Childcare Sufficiency Statement 2023

North Tyneside Council

North Tyneside Childcare Sufficiency Statement 2023

Contents

Executive Summary

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

- The quality of provision 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 is working with partners to develop 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.

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 2, 3 and 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 entitlement will be phased in from April 2004, when eligible 2 year olds will receive 15 funded hours, which will be expanded to eligible families with children aged 9+ month year olds in 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 difficulties and rising costs, as it prepares for 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 2021 and March 2023.

	March 2021	March 2022	March 2023
Non-EYR providers	27	26	25
EYR providers	189	171	154
Total providers	216	197	179

The number of Ofsted registered childcare and early years providers in North Tyneside has declined from 216 in March 2021 to 179 in March 2023, which reflects national trends. This represents an 17% reduction in the number of providers. The number of providers on the early years register has reduced from 189 to 154 in the same period, which is a 19% reduction. The sector has seen a significant reduction in provision post covid, however, 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 2023 by type.

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

North Tyneside has experienced a decrease in the number of childminders between March 2021 and March 2023, from 124 to 96, which is a 23% decrease. The number of childcare providers operating on non-domestic premises has remained stable. The decline in the childminding sector in the aftermath of covid has reduced parental choice.

Childcare on Non Domestic Premises

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

	Definition	March 2021	March 2022	March 2023
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.	43	46	48
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.	14	13	12
Sessional daycare	Providers operating for less than 3 hours per day, less then 5 days per week or less than 45 weeks per year.	16	12	11

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 2022 and 2023 from 46 to 48, however, the number of sessional providers declined from 12 to 11. There was also one fewer out of school daycare providers in March 2023 compared to the previous year. North Tyneside maintains a strong full daycare offering which is important for families with early years children. There is sufficient diversity in the sector to meet a variety of needs, however, sessional daycare provision has declined over the past 2 years, this may reflect changing parental preferences.

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
Number of Ofsted registered early years places	4,108	4,174	4,057	4,059

The number of Ofsted registered early years places has remained stable between March 2022 and March 2023. 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
North West	Full Daycare	903
	Sessional	45
	Out of School Care	162
	Childminders	270
	Total	**1380**
North East	Full Daycare	455
	Sessional	66
	Out of School Care	198
	Childminders	162
	Total	**881**
South West	Full Daycare	652
	Sessional	44
	Out of School Care	0
	Childminders	52
	Total	**748**
South East	Full Daycare	826
	Sessional	80
	Out of School Care	0
	Childminders	144
	Total	**1050**

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 2021 and March 2023.

Ofsted Judgement	All childcare providers 2021	Percentage of providers 2021	All childcare providers 2022	Percentage of providers 2022	All childcare providers 2023	Percentage of providers 2023
Outstanding	31	14%	27	14%	24	13%
Good	108	50%	116	59%	111	62%
Requires Improvement	3	1%	3	2%	1	1%
Inadequate	0	0%	0	0%	1	1%
Not applicable or did not receive a judgement	74	34%	51	26%	42	23%

Most childcare provision is rated 'Good' or 'Outstanding'. There is 1 provision judged as 'Inadequate' and one judged to be 'requires improvement'. The Local Authority will withdraw early years entitlement funding from a provider judged to be 'inadequate' as soon as is practicable unless there are sufficiency concerns. A further 42 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	693
Good	2846
Requires Improvement	6
Inadequate	24
N/A	490

The overwhelming majority of places are delivered in settings judged to be 'good' or 'outstanding' by Ofsted. This demonstrates that childcare provision in North Tyneside is of a high standard overall.

Ofsted Deprivation Rating

Childcare must be accessible to all North Tyneside communities to ensure sufficiency of provision. Ofsted allocate providers to one of five deprivation bands based on quintiles calculated from the Income Deprivation Affecting Children Index (IDACI). The table below shows the total number by Ofsted deprivation band, which are then broken down by provider type.

Ofsted Deprivation	Total Number - 2021	Total Number - 2022	Total Number - 2023	Provider Type	Number 2021	Number 2022	Number 2023
Least Deprived	65	61	**54**	Full Daycare	7	7	**7**
				Sessional	5	6	**5**
				Out of School Care	7	6	**7**
				Non domestic – other	1	1	**0**
				Childminders	41	37	**33**
				Home Childcarers	4	4	**2**
Less Deprived	40	32	**33**	Full Daycare	4	4	**5**
				Sessional	3	1	**2**
				Out of School Care	2	2	**2**
				Childminders	26	19	**20**
				Home Childcarers	5	5	**4**
Average	35	33	**30**	Full Daycare	9	10	**11**
				Sessional	3	3	**3**
				Out of School Care	2	3	**2**
				Childminders	16	12	**10**
				Home Childcarers	5	5	**4**
Deprived	36	33	**31**	Full Daycare	7	8	**8**
				Sessional	2	1	**1**
				Out of School Care	2	1	**2**
				Childminders	24	23	**20**
				Home Childcarers	1	0	**0**
Most Deprived	40	38	**31**	Full Daycare	16	17	**17**
				Sessional	3	1	**0**
				Out of School Care	1	1	**0**
				Childminders	17	14	**13**
				Home Childcarers	3	5	**1**

North Tyneside's childcare provision operates in a range of socio-economic contexts. 87 providers are based in local super output areas classified as 'least deprived' or less deprived. This is a reduction from 2021, when the total number in 'least' or 'less' deprived areas was 105. 62

operate in localities classified as 'deprived' or 'most deprived', compared to 76 in 2021. North Tyneside has a reasonable distribution of childcare, however, there has been a disproportionate reduction of provision in our most deprived communities.

Ofsted Deprivation	**Provider Type**	**Number of Early Years Places 2023**
Most Deprived	Full Daycare	1089
	Childminders	78
	Total	**1167**
Deprived	Full Daycare	521
	Sessional	24
	Out of School Care	97
	Childminders	142
	Total	**784**
Average	Full Daycare	516
	Sessional	40
	Childminders	54
	Total	**610**
Less Deprived	Full Daycare	202
	Sessional	56
	Out of School Care	75
	Childminders	138
	Total	**471**
Least Deprived	Full Daycare	508
	Sessional	115
	Out of School Care	188
	Childminders	216
	Total	**1027**

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.

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 table below. This data suggests that the 0-4-year-old population will remain static until 2027 before showing signs of recovery.

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

	Estimates				Projections								
AGE GROUP	**2018**	**2019**	**2020**	**2021**	**2022**	**2023**	**2024**	**2025**	**2026**	**2027**	**2028**	**2029**	**2030**
0-4	11,471	11,188	11,045	10,859	10,696	10,583	10,585	10,582	10,581	10,588	10,596	10,604	10,611
5-14	23,569	23,973	24,126	24,060	24,353	24,292	24,120	23,893	23,663	23,489	23,284	23,021	22,874

Source: ONS via NOMIS – population mid-year estimates and projections (21/12/2022)

The 5-14-year-old population is expected to decline from 2023. 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.

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-2020 population estimates by ward can be seen in table below. Across North Tyneside, 32% of the 0-14 population are aged 0-4 years.

Ward	Age 0 - 4	Aged 5 to 14
North East	**1,782**	**4,536**
Monkseaton North	469	1189
Monkseaton South	465	1140
St Mary's	325	1053
Whitley Bay	523	1154
North West	**3,200**	**6,456**
Benton	501	973
Camperdown	507	1262
Longbenton	737	1317
Valley	933	1885
Weetslade	522	1019
South East	**3,578**	**7,744**
Chirton	722	1788
Collingwood	615	1339
Cullercoats	466	1024
Northumberland	502	966
Preston	359	719
Riverside (c. 2/3 SE)	485	913
Tynemouth	429	995
South West	**2,696**	**5,354**
Battle Hill	556	1156
Howdon	630	1340
Killingworth	652	1314
Riverside (c. 1/3 SW)	243	456
Wallsend	615	1088

N.B. Ward as of 2023.
Source: ONS mid-2020 population estimates

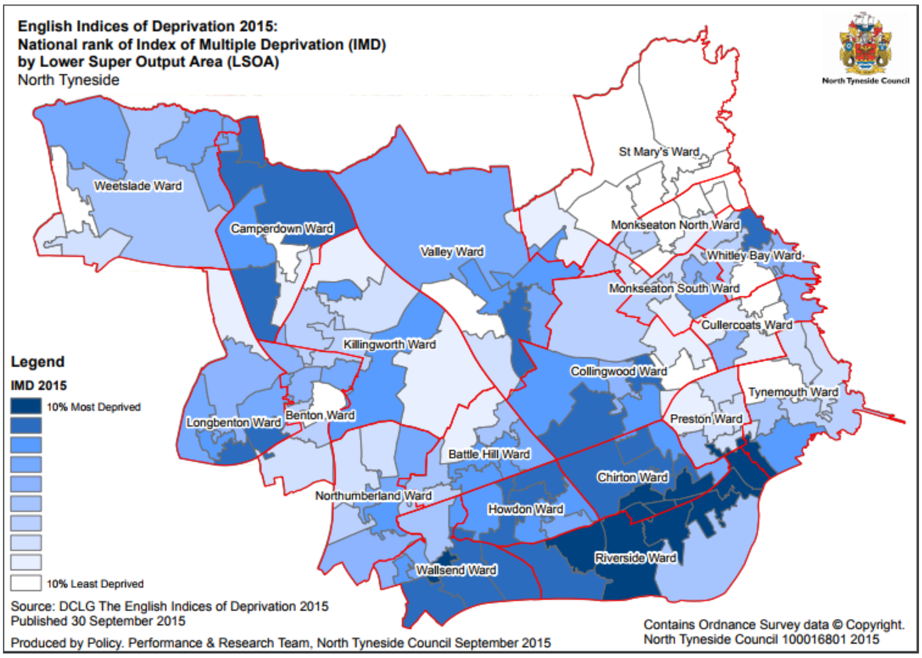
Within the Local Plan two strategic housing sites have been identified at Killingworth Moor and Murton.

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 2018 national childcare and early years survey found that 62% of children living in the least deprived areas received formal childcare, compared to 44% of children living in the most deprived communities. 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 located 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 indicates that between March 2020 and June 2021 there has been a fall in the percentage of economically active people in North Tyneside who are in employment; from 79.3% (March 2020) to 73.6% (Jan 2023). These figures are higher than the comparative regional figures (71.1% and 71.6%). The picture nationally is one of a static percentage in employment at 75.9%, however, North Tyneside's relative position has changed from better than average to below average.
The employment rate in North Tyneside, regionally and nationally can be seen in the table below. 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 (Jan 2023) in North Tyneside, compared to the England and North East averages.

Employment rate	North Tyneside	England	North East
Aged 16-64	73.6	75.9	71.6
Aged 16-19	*39.3*	*34.8*	*37.0*
Aged 20-24	*65.0*	*66.8*	*67.4*
Aged 25-34	*88.8*	*84.6*	*78.4*
Aged 35-49	*81.3*	*85.9*	*83.6*
Aged 50-64	*65.5*	*71.9*	*65.8*

Overall employment is broadly in line or higher than national for younger age ranges (16-34), but lower than national for ages 35 to 64. Employment rates for 25-34 are very much higher than regional rates.

Childcare Sufficiency Survey 2023

This section of the report outlines the findings that were obtained from the electronic survey undertaken in June 2023.

Overall provider response rate for PVI and Childcare was high. (n=132 responses)

Changes in Number of places offered in the Last 12 Months:

Provider Type	Reduced	Kept the Same	Increased
Childminding	11.3%	70.4%	18.3%
Full day provision for early years children	5.4%	74.3%	20.3%
Holiday activity club	8.3%	66.7%	25.0%
Out of school and / or wraparound provision	5.4%	70.3%	24.3%
Sessional early years provision	10.5%	68.4%	21.1%

- More than 88% of providers of any type, report that they have increased or maintained the number of places offered over the last 12 months.
- Childminders and sessional providers are the most likely to report a decrease in numbers.

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.

Name	Increased to some extent	No change	Decreased to some extent
Childminding	35.7%	50.0%	14.3%
Full day provision for early years children	45.2%	45.2%	9.6%
Holiday activity club	63.6%	27.3%	9.1%
Out of school and / or wraparound provision	50.0%	44.4%	5.6%
Sessional early years provision	41.2%	47.1%	11.8%

- In line with the picture of little decrease in numbers of places; we observe little decrease in demand.
- Again, childminders and sessional providers are most likely to report a decrease in demand for paid hours.

The majority of 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 expansion of Government funded hours may impact upon this trend from April 2024 onwards. 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**.**

Name	Increased to some extent	No change	Decreased to some extent
Childminding	25.4%	61.2%	13.4%
Full day provision for early years children	31.4%	57.1%	11.4%
Holiday activity club	45.5%	36.4%	18.2%
Out of school and / or wraparound provision	31.4%	57.1%	11.4%
Sessional early years provision	35.3%	58.8%	5.9%

- All provider types, other than sessional providers, are slightly more likely to report a decrease in demand for government funded places over paid for places.
- Although overall demand for funded places is more likely to be reported as increasing rather than decreasing.
- Holiday activity clubs are most likely to report a decrease in demand for funded places than other types of provision.

The majority of providers believe that demand for Government childcare entitlements has increased or remained unchanged, across all provider types. 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 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.

Name	Increased to some extent	No change	Decreased to some extent
Childminding	20.3%	53.1%	26.6%
Full day provision for early years children	24.6%	62.3%	13.1%
Holiday activity club	72.7%	27.3%	0.0%
Out of school and / or wraparound provision	40.6%	50.0%	9.4%
Sessional early years provision	57.1%	35.7%	7.1%

- Only childminders are more likely to report a decrease in demand for holiday places rather than an increase.
- The majority of Holiday clubs and sessional providers report an increase in demand over the holidays.

The results show that demand for holiday childcare has varied across settings. A significant majority of holiday activity clubs reported increased demand, as did more than half of sessional early years providers. The majority of the other provider types reported no change in demand. More than a quarter of childminders reported reduced demand. The figures suggest that demand may be recovering after a period of unstable demand. Further monitoring of the situation is required.

Financial Pressures on families

Providers were asked whether financial pressures on families were reducing demand for childcare. The table below shows the responses by provider type.

Provider	Agree to some extent	Disagree to some extent	Don't know
Childminding	54.9%	21.1%	22.5%
Full day provision for early years children	75.7%	20.3%	2.7%
Holiday activity club	66.7%	25.0%	0.0%
Out of school and / or wraparound provision	70.3%	24.3%	2.7%
Sessional early years provision	78.9%	15.8%	0.0%

- Across all providers, far more agree that family finances are reducing demand than disagree.
- Childminders are relatively likely to respond that they don't know.

Most providers believe that financial pressures on families is reducing demand for childcare. The Local Authority will monitor whether the introduction of expanded early years entitlements will relieve some of these pressures.

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:

	Value	Childminders	Full day provision for early years children	Holiday activity club	Out of school and or wraparound provision	Sessional early years provision	All Providers
	1	2.8%	1.4%				2.3%
Weak	2	7.0%	2.7%	8.3%	2.7%	5.3%	4.7%
	3	4.2%	6.8%		2.7%	5.3%	6.3%
	4	11.3%	8.1%	8.3%	8.1%	5.3%	10.2%
	5	15.5%	17.6%	33.3%	16.2%	21.1%	16.4%
	6	18.3%	14.9%	16.7%	18.9%	26.3%	16.4%
	7	11.3%	17.6%		16.2%	21.1%	15.6%
	8	16.9%	12.2%	16.7%	13.5%		14.8%
Strong	9	5.6%	6.8%	8.3%	5.4%	10.5%	6.3%
	10	7.0%	9.5%		10.8%	5.3%	7.0%
	Mean	6.0	6.1	5.3	6.2	6.1	6.1

- No provider type is significantly more likely to report poor financial stability then the average.
- 13% of providers report their financial stability as weak (0-3) whereas 28% of providers report their financial stability as strong (8+).

Financial sustainability varies across settings and provider types. A minority of settings report weak financial sustainability, with the greatest proportion of settings reporting very poor (i.e. 2 or less) financial sustainability amongst childminders and also holiday activity clubs. Overall financial sustainability appears to be reasonable, given the significant challenges facing the sector. A number of 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 agreed that it is difficult to recruit high quality childcare staff to your setting. The table below shows the responses by provider type.

Provider Type	Agree to some extent	Disagree to some extent	Don't know
Childminding	19.2%	15.4%	65.4%
Full day provision for early years children	84.5%	5.2%	10.3%
Holiday activity club	83.3%	8.3%	8.3%
Out of school and / or wraparound provision	68.0%	12.0%	20.0%
Sessional early years provision	80.0%	6.7%	13.3%

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

- Not shown here, but, overall, across all provider types 44% of respondents reported strong agreement with the difficulties of recruiting staff.

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 reduce capacity within the sector.

Reductions in offer

Provider were asked whether they have reduced capacity permanently or temporarily in the past 12 months. The table below shows the responses by provider type.

Value	Childminding	Full day provision for early years children	Holiday activity club	Out of school and / or wraparound provision	Sessional early years provision
Temporarily reduce opening hours	5.6%	2.7%	16.7%	10.8%	5.3%
Permanently reduce opening hours	2.8%	5.4%			5.3%
Temporarily reduce the total number of childcare places	8.5%	14.9%	16.7%	8.1%	5.3%
Permanently reduce the total number of childcare places	1.4%	4.1%		2.7%	
Temporarily reduce the number of funded places that you offer	1.4%	2.7%	8.3%	2.7%	5.3%
Permanently reduce the number of funded places that you offer	1.4%	1.4%			5.3%
Temporarily close a room / rooms		8.1%	8.3%	2.7%	
Temporarily close the setting	4.2%	2.7%	8.3%	2.7%	5.3%

- Of the 132 respondents only 33 providers had to take one of the listed cost control measures.

- One provider reported taking 4 listed measures (permanently reducing hours and all places as well as temporarily closing a room or rooms).

- 28 providers reported taking one and one only of the listed measures.

- The most common measure was to temporarily reduce the number of total places. 15 providers reported using this measure.

A minority of providers have had to reduce capacity temporarily or permanently. As covid recedes this is less of an issue but the Authority will continue to support providers, where feasible, to avoid reductions in capacity.

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	Agree to some extent	Disagree to some extent	Don't know
Childminding	79.4%	2.9%	17.6%
Full day provision for early years children	87.5%	8.3%	4.2%
Holiday activity club	83.3%	16.7%	0.0%
Out of school and / or wraparound provision	91.7%	5.6%	2.8%
Sessional early years provision	83.3%	11.1%	5.6%

- Holiday clubs are most likely to report that they disagree they can meet the needs of children with SEN .

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

- However, the majority of all 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 is able to 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

The March budget 2023 included proposals to extend the 30 hour entitlement for working parents, providers were asked a series of questions about the expected impact on demand for childcare.

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

Providers were asked if they were confident in their settings' ability to meet demand for the new working families entitlement for 2 year olds. The table below shows responses by provider type.

Provider Type	Agree to some extent	Neither agree or disagree	Disagree to some extent	Don't know
Childminding	59.2%	14.3%	18.4%	8.2%
Full day provision for early years children	44.4%	23.8%	17.5%	14.3%
Holiday activity club	57.1%	14.3%	0.0%	28.6%
Out of school and / or wraparound provision	57.7%	11.5%	11.5%	19.2%
Sessional early years provision	50.0%	31.3%	6.3%	12.5%

- Most providers (>50%) are confident that they can meet demand for 2 year old places.
- However, 19% to 31% of providers either disagree or don't know if they will be able to meet demand.

The majority of providers expected to be able to meet demand, but a significant minority of childminders and full day providers disagreed to some extent.

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. The table below shows the responses by provider types.

Provider Type	Agree to some extent	Neither agree or disagree	Disagree to some extent	Don't know
Childminding	54.0%	18.0%	18.0%	10.0%
Full day provision for early years children	35.5%	25.8%	21.0%	17.7%
Holiday activity club	42.9%	14.3%	0.0%	42.9%
Out of school and / or wraparound provision	44.0%	20.0%	16.0%	20.0%
Sessional early years provision	33.3%	33.3%	20.0%	13.3%

- There is notably more uncertainty about meeting demand for 0.75-2 year olds. Only 1/3 to 1/2 of providers appear confident.

Providers are unsure of their ability to meet the 9+ months working families entitlement at this stage. This may partially reflect a lack of key information at the time of the survey but the Local Authority will need to continue working with settings to understand their capacity.

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	Agree to some extent	Neither agree or disagree	Disagree to some extent	Don't know
Childminding	34.7%	22.4%	34.7%	8.2%
Full day provision for early years children	30.2%	20.6%	28.6%	20.6%
Holiday activity club	75.0%	0.0%	12.5%	12.5%
Out of school and / or wraparound provision	51.9%	7.4%	29.6%	11.1%
Sessional early years provision	50.0%	25.0%	25.0%	0.0%

- Childminders and providers of full day provision tend to be split between agreement and disagreement over financial stability.

- Holiday clubs are more likely than other providers to agree that financial stability will improve.

A majority amongst holiday activity clubs and sessional providers, anticipate that the new entitlements will improve their financial security. Overall, the picture is more mixed, this may reflect an absence of key information, such as funding rates at the time of the survey. The Local Authority will inform providers of funding rates at the earliest opportunity.

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+%
Childminding	15.7%	8.6%	18.6%	15.7%	41.4%
Full day provision for early years children	2.7%	15.1%	26.0%	27.4%	28.8%
Out of school and / or wraparound provision	14.3%	17.1%	14.3%	22.9%	31.4%
Sessional early years provision	10.5%	10.5%	15.8%	31.6%	31.6%

- Most provider types (54% to 63%) 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 2023 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.
Childminding	22.2%	11.1%	22.2%	27.8%	16.7%
Full day provision for early years children	2.7%	27.4%	28.8%	15.1%	26.0%
Out of school and / or wraparound provision	31.4%	17.1%	22.9%	14.3%	14.3%
Sessional early years provision	20.0%	60.0%	20.0%	0.0%	0.0%

- Over a quarter of full day providers reported that they could not meet the needs of families in summer 2023. Only 1 such provider reported they could meet the needs of all families.

- Conversely 80% of sessional providers reported they could meet the needs of most or all families.

Only a minority of providers could meet the needs of most or all other families. A significant 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.

Group		Avg Value	Min Value	Max Value
Childminders	Minimum age	4.5	0.3	12.0
Childminders	Maximum age	9.5	3.0	16.0
Holiday Activity Clubs	Minimum age	3.1	2.0	5.0
Holiday Activity Clubs	Maximum age	11.1	10.0	12.0
Out of school	Minimum age	3.2	2.0	5.0
Out of school	Maximum age	9.8	4.0	13.0

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.

Group		Mode Value	Min Value	Max Value
Childminders	Start	07:30:00	06:45:00	09:00:00
Childminders	Finish	17:30:00	16:00:00	18:30:00
Holiday Activity Clubs	Start	08:00:00	07:00:00	08:00:00
Holiday Activity Clubs	Finish	18:00:00	17:30:00	18:30:00
Out of school	Before school session: Start	07:30:00	07:00:00	08:00:00
Out of school	Before school session: Finish	09:00:00	08:30:00	09:00:00
Out of school	After school session: Start	15:30:00	15:00:00	18:00:00
Out of school	After school session: Finish	18:00:00	16:30:00	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 in some settings.

Childminders Holiday / Weekend / Overnight stays

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

Do you provide care during school holidays?

Value	Childminding
No	11.3%
Yes	88.7%

Do you offer weekend placements?

Value	Childminding
No	93.0%
I would consider if there was a family requiring weekend placements	7.0%

Do you offer overnight stays?

Value	Childminding
Yes	1.4%
No	85.9%
I would consider if there was a family requiring overnight stays	12.7%

Most childminders responding will provider 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). Eligibility is based on a series of economic and non-economic criteria. The two year old offer supports some of the most disadvantaged children. 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 2023 census)

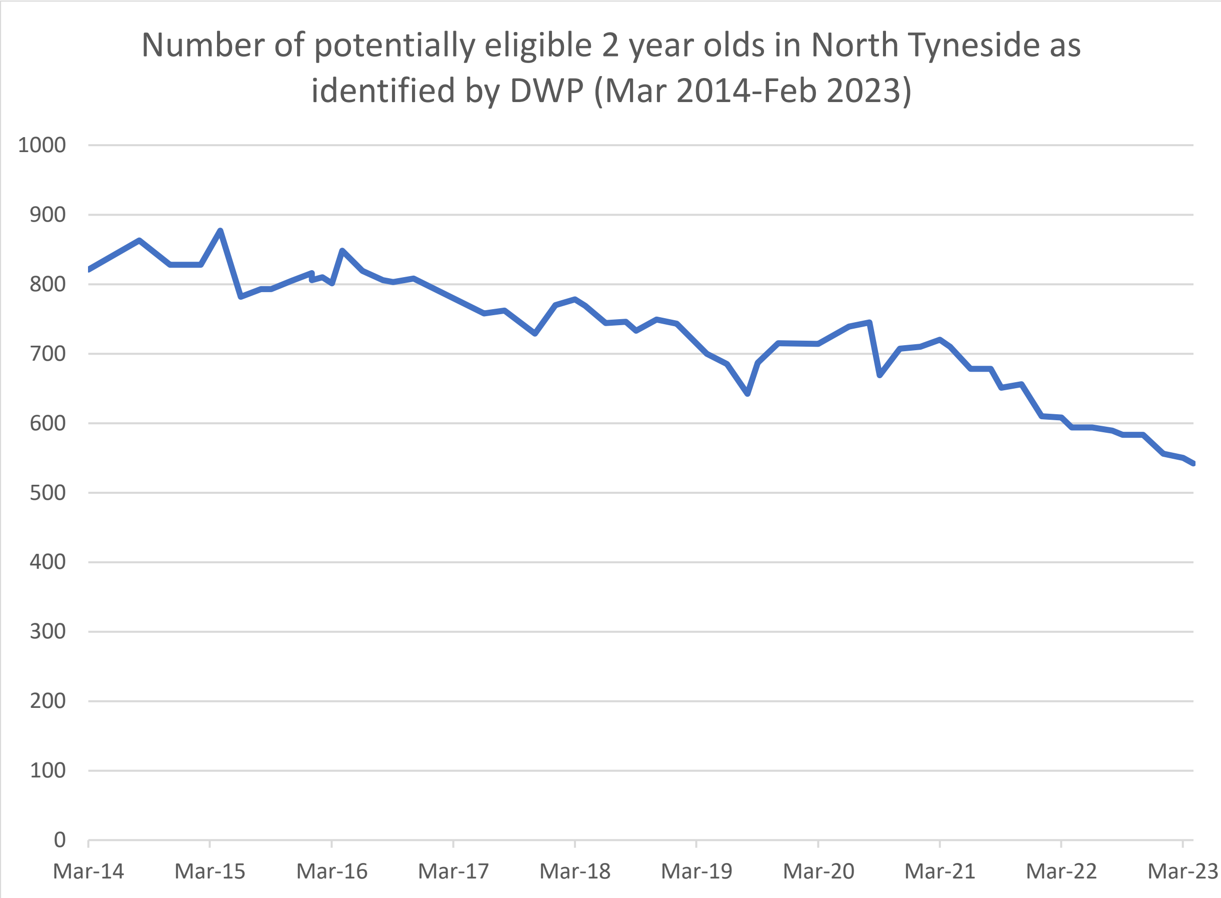
The table and graph below show the total number of children in North Tyneside accessing their 2 year old entitlement at the January census from 2018 to 2023.

	2019	2020	2021	2022	2023
Universal	632	607	573	576	503

The number of two year olds accessing the 2 year old entitlement in North Tyneside declined between 2022 and 2023, from 576 to 503. This is the lowest number of children accessing the entitlement. 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.



The graph shows a steady decline from a high point in 2015 to the current levels which are the lowest recorded. This is consistent with national and regional trends. This may partly reflect demographic decline in the borough. The biggest factor is likely to be that fewer families are eligible, because the income thresholds for the Universal Credit eligibility criteria have not changed since the launch of the entitlement. This is likely to mean that fewer families now qualify for the entitlement as wages have increased.

2 Year Old Entitlement Uptake – Percentage (Jan 2023 census)

The table and graph below show the percentage uptake of the 2 year old entitlement between 2018 and 2023. The figures are based on the annual censuses in January.

	2019	2020	2021	2022	2023
North Tyneside	84%	85%	81%	88%	86.3%
North East	82%	83%	75%	85%	84.5%
England	68%	69%	62%	72%	73.9%

The percentage of eligible 2 year olds accessing their funded childcare entitlement decreased slightly between 2022 and 2023, from 88% to 86.3%. North Tyneside maintains a high percentage take up, which exceeds the regional and 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 and 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
Economic criteria	591	564	525	538	451
High level Special Educational Needs or disability	11	12	18	10	24
Looked after or adopted from care	33	36	33	31	34
Multiple Reasons	3	5	3	3	6
Total	632	607	573	576	503

The overwhelming majority of eligible 2 year olds continue to access their 2 year old entitlement under the economic criteria. The proportion accessing their entitlement based on high level Special Educational Needs or Disability more than doubled between 2022 and 2023.

Number and Percentage of Children Accessing Their 2 Year Old Entitlements by Ofsted Grade of Provider (2023 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
Outstanding	31%	29%	27%	21%	19%
Good	69%	71%	73%	76%	79%
Requires Improvement	0%	0%	0%	3%	2%
Inadequate	0%	0%	0%	0%	0%

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 declined since 2018.

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 and the Early Years SENCO. The table below shows the number and proportion of children accessing their Government funded entitlements between 2019 and 2023.

	2019	2020	2021	2022	2023
EHC Plans - Number of children	5	0	1	10	1
EHC Plans - % of total funded children	0.8%	0%	0.2%	1.7%	0.2%
SEN Support – Number of children	11	14	17	8	16
SEN Support – % of total funded children	1.7%	2.3%	3%	1.4%	3.2%
All SEN Children - Number	16	14	18	18	17
All SEN Children –	2.5%	2.3%	3.1%	3.1%	3.4%

The total number of funded 2 year old children receiving special educational needs support has remained stable. The number of children receiving support through an Education, Health and Care Plan has reduced on the previous year but there has been a corresponding increase in SEND support.

Number of Hours Accessed Each Week by Funded 2 Year Old

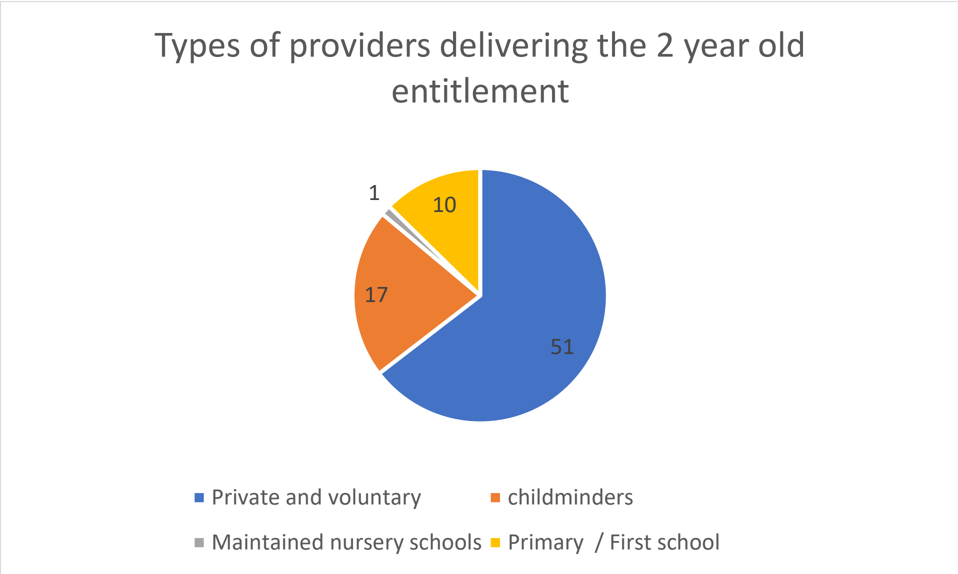
The table below shows the number of hours taken by children accessing their 2 year old entitlement at the January 2023 census in North Tyneside. These figures are compared to the North East and England averages.

	North Tyneside	North East	England
0.01 to 5.00 hours	0%	0.1%	04%
5.01 to 10.00 hours	2.8%	1.3%	4.5%
10.01 to 12.50 hours	1.4%	2.4%	6.7%
12.51 to 15.00 hours	95.8%	96.3%	88.5%

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

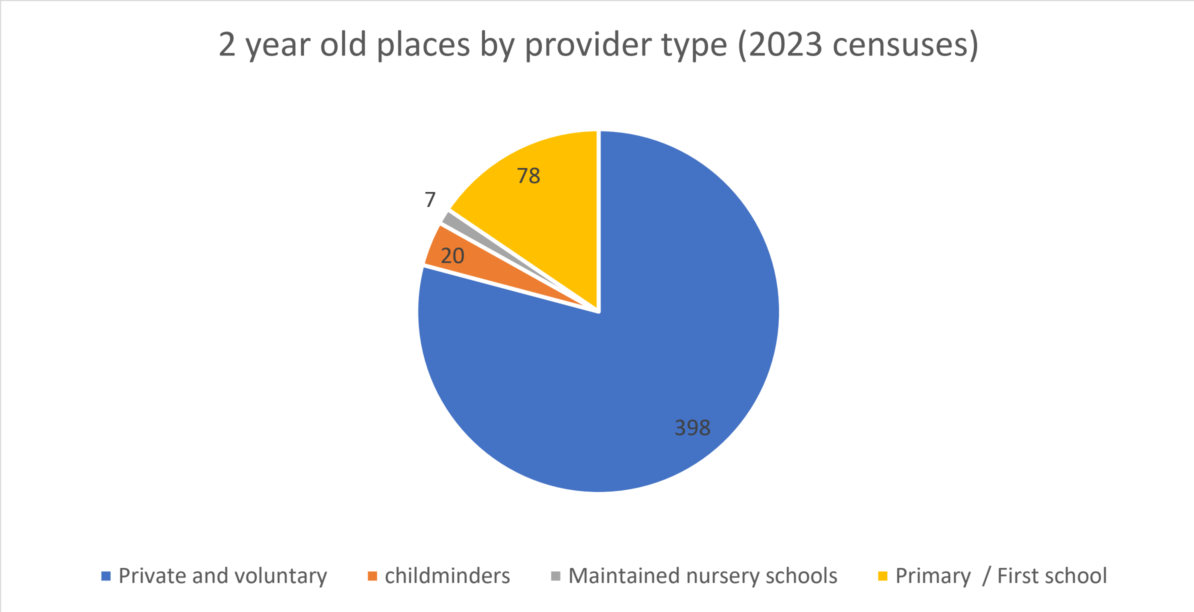
The chart below shows the provider types delivering 2 year old entitlement places.



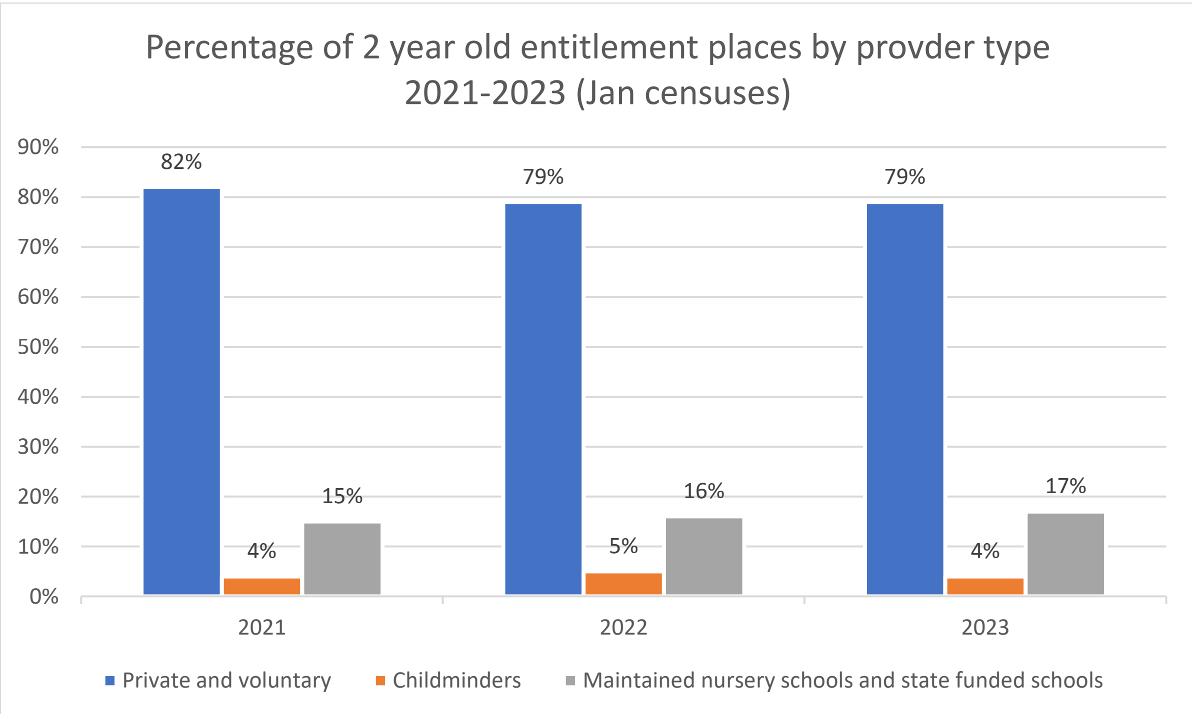
Private and voluntary sector provision delivered 79% of funded 2 year old places in 2023. A further 15.5% of places were taken within nursery provision is primary / first schools.

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 79% of funded 2 year old places in 2023. A further 15.5% of places were taken within nursery provision is primary / first schools. The table below shows this distribution has remained stable since 2021.



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 2023 census.

	2 Year Old – number	2 Year Old - % of total
Asian / Asian British	472	1.2%
Black	9	0.4%
Mixed / Multiple Ethnic Groups	6	1.8%
White	2	93.8%
Other	5	1%
Refused / not obtained	9	1.8%
Total Children	503	

The ethnicity of the majority of children accessing their funded childcare entitlements is 'white' for funded 2 year olds accessing their entitlement in North Tyneside.

The table below compares the breakdown of children accessing their 2 year old entitlement by ethnicity between 2021 and 2022.

	2 Year Old % of total – 2021	2 Year Old % of total – 2022	2 Year Old % of total – 2023
Asian / Asian British	1%	2%	1.2%
Black	1%	1%	0.4%
Mixed / Multiple Ethnic Groups	2%	2% W	1.8%
White	86%	89%	93.8%
Other	0.5%	1%	1%
Refused / not obtained	9.5%	6%	1.8%

The ethnicity of the majority of children accessing their funded childcare entitlements is 'white' for funded 2 year olds accessing their entitlement in North Tyneside. There has been a decline in the proportion of children from Asian /Asian British and Black ethnicities. 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 2018 to 2023.

	2018	2019	2020	2021	2022	2023
Universal	4,698	4,603	4,541	4,484	4479	4536

The total number of children accessing the entitlement increased slightly on the previous year, halting the decline in numbers.

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

North Tyneside has achieved high levels of take up for the universal 3 & 4 year old entitlement over a number of 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 2018 and 2021.

	2018	**2019**	**2020**	**2021**	**2022**	**2023**
North Tyneside	101%	99%	97%	98%	100%	105.2%
North East	99%	98%	98%	95%	97%	98.6%
England	94%	93%	93%	88%	92%	93.7%

The percentage of eligible children accessing their entitlement in North Tyneside was 105% in January 2023, 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 was higher than both the North East and England averages in 2023.

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 SENCO. The table below shows the number and proportion of children accessing their Government funded entitlements between 2019 and 2023.

	2019	2020	2021	2022	2023
EHC Plans - Number of children	23	42	46	72	82
EHC Plans - % of total funded children	0.5%	0.9%	1%	1.6%	1.8%
SEN Support – Number of children	307	300	275	290	324
SEN Support – % of total funded children	6.7%	6.6%	6.1%	6.5%	7.1%
All SEN Children - Number	330	342	321	362	406
All SEN Children – % of total funded children	7.2%	7.5%	7.2%	8.1%	9%

The number 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 continues to grow in North Tyneside. This reflects the significant increase in EHC plans maintained since 2019. The percentage of children receiving SEN support increased from 2022 levels. The local authority has put in place additional support to enable children with SEN to access their universal 15 hour entitlement. 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**		
	2021	**2022**	**2023**	**2021**	**2022**	**2023**
Funded Universal Entitlement 3 & 4 Year Olds with EHC Plans - % of total funded children	1%	1.6%	1.8%	1%	1.1%	1.3%
Funded Universal Entitlement 3 & 4 Year Olds with SEN Support – % of total funded children	6.2%	6.5%	7.1%	5.3%	5.9%	6.7%
All Universal funded 3 & 4 year olds receiving SEN support as % of total funded children	7.2%	8.1%	9%	6.3%	7%	8%

The percentage of children accessing their universal 3 / 4 year old entitlement receiving SEN support in North Tyneside is higher than the national average, across all three indicators.

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.

	2018	2019	2020	2021	2022	2023
Outstanding	41%	41%	38%	34%	34%	24%
Good	57%	57%	59%	63%	64%	73%
Requires Improvement	2%	3%	3%	3%	2%	3%
Inadequate	0%	0%	0%	0%	0%	0%

Almost all children accessing their universal 3 & 4 year old entitlement in a North Tyneside setting are receiving provision rated 'outstanding' or 'good' by Ofsted. The proportion accessing their entitlement in an 'outstanding' setting has declined from 34% in 2022 to 24% in 2023. A small number are accessing their provision in settings rated as 'requires improvement' in 2023.

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

	England 2023	North East 2023	North Tyneside 2023
Outstanding	20.6%	20.6%	24%
Good	73.3%	73.9%	73%
Requires Improvement	4.7%	5%	3%
Inadequate	1.4%	0.6%	0%

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 inadequate or requires improvement, than the North East and England average.

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 2022.

	Number Universal 3&4 Year Old 2023	% Universal 3&4 Year Old 2023
Asian	161	3.5%
Black	46	1%
Mixed / Multiple Ethnic Groups	142	3.1%
White	4069	89.7%
Other	38	0.8%
Unknown	80	1.8%
Total Children	4,536	

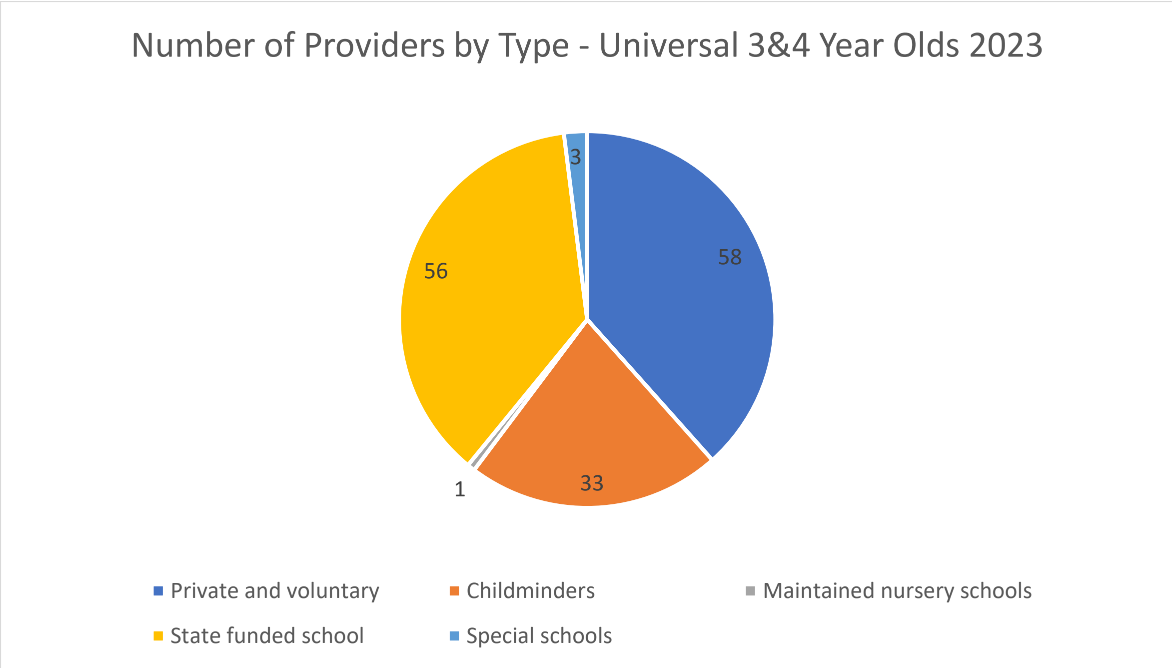
Most children accessing the entitlement are white British (89.7%), with Asian the next biggest ethnic group (3.5%).

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 2021	Universal 3&4 Year old – % of total 2022	Universal 3&4 Year old – % of total 2023
Asian	2.5%	4%	3.5%
Black	0.5%	1%	1%
Mixed / Multiple Ethnic Groups	3%	3%	3.1%
White	91%	90%	89.7%
Other	1%	1%	0.8%
Unknown	2%	1%	1.8%

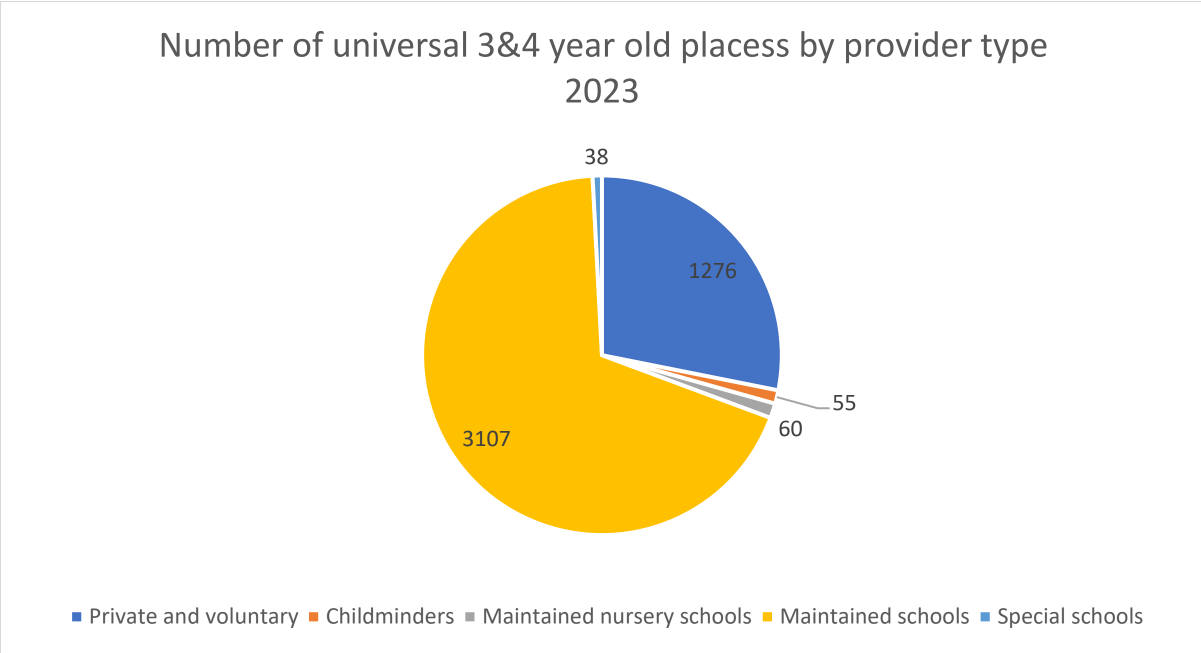
The ethnicity of children taking up the universal 3 & 4 year old entitlement is broadly similar to the previous year.

3 and 4 Year Old Universal Entitlement – Percentage Take up by Provider
The graph below shows the number of providers by type who were delivering universal 3 & 4 year old places in 2023.

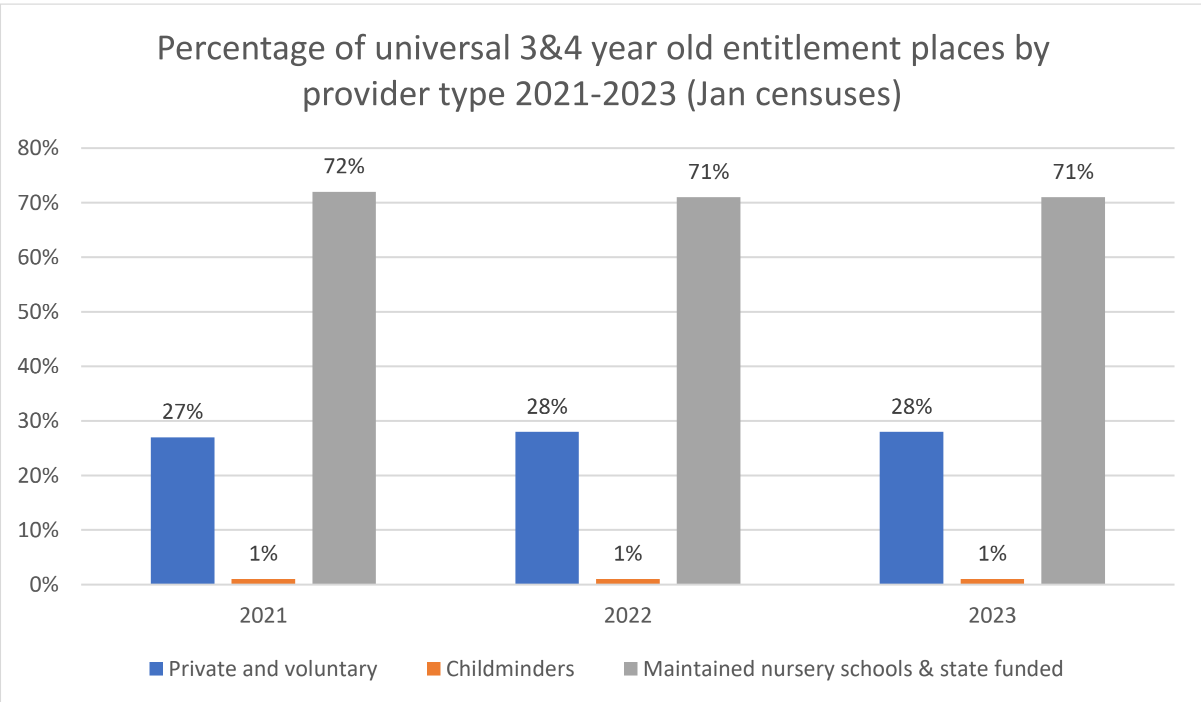


Private and voluntary childcare providers and state funded schools are the biggest group of providers.

The chart below shows the number 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. This distribution has remained largely static over the past 3 years, as shown by the table below.



Extended Entitlement for 3 & 4 Year Olds

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

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

The table and graph below show the number of children accessing their extended 3 and 4 year old entitlement at the January census, in the years 2018 to 2022.

	2018	2019	2020	2021	2022	2023
Extended	1,390	1,500	1,561	1,493	1638	1823

The number of children accessing their extended 3 & 4 year old offer in 2023 was 1823. This is the highest number of children accessing the entitlement, since the launch of the extended entitlement. This suggests a greater proportion of families with 3&4 year olds are eligible for the extended entitlement 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.

	2018	2019	2020	2021	2022	2023
Outstanding	44%	44%	42%	37%	36%	24.9%
Good	55%	54%	56%	61%	61%	74.5%
Requires Improvement	1%	2%	2%	2%	3%	0.6%
Inadequate	0%	0%	0%	0%	0%	0%

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 2018 to 24.9% in 2023.

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 2023	North East 2023	North Tyneside 2023
Outstanding	21.7%	25%	24.9%
Good	74%	71%	74.5%
Requires Improvement	3.2%	3.6%	0.6%
Inadequate	1.1%	0.6%	0%

North Tyneside is broadly in line with the north east average for children accessing places in 'Outstanding' provision. North Tyneside has slightly more children accessing places in 'good' provision and a lower proportion access places in provision rated as 'requires improvement'. The borough has a high proportion in outstanding settings and a lower proportion in 'requires improvement' or 'inadequate' provision, than the national average.

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.

	2018	2019	2020	2021	2022	2023
EHC Plans - Number of children	0	3	3	5	9	10
EHC Plans - % of total funded children	0%	0.2%	0.2%	0.3%	0.5%	0.5%
SEN Support – Number of children	32	41	44	31	49	57
SEN Support – % of total funded children	2.3%	2.7%	2.8%	2.1%	3%	3.1%
All SEN Children - Number	32	44	47	36	58	67
All SEN Children –	2.3%	2.9%	3%	2.4%	3.5%	3.7%

The number of children receiving special educational needs support to access their extended 30 hour entitlement increased from 58 in 2022 to 67 in 2023. The number of children accessing their entitlement with an EHC Plan increased from 9 in 2022 to 10 in 2023.

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 2021	North Tyneside 2022	North Tyneside 2023	England Ave 2021	England Ave 2022	England Ave 2023
Funded Extended Entitlement 3 & 4 Year Olds with EHC Plans - % of total funded children	0.3%	0.5%	0.5%	0.4%	0.4%	0.6%
Funded Extended Entitlement 3 & 4 Year Olds with SEN Support – % of total funded children	2.1%	3%	3.1%	2.4%	2.9%	3.6%
All extended funded 3 & 4 year olds receiving SEN support as % of total funded children	2.4%	3.5%	3.7%	2.8%	3.3%	4.1%

The proportion of children taking up their extended entitlement who receive SEND support is broadly in line with the national average, although

North Tyneside is slightly below the national average of the proportion of children who receive any SEN support.

Extended 3 and 4 Year Old Entitlement Uptake by Ethnicity

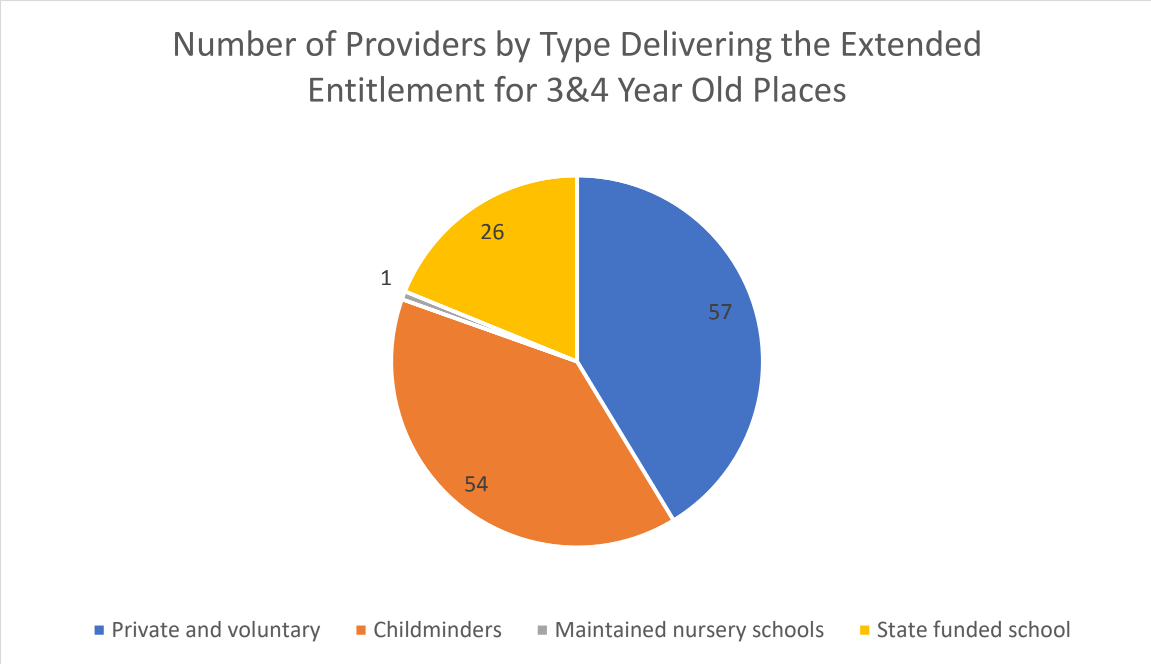
The table below shows the ethnicity of children taking up their extended 3 and 4 year old entitlement.

	Percentage of Total Extended 3&4 Year Old 2023 – England	Percentage of Total Extended 3&4 Year Old 2023 – North Tyneside
Asian	5.7%	1.5%
Black	3.4%	0.4%
Mixed / Multiple Ethnic Group	6.1%	3.2%
White	76.7%	92%
Other	1.1%	0.4%
Unknown	7.1%	2.4%

Most children accessing their extended entitlement are classed as 'white' under the 2023 census information.

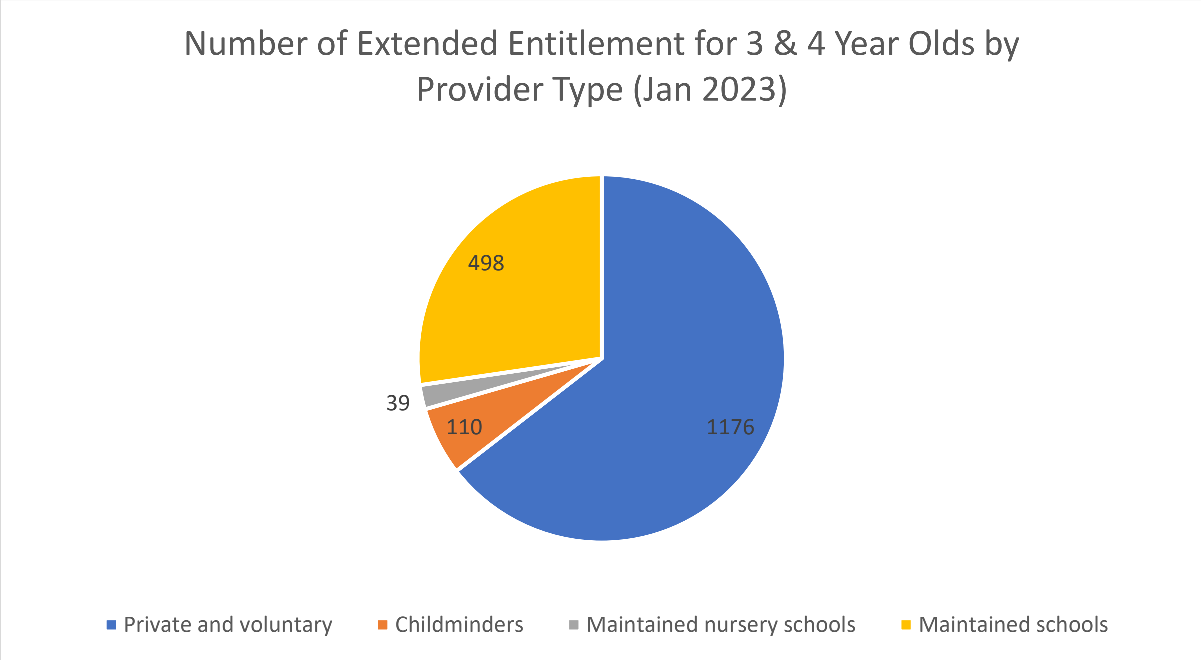
3 and 4 Year Old Extended Entitlement – Percentage Take up by Provider

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

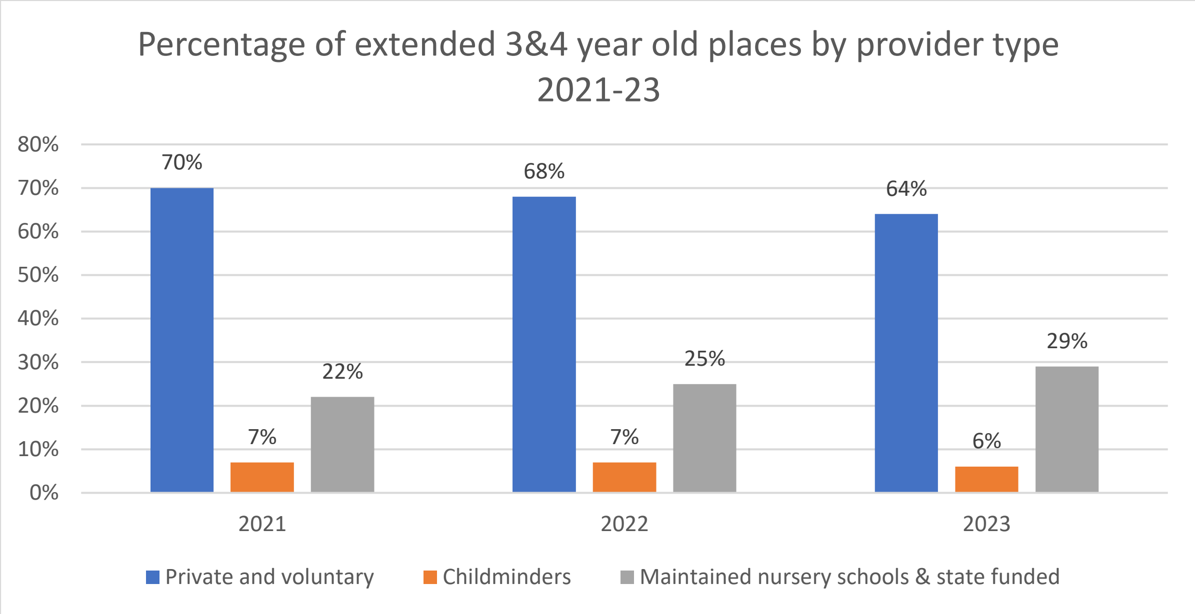


The majority of providers delivering extended 3 & 4 year old entitlement places are private and voluntary sector entities. North Tyneside also has a significant school based offer and more than 50 childminders are delivering places.

The chart below shows the number of extended entitlement places for 3 & 4 year olds by provider type, based on the January 2023 censuses.



The majority of extended entitlement places for 3 & 4 year olds are delivered in the private and voluntary childcare sector. School nursery places 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. This reflects an increase in the number of schools delivering a 30 hour offer.


Percentage of extended 3&4 year old places by provider type 2021-23
80%
70%
60%
50%
40%
30%
20%
10%
0%
70%
7%
22%
68%
7%
25%
64%
6%
29%
2021
2022
2023
Private and voluntary
Childminders
Maintained nursery schools & state funded

Summary of Findings

Supply

Overall, the borough has maintained a diverse and comprehensive childcare offer, with the quality of provision high. 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, as costs continue to rise. Staffing also remains an issue across group providers. The combination of these factors has the potential to impact upon sufficiency of childcare places in the longer term. The staffing issue also has the potential to restrict growth, as the sector prepares for an extension in the early years entitlements. 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 proposed expansion to the early years entitlements is expected to increase demand. The highest demand for formal childcare is likely to continue being concentrated in the coastal areas, 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 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 also support parents 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 joint area SEND inspection in North Tyneside, Nov 2021 found that ‘early years providers receive highly effective specialist support’ and ’are confident in using a graduated response to help identify emerging needs and support the children and young people in their care’. 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 is working with partners to develop a new Early Years Inclusion Service. The service will support schools and PVI settings to build their skills and 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, the sector faces a potentially significant increase in demand for childcare places during the early years. The local authority will also be working closely with schools to ensure they are able to deliver the expansion in wraparound provision for primary / first school age children. A detailed assessment of sufficiency will be carried out as part of this process. Rising costs and difficulties in recruiting and retaining staff are potential barriers to meeting future demand.