entitlement.
- Sessional providers saw the largest increase.

Changes in Demand Following Working Families Entitlement for Children Aged 2 Years

Providers were asked to consider the statement that: new working families entitlements have increased demand for childcare places at my setting. The table below shows responses by provider type.

Provider Type	Responses	Agree to some extent	Neither agree or disagree	Disagree to some extent
Childminders	66	56.1%	33.3%	7.6%
Daycare Provision	46	97.8%	2.2%	0.0%
Holiday Clubs	14	85.7%	14.3%	0.0%
Out of School / Wraparound	17	88.2%	11.8%	0.0%
Sessional	15	66.7%	20.0%	13.3%
All	**120**	**70.8%**	**21.7%**	**5.8%**

- Only 6% of providers disagreed that demand for places had increased.

- 98% of Daycare providers indicated that demand had increased for their provision.

- Childminders and Sessional providers were the only provisions to disagree with the statement.

Ability to Meet Demand for Working Families Entitlement for Children Aged 2 years

Providers were also asked if they could meet demand for funded places for working families with children aged children aged 2 years. The table below shows the responses by provider types.

Provider Type	Responses	Agree to some extent	Neither agree or disagree	Disagree to some extent
Childminders	66	45.5%	30.3%	21.2%
Daycare Provision	46	60.9%	10.9%	28.3%
Holiday Clubs	14	50.0%	7.1%	28.6%
Out of School / Wraparound	17	52.9%	5.9%	29.4%
Sessional	15	46.7%	20.0%	20.0%
All	120	51.7%	21.7%	23.3%

- Around half of providers agreed that they could meet the current demand for places.

- Around a quarter of providers felt they could not.

- Confidence was lowest in the North West of the LA where only a third (35%) of providers agreed that they could meet demand.

Ability to Meet Demand for Working Families Entitlement for Children Aged 9+ Months

Providers were also asked if they were confident in their settings' ability to meet demand for funded places for working families with children aged children aged between 9 months to 2 year olds in September 2024. The table below shows the responses by provider types.

Provider Type	Responses	Agree to some extent	Neither agree or disagree	Disagree to some extent
Childminders	66	53.0%	24.2%	19.7%
Daycare Provision	46	56.5%	10.9%	26.1%
Holiday Clubs	14	50.0%	7.1%	21.4%
Out of School / Wraparound	17	41.2%	0.0%	23.5%
Sessional	15	26.7%	6.7%	20.0%
All	120	51.7%	17.5%	21.7%

- Similar overall rates of agreement are seen for this statement about 9 months to 2 year-olds as the previous statement about 2 year-olds.

- However, the overall rate of agreement is largely due to the confidence of Childminders to meet new demand.

- Once again confidence was slightly lower in the North West where only 43% of respondents agreed with the statement. This lower rate is largely driven by less confidence amongst Childminders in the North West.

Paid Additional Hours

Providers were asked to approximate the percentage of children accessing the working families entitlement places that also paid for additional hours.

Childminders	60	67.5%
Day Care	45	59.6%
Holiday Activity Clubs	14	50.2%
Out of school	17	46.6%
Sessional	15	39.1%
All	**113**	**61.1%**

- The approximations offered within provider categories ranged from 0% to 100% in all instances.

- Most children in Childminder and Daycare settings have additional paid hours.

Impact of the Expanded Entitlements on Financial Sustainability

Providers were asked whether they agreed that the new entitlements will improve their financial sustainability. The responses are broken down by provider type:

Provider Type	**Responses**	**Agree to some extent**	**Neither agree or disagree**	**Disagree to some extent**
Childminders	66	59.1%	25.8%	12.1%
Daycare Provision	44	34.1%	40.9%	20.5%
Holiday Clubs	14	42.9%	28.6%	7.1%
Out of School / Wraparound	17	35.3%	23.5%	17.6%
Sessional	15	13.3%	20.0%	40.0%
All	**118**	**46.6%**	**29.7%**	**17.8%**

- 18% of current providers did not feel that the new entitlements would improve their financial stability.

- Sessional providers were the least likely to agree that their financial stability would improve.

- Holiday Clubs and Childminders were the most likely to agree with the statement.

- Providers in the South West were most likely to agree with the statement.

New entitlement in 2024

Providers were asked if they are planning to offer working family entitlement places for children aged 9-23 months in September 2024.

	Responses	**Yes**	**No**
Childminders	68	97.1%	2.9%
Day Care	46	89.1%	10.9%
Holiday Activity Clubs	14	71.4%	28.6%
Out of school	17	58.8%	41.2%
Sessional	15	40.0%	60.0%
All	**122**	**88.5%**	**11.5%**

- Most Childminders and Daycare providers are planning to offer the new under-two provision.

- Relatively few Sessional providers will offer these places.

Sufficiency

Providers were asked to describe their weekly occupancy on the week the survey was carried out. The table below shows the responses broken down by provider type.

Provider Type	Less than 50%	50%-70%	71%-80%	81% - 94%	95+%
Childminders	15.1%	9.6%	5.5%	13.7%	56.2%
Daycare Provision	2.1%	8.5%	27.7%	21.3%	40.4%
Out of School / Wraparound	14.3%	4.8%	9.5%	38.1%	33.3%
Sessional	6.3%	6.3%	37.5%	18.8%	31.3%

- Most provider types (50% to 71%) report >80% occupancy on survey week.

North Tyneside has sufficient childcare places, with availability across all provider types during summer term, which is the busiest term. A minority of settings reported operating with an occupancy rate of 'less than 50%'. Prolonged periods of low occupancy could impact upon settings' sustainability, potentially reducing childcare places in the borough in the longer term.

Ability to Meet Demand for Places

Providers were asked to describe their ability to meet the needs of families during summer term 2024 in terms of days and times requested. Providers' responses are set out below by provider type.

Provider	**all families.**	**most families.**	**some families.**	**few families.**	**Cannot meet needs.**
Childminders	59.2%	25.4%	8.5%	4.2%	2.8%
Daycare Provision	27.7%	44.7%	14.9%	6.4%	6.4%
Out of School / Wraparound	38.1%	38.1%	14.3%	0.0%	9.5%
Sessional	43.8%	37.5%	12.5%	0.0%	6.3%

- Most providers reported that they could meet the needs of all or most families this summer.

- Almost 10% of Out of School Providers could not.

- Out of School Providers and Sessional providers in the NE were amongst those most likely to report they could not meet current needs.

- As were Childminders in the South West

Most providers could meet the needs of most or all other families. A small proportion could not meet needs. Summer term is the busiest term for childcare providers in the early years, therefore it is to be expected that some settings are operating at full capacity.

Ages

Providers were asked to show the maximum and minimum ages that they provide care for. The table below shows the minimum, maximum and average values provided by respondents.

Provider		Average Value	Min Value	Max Value
Childminders	Minimum age	0.66	0.00	12.00
Childminders	Maximum age	9.14	1.00	16.00
Holiday Activity Clubs	Minimum age	3.60	0.25	8.00
Holiday Activity Clubs	Maximum age	10.85	5.00	16.00
Out of school	Minimum age	3.68	0.25	9.00
Out of school	Maximum age	11.09	5.00	25.00

North Tyneside offers childcare places to children across a range of ages.

Opening Times

Providers were asked to identify their opening and closing times. The table below shows the minimum, maximum and mode values.

Provider		Modal Value	Min Value	Max Value
Childminders	Start	07:30:00	06:45:00	09:30:00
Childminders	Finish	17:30:00	16:00:00	18:45:00
Holiday Activity Clubs	Start	08:00:00	07:30:00	10:30:00
Holiday Activity Clubs	Finish	17:30:00	12:00:00	18:30:00
Out of school	Before school session: Start	07:30:00	07:15:00	09:30:00
Out of school	Before school session: Finish	09:00:00	08:30:00	12:30:00
Out of school	After school session: Start	15:15:00	11:30:00	16:30:00
Out of school	After school session: Finish	18:00:00	17:00:00	18:30:00

Families in North Tyneside can access childcare which supports access to a traditional working day, i.e. between 08:00-18:00. Some provision opens earlier, and places are available until 18:30 or 18:45 in some settings.

Childminders Holiday / Weekend / Overnight stays

Childminders were asked some specific questions about provision outside of normal working hours and term time.

Childminders	Responses	Yes	No	I would consider it if a family required it
Do you provide care during school holidays?	74	83.8%	16.2%	0.0%
Do you offer weekend placements?	74	0.0%	95.9%	4.1%
Do you offer overnight stays?	74	1.4%	90.5%	8.1%

Most childminders responding will provide care during the school holidays. A small number would consider offering weekend placements or overnight stays if required by a family.

Early Years Entitlements for Eligible 2, 3 and 4 Year Olds

2 Year Old Entitlement

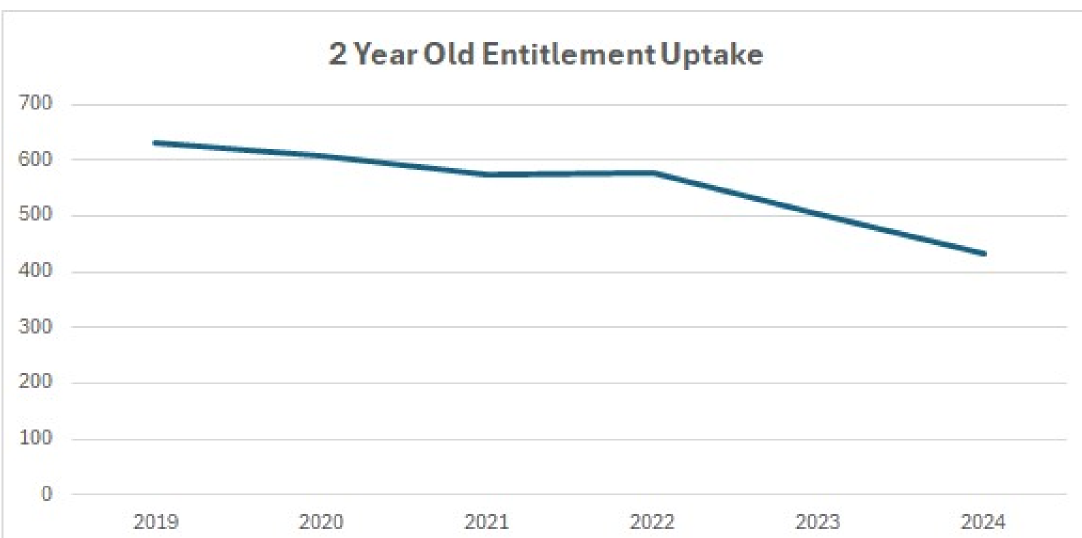
The two year old entitlement provides eligible children with 15 hours of free childcare a week, for 38 weeks (a maximum entitlement of 570 hours). The two year old offer supports some of the most disadvantaged children in the borough. It is therefore important that eligible children can take up their entitlement, in high quality provision within their local communities. This section considers whether North Tyneside's has sufficient childcare to ensure eligible 2 year olds can take up their funded entitlement.

2 Year Old Entitlement

Uptake – Number (Jan 2024 census)

The table and graph below show the total number of children in North Tyneside accessing their 2 year old entitlement at the January census from 2019 to 2024

	2019	2020	2021	2022	2023	2024
Universal	632	607	573	576	503	432

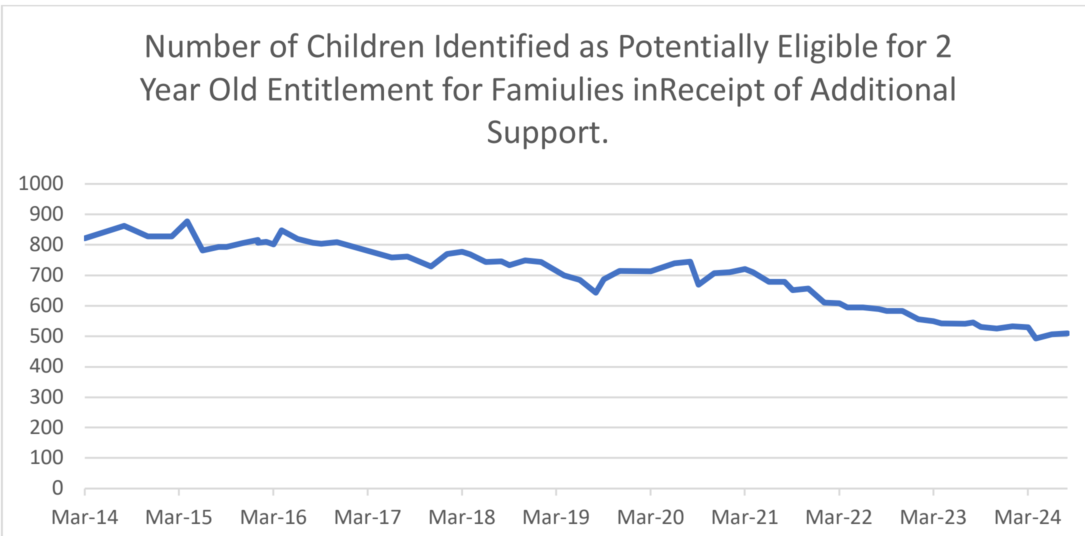


The number of two year olds accessing the 2 year old entitlement in North Tyneside declined between 2022 and 2024, from 576 to 432. This is the lowest number of children accessing the entitlement since 2018. The decline reflects a reduction in the number of children eligible for the 2 year old entitlement.

2 Year Old Entitlement – Number of Children Identified as Potentially Eligible

The graph below shows the number of children identified as potentially eligible for the 2 year old entitlement in North Tyneside, as identified by the DWP.

Number of potentially eligible 2 year olds in North Tyneside as identified by DWP (March 2014-August 2024)



The graph shows a steady decline from a high point in 2015 to the current levels, which are 41% lower. This is consistent with national and regional trends. This may partly reflect demographic decline in the borough. However, the greatest factor is that the income thresholds for the Universal Credit eligibility criteria have not changed since the entitlement's launch. Resulting in fewer families qualify for the entitlement, following wage inflation.

2 Year Old Entitlement Uptake – Percentage (Jan 2024 census)

The table and graph below show the percentage uptake of the 2 year old entitlement between 2019 and 2024. The figures are based on the annual censuses in January.

	2019	**2020**	**2021**	**2022**	**2023**	**2024**
North Tyneside	84%	85%	81%	88%	86%	82%
North East	82%	83%	75%	85%	85%	86%
England	68%	69%	62%	72%	74%	75%

The percentage of eligible 2 year olds accessing their funded childcare entitlement decreased between 2023 and 2024, from 86% to 82%. North Tyneside maintains a high percentage take up, which exceeds the national average. Fewer people are taking up the entitlement, but the percentage take up remains high, demonstrating that the majority of eligible children can access the entitlement.

North Tyneside - 2 Year Old Actual Number

The table below shows the actual number of children accessing their 2 year old entitlement broken down by the eligibility criteria through which they applied for the funding.

	2019	2020	2021	2022	2023	2024
Economic criteria	591	564	525	538	451	396
High level Special Educational Needs or disability	11	12	18	10	24	10
Looked after or adopted from care	33	36	33	31	34	30
Multiple Reasons	3	5	3	3	6	4
Total	632	607	573	576	503	432

The overwhelming majority of eligible 2 year olds continue to access their 2 year old entitlement under the economic criteria.

Number and Percentage of Children Accessing their 2 Year Old Entitlements by Ofsted Grade of Provider (2024 Census)

Access to high quality childcare places is important, particularly during the critical early years of a child's life. The table below shows the breakdown of children attending 2 year old entitlement places by the Ofsted rating of the provider.

	2019	2020	2021	2022	2023	2024
Outstanding	31%	29%	27%	21%	19%	25%
Good	69%	71%	73%	76%	79%	73%
Requires Improvement	0%	0%	0%	3%	2%	0%
Inadequate	0%	0%	0%	0%	0%	2%

Almost all children accessing their entitlement in a North Tyneside setting are experiencing provision rated 'outstanding' or 'good' by Ofsted. The proportion accessing their entitlement in an 'outstanding' setting has increased since 2023.

SEN - 2 Year Old Extended Entitlement

North Tyneside has a range of support available for funded 2 year old children with special educational needs, including the Early Years Inclusion Fund, the Early Years Inclusion Team and the Early Years SENCO. The table below shows the number and proportion of children accessing their government funded entitlements between 2019 and 2024.

	2019	2020	2021	2022	2023	2024
EHC Plans - Number of children	5	0	1	10	1	0
EHC Plans - % of total funded children	0.80%	0%	0.20%	1.70%	0.20%	0.00%
SEN Support – Number of children	11	14	17	8	16	14
SEN Support – % of total funded children	1.70%	2.30%	3%	1.40%	3.20%	3.20%
All SEN Children - Number	16	14	18	18	17	14
All SEN Children	2.50%	2.30%	3.10%	3.10%	3.40%	3.20%

The percentage of funded 2 year old children receiving special educational needs support has remained stable.

Number of Hours Accessed Each Week by Funded 2 Year Old

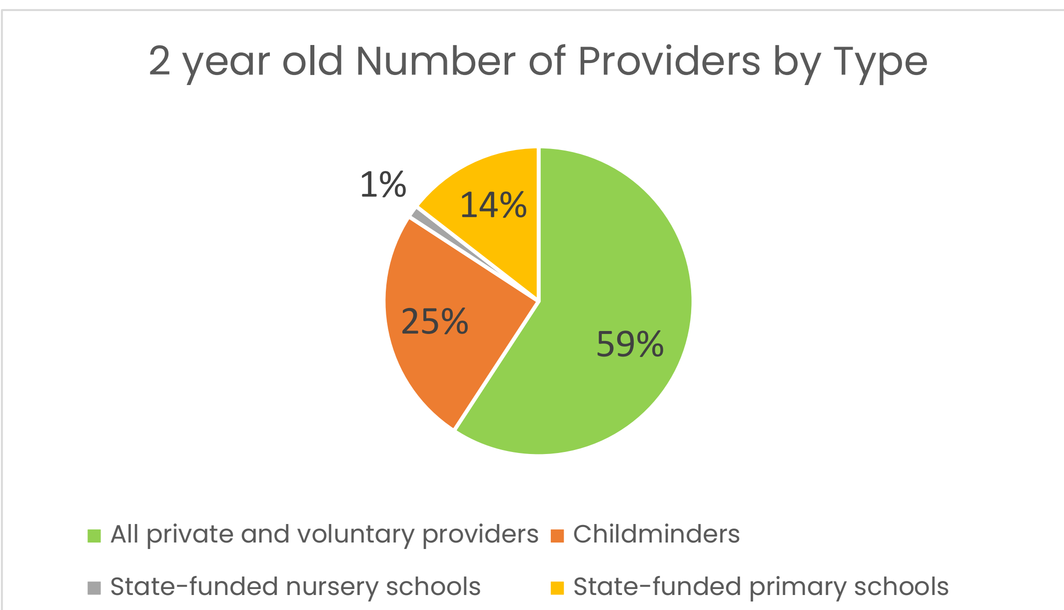
The table below shows the number of hours taken by children accessing their 2 year old entitlement at the January 2024 census in North Tyneside. These figures are compared to the North East and England averages.

	North Tyneside	North East	England
0.01 to 5.00 hours	0	0.1	0.4
5.01 to 10.00 hours	1.4	1.4	4.6
10.01 to 12.50 hours	0.9	2.2	6.8
12.51 to 15.00 hours	97.7	96.4	88.1

Almost all eligible 2 year old children in North Tyneside take up 12.5 - 15 hours of their entitlement each week. This suggests there is sufficient childcare for families to access their full entitlement should they wish.

2 Year Old Entitlement – Provider Types Delivering 2 Year Old Places

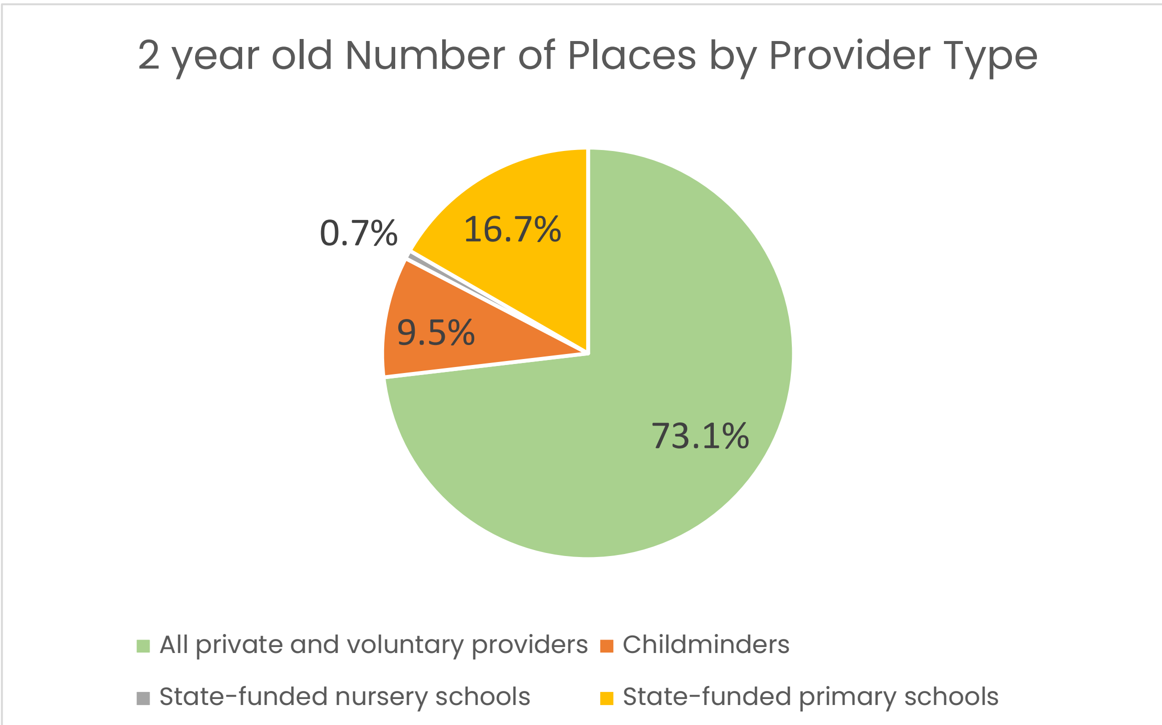
The chart below shows the provider types delivering 2 year old entitlement places.



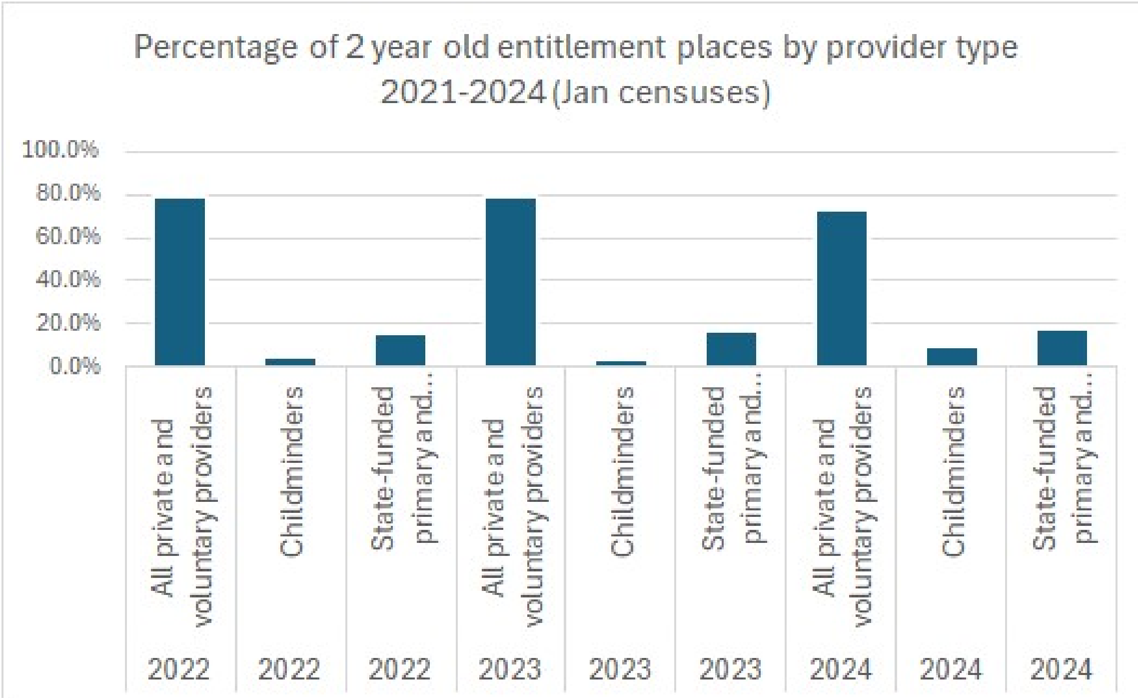
Private and voluntary sector provision delivered 59% of funded 2 year old places in 2024. A further 15.8% of places were taken within nursery provision is primary / first schools.

2 Year Old Entitlement – Percentage Take up by Provider

The chart below shows the provider types in which 2 year old entitlement places were accessed.



Private and voluntary sector provision delivered 73% of funded 2 year old places in 2024. A further 17.4% of places were taken within nursery provision is primary / first schools. The table below shows the decreasing share of private and voluntary providers in 2024.



2 Year Old Entitlement Uptake by Ethnicity

The table below shows a breakdown of children accessing their 2 year old entitlement by ethnicity, at the January 2024 census.

	2 Year Old – number	2 Year Old - % of total
Asian / Asian British	15	3.5%
Black/African/Caribbean/Black British	2	0.5%
Mixed / Multiple Ethnic Groups	9	2.1%
White	394	91.2%
Other ethnic group	5	1.2%
Refused / not obtained	7	1.6%
Total Children	432	

Most funded 2 year olds accessing their entitlement in North Tyneside are white.

The table below compares the breakdown of children accessing their 2 year old entitlement by ethnicity between 2022 and 2024.

	2 Year Old % of total – 2022	**2 Year Old % of total – 2023**	**2 Year Old - % of total - 2024**
Asian / Asian British	2.0%	1.2%	3.5%
Black/African/Caribbean/Black British	1.0%	0.4%	0.5%
Mixed / Multiple Ethnic Groups	2.0%	1.8%	2.1%
White	89.0%	93.8%	91.2%
Other ethnic group	1.0%	1.0%	1.2%
Refused / not obtained	6.0%	1.8%	1.6%

Most funded 2 year olds accessing their entitlement in North Tyneside are white. There has been a slight increase in other groups. The proportion of 2 year olds, where the ethnicity of the child was not obtained has reduced, which supports the analysis of need within North Tyneside.

Universal 3 & 4 Year Old Entitlement

All 3 and 4 year olds are eligible for 15 hours of free childcare a week, for 38 weeks a year, which is equivalent to a maximum annual entitlement of 570 hours.

Number of Children Accessing the Universal 3 and 4 Year Old Entitlement

The table and graph below show the number of children accessing their universal 3 and 4 year old entitlement at the January census, in the years 2019 to 2024.

	2019	2020	2021	2022	2023	2024
Universal	4,603	4,541	4,484	4,479	4,536	4,349

The total number of children accessing the entitlement decreased slightly on the previous year, continuing the general declining trend.

Universal 3 & 4 Year Old Entitlement - % Uptake (January census)

North Tyneside has achieved high levels of take up for the universal 3 & 4 year old entitlement over many years. The table below shows the percentage of eligible 3 and 4 year olds accessing their universal 15 hour entitlement in North Tyneside at the January census, between 2019 and 2024.

	2019	2020	2021	2022	2023	2024
North Tyneside	99.0%	97.0%	98.0%	100.0%	105.2%	104.8%
North East	98.0%	98.0%	95.0%	97.0%	98.6%	100.4%
England	93.0%	93.0%	88.0%	92.0%	93.7%	94.9%

The percentage of eligible children accessing their entitlement in North Tyneside was 104.8% in January 2024, as North Tyneside attracted children from outside the borough. This suggests that North Tyneside has sufficient childcare to meet the needs of families wishing to access their 3 & 4 year old universal entitlement. North Tyneside's uptake has been higher than both the North East and England averages since 2021.

SEN - 3 & 4 Year Old Universal Entitlement

North Tyneside has a range of support available for 3 and 4 year olds with SEN, such as the Early Years Inclusion Fund, Disability Access Fund and Early Years Inclusion Service. The table below shows the number and proportion of children accessing their government funded entitlements between 2020 and 2024.

	2020	**2021**	**2022**	**2023**	**2024**
EHC Plans - Number of children	42	46	72	82	58
EHC Plans - % of total funded children	0.9%	1.0%	1.6%	1.8%	1.3%
SEN Support – Number of children	300	275	290	324	440
SEN Support – % of total funded children	6.6%	6.1%	6.5%	7.1%	10.1%
All SEN Children - Number	342	321	362	406	498
All SEN Children – % of total funded children	7.5%	7.2%	8.1%	9.0%	11.5%

The number and percentage of children accessing their universal 3 & 4 year old entitlement while receiving SEN support is at the highest level since 2018. The number of universal 3 & 4 year old entitlement children in receipt of an EHC plan has dropped since last year. The percentage of children receiving SEN support increased from 2023 levels. The local authority will continue to review its support to ensure we are meeting the needs of children with SEN and their families.

The table below show the percentage of universal entitlement funded 3&4 year old children receiving SEN support in North Tyneside, compared to the England average.

	North Tyneside			England		
Funded Universal Entitlement 3 & 4 Year Olds:	2022	2023	2024	2022	2023	2024
with EHC Plans - % of total funded children	1.6%	1.8%	1.3%	1.1%	1.3%	1.6%
with SEN Support – % of total funded children	6.5%	7.1%	10.1%	5.9%	6.7%	7.3%
with any SEN as % of total funded children	8.1%	9.0%	11.5%	7.0%	8.0%	8.9%

The percentage of children accessing their universal 3 / 4 year old entitlement receiving SEN support in North Tyneside is higher than the national average as is the percentage with any SEN. The percentage of children with EHCPs is slightly lower than the national average.

Percentage of Children Accessing Their Universal 3 & 4 Year Old Entitlement by Ofsted Grade of Provider (2023 Census)

Access to high quality childcare places is particularly important during the critical early years of a child's life. The table below shows the breakdown of children attending universal 3&4 year old entitlement places by the Ofsted rating of the provider.

	2019	**2020**	**2021**	**2022**	**2023**	**2024**
Outstanding	41%	38%	34%	34%	24%	23%
Good	57%	59%	63%	64%	73%	72%
Requires Improvement	3%	3%	3%	2%	3%	3%
Inadequate	0%	0%	0%	0%	0%	1%

Almost all children accessed their universal 3 & 4 year old entitlement in a North Tyneside setting rated 'outstanding' or 'good' by Ofsted. The proportion accessing their entitlement in an 'outstanding' setting has declined from 34%

in 2022 to 23% in 2024. A small proportion are accessing their provision in settings rated as 'requires improvement' or Inadequate in 2024.

The table below shows how North Tyneside compares to the England and North East average, for the percentage of children accessing their universal 3 & 4 year old entitlement by Ofsted rating.

	England 2024	**North East 2024**	**North Tyneside 2024**
Outstanding	19%	21%	23%
Good	75%	75%	72%
Requires Improvement	4%	4%	3%
Inadequate	1%	0%	1%

North Tyneside has a higher proportion of children accessing their universal 3 & 4 year old entitlement in provision rated 'outstanding' and a lower proportion in settings rated requires improvement, than the North East and England average. Overall, North Tyneside is broadly in line with national and regional averages.

Universal 3 / 4 Year Old Entitlement Uptake by Ethnicity

The table below shows the ethnicity of children taking their universal 3 and 4 year old entitlement in 2024.

	Number Universal 3&4 Year Old 2024	% Universal 3&4 Year Old 2024
Asian / Asian British	175	4.0%
Black/African/Caribbean/Black British	92	2.1%
Mixed / Multiple Ethnic Groups	142	3.3%
White	3825	88.0%
Other ethnic group	40	0.9%
Refused / not obtained	75	1.7%
Total Children	**4,536**	

Most children accessing the entitlement are white British (88%), with Asian the next biggest ethnic group (4%).

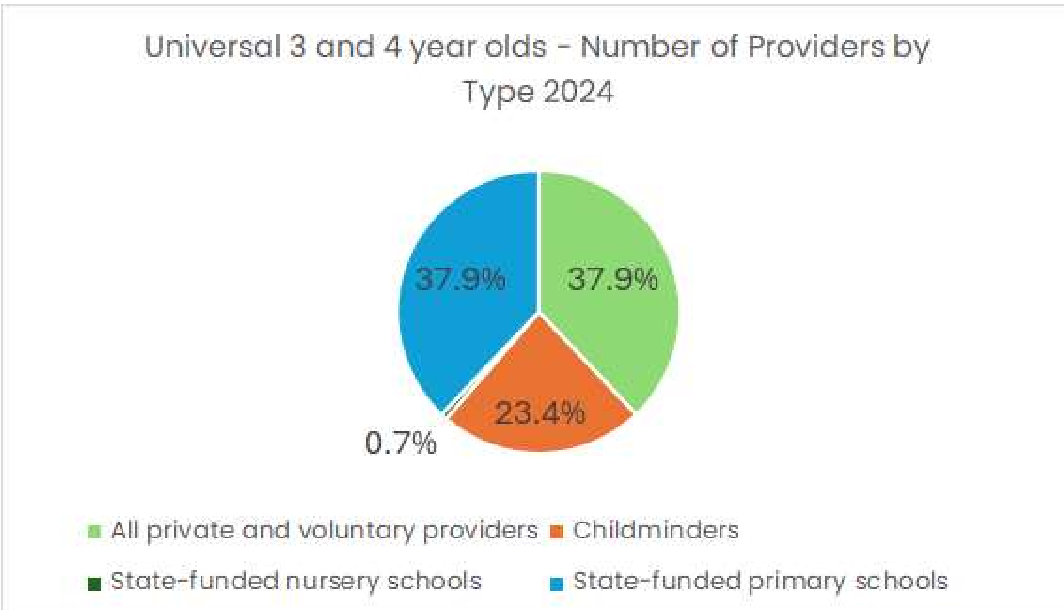
The table below shows the ethnicity of children taking their universal 3 and 4 year old entitlement between 2021 and 2023.

	Universal 3&4 Year old – % of total 2022	Universal 3&4 Year old – % of total 2023	Universal 3&4 Year old – % of total 2024
Asian / Asian British	4.0%	3.5%	4.0%
Black/African/Caribbean/Black British	1.0%	1.0%	2.1%
Mixed / Multiple Ethnic Groups	3.0%	3.1%	3.3%
White	90.0%	89.7%	88.0%
Other ethnic group	1.0%	0.8%	0.9%
Refused / not obtained	1.0%	1.8%	1.7%

The ethnicity of children taking up the universal 3 & 4 year old entitlement is broadly similar to the previous year.

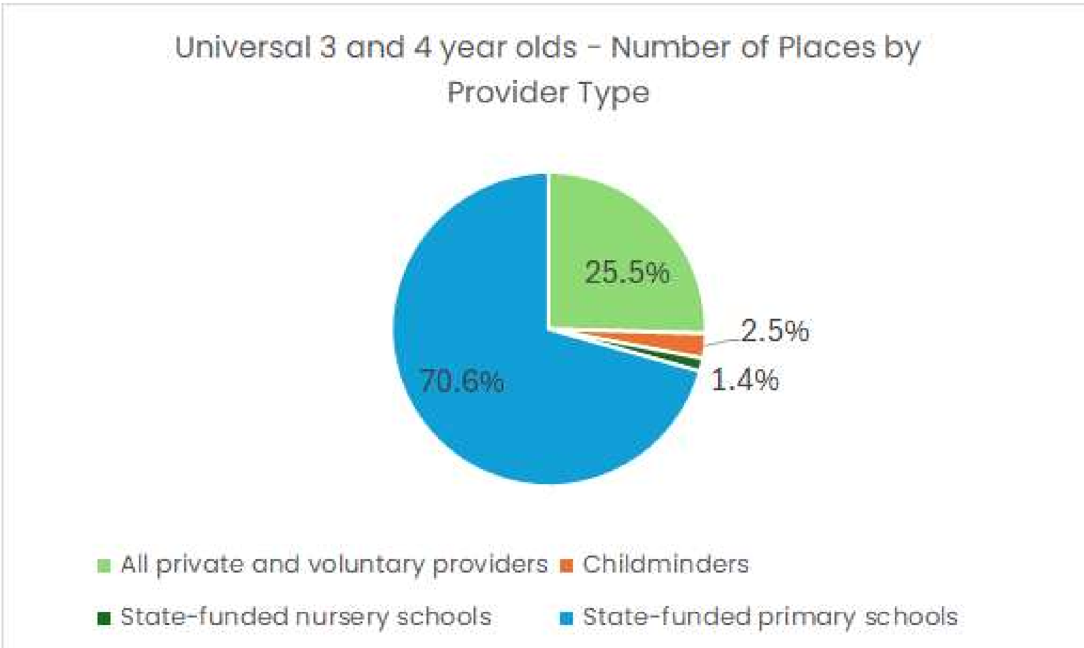
3 and 4 Year Old Universal Entitlement – Percentage Take up by Provider

The graph below shows the percentage of providers, by type, who were delivering universal 3 & 4 year old places in 2023.

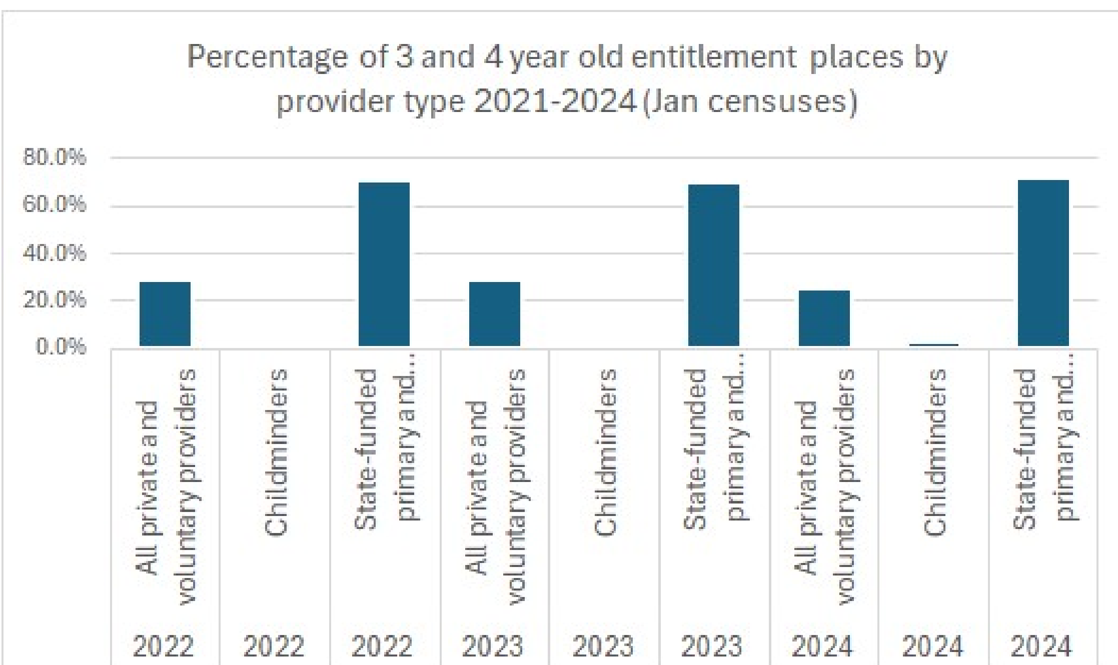


Private and voluntary childcare providers and state funded schools are the biggest group of providers.

The chart below shows the percentage of universal 3 & 4 year old places by provider type, as of January 2023.



The majority of universal 3 & 4 year old places are delivered in state funded school nursery provision. The next biggest provider of universal 3 & 4 year old places is the private and voluntary sector. There has been a slight increase in the proportion attending state-funded schools in 2024.



Working Families Entitlement for 3 & 4 Year Olds

30 hours of free childcare is available to eligible working families of 3 and 4 year olds in England. Eligible working families receive an additional 15 hours, alongside the universal entitlement. This section assesses the North Tyneside childcare market's ability to meet parental demand for the 30 hour entitlement by considering the number providers, and places, their quality and location.

Number of Children Accessing the Working Families Entitlement for 3 and 4 Year Olds

The table below shows the number of children accessing their extended 3 and 4 year old entitlement at the January census, in the years 2019 to 2024.

	2019	2020	2021	2022	2023	2024
Extended	1,500	1,561	1,493	1,638	1,823	1,667

The number of children accessing their extended 3 & 4 year old offer in 2024 was 1667. This is a reduction from the very high number in 2023.

Percentage of Children Accessing Their Extended 3&4 Year Old Entitlement by Ofsted Grade of Provider (2023 Census)

Parents and carers want to access the extended entitlement in high quality provision. The table below shows the breakdown of children attending extended 3 & 4 year old entitlement places by the provider's Ofsted rating.

	2019	2020	2021	2022	2023	2024
Outstanding	44%	42%	37%	36%	25%	26%
Good	54%	56%	61%	61%	75%	73%
Requires Improvement	2%	2%	2%	3%	1%	0%
Inadequate	0%	0%	0%	0%	0%	1%

Almost all children access their extended 3 and 4 year old entitlement in provision rated 'good' or 'outstanding' by Ofsted. North Tyneside has sufficient high quality childcare to meet the needs of children accessing their extended

3 and 4 year old entitlement. The percentage of children accessing the extended element of the 30 hour entitlement in outstanding settings has declined from 44% in 2019 to 26% in 2024.

The table below shows how North Tyneside compares to the England and North East, for the percentage of children accessing their extended 3&4 year old entitlement by Ofsted rating.

	England 2024	**North East 2024**	**North Tyneside 2024**
Outstanding	21%	25%	26%
Good	76%	72%	73%
Requires Improvement	3%	3%	0%
Inadequate	1%	0%	1%

North Tyneside is broadly in line with the North East average for children accessing places in 'Good and Outstanding' provision. The borough has a high proportion in outstanding settings.

SEN - 3 & 4 Year Old Extended Entitlement

The table below shows the number and percentage of children accessing the extended 30 hour entitlement who are receiving SEN support.

	2019	**2020**	**2021**	**2022**	**2023**	**2024**
EHC Plans - Number of children	3	3	5	9	10	4
EHC Plans - % of total funded children	0.2%	0.2%	0.3%	0.5%	0.5%	0.02%
SEN Support – Number of children	41	44	31	49	57	85
SEN Support – % of total funded children	2.7%	2.8%	2.1%	3.0%	3.1%	0.5%
All SEN Children - Number	44	47	36	58	67	89
All SEN Children	2.9%	3.0%	2.4%	3.5%	3.7%	5.3%

The number of children receiving special educational needs support to access their extended 30 hour entitlement increased from 58 in 2022 to 89 in 2024. The number of children accessing their entitlement with an EHC Plan decreased from 10 in 2023 to 4 in 2024.

The table below shows the proportion of children taking up their extended entitlement who receive SEND support in North Tyneside, compared to the national average.

	North Tyneside			England		
Extended Entitlement 3 & 4 Year Olds:	**2022**	**2023**	**2024**	**2022**	**2023**	**2024**
with EHC Plans - % of total funded children	0.5%	0.5%	0.2%	0.4%	0.6%	0.7%
with SEN Support – % of total funded children	3.0%	3.1%	5.1%	2.9%	3.6%	3.9%
with any SEN as % of total funded children	3.5%	3.7%	5.3%	3.3%	4.1%	4.5%

The proportion of children accessing their extended entitlement with any SEN is higher than the national average.

Extended 3 and 4 Year Old Entitlement Uptake by Ethnicity

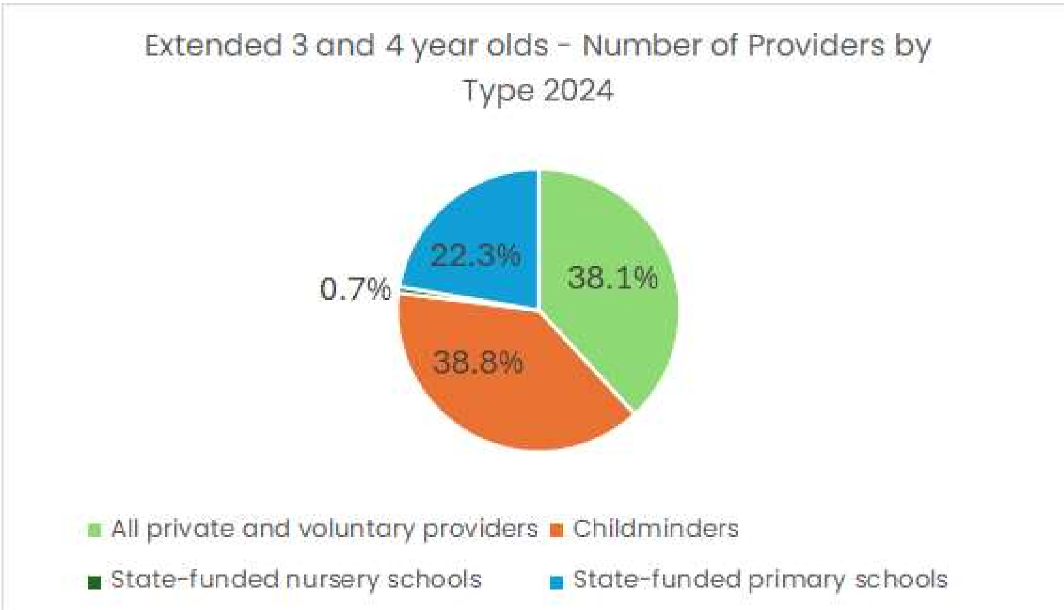
The table below shows the ethnicity of children taking up their extended 3 and 4 year old entitlement.

	Number of Extended 3&4 Year olds 2024	**Percentage of Extended 3&4 Year olds 2024**
Asian / Asian British	37	2.20%
Black/African/Caribbean/Black British	15	0.90%
Mixed / Multiple Ethnic Groups	56	3.40%
White	1528	92%
Other ethnic group	8	0.50%
Refused / not obtained	23	1.40%
Total Children	**1667**	

Most children accessing their extended entitlement are classed as 'white' under the 2024 census information.

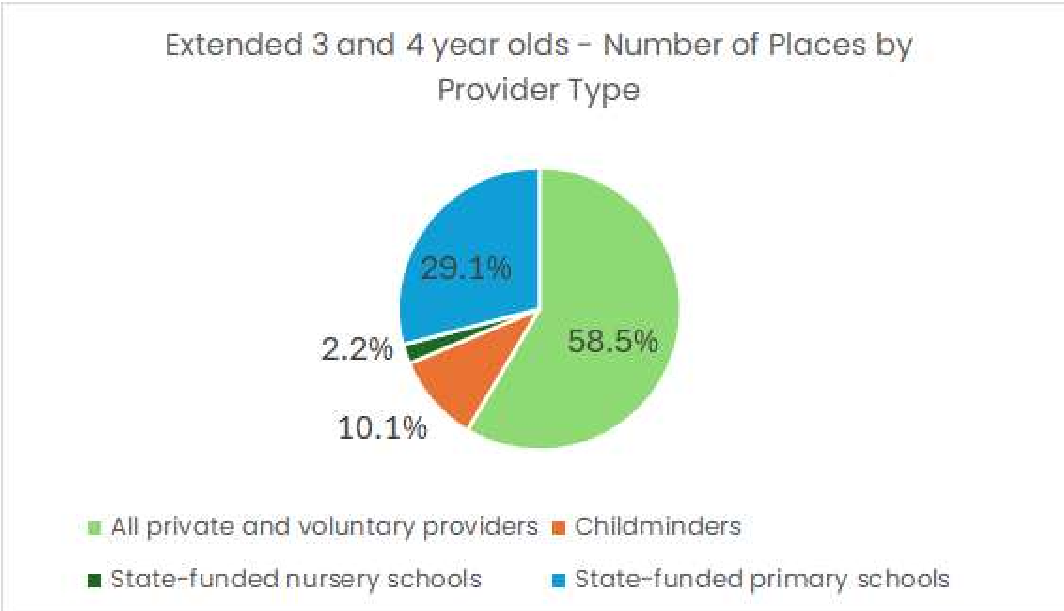
3 and 4 Year Old Extended Entitlement – Percentage Take up by Provider

Extended places are delivered across a range of provider types, the graph below shows the proportion of providers delivering extended 3 & 4 year old entitlement places by provider type.



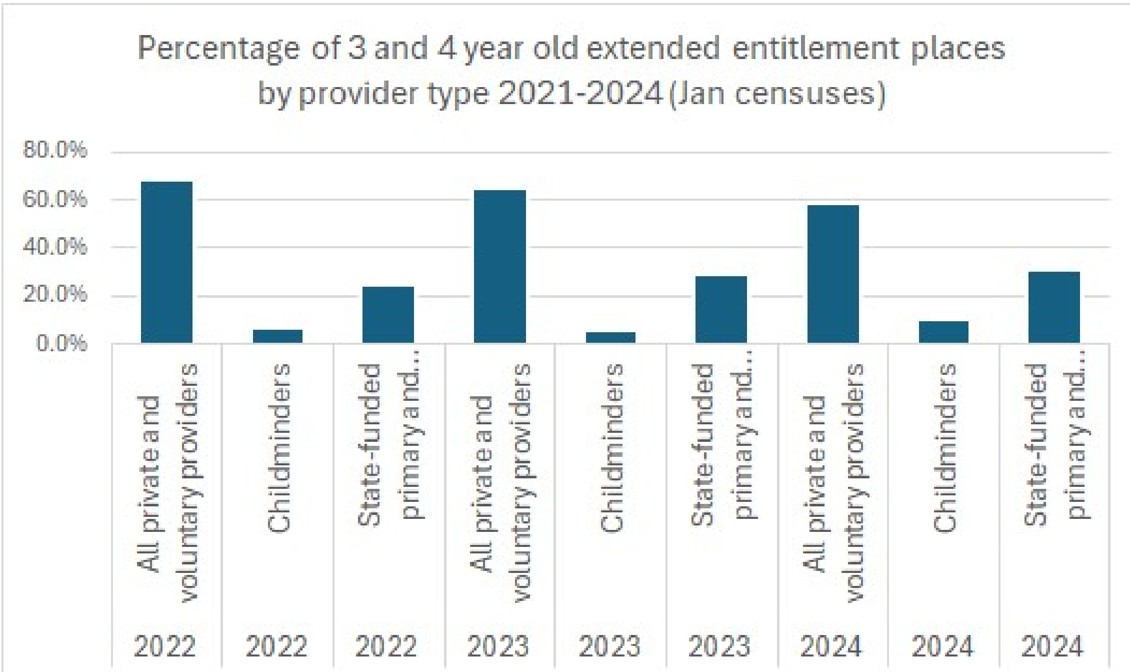
The majority of providers delivering extended 3 & 4 year old entitlement places are childminders or private and voluntary sector entities. North Tyneside also has a significant school based offer.

The chart below shows the number of extended entitlement places for 3 & 4 year olds by provider type, based on the January 2024 censuses.



Most extended entitlement places for 3 & 4 year olds are delivered in the private and voluntary childcare sector. Schools deliver a significant minority of places.

The table below shows that the proportion of places delivered in private, voluntary and independent settings has reduced over the past 3 years, with a corresponding growth in the proportion of places delivered by maintained nursery schools and state funded schools and Childminders. This reflects an increase in the number of schools delivering a 30 hour offer.



Working Families Entitlement Expansion

Working Families Entitlement for 2 Year Olds

The table below shows the number of working families codes issued, validated for 2 year olds in summer 2024 in each ward (as of Jan 2025). It also shows the percentage of codes validated.

Term	Ward	Codes Validated	Codes Issued	Percentage of Codes Validated
Summer 2024	Backworth & Holystone	96	100	96%
	Battle Hill	43	45	96%
	Camperdown	71	72	99%
	Chirton & Percy Main	44	44	100%
	Cullercoats & Whitley Bay South	75	75	100%
	Forest Hall	54	55	98%
	Howdon	37	38	97%
	Killingworth	25	27	93%
	Longbenton & Benton	54	56	96%
	Monkseaton	80	80	100%
	New York & Murton	38	38	100%
	North Shields	46	46	100%
	Preston with Preston Grange	48	49	98%
	Shiremoor	54	56	96%
	St Mary's	46	46	100%
	Tynemouth	51	51	100%
	Wallsend Central	30	32	94%
	Wallsend North	64	64	100%
	Weetslade	41	45	91%
	Whitley Bay North	78	78	100%
	Total	**1075**	**1097**	**98%**

Uptake of the new entitlement appears strong with 98% of 2 year old codes issued in summer 2024 being validated. This suggests that parents in North Tyneside had access to sufficient 2 year old places to meet demand during the first phase of the entitlements expansion. Take up was consistently high across all wards.   Weetslade and Killingworth had the lowest validation rates. The Local Authority will monitor the sufficiency of provision for the working families entitlement for 2 year olds, with a particular focus on the north west of the borough. A key challenge will be to ensure that children who are eligible for funding because they are in receipt of additional Government support will continue to be able to access places.   The Local Authority will continue to uptake of the entitlement for children aged 2 years receiving additional forms of support.

Further Expansion of the Working Families Entitlement

Phase 2 of the early years entitlement expansion will result in working families with children aged under 2 years, receiving a 15 hour entitlement from September 2024 onwards. The local authority expects to have sufficient places for under 2 year olds to meet demand in September 2024.

The final phase of the early years entitlement expansion will take place in September 2025. The Local Authority is forecasting a shortfall of places for under 2 year olds, particularly in the North and north west of the borough. The Local Authority will continue to work with the sector to address this shortfall.

Wraparound Expansion

The childcare offer is also expanding for school age children, with a national programme aimed at ensuring that all parents and carers of primary school-aged children (5-11 years) who need it can access term time childcare in their local area from 8am-6pm. Enabling parents to access employment and improve labour market opportunities. To support this ambition, the government announced that it will provide start-up funding, over two academic years to support local authorities and providers in to introduce or expand childcare provision on either side of the school day, which parents of primary school-aged children will be able to pay to access. This programme is focussed on primary aged children from reception to year 6, Monday to Friday during term time.

Summary of Findings

Supply

Overall, the borough has maintained a diverse and comprehensive childcare offer, with the quality of provision high. The number of providers is stable, with a decline in early years registered providers and an increase in non-early years childcare providers. North Tyneside has seen a continued decline in childminder numbers, which is consistent with the national context. The number of childcare providers on non-domestic settings has increased, with increased numbers of full daycare providers, out of school daycare and sessional daycare providers. North Tyneside has seen a small reduction in childcare places between 2023 and 2024 but retains a good geographical distribution of places across the borough. Early years places are high quality, as demonstrated by the Ofsted rating of the providers delivering places. The Holiday Activities and Food Programme (HAF) continues to complement the borough's childcare offer. Workforce and rising costs are seen as significant challenges by providers and are likely to remain issues in the immediate term. A minority of settings reported that they were concerned about their financial sustainability, in the face of rising costs. The combination of these factors has the potential to impact upon sufficiency of childcare places as the expansion of the early years entitlements continues. The local authority will closely monitor provider numbers to ensure continued choice and sufficiency of childcare for families, with particular emphasis on out of school provision.

Demand

The demographic information suggests that the number of children requiring childcare is likely to remain static or decline slightly in the short term. However, the expansion to the early years entitlements is expected to increase demand for Government funded places for children aged 2 and under, with working families. Demand for formal childcare is high in the north and east of the borough, although demand exists across every ward. The impact of new housing developments in the borough may alter the geographic distribution of demand at a local level but will not necessarily result in significant additional total demand. The proportion of eligible children taking up their funded early years entitlements remains high, suggesting demand can currently be met. Almost all children access their government funded entitlement in high quality provision. The local authority will continue to promote the support available to families to help them meet the cost of childcare.   The local authority will continue to support families to navigate the phased expansion of the early years entitlements.

SEND

The quality of childcare provision is high, and most children access their early years entitlements in settings rated 'good' or 'outstanding' by Ofsted. Support to enable early years children with lower level and emerging SEN to access childcare, is established and effective. The proportion of children with SEND accessing the Government funded entitlements are broadly in line with regional and national averages. The local authority and its partners will continue working to ensure children are able to access high need provision, where appropriate. The local authority has launched a new Early Years Inclusion Service, as part of a wider Early Years Partnership, which is supporting children to access their entitlement. The service and wider partnership support settings to build their skills, knowledge, expertise and capacity to support children with SEND across North Tyneside.

Conclusion

North Tyneside retains a strong network of providers able to deliver high quality places.   The local authority will continue to support and engage the sector, to help it meet the challenges of the future and support the needs of families. North Tyneside currently has sufficient childcare provision to allow eligible families to take up their funded childcare entitlements and meet the needs of working parents with children during the early years. However, there may be limited or no availability in particular settings, particularly during the summer term.   North Tyneside has successfully delivered the first phase of the working families entitlement expansion and will meet demand for the second phase. The sector faces a significant increase in demand for childcare places ahead of the final phase of the expansion in September 2025. The borough expects to need additional early years places, particularly for children under 2 years of age to meet anticipated demand.   Rising costs, the availability of additional space and difficulties in recruiting and retaining staff remain the most significant barriers to meeting future demand. The local authority is working closely with the early years sector to increase the supply of childcare places ahead of September 2025. The local authority is also working closely with schools to ensure they can deliver the expansion in wraparound provision for primary / first school age children.

Priorities for Action

Action	**Dates**
Work with schools to meet the needs of families requiring early years childcare.	September 2025
Promote careers in childcare, particularly childminding.	September 2025
Deliver childcare expansion capital programme.	September 2025
Deliver expansion of school wraparound places.	March 2026