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Family and Childcare

Childcare Survey 2026

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We would also like to thank the National Association of Family Information Services (NAFIS) for their input into this year's additional questions.

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About this report

This special edition of the annual Childcare Survey is published 25 years after the first survey, in 2001. The 25-year analysis is based on information from those previous reports.

This year's data is based on surveys from local authorities in England, Scotland and Wales, which were returned to Coram Family and Childcare between October 2025 and December 2025. Questions on cost and sufficiency were revised and updated this year; further details can be found in the Introduction.

This report also includes findings from three focus groups with parents, held in December 2025.

We also produce the Holiday Childcare Survey, which is published annually before the school summer holidays in England. Recent previous reports are available from our website: coramfamilyandchildcare.org.uk

Note on terminology: we use childcare to refer to all forms of care which are paid for by families or funded by governments, not provided by parents or carers and outside of compulsory schooling. Early education can act as a form of childcare alongside its role in child development and refers to children below school age. We believe that all activities in a child's life have a role in their education and development but use the term childcare for simplicity.

About Coram Family and Childcare

Coram Family and Childcare works to make the UK a better place for families, focussing on childcare and early years to make a difference to families' lives now and in the long term. We are a leading voice on early education and childcare, carrying out research to aid understanding and drive change in national and local policy.

Our network of Parent Champion schemes reach thousands of parents each year, with dedicated local volunteers ensuring parents are aware of their rights and entitlements, improving children's outcomes.

We deliver the National Association of Family Information Services – the only national membership organisation supporting essential Family Information Service staff in local authorities to deliver high-quality information and advice to families.

We deliver responsive, family-focussed projects, often in partnership with other expert organisations, reaching some of the most disadvantaged families and levelling the playing field for disadvantaged children.

We are part of the Coram Institute for Children and a member of the Coram group of children's charities and organisations. Coram changes lives, laws and systems to create better chances for children, now and forever.

Glossary 1 – Terms used in this report

Childcare – the care, education and supervision of a child or multiple children by someone who is not their parent or carer, usually including pre-school and school-aged children. In this report, childcare includes government funded early education but not compulsory schooling, nor support from relatives or friends.

Early years – from a child’s birth to school age.

Nursery – childcare provided in a group setting, with several early years professionals looking after a group of children. For children under five years of age, and can include pre-school, day nurseries, and school nurseries.

Private, voluntary and independent (PVI) nurseries – nurseries not run by local authorities or schools. They may be run by private companies, independent schools or voluntary organisations such as charities.

Maintained nurseries – standalone local authority nurseries that provide early education and childcare to children under five years, normally during school hours in term time.

Childminder – a registered child carer who works with children for more than two hours a day in domestic premises (usually their own home) or, in England, in approved non-domestic premises (such as a community or village hall).

Registered childcare – childcare providers that are registered for quality assessment by the childcare regulator. In England, this is Ofsted, in Wales, it is the Care Inspectorate Wales (CIW) and in Scotland, the Care Inspectorate. To receive government funding for childcare, providers must be registered.

25 hours – considered as ‘part-time’ childcare to cover a typical part-time working week, including time to travel to and from work.

50 hours – considered as ‘full-time’ childcare to cover a typical full-time working week, including time to travel to and from work.

Weighted average – this provides a more realistic average to account for differences in the population of children and number of childcare providers in the local authority areas.

Glossary 2 – Terms related to childcare payments

There is different childcare and early years provision in England, Wales and Scotland. Where there are commonalities, we have presented the data comparatively. Where there are differences, the data is separated. The table below outlines some of the key terms.

Funded childcare in England, Scotland and Wales		
Age of child	Nation	Eligibility and hours
Children aged nine months to two years	England	Since September 2025, children from nine months to four years old with eligible working parents are entitled to 30 hours a week for 38 weeks a year. Parents and their partner (if they have one) must earn at least the equivalent of 16 hours a week at the National Minimum Wage or Living Wage. Parents' net earnings cannot exceed £100,000 a year.
Two-year-olds	England	15 hours a week for 38 weeks a year for parents in receipt of certain benefits, or children who are disabled or looked after. Since September 2025, children from nine months to four years old with eligible working parents are entitled to 30 hours a week for 38 weeks a year. Parents and their partner (if they have one) must earn at least the equivalent of 16 hours a week at the National Minimum Wage or Living Wage. Parents' net earnings cannot exceed £100,000 a year.
	Scotland	Up to 1,140 hours a year for parents in receipt of certain benefits or children who are looked after (30 hours a week for 38 weeks a year, or 22 hours spread across the year).
	Wales	12.5 hours a week for 39 weeks a year for two- to three-year-olds in Flying Start areas.
Three- to four-year-olds	England	15 hours a week for 38 weeks a year for all three- and four-year-olds. An extra 15 hours a week (30 hours a week total) for 38 weeks a year for three- and four-year-olds with eligible working parents. Parents and their partner (if they have one) must earn at least the equivalent of 16 hours a week at the National Minimum Wage or Living Wage. Parents' net earnings cannot exceed £100,000 a year.
	Scotland	1,140 hours a year for all three- to four-year-olds (30 hours a week for 38 weeks a year, or 22 hours spread across the year).
	Wales	Minimum of 10 hours a week nursery education for 39 weeks a year for all three-to four-year-olds. 30 hours a week for 48 weeks a year for children with eligible parents. During term time this is made up of the (minimum) 10 hours of nursery education and (up to) 20 hours of childcare. For 9 weeks outside of term time this is made up of 30 hours of childcare only. Parents and their partner (if they have one) must earn at least the equivalent of 16 hours a week at the National Minimum Wage or Living Wage OR be in education or training at a publicly funded college or university. Parents' gross earnings cannot exceed £100,000 a year.

Additional support with childcare costs across Great Britain			
Type of support	Age of child	Nation	Applicability
Tax-Free Childcare	Aged under 12 or under 17 if child has a disability	All nations	Covers 20% of childcare costs up to a maximum of £2,000 per child per year or £4,000 for disabled children. Tax-Free Childcare replaces the childcare vouchers scheme which has closed for new applications. Parents and their partner (if they have one) must earn at least the equivalent of 16 hours a week at the National Minimum Wage or Living Wage. Parents' net earnings cannot exceed £100,000 a year. Can be received alongside the 30 hours of expanded entitlement but not Working Tax Credit or Universal Credit.
Universal Credit	Aged under 16	All nations	Universal Credit claimants can claim back up to 85% of their childcare costs (or receive them up-front if moving into work) to a maximum of £1,031.88 for one child or £1,768.94 for two or more children per month. Universal Credit can be claimed alongside funded childcare, but not with Working Tax Credit or Tax-Free Childcare. Parents must have an income below a certain level – this varies depending on families' circumstances.

Executive summary

The Childcare Survey 2026 marks a special moment: 25 years since our first survey was published. For this anniversary edition, we look back over a quarter of a century of data collection on the cost of childcare.

Our analysis shows a steady climb in the cost of childcare for children under two in England each year, with the cost of a part-time (25 hour) place in spring 2024 nearly triple what it was in 2001, and a full-time (50 hour) place costing 2.7 times more by the end of the same period.

This is above what would have been expected if costs had risen in line with inflation by as much as 37%. Until 2025, when things began to change. This was the first Childcare Survey published after the September 2024 introduction of government-funded entitlements for children as young as nine months, which saw costs for eligible working parents in England fall, bringing the cost of a part-time place back down to what it had been in 2005 and rolling back the years for the cost of a full-time place to 2018.

2026 figures show that when the entitlement expanded from 15 hours per week to 30 per week, costs for eligible working parents fell again. Theoretically, a part-time (25 hour) place may now be free during term time for a family eligible for the 30-hour entitlement, and a full-time place now costs less than half what it did in 2024.

It is more important than ever that, when presenting these figures, we are clear that the picture is often more complicated for most families. Entitlements are for 38 weeks of the year, meaning much larger bills outside of term time or higher (but more consistent) weekly costs for those who 'stretch' the entitlement over a greater number of weeks, typically giving 22 funded hours per week instead of 30. There may also be other costs such as deposits (though these must be refundable) and for consumables and activities. Additional charges for consumables must be voluntary when accessing a funded place but parents who opt out must follow their provider's policy on alternatives, such as buying and providing those extras themselves.

Costs from 2025 are now a story of two halves. Families who are not eligible for the expanded entitlement will still have to meet the full cost of a part-time place, now £189 per week. This split in access to funded hours risks sending a message to disadvantaged families that childcare isn't 'for them' and parents who might want to give their child the same benefit of early education are likely to be priced out.

Outside of England where there are no funded entitlements for children under two, costs have risen. A part-time place for a child under two increased by 5% in Scotland, and by 8% in Wales.

There were increases for all nations in the cost of full-time places for three- and four-year-olds; 6% in England, 9% in Scotland and 6% in Wales.

Childcare sufficiency remains highest for the funded entitlements, particularly in England, reflecting the focus and drive of this year's work.

The lack of sufficiency for children with special educational needs and disabilities (SEND) has long been one of the most concerning findings of the survey. By separating the question into two age groups this year, we learn more of the detail behind the data.

We can now see that much less is known by local authorities about how much childcare they have for school aged children with SEND than those in early years, though neither finding is likely to inspire confidence in parents of children with additional needs, particularly if they live in Inner London where only 9% of local authorities say they have enough childcare for early years children with SEND, and none have enough for school-aged children with SEND.

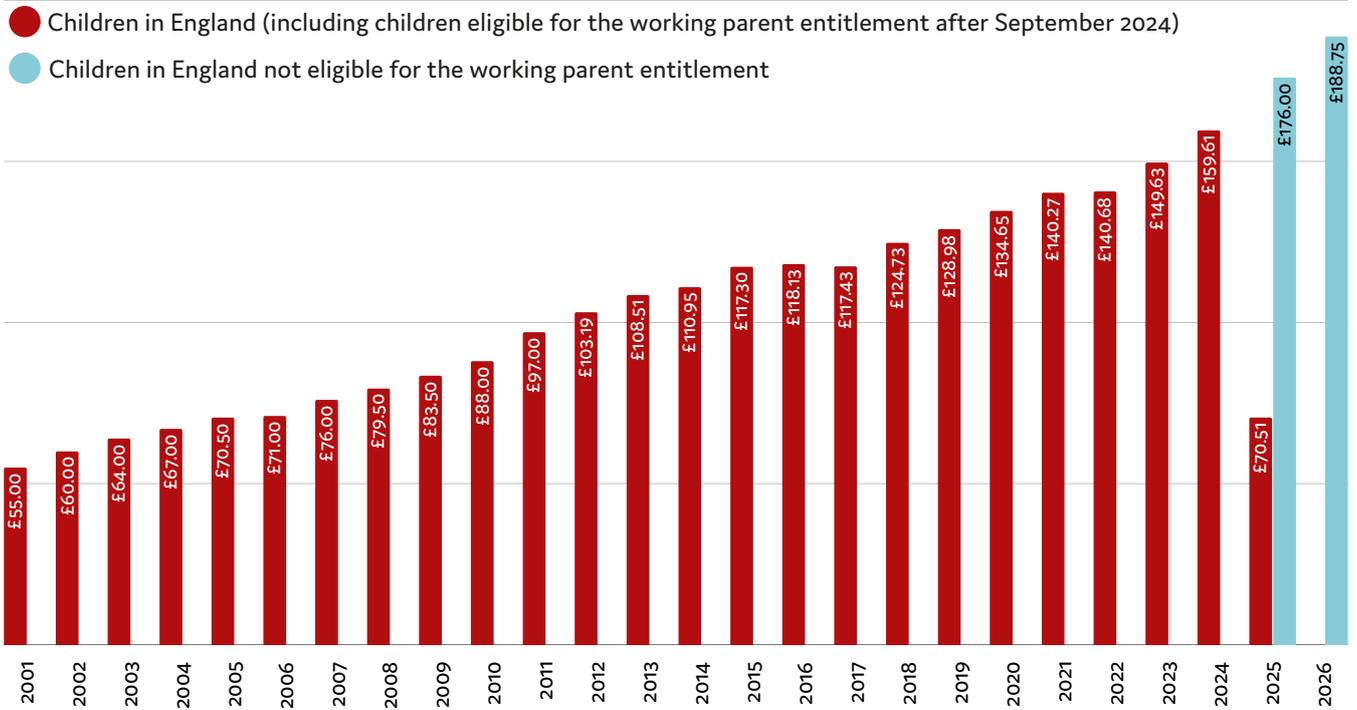
Through talking directly with parents for the second year running, we have learned even more about the important impact of early education and childcare, as well as the confusion and frustration that exists around funded entitlements.

From the lasting friendships made through childcare (for both children and parents), the language and creativity skills gained, to the growth in confidence, independence and opportunities; it is clear these experiences are of unique value in their own right, as well as an important part of setting foundations for the future.

25 years of the Childcare Survey

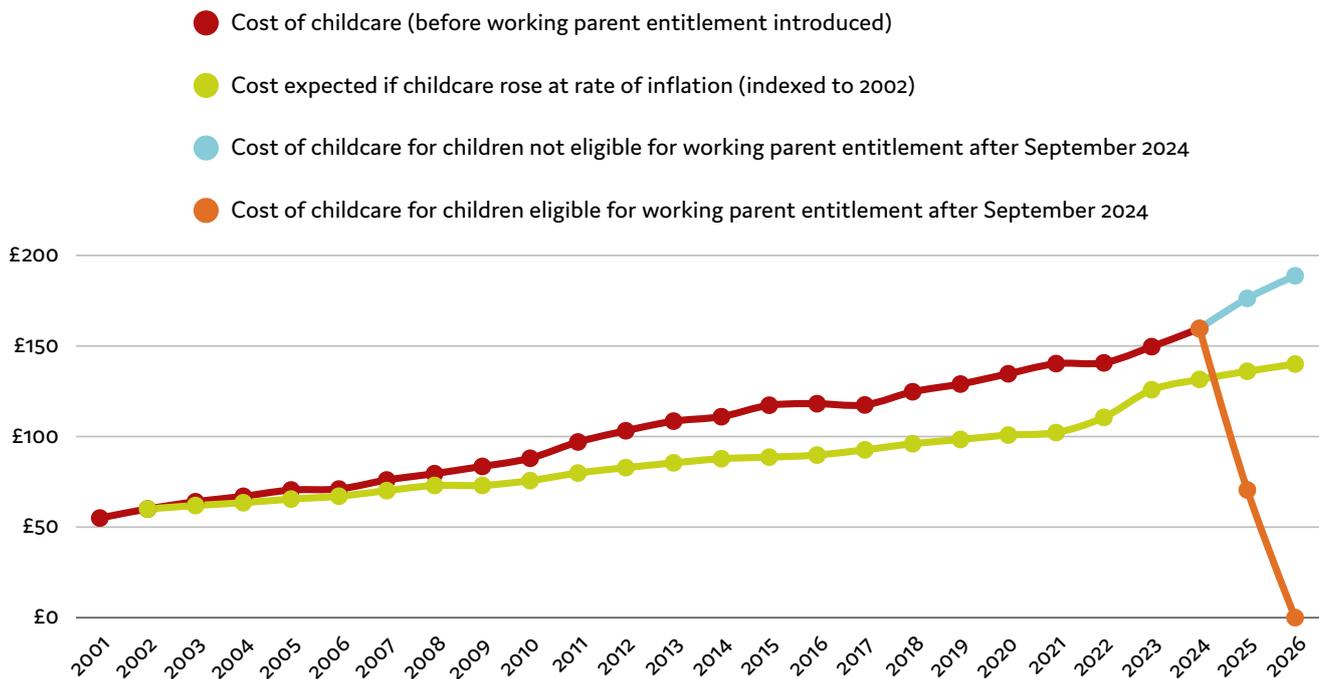
The cost of a part-time place in a nursery for a child under the age of two in England grew by over £100 per week in the period between 2001 and 2024 (from £55 per week to £160 per week), before falling for working parents in 2025 but continuing to increase for those who are not eligible for funded entitlements.

Figure 1 - The cost per week for part-time childcare (25 hours) at a nursery for children aged under two in England (2001 to 2026)



Childcare costs have increased at a higher rate than inflation over the last 25 years. If childcare costs had increased in line with inflation each year since the beginning of our survey, then in 2021 (when the greatest difference occurred), the cost of a part-time place would have been £102 for a child under two, rather than the actual cost of £140.

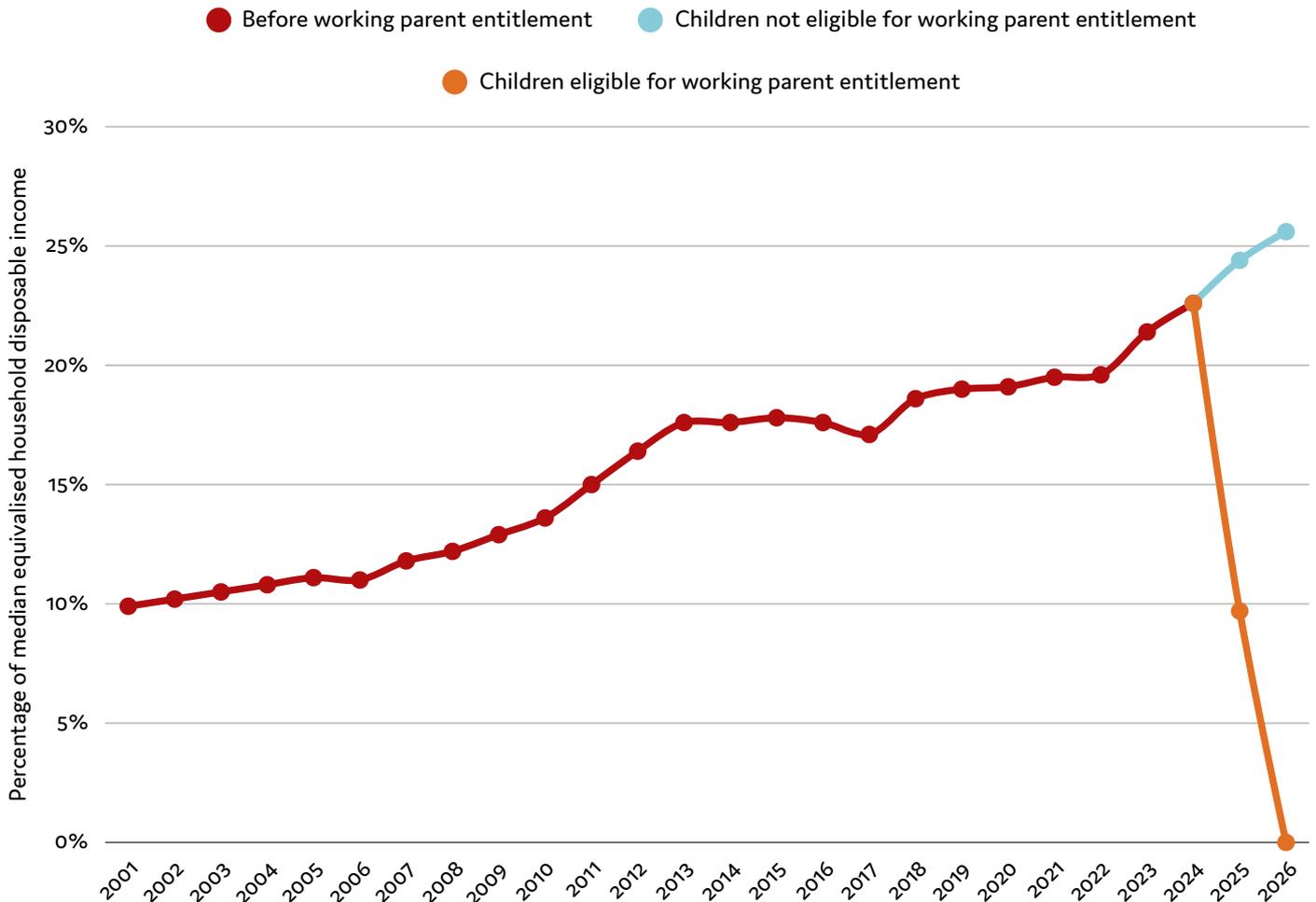
Figure 2 - The cost per week for part-time childcare (25 hours) at a nursery for children aged under two in England compared to the cost if childcare had risen in line with inflation (2001 to 2026)



Note: Inflation calculated using Retail Price Index All Items Index. Available at: <https://www.ons.gov.uk/economy/inflationandpriceindices/timeseries/chaw/mm23>

The percentage of household income needed to cover part-time childcare for a child under the age of two doubled over twenty years, growing from 10% when our survey began to 20% in 2022. While working parents eligible for 30 hours of funded childcare have seen those costs fall, ineligible families will today spend a quarter of their household income on part-time childcare.

Figure 3 - The cost per week for part-time childcare (25 hours) at a nursery for children aged under two in England as a percentage of median equivalised household disposable income (2001 to 2026)



Note: Median household income calculated using Office for National Statistics data. Available at: <https://www.ons.gov.uk/peoplepopulationandcommunity/personalandhouseholdfinances/incomeandwealth/bulletins/householddisposableincomeandinequality/financialyearending2024>
Note: Median household income for 2025 and 2026 has been estimated by applying projected growth figures from the Office for Budget Responsibility. Available at: <https://obr.uk/forecasts-in-depth/the-economy-forecast/income/#disposable>

Cost of childcare

- Differences in the average cost of childcare for children under three years old between England and the other nations of Great Britain are even greater this year due to the final expansion of entitlements for working parents in England.
- For those eligible for the working parent entitlement, part-time (25 hour) childcare in England is now theoretically free during term time, and the cost of full-time childcare has reduced by 39% since last year due to funded hours increasing from 15 to 30 per week.

Table 1 – Cost changes since 2025 for 50 hours nursery for children under 5 in England, including 30 hour working parent entitlement for all age groups

	Children aged under two			Children aged two			Children aged three and four		
	2026	2025	Price change	2026	2025	Price change	2026	2025	Price change
England	£148.82	£238.95	-38.90%	£140.72	£225.70	-38.60%	£132.72	£126.94	5.90%

- Costs for full-time childcare in Scotland increased by 5.3% for children aged under two, and by 8.4% for two-year-olds. Wales also saw increases, with costs climbing by 10.5% for children aged under two and by 9.5% for two-year-olds.
- Working parents of three- and four-year-olds in England and Wales are also eligible for 30 hours of funded childcare a week during term time. If they need to pay for 20 extra hours to take this up to a full-time place (50 hours a week), the average weekly price in a nursery is £132.72 in England, a 5.9% increase since last year, and £134.29 in Wales, a 6.4% increase.
- All three- and four-year-olds in Scotland can access 1,140 hours of funded childcare per year. This equates to 30 hours a week during term time, or about 22 hours if spread across the year. For a full-time place in a nursery (50 hours a week) in Scotland, families are paying on average £112.33 per week if receiving 30 hours of funded childcare and paying for 20 hours, an increase of 9.1%.
- The average price of an after-school club for a week is £69.38 in England, or £85.03 per week for a childminder to 6pm. In Scotland an after-school club averages £71.08 per week or £94.31 with a childminder. In Wales, the average price of an after-school club is £74.31 per week, or £81.81 for a childminder.



Is there enough childcare?

Table 2 - Childcare sufficiency defined as the combined sum of '100%' and '75% to 99%' of children, in England (% LAs)

	At least 75%	Total responses
Children under two (entitled to 30-hour funded entitlement for working families)	75%	137
Children under two (not entitled to any funded entitlement)	58%	137
Two-year-olds (entitled to 15-hour funded entitlement for Families Receiving Additional Support)	80%	137
Two-year-olds (entitled to 30-hour funded entitlement for working families)	79%	137
Two-year-olds (not entitled to any funded entitlement)	66%	137
Three- to four-year-olds (entitled to 15-hour universal funded entitlement)	85%	137
Three- to four-year-olds (entitled to 30-hour funded entitlement for working families)	83%	137
Children with SEND (early years)	44%	137
5- to 11-year-olds before school (e.g. breakfast club or childminder)	66%	136
5- to 11-year-olds after school until around 6pm (e.g. after school clubs or childminder)	64%	137
12- to 14-year-olds before school (e.g. breakfast club or childminder)	15%	136
12- to 14-year-olds after school until around 6pm (e.g. after school clubs or childminder)	13%	137
Children and young people with SEND (school age)	23%	134
Children of parents working full time (9am to 5pm on weekdays)	60%	136
Children of parents working atypical hours (outside 9am to 5pm on weekdays)	27%	137
Children living in rural areas (please leave this question blank if there are no rural areas in your local authority)	39%	72

- Local authorities across England, Scotland and Wales were asked to report on the percentage of children for whom they have sufficient childcare across a range of categories in terms of: '100%', '75% to 99%', '50% to 75%', '25% to 50%', 'Less than 25%' or 'Data not held or cannot tell'.
- Sufficiency is highest for the funded entitlements, with around 8 in 10 local authorities having enough places for at least three quarters of children in their area for all funded entitlements.
- Separating this year's question on funded entitlements into more detailed age groups, 'children under two' and 'two-year-olds' (previously a combined category), shows us that sufficiency increases with the age of children. For the working parent entitlement, 75% of local authorities have enough childcare for under twos, increasing to 79% for two-year-olds and peaking at 83% for three- and four-year-olds. Sufficiency for the 15-hour entitlement follows a similar pattern, increasing from 80% for the FRAS entitlement for two-year-olds, to 85% for the universal entitlement when children reach the age of three (see table 2).
- Sufficiency is lowest for before- and after-school childcare for older children, parents working atypical hours, families in rural areas and children of all ages with special educational needs and disabilities, though levels for children under five are higher than for those of school age.
- In Scotland, availability for three- and four-year-olds, all of whom are entitled to 1,140 funded hours per year, is high with 74% of LAs reporting enough places for at least three quarters of children. Sufficiency for most other categories in Scotland was not well enough known to draw a relevant conclusion.
- In Wales, 57% of local authorities have sufficient places for at least three quarters of children entitled to Flying Start, and others did not hold this information. Similarly to Scotland, sufficiency for other categories was not well known.

Parents' views and experiences of childcare

- Making friends and building confidence emerged as the most frequent benefit of attending childcare in our parent focus groups. Whilst primarily a benefit for their children, the groups also talked about the connections and community they had built with other parents and staff at their childcare setting.
- Parents saw the value of their child attending childcare through the skills their child had developed, including becoming more independent, increased language skills, and learning to take care of themselves. Parents saw this as key in helping their child be ready for school.
- When choosing childcare, an important consideration for parents was the people looking after their child. While not all parents looked for the same thing, they were very aware of how pressures on staff could translate into a different experience for their child and sought settings with low staff turnover, a positive atmosphere and staff who were happy in their role.
- Parents in the focus groups were unclear about funded entitlements and this was supported by findings from additional questions to local authorities, who reported that over half of all enquiries to their Family Information Services included confusion about entitlements. Frequent areas of confusion were around the entitlements being "free", about when children could start their entitlement, and about eligibility criteria.
- Examples were shared in the focus groups of childcare settings proactively helping parents to understand entitlements through visual, parent-friendly information. Where this was working well, it was greatly appreciated by parents.



Areas for action

The analysis clearly shows the disparity in access to early education for disadvantaged children whose parents do not qualify for extra government-funded childcare hours. This is at odds with school entitlements, and results in an age inequality for children. Low sufficiency and poor communications blight children's opportunities, particularly where they have SEND.

We call on all Governments in Great Britain to rebalance the system to enable all parents and carers to work and to ensure that children have the best start in life during their essential early years.

Immediate actions:

1. **Extend the working parent funded early education entitlement to children whose parents are in training or education, are migrants who meet the work criteria, or who are unable to work due to terminal illness.**
2. **Make the 15-hour funded entitlement for two-year-olds universal**, to remove the need for parents to navigate complicated criteria, increase take-up and eradicate the issue of overlap and gap between the two entitlements.
3. **Provide clearer communication on entitlements**, working directly with a diverse range of parents to coproduce simple, understandable messages.
4. **Further increase the early years pupil premium to bring it in line with the primary pupil premium** and support achievement of a good level of development for disadvantaged children.
5. **Ensure that new local authority-led proposals for school-based nurseries include plans for wraparound and holiday childcare**, to avoid exacerbating employment barriers for disadvantaged families.
6. **Update the funding model to ensure rates cover the true cost of provision** as part of the upcoming funding system review, to support sustainability of the sector and prevent costs being passed on to parents.
7. **Protect the rights of preschool children with SEND** by ensuring early years is a central consideration in the upcoming reform of the SEND system and that children's rights and experiences are equal across all types of provision.

Long term actions:

1. **Remove the parental work criteria from the 30-hour childcare entitlement**, giving all children an equal right to 30 hours per week of early education from the age of nine months until they start school, and introduce a single, means-tested co-payment system for families wishing to access additional hours, with families below the poverty line paying nothing.
2. **Extend the entitlement to 48 weeks per year**, to reflect the year-round need of families.
3. **Allow use of the childcare element of Universal Credit for reasonable additional charges** such as food and other consumables, bringing it in line with Tax-Free Childcare usage and removing barriers for low-income families.
4. **Work towards extending free meals in early years to all settings**, using the same criteria as free school meals.
5. **Safeguard access to provision for disadvantaged children** by extending the duty to accept children with an EHCP, and to give priority admission to looked-after and previously looked-after children, to all registered early years settings as a condition of receiving government funding.
6. **Create a workforce strategy** that addresses the issues of staff recruitment, retention and skills, with specific consideration of and action on childminders.
7. **Allocate separate and dedicated funding to LAs to support their role**, delinked from the rate paid to providers.

Introduction

This is the annual Childcare Survey for 2026. This year's data is based on surveys from local authorities in England, Scotland and Wales, that were returned to Coram Family and Childcare between October 2025 and December 2025. A total of 184 local authorities returned data generating a response rate of 89%. It also includes findings from three focus groups with parents, held in December 2025.

In addition, this year the report includes analysis of the cost of childcare since the survey began in 2001.

The methodology section at the end of the report provides further information on how the survey and focus groups were conducted and the findings analysed.

The report consists of four main sections: 1) 25 years of the Childcare Survey, 2) the cost of childcare, 3) the availability of childcare and 4) parents views and experiences of childcare. Information on the price and availability of childcare is broken down by nation and region (in England), by the age of child and the type of childcare. Based on the local authority survey data, we make recommendations for action, which can be found in the conclusion section.

Our Childcare Survey looks at the price of childcare before the support to help pay for childcare (Tax-Free Childcare or Universal Credit) is taken into account, as this allows us to track price changes over time and recognises that different families will also be eligible for different levels of support depending on their circumstances.

Since 2017, for three- and four-year-olds, we have asked about the cost of childcare assuming that families are using the funded childcare entitlements. Last year, the price questions for children under the age of three in England were changed to take account of the expansion of funded entitlements for working families which, at that time, gave eligible working parents 15 funded hours of childcare per week, for 38 weeks per year, from the term after their child turns nine months old. This year's questions were updated again to reflect the final stage of the expansion, rolled out in September 2025, which increased the entitlement to 30 funded hours per week.

For the first time, we have calculated the amount that families receiving an entitlement based on disadvantage criteria would need to pay, on top of their entitlement, to bring their hours up to a part-time place.

With the divergence of childcare entitlements across the nations of Great Britain, it has become increasingly difficult to present cost data together for all nations. As such, we have presented the cost findings for Scotland and Wales separately to England this year.

Last year's survey included revised questions on childcare sufficiency to give a more accurate picture of current circumstances. This year continues those questions with some further changes, including separating the question on childcare sufficiency for children with special educational needs and disabilities (SEND), additional support needs (ASN) or additional learning needs (ALN), into two – one for early years and one for school-aged children – to give more detailed information. Changes to the sufficiency questions for Welsh and Scottish local authorities were made in order to update terminology, and to the questions for English local authorities in order to reflect changes in funded entitlements.

In the second year of these questions we have seen an encouraging decrease in the number of local authorities in England responding 'data not held or cannot tell', boosting the reliability of the information. Rates of 'data not held or cannot tell responses' are higher this year in Wales, which is to be expected as local authorities draw near the end of their 5-year sufficiency assessment cycle. Rates for this response in Scotland, which has very different statutory requirements to England and Wales, have frequently been higher but are particularly high for several questions this year. As a result, it is not possible to draw conclusions for several categories of sufficiency in Scotland.

This year's section on parent views and experiences includes findings from additional questions to local authorities on the number, type and frequency of enquiries from parents that included confusion about the entitlements. This complements the rich discussion with parents in the focus groups on this topic, discussion which also covered what parents' look for in a childcare provider, and their perspective of the difference that attending childcare had made to their family. We hope you enjoy reading this section as much as we valued speaking with every parent who so generously gave their time.

In recent years there has rarely been a quiet time for the childcare sector and we reflect on this in the first section of the report, looking back over the key policy changes that have influenced where we are today. We also examine the changes in childcare costs over 25 years. This is based on nursery costs for children under the age of two in England as the survey did not begin collecting data on other age groups, provision types and nations until some years later.

The last 12 months has also had its share of changes. The Government's Best Start in Life strategy was published in July 2025, announcing the expansion of Family Hubs to every local area and outlining plans to improve children's development.

The strategy recognised the role and responsibility of government in shaping the childcare market, and the need for more diverse provision models such as social enterprises.

In hopeful news for families, it promised a commitment to simplifying the childcare system and improving take-up of the 15-hour entitlement for two-year-olds in Families Receiving Additional Support, previously known as the disadvantaged two-year-old entitlement and recently renamed 'Early Learning for 2-year-olds'. The latter commitment will be of particular importance in light of this year's figures, which showed a staggering drop of 10 percentage points in the number of children taking up the entitlement from the previous year. While it must be noted that some families with dual eligibility may be 'hiding' in the working parent entitlement numbers, experts agree^[1] this is unlikely to fully explain the decrease and that more must be done to both improve the data and to ensure disadvantaged children are not pushed out.

We have been pleased to support both government and local authorities with insight and good practice guidance to facilitate that aim this year and are committed to continuing this important focus, on behalf of those children with the quietest voice but the most to gain from early education.

In September 2025 the final phase of the expansion of government-funded entitlements for working parents in England was rolled out, giving more hours of funded childcare to a greater number of children than ever before.

Along with the tens of thousands of extra places created by private, voluntary and independent providers this year, 300 new school-based nurseries opened in the first phase of a government-funded expansion. This expansion has also been on a journey of change, with the second phase open to maintained nurseries and heavy priority given to applications in areas of disadvantage. Maintained settings, either standalone nurseries or school-based nurseries, are more likely to operate in areas of disadvantage and the most recent data from the Department for Education shows an interesting pattern, with over half of all three- and four-year-olds attending school-based or maintained nurseries being in receipt of the 15-hour universal entitlement, compared to only 36% of those attending a private provider. The opposite is true for children receiving the 30-hour working parent entitlement, with a much greater proportion of those attending private settings (53%) in receipt of this entitlement, compared to only 36% of those in maintained provision.

Phase three will see greater changes still, with responsibilities for proposals handed to local authorities. We called for a more focused curation of this programme in last year's survey and so are pleased to see its evolution to a more strategic and targeted approach.

Of course, a challenge remains in this model, and that is the question of wraparound and holiday care. Maintained and school-based nurseries typically follow the same operating patterns as schools and are less likely to be open before 9am or after 3pm, or outside of term time. Several have cited lack of demand for these extra hours from parents but, as heard in our focus groups, parents need available childcare to facilitate work, but need a job before they can afford to sign up for extra childcare hours. Careful thought must be given to these contexts, to ensure parents in disadvantaged areas are not unintentionally shut out of work. The same issue of circular causality applies to the funded entitlements, where non-working families must wait until their child is two, at the earliest, to receive 15 funded hours per week, compared to those eligible for the working parent entitlement, who can access twice the number of funded hours per week, up to 15 months earlier.

[1] <https://blogs.ucl.ac.uk/cepeo/2025/07/22/has-take-up-of-early-education-really-fallen-amongst-disadvantaged-two-year-olds/?https://ifs.org.uk/articles/what-you-need-know-about-new-childcare-entitlements>

September also brought the launch of the Education Select Committee's early years inquiry, and we were pleased to contribute to their first oral hearing in November. This was swiftly followed by the Budget and a moment that many have campaigned for tirelessly – an end to the two-child limit on welfare benefits. The importance of this in addressing child poverty and the impact on children's health, educational outcomes, and emotional wellbeing cannot be overstated.

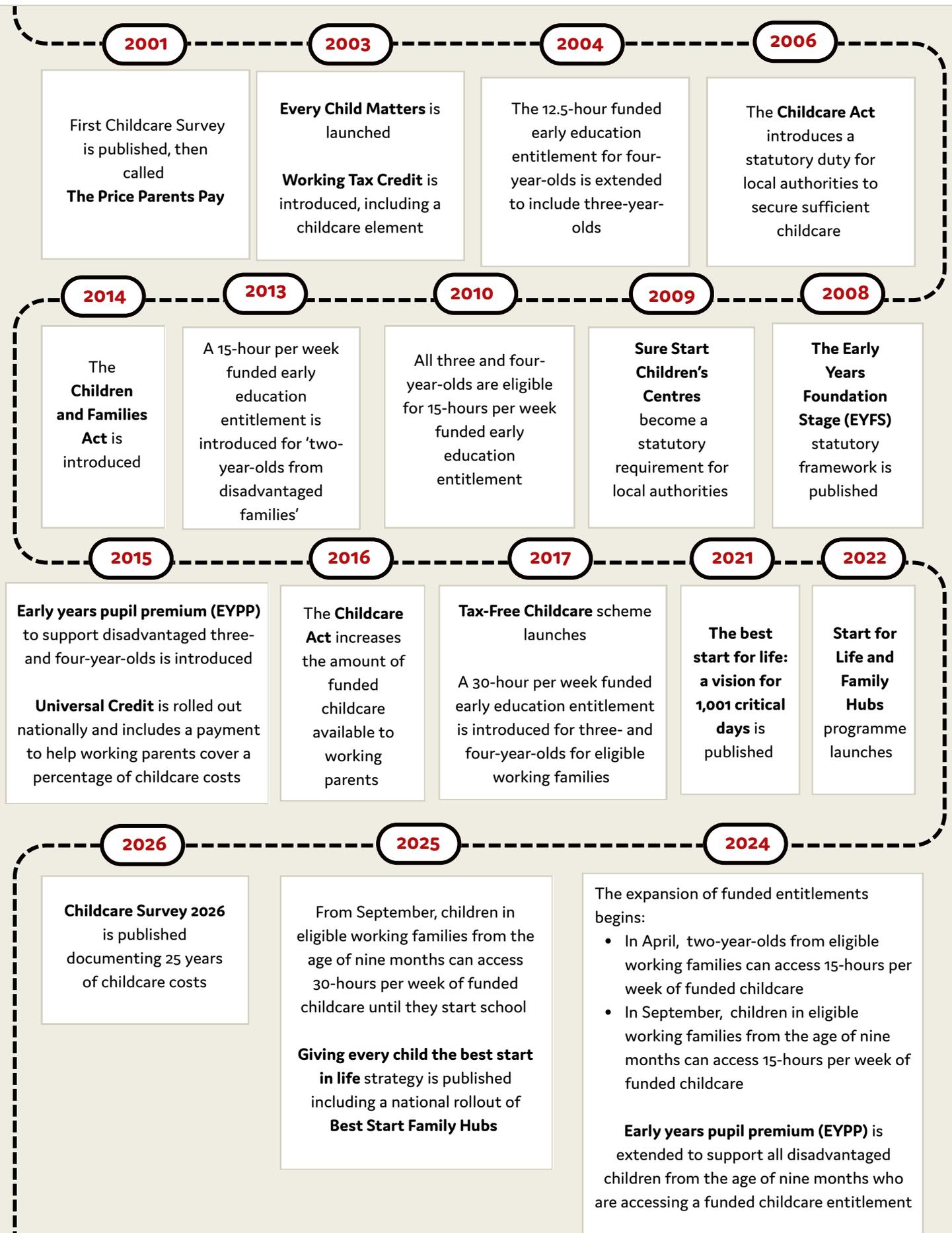
The publication of the Child Poverty strategy in December further confirmed this new focus and held a small change that was perhaps less expected – upfront childcare support through Universal Credit will be extended to those returning to work from parental leave. This is positive for all those going back to work after a baby but there is another Universal Credit childcare story developing: an unintended consequence of very good intentions to ensure families can access their childcare entitlements "for free". Statutory guidance was updated to state that additional charges to parents accessing funded entitlements must be voluntary. For those relying on childcare help through Universal Credit, charges no longer form part of the 'contract' with the childcare provider and are therefore no longer eligible for support. This puts both providers and parents in a difficult place and invites comparisons with Tax-Free Childcare support, which has no such restrictions. Outside of maintained settings, there is no access to free meals in early years to support those struggling with the cost of food, even for those who otherwise meet the criteria.

In February, plans for SEND reforms were announced in the 'Every child achieving and thriving' white paper, to a largely warm response in recognition of the growing need to change a system that does not work for many children with additional needs. Difference in the way early years settings are constituted present a challenge, with only maintained and school-based settings governed by education legislation. As the paper progresses, careful plans must be made to avoid any divide, and ensure that children with additional needs receive an equitable experience in early years, no matter what type of setting they attend.

The Government's intention and aim to build a better future for disadvantaged children is clear, and the steps so far should be celebrated. Now the task must be to properly examine the current systems, processes and structures to ensure they support those aims, and be prepared to change them to ensure that intention becomes a reality for families.



Childcare in England: A timeline of key events, 2001 to 2026



Section 1 - 25 years of the Childcare Survey

In 2001, our first report on the cost of childcare in England was published. Then called **The Price Parents Pay**, and produced by the Daycare Trust, both the report and organisation have evolved over time to become the Childcare Survey, and Coram Family and Childcare.

Since then, our survey has documented childcare costs every year, expanding to cover all of Great Britain, to include additional age categories and to report on the availability of childcare.

This 25-year summary of the Childcare Survey is focused on the cost of childcare for children under the age of two in England.

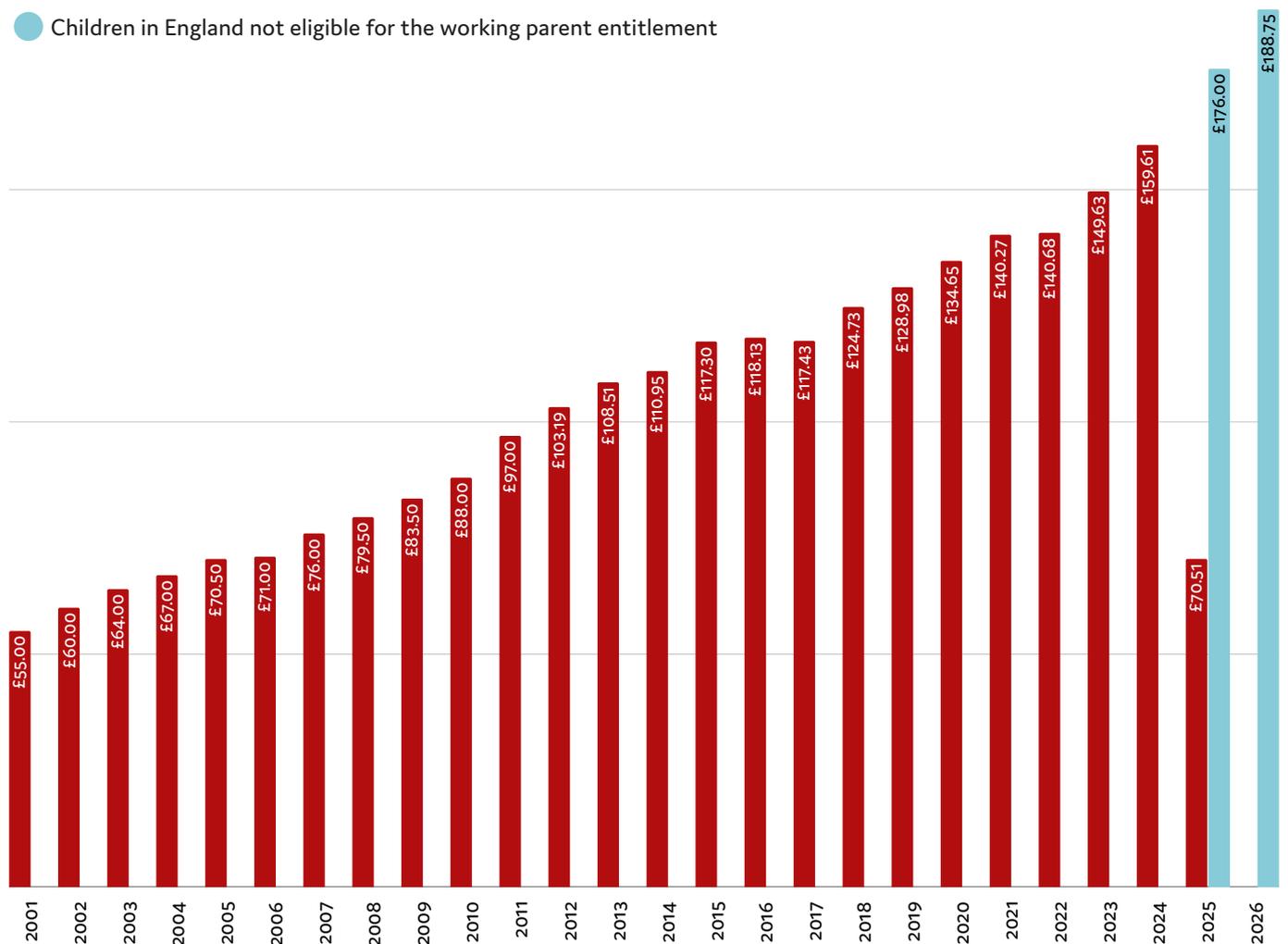
A. Changes in the cost of part-time (25 hours per week) childcare for children aged under two in England, over 25 years

The first years of the survey focused on the cost of childcare for children under two years old in England only. Using data collected through the survey each year, Figure 1 (below) shows the cost of a part-time (25 hour per week) place for a child under the age of two at a nursery, over time.

Costs split into two categories from 2025 due to the expansion of government-funded entitlements for eligible working parents in England. Last year's survey calculations included two costs, one for working parents eligible for 15 hours of funded childcare, and one for those who were not eligible. This year's survey is the first published since the final phase of the expansion, which increased the entitlement for eligible working parents to 30 hours per week, and as such 2026 again includes two costs.

Figure 1 - The cost per week for part-time childcare (25 hours) at a nursery for children aged under two in England (2001 to 2026)

- Children in England (including children eligible for the working parent entitlement after September 2024)
- Children in England not eligible for the working parent entitlement



Note: From September 2024 children from eligible working families were entitled to 15 hours of government-funded childcare from the age of nine months. This increased to 30 hours from September 2025.

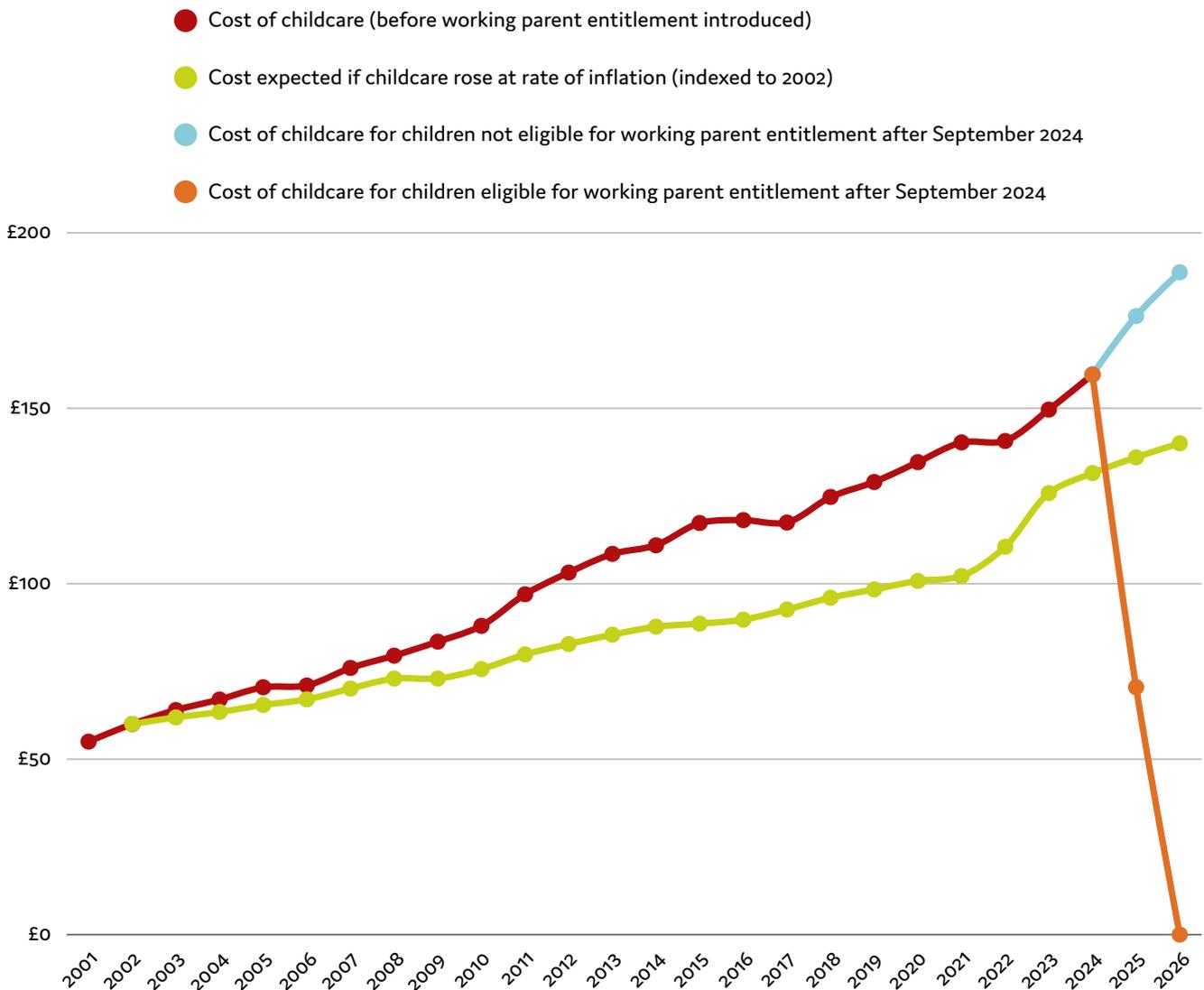
By 2018, the cost of part-time childcare had more than doubled since 2002, and by 2024 it had reached a peak of £160 per week. In September 2025 the final stage of the expansion of funded entitlements was rolled out. Children in eligible working families are now entitled to 30 hours per week funded childcare from the age of nine months until they start school, for 38 weeks per year. This means that a family eligible for 30 hours, needing only a part-time place during term time, will theoretically no longer have a cost to find. However, in practice, there may still be charges such as deposits (which must be refundable) or for consumables and activities (though these must be voluntary). It is important to note that most working families will need childcare for more than 38 weeks of the year and so will either pay full price during the other weeks or 'stretch' their entitlement

across the year, giving them fewer funded hours per week but for a greater number of weeks per year. A stretched 30-hour entitlement commonly gives a child 22 funded hours per week, leaving parents to cover the cost of 3 hours per week when using only a part-time place. For either scenario, this represents a significant reduction in the cost of a part-time place for working families.

B. Actual childcare costs compared to if childcare costs had risen in line with inflation

Using 2002 as a baseline^[2] we have calculated what the cost of part-time childcare would have been each year, had it increased in line with inflation. Figure 2 (below) shows this calculation (green line) along with the actual costs, over the last 25 years.

Figure 2 - The cost per week for part-time childcare (25 hours) at a nursery for children aged under two in England compared to the cost if childcare had risen in line with inflation (2001 to 2026)



[2] 2002 is used as the baseline for inflation calculations because data is not held on the cost for children under two for 2001. The first survey reported data on costs for children aged two only. We have included the two-year-old cost for 2001 as a representative data point only.

Note: Inflation calculated using Retail Price Index All Items Index. Available at: <https://www.ons.gov.uk/economy/inflationandpriceindices/timeseries/chaw/mm23>

Childcare costs have often increased above inflation for the year and have consistently stayed above the expected inflation-aligned cost. Before the introduction of the entitlement, the greatest absolute difference between actual and expected costs occurred in 2021 when part-time childcare prices reached £140; £38 more per week than the inflation-aligned cost.

As explained previously, costs split into two categories from 2025 due to the expansion of government-funded entitlements for eligible working parents in England. For families not eligible for the 30-hour entitlement, the cost of part-time childcare reached £187 per week this year; £47 more than the expected inflation-aligned cost.

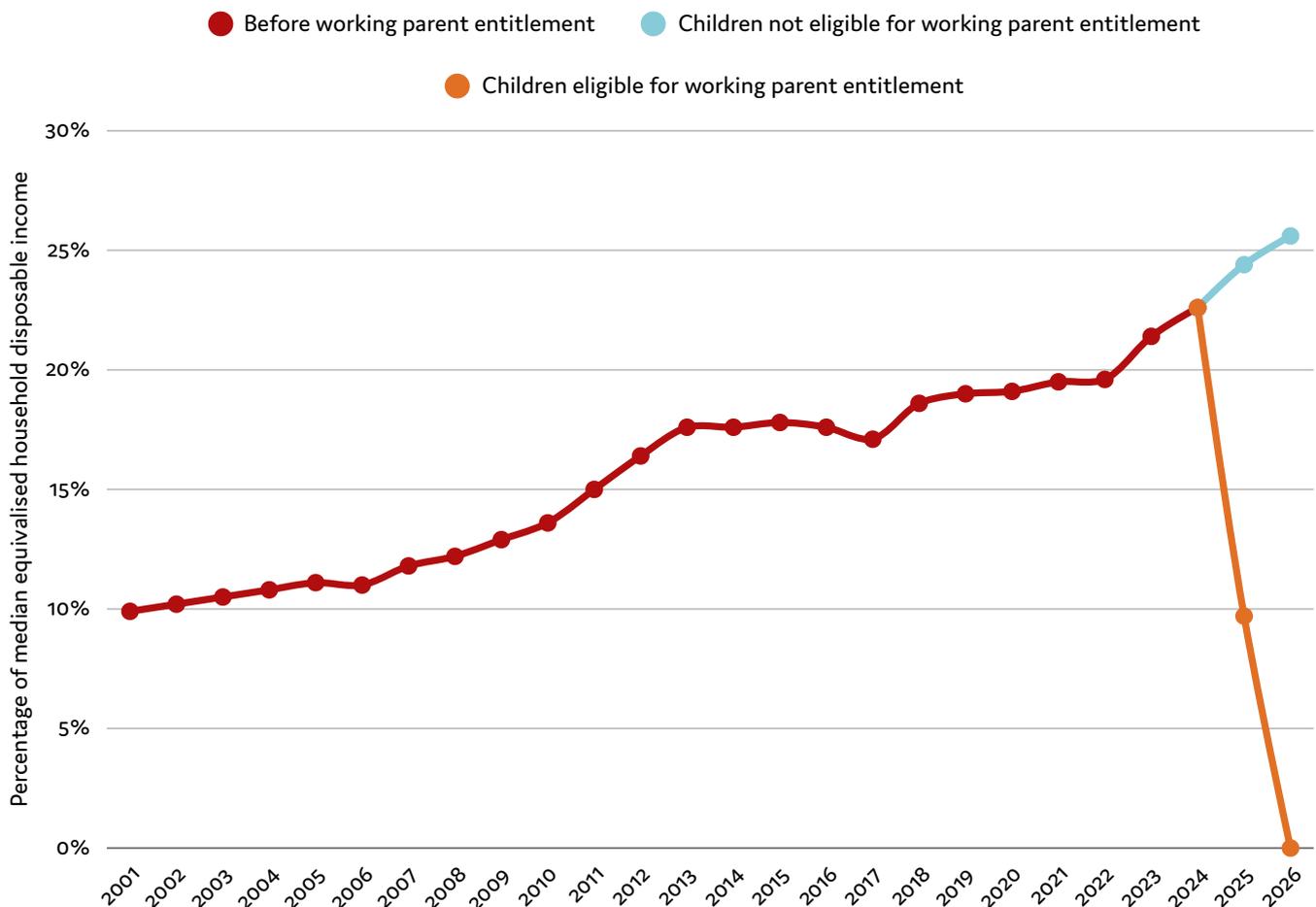
C. Childcare costs as a percentage of household income

Figure 3 (below) shows the percentage of household disposable income needed to cover the cost of part-time childcare for children under the age of two over the last 25 years.

When our survey began, families with young children using childcare were spending an average of 10% of their household income on a part-time place but this had more than doubled by 2024, reaching 22%. However, with the expansion of funded entitlements over the last two years, eligible working families have experienced a significant reduction in the percentage of their household income spent on childcare for children under the age of two. For these families, the percentage of household income spent on part-time childcare has fallen to 0%, while for others (who do not receive funded entitlements) the proportion of household income needed to pay for childcare has increased again.

It is also important to note that many families ineligible for the entitlements are likely to have lower incomes (below the median), potentially resulting in an even higher proportion of their household income being needed to pay for part-time childcare.

Figure 3 - The cost per week for part-time childcare (25 hours) at a nursery for children aged under two in England as a percentage of median equivalised household disposable income (2001 to 2026)



Note: Median household income calculated using Office for National Statistics data. Available at:

<https://www.ons.gov.uk/peoplepopulationandcommunity/personalandhouseholdfinances/incomeandwealth/bulletins/householddisposableincomeandinequality/financialyearending2024>

Note: Median household income for 2025 and 2026 has been estimated by applying projected growth figures from the Office for Budget Responsibility. Available at:

<https://obr.uk/forecasts-in-depth/the-economy-forecast/income/#disposable>

D. Changes in the cost of full-time (50 hours per week) childcare for children aged under two in England over 25 years

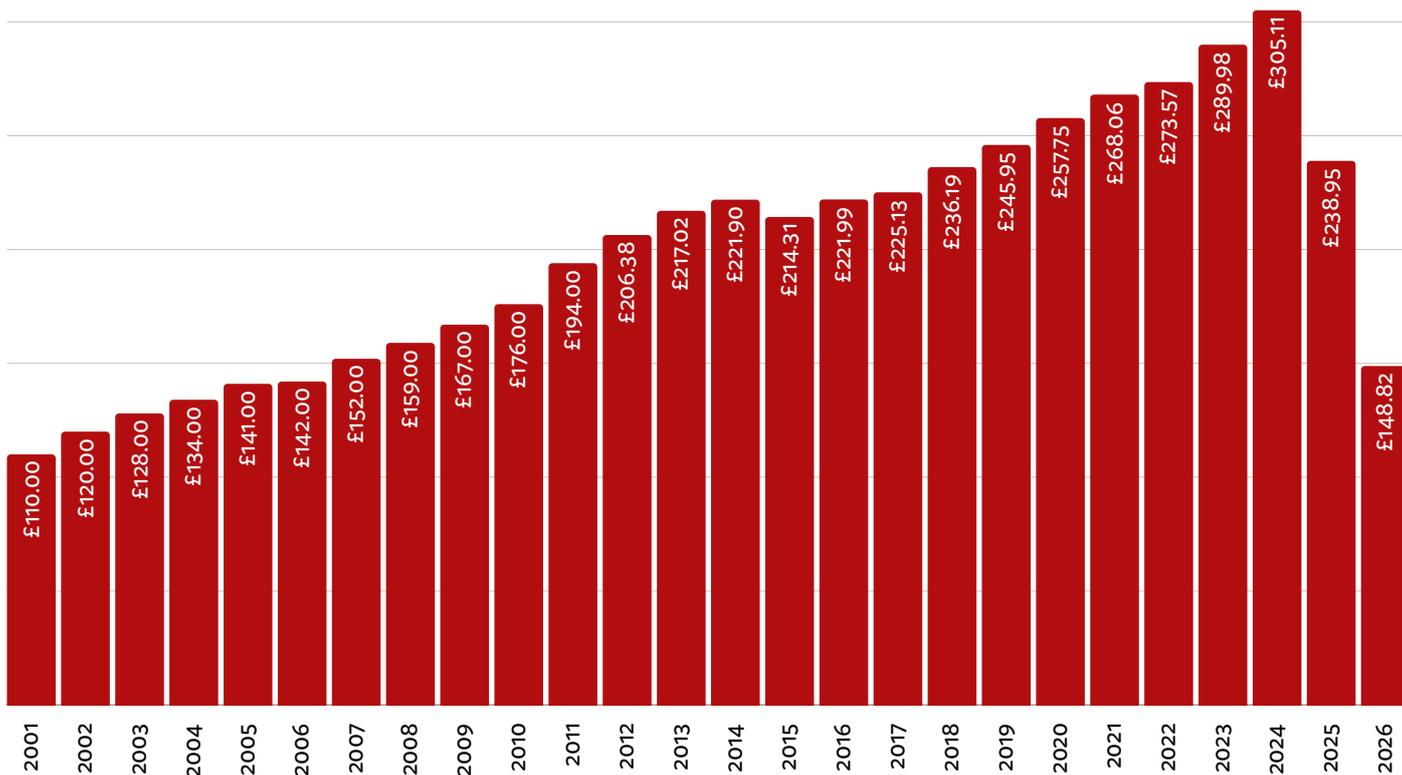
Most families working full-time need a full-time childcare place. Figure 4 (below) shows the cost of a full-time place (50 hours per week) in a nursery for a child under the age of two, over time.

In 2002 the weekly cost of full-time childcare was £120, increasing to over £200 per week by 2012 and climbing again to £305 per week by 2024. Over the last two years, with the expansion of the funded entitlements, eligible working families have experienced a 51% decrease in full-time childcare costs. However, these families still need to pay for an additional 20 hours (after the 30-hour funded entitlement) at a cost of £149 per week, for a full-time childcare place during term time.

As the entitlement is only for 38 weeks, parents who need childcare throughout the year will need to either stretch their entitlement over a greater number of weeks, giving them fewer funded hours (typically 22 hours) per week and a higher weekly cost, or pay full price outside of term time if the stretched option is not available to them. This outside of term time cost, without entitlements, was £305 per week in 2024, £341 in 2025 and is now £372 in 2026. These weekly costs also apply to families who are not eligible for funded entitlements but may need full-time childcare, such as those who are in education or training; working parents with no recourse to public funds; or families where either parent's income is above the eligibility limit.

Figure 4 - The cost per week for full-time childcare (50 hours) at a nursery for children aged under two in England (including working parent entitlement in 2025 and 2026) (2001 to 2026)

● Children in England (including children eligible for the working parent entitlement)



E. The availability of childcare

Whilst there has been a significant increase in funded childcare entitlements in England over the last 25 years, accessing childcare is not solely about cost and affordability. Over this time, our survey has also monitored the availability of childcare. How we think about sufficiency of childcare has changed over the last 25 years and as such our survey questions have changed and adapted alongside that.

These changes prevent direct comparison of sufficiency levels since 2001 but trends over recent years show a pattern of low

availability for particular children, including those with special educational needs and disabilities (SEND) and those whose parents work outside of standard 9am to 5pm hours. In contrast, the highest levels of sufficiency in recent years have been for the funded entitlements, reflecting changes in government policy and the area of focus and investment. Throughout every edition, the survey has provided important insight into how easy – or how difficult – it is for families to access early education and childcare.

Note: From September 2024 children from eligible working families were entitled to 15 hours of government-funded childcare from the age of nine months. This increased to 30 hours from September 2025.

Section 2 - Cost of childcare

This section describes the typical costs charged by childcare providers across Great Britain and discusses how they have changed since last year’s report. The data illustrates differences in childcare costs between England, Scotland and Wales, as well as between English regions. Most parents receive some support through Tax-Free Childcare or the benefits system to help pay these costs. We also take into account that many children are entitled to funded early education via universal or working parent entitlements. Many parents will therefore only need to pay for some of the hours of childcare that they use (see the glossary in the introduction).

A. Costs for part-time (25 hours a week) childcare for children aged under two

This section provides an overview of the cost of part-time (25 hours per week) childcare for children under two years old across Great Britain. The section also discusses the impact of the expansion of the funded entitlement for working parents in England, from 15 hours per week to 30 hours per week. It is important to note that only families eligible for the working parent entitlement will benefit from the reduced costs, while those who are not eligible continue to face rising costs (see Table 3).

Costs in England

In this year’s survey, when asking about costs in England, we have taken into account that children of this age group with working parents are now entitled to 30 funded hours per week. Theoretically, this means that working parents only needing a part-time place of 25 hours per week will not need to pay any fees. However, in practice, there may still be charges such as deposits (which must be refundable) or for consumables and activities (though these must be voluntary).

The following figures show costs of childcare in England for children under two, in nurseries and with childminders. These do not include costs for hours taken outside of term-time, meaning that costs during school holidays would be considerably higher. Alternatively, families may ‘stretch’ their entitlement across the year. A stretched 30-hour entitlement commonly gives a child 22 funded hours per week, leaving parents to cover the cost of 3 hours per week of a part-time place.

- After the expansion of the working parent entitlement in England to 30 hours per week (in term time), 25 hours of childcare for eligible children under two is essentially free during term time, although in practice, there may still be charges such as deposits (which must be refundable) or for consumables and activities (though these must be voluntary).
- For children in England not eligible for the working parent entitlement, families pay an average of £188.75 per week for 25 hours in a nursery, and £155.28 per week for 25 hours with a childminder.

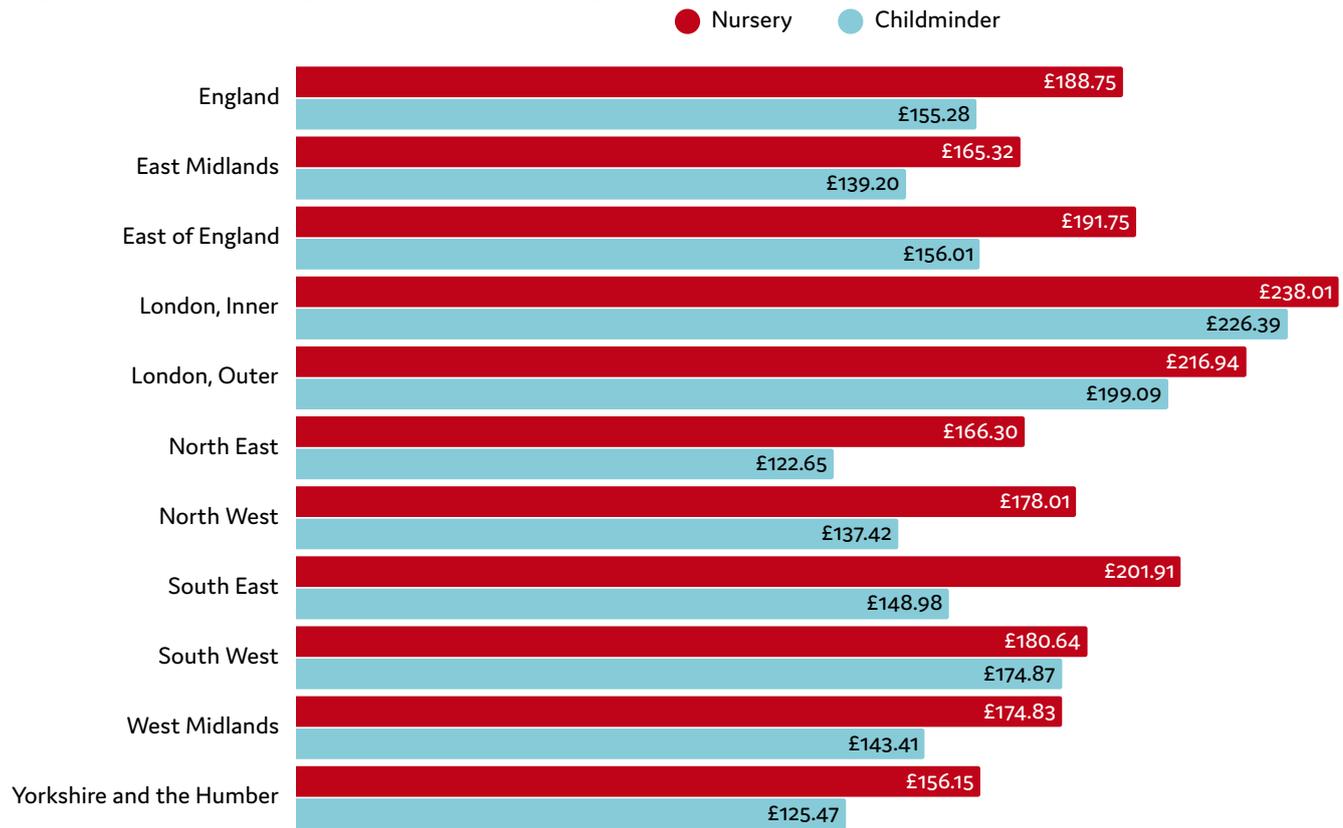
English regional differences:

- In the English regions, the cost of 25 hours of childcare per week for children under two (for those not eligible for the working parent entitlement) varies substantially. Nursery costs are highest in Inner London (£238.01), which is 52% higher than the cost in the least expensive region, Yorkshire and the Humber (£156.15). Childminder costs in Inner London (£226.39) are 85% higher than in the North East (£122.65).
- However, it is worth noting that some English regions contain fewer local authorities than others and therefore responses from a few larger authorities in those regions can make a noticeable difference to the regional figure.

Table 3 - Cost of 25 hours a week childcare in England for children under two at nurseries and childminders

		Nursery	Childminder
	Children eligible for 30 hour working parent entitlement in England	Children not eligible for 30 hour working parent entitlement in England	
England	Families only using 25 hours per week will not pay for any hours during term time if they are eligible for this entitlement, whether they are using a nursery or childminder. In practice, there may still be charges such as deposits (which must be refundable) or for consumables or activities (which must be voluntary).	£188.75	£155.28
East Midlands		£165.32	£139.20
East of England		£191.75	£156.01
London, Inner		£238.01	£226.39
London, Outer		£216.94	£199.09
North East		£166.30	£122.65
North West		£178.01	£137.42
South East		£201.91	£148.98
South West		£180.64	£174.87
West Midlands		£174.83	£143.41
Yorkshire and the Humber		£156.15	£125.47

Figure 5- Cost of 25 hours a week childcare in England for children under two at nurseries and childminders who are not eligible for 30 hour working parent entitlement in England



Costs in Scotland and Wales

Table 4 – Cost of 25 hours a week childcare in Scotland and Wales, for children under two at nurseries and childminders

	Nursery	Childminder
Scotland	£133.08	£145.65
Wales	£163.33	£136.96

- There are no funded entitlements for children aged under two in either Scotland or Wales.
- Nurseries in Wales cost more than in Scotland for children under two. The weekly average for those aged under two is £163.33 in Wales, 23% more than for those in Scotland (£133.08).
- However, childminders in Scotland are slightly more expensive than in Wales. The average weekly cost is £145.65 in Scotland, 6% more than the cost in Wales (£136.96). Scotland is also the only nation where a place with a childminder costs more than with a nursery, consistent with previous years.
- Costs for children not eligible for the working parent entitlement in England are considerably higher than for children in Scotland and Wales, for both nurseries and childminders.

Figure 6 - Cost of 25 hours a week childcare in Scotland and Wales, for children under two at nurseries and childminders



B. Costs for part-time (25 hours a week) childcare for children aged two

This section provides an overview of the cost of part-time (25 hours per week) childcare for children aged two years old across Great Britain.

Costs in England

As with children aged under two, the funded entitlement for working parents in England has been expanded from 15 hours per week to 30 hours per week (in term time), which means that theoretically, working parents only needing a part-time place of 25 hours per week will not need to pay any fees. However, in practice, there may still be charges such as deposits (which must be refundable) or for consumables and activities (though these must be voluntary).

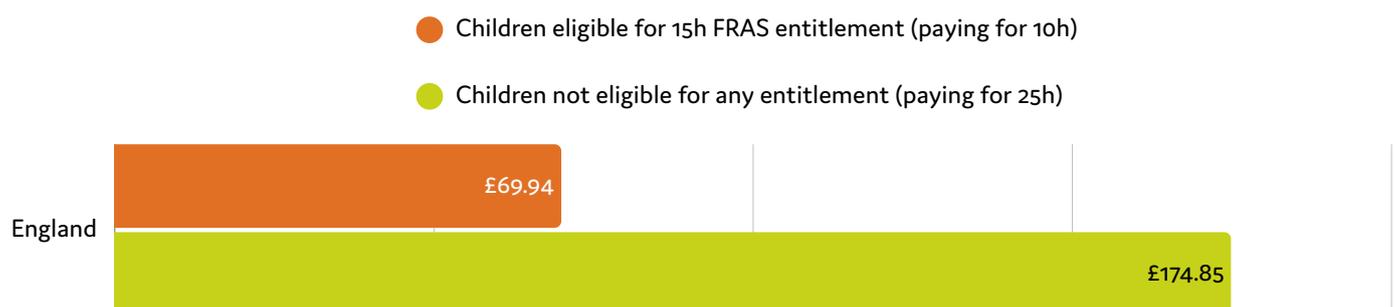
Children in England aged two may also be eligible for the 15 hours per week entitlement for Families Receiving Additional Support (FRAS), formerly known as the entitlement for disadvantaged children. Some children aged two will not be eligible for either entitlement, if their parents are working and earning more than the eligibility criteria for the FRAS entitlement, but not enough to be eligible for the working parent entitlement. For these children, costs continue to rise (see Table 5).

The following figures show costs of childcare in England for children aged two, in nurseries and with childminders. These do not include the costs for childcare needed outside of term-time, meaning that the costs for families during school holidays would be considerably higher.

Table 5 - Cost of 25 hours a week childcare in England for children aged two, at nurseries and childminders

	Children eligible for 30 hour working parent entitlement	Nursery		Childminder	
		Children eligible for 15h FRAS entitlement (paying for 10h)	Children not eligible for any entitlement (paying for 25h)	Children eligible for 15h FRAS entitlement (paying for 10h)	Children not eligible for any entitlement (paying for 25h)
England	Families only using 25 hours per week will not pay for any hours during term time if they are eligible for this entitlement, whether they are using a nursery or childminder. In practice, there may still be charges such as deposits (which must be refundable) or for consumables or activities (which must be voluntary).	£69.94	£174.85	£60.67	£151.67
East Midlands		£63.61	£159.02	£54.38	£135.96
East of England		£70.27	£175.67	£64.64	£161.61
London, Inner		£88.87	£222.18	£86.81	£217.02
London, Outer		£85.60	£213.99	£76.17	£190.43
North East		£63.64	£159.10	£53.32	£133.30
North West		£63.20	£158.01	£54.66	£136.66
South East		£73.84	£184.60	£58.88	£147.21
South West		£65.93	£164.83	£60.81	£152.01
West Midlands		£68.50	£171.26	£57.24	£143.10
Yorkshire and the Humber		£61.51	£153.78	£50.13	£125.34

Figure 7 - Cost of 25 hours a week childcare in England for children aged two at nurseries



- As with children under two, the expansion of the working parent entitlement in England to 30 hours per week means that 25 hours of childcare for eligible children aged two is essentially free during term time, barring charges such as registration fees (which must be refundable) or charges for consumables or activities (which must be voluntary).
- For children aged two in England eligible for the 15 hour per week FRAS entitlement, parents pay an average of £69.94 per week for 25 hours in a nursery, and £60.67 per week for 25 hours with a childminder.
- For children aged two not eligible for either entitlement, the cost of 25 hours of childcare per week is £174.85 in a nursery and £151.67 with a childminder.

Costs in Scotland and Wales

Table 6 – Cost of 25 hours a week childcare in Scotland and Wales for children aged two, at nurseries and childminders (without entitlements)

Region	Nursery	Childminder
	Children not eligible for any entitlement (paying for 25 hours)	Children not eligible for any entitlement (paying for 25 hours)
Scotland	£133.30	£145.25
Wales	£166.01	£138.02

- In Scotland, some children aged two are eligible for the 1,140-hour (per year) entitlement, which is the equivalent of 30 hours of funded care per week. For eligible children, there is essentially no cost for 25 hours of care, although families may still have to pay charges for (refundable) registration fees or activities (which must be voluntary).
- For children in Scotland aged two who are not eligible for the 1,140-hour entitlement, 25 hours of childcare costs on average £133.30 in a nursery and £145.25 with a childminder.
- Children in Wales aged two pay, on average, £166.01 for 25 hours of care in a nursery, and £138.02 with a childminder.

- Some children in Wales are eligible for 12.5 hours of childcare per week under the Flying Start programme. For these children, the cost of 25 hours of childcare per week are halved, equating to £83.01 in a nursery and £69.01 with a childminder.
- Costs for children not eligible for the working parent entitlement in England are higher than for children not eligible for entitlements in Scotland and Wales, for both nurseries and childminders (see table 6).
- Nurseries in Wales cost more than in Scotland for children aged two. The weekly average for those aged two (and not eligible for Flying Start) is £166.01 in Wales, 25% more than for those in Scotland (£133.30).
- As with last year’s report, childminders in Scotland are slightly more expensive than in Wales. The average weekly cost is £145.25 in Scotland, 5% more than the cost in Wales (£138.02).

Figure 8 - Cost of 25 hours a week childcare in Scotland and Wales for children aged two, at nurseries and childminders (without entitlements)



C. Costs for full-time (50 hours a week) childcare for children aged under three

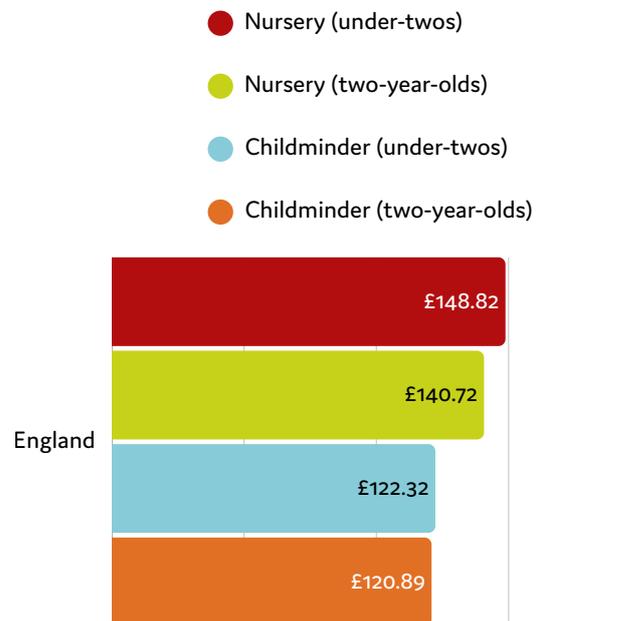
Nursery and childminder costs in England

Historically, the cost of full-time childcare (50 hours per week) was slightly less than twice the cost of part-time care (25 hours per week) due to providers passing on economies of scale to parents. However, our past two surveys have shown that since the expansion of funded childcare in England, this is no longer the case. While the overall cost of full-time childcare in England has decreased on average since last year, the reduction has not been as substantial as the decrease for part-time places.

When asking about costs in England, this year we have taken into account that children of this age group with working parents are now entitled to 30 funded hours per week, up from 15 funded hours per week last year. Parents who want to access additional hours will therefore only need to pay for some of the hours of childcare that they need. We have not included costs for children who are not eligible for the 30 hours working parent entitlement, as there are only a small number of circumstances in which a family not eligible for the 30-hour entitlement would be accessing full-time childcare.

- In England, nursery costs are higher on average than childminder costs. For example, the average cost for 50 hours of nursery care per week for a child under two is £148.82, 22% more than for a childminder (£122.32) (see figure 8).
- Generally, the cost of 50 hours per week of childcare is slightly higher for children under two compared to those aged two. Nursery costs for children under two are 6% higher than for children aged two, while childminder costs are 1% higher for children under two than for children aged two.

Figure 9 - Cost of 50 hours a week childcare for children under three at nurseries and childminders after working parent entitlements in England have been taken into account (parents paying for 20 hours per week)



English regional differences:

- Within the English regions, the cost of a full-time nursery place for children aged under two is 46% higher in Inner London (£185.10) than Yorkshire and the Humber (£126.38).
- For nursery places for children aged two, the highest costs are again in Inner London at £180.69, 46% higher than the North West (£123.50).
- For all the English regions, childminder costs are cheaper than nursery costs for 50 hours a week. The highest costs are again seen in Inner London for those aged under two (£179.83) and for two-year-olds (£173.81).

Table 7 – Cost of 50 hours a week childcare for children under three at nurseries and childminders after working parent entitlements in England have been taken into account (parents paying for 20 hours per week)

	Nursery		Childminder	
	Under two	Two	Under two	Two
England	£148.82	£140.72	£122.32	£120.89
East Midlands	£127.70	£129.80	£102.71	£110.05
East of England	£154.56	£140.83	£125.03	£129.44
London, Inner	£185.10	£180.69	£179.83	£173.81
London, Outer	£171.39	£172.62	£154.50	£150.31
North East	£140.30	£125.81	£106.33	£107.05
North West	£135.54	£123.50	£108.06	£107.88
South East	£161.28	£151.68	£118.43	£117.02
South West	£145.34	£133.19	£127.13	£122.69
West Midlands	£141.79	£137.51	£118.11	£115.15
Yorkshire and the Humber	£126.38	£123.90	£100.74	£100.25

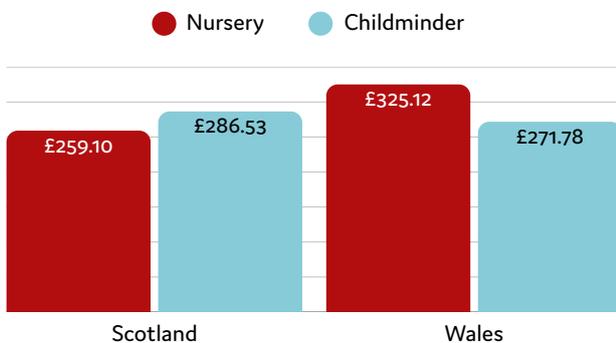
Nursery and childminder costs in Scotland and Wales:

- Neither Scotland or Wales have entitlements equivalent to the 30 hours working parent entitlement in England. We have not taken Flying Start in Wales into account in these calculations.
- In Scotland, 50 hours of childcare in a nursery for a child aged under two costs £259.10, while the cost for children aged two is marginally more, at £259.68 (see table 8).
- Childminders in Scotland are more expensive than nurseries, with 50 hours of childcare with a childminder for a child aged under two costing £286.53 and the cost for a child aged two being £290.65.
- In Wales, 50 hours of childcare in a nursery for a child aged under two costs £325.12, and as in Scotland, the cost for children aged two is slightly higher (£329.84).
- Childminders in Wales are cheaper than nurseries, with 50 hours of childcare with a childminder costing £271.78 for a child aged under two and £270.35 for a child aged two.

Table 8 – Cost of 50 hours a week childcare for children under three at nurseries and childminders in Scotland and Wales

Region	Nursery		Childminder	
	Under two	Two	Under two	Two
Scotland	£259.10	£259.68	£286.53	£290.65
Wales	£325.12	£329.84	£271.78	£270.35

Figure 10 – Cost of 50 hours a week childcare for children under two at nurseries and childminders in Scotland and Wales



D. Costs for childcare for children aged three and four

When asking about childcare costs for three- and four-year-olds, we take into account that all children of this age group in England, Scotland and Wales are entitled to some funded early education before they start school. Parents who want to access additional hours will therefore only need to pay for some of the hours of childcare that they need.

Costs in England

The following figures show costs of childcare in England for children aged three and four, in nurseries and with childminders. These do not include costs that childcare hours needed outside of term-term incur for families, meaning that costs during school holidays would be considerably higher.

- For 25 hours of childcare per week, children aged three and four in England who are not eligible for the working parent entitlement (but still receive the 15 hour universal entitlement) pay an average of £67.20 for a nursery and £59.19 with a childminder.
- For 50 hours of childcare per week, children in England eligible for the working parent entitlement pay, on average, £132.72 per week for 50 hours of care in a nursery and £116.37 per week with a childminder.
- Part-time (25 hours) nursery care in England is 14% more expensive than with a childminder, and full-time (50 hours) nursery care is also 14% more expensive than with a childminder.

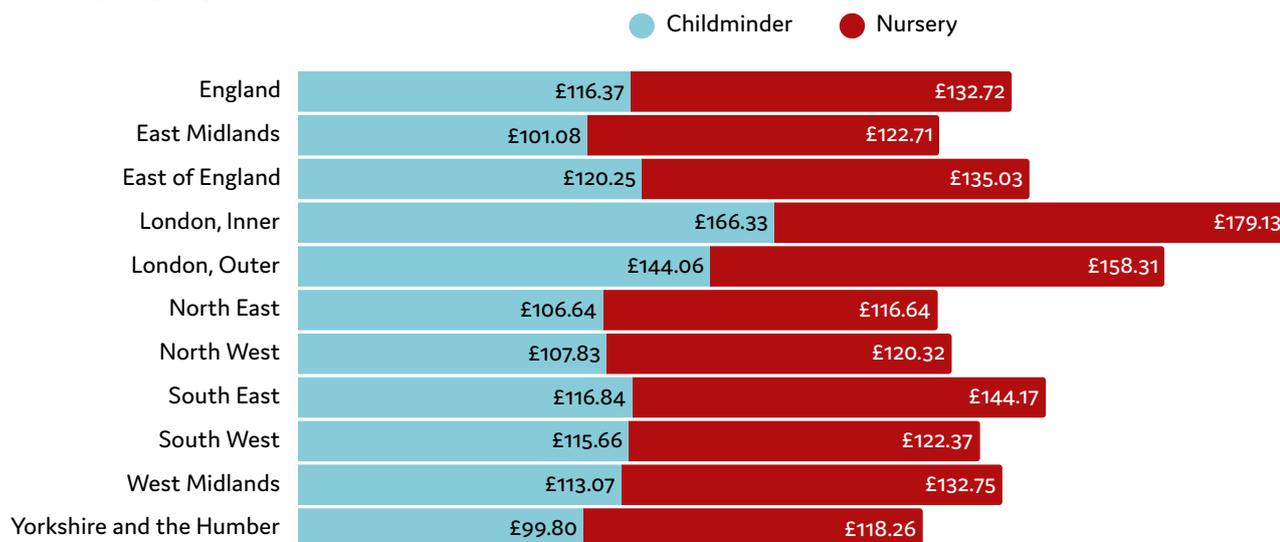
Table 9 - Cost of 25 and 50 hours a week childcare for three- and four-year-olds at nurseries and childminders in England, after entitlements have been taken into account

	25 hours a week, including universal entitlement (paying for 10 hours)		50 hours a week, including extended entitlement in England (paying for 20 hours)	
	Nursery	Childminder	Nursery	Childminder
England	£67.20	£59.19	£132.72	£116.37
East Midlands	£62.07	£50.05	£122.71	£101.08
East of England	£67.33	£60.24	£135.03	£120.25
London, Inner	£86.54	£82.27	£179.13	£166.33
London, Outer	£82.67	£75.87	£158.31	£144.06
North East	£58.38	£53.37	£116.64	£106.64
North West	£61.70	£54.66	£120.32	£107.83
South East	£71.97	£59.10	£144.17	£116.84
South West	£61.45	£58.30	£122.37	£115.66
West Midlands	£66.45	£56.44	£132.75	£113.07
Yorkshire and the Humber	£58.69	£49.97	£118.26	£99.80

Figure 11 - Price of 25 hours a week childcare for three- and four-year-olds at nurseries and childminders in England, after entitlements have been taken into account



Figure 12 - Price of 50 hours a week childcare for three- and four-year-olds at nurseries and childminders in England, after entitlements have been taken into account



English regional differences

- The cost of a part-time nursery place (25 hours a week) for three- and four-year-olds is highest in Inner London at £86.54, 48% more than the lowest cost of £58.38 in the North East.
- Inner London also has the highest cost for 25 hours with a childminder (£82.27), 67% higher than the lowest cost of £49.97 in Yorkshire and the Humber.
- A similar pattern is seen for full-time places (50 hours a week). In Inner London, a full-time nursery place costs £179.13 and a childminder place costs £166.33.
- The North East has the lowest full-time costs for a nursery place, at £116.64, while Yorkshire and the Humber has the lowest full-time costs with childminders, at £99.80.

Costs in Scotland and Wales

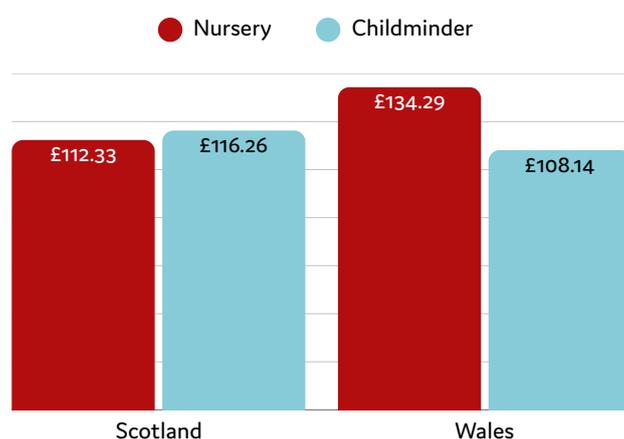
- In Wales, part-time nursery care is £99.05, 22% more expensive than with a childminder (£81.08), and full-time nursery care (£134.29) is 24% more expensive than with a childminder (£108.14).
- In Scotland, full-time care with a childminder costs £116.26, 3% more expensive than full-time nursery care (£112.33).
- In Scotland, there is no cost for 25 hours of childcare for three- and four-year-olds as this is completely covered by the 1,140-hour per year entitlement.

Table 10 - Costs of 25 and 50 hours a week childcare for three- and four-year-olds at nurseries and childminders in Scotland and Wales

	25 hours a week, including the 10 hour universal entitlement in Wales (paying for 15 hours)		50 hours a week, including the Childcare Offer for Wales (paying for 20 hours) and 1,140-hour entitlement in Scotland (paying for 20 hours)	
	Nursery	Childminder	Nursery	Childminder
Scotland	N/A*	N/A*	£112.33	£116.26
Wales	£99.05	£81.08	£134.29	£108.14

*Please note that in table 8, there is no cost for 25 hours a week childcare in Scotland since this is entirely covered by the 1,140-hour per year entitlement.

Figure 13 - Costs of 50 hours a week childcare for three- and four-year-olds at nurseries and childminders in Scotland and Wales



E. Changes in childcare costs for children under five, since 2025

In England, the funded childcare entitlement for working parents increased from 15 hours per week to 30 hours per week in September 2025. This makes 25 hours of childcare essentially free (excluding other costs such as registration fees, consumables etc.), and so the table below shows the cost change for children under two not eligible for the working parent entitlement, and for children aged two who are not eligible for the working parent entitlement, but are eligible for the FRAS entitlement.

For children in England aged two or under, who are not eligible for the working parent entitlement, costs have increased since 2025. This is also the case for children aged three to four. Similarly, costs have risen across all age groups in Scotland and Wales. The greatest increase was seen in Wales, for children aged two (8.7%).

Table 11a – Cost changes since 2025 for 25 hours nursery for children under 5 in England, not eligible for working parent entitlement

	Children aged under two (not entitled to working parent entitlement)	Children aged two	Children aged three and four (children only entitled to universal 15h entitlement)
England	4.60%	4.80%	4.90%

Table 11b – Cost changes since 2025 for 25 hours nursery for children under 5 in Scotland

	Children aged under two	Children aged two (not entitled to 1,140-hour entitlement)	Children aged three and four (with universal entitlement to 1,140 hours)
Scotland	5.10%	7.90%	N/A

Table 11c – Cost changes since 2025 for 25 hours nursery for children under 5 in Wales

	Children aged under two	Children aged two	Children aged three and four
Wales	8.50%	8.70%	7.70%

- This year, we have not included cost changes for Great Britain overall. This is because the differences in policy between England, Scotland, and Wales are now so extensive that an overall Great Britain figure is no longer useful.
- As mentioned above, the introduction of the new entitlement for working parents in England has made part-time childcare of 25 hours per week essentially free for eligible children, apart from other costs such as registration fees (which must be refundable) and charges for consumables (which must be optional).
- For children in England aged under two who are not eligible for this entitlement, costs have increased by an average of 4.6% since last year. This is similar to the increase for children aged two who are only eligible for the FRAS entitlement (4.8%) and for children aged three and four using the 15 hour universal entitlement (4.9%).
- Scotland experienced a 5.1% increase in cost for children aged under two and 7.9% for children aged two. There is no cost for children aged three and four, because the 1,140-hour entitlement covers the cost of part-time childcare.
- Wales saw increases across all age groups, with an 8.5% rise for children under two years old, an 8.7% rise for two-year-olds, and a 7.7% rise for three- and four-year-olds using the universal entitlement.

Table 12a – Cost changes since 2025 for 50 hours nursery for children under 5 in England, including 30 hour working parent entitlement for all age groups

	Children aged under two	Children aged two	Children aged three and four
England	-38.90%	-38.60%	5.90%

Table 12b – Cost changes since 2025 for 50 hours nursery for children under 5 in Scotland

	Children aged under two	Children aged two (not entitled to 1,140-hour entitlement)	Children aged three and four (with universal entitlement to 1,140 hours)
Scotland	5.30%	8.40%	9.10%

Table 12c – Cost changes since 2025 for 50 hours nursery for children under 5 in Wales

	Children aged under two	Children aged two	Children aged three and four (entitled to Childcare Offer for Wales)
Wales	10.50%	9.50%	6.40%

- The expansion of the working parent entitlement from 15 hours per week to 30 hours per week for children aged under three in England led to a decrease in cost (for eligible children) of 38.9% for under-twos and 38.6% for two-year-olds (see table 9a).
- By contrast, costs for three- and four-year-old places continued to increase in England, up 5.9% since 2025.
- Both Scotland and Wales experienced increased costs across all age groups.

F. Comparing costs for three- and four-year-olds, two-year-olds and under-twos in England (working parent entitlements)

Table 13 compares the cost of the average part-time (25 hours a week) and full-time (50 hours a week) nursery place in England for under-fives who are entitled to funded childcare for working parents, versus the same nursery places for children who do not have access to this funded entitlement. We have included any universal entitlements in England (currently, only the 15-hour universal funded entitlement for three- and four-year-olds) to highlight the difference the funded entitlement makes for working families.

- With the expansion of the working parent entitlement to cover 30 hours per week, a part-time nursery place now has no cost (except for additional charges such as registration fees and consumables).
- Without the working parent entitlement, the average part-time nursery place for a child aged under two is £188.75 per week, compared to £174.85 per week for a child aged two.
- For three- and four-year-olds not entitled to funded childcare for working parents, a part-time nursery place costs £67.20. This is much lower than the cost for under-twos and two-year-olds because all children aged three and four are entitled to 15 hours per week of funded childcare.
- Before September 2025, the average cost of a 50-hour nursery place was much lower for children aged three and four than for children aged two and under, due to the working parent entitlement only covering 15 hours for children aged two and under compared to 30 hours for children aged three and four.
- After the expansion of the working parent entitlement for children aged two and under, the average cost of a 50-hour nursery place for eligible under-twos (£148.82) and two-year-olds (£140.72) is now broadly similar to that for children aged three and four (£132.72).

Table 13 - Cost difference for 25 and 50 hours a week in a nursery with and without funded entitlements for working parents

	Part-time (25 hours a week)			Full-time (50 hours a week)		
	Under-twos	Two-year-olds	Three- and four-year-olds	Under-twos	Two-year-olds	Three- and four-year-olds
Including funded entitlements for working parents	N/A	N/A	N/A	£148.82	£140.72	£132.72
Without funded entitlement for working parents	£188.75	£174.85	£67.20	£372.06	£351.81	£331.79

G. Costs for school-age childcare

Childminders and after-school clubs offer childcare to 5- to 11-year-olds after school, during term time. The costs featured in this section do not include the costs that parents will face if they are also paying for childcare before school, which is often necessary for parents working typical 9am to 5pm hours.

Table 14 - Weekly costs of an after-school club or childminder for children aged 5 - 11

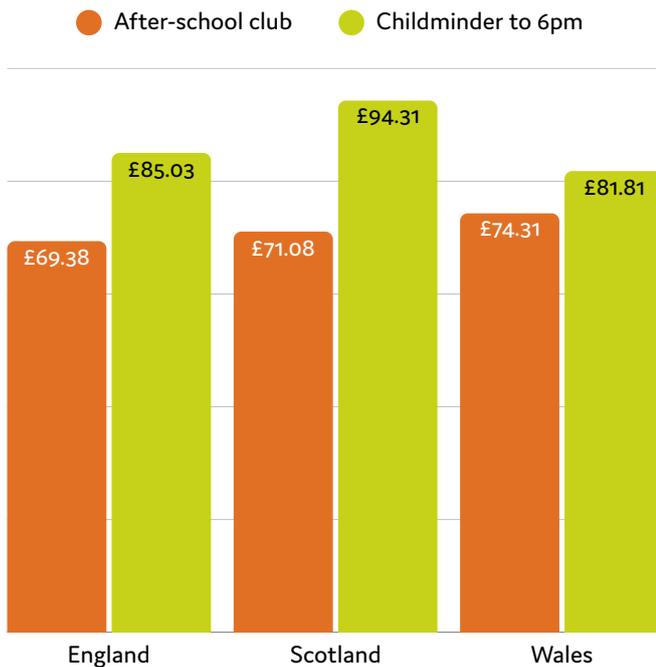
	After-school club	Childminder to 6pm
England	£69.38	£85.03
Scotland	£71.08	£94.31
Wales	£74.31	£81.81
East Midlands	£71.09	£79.27
East of England	£74.12	£91.73
London, Inner	£68.07	£131.57
London, Outer	£72.66	£116.95
North East	£69.66	£77.34
North West	£54.57	£70.49
South East	£83.93	£89.31
South West	£64.85	£84.79
West Midlands	£75.11	£77.88
Yorkshire and the Humber	£60.19	£66.57

After-school club and childminder costs in Great Britain:

- This year, the average cost of an after-school club for a week is £69.38 in England, compared to £85.03 for a childminder to 6pm per week (table 14).
- The most substantial difference is in London, where after-school clubs are often subsidised by the local authority.
- Costs for after-school clubs are higher in Wales (£74.31) than in England (£69.38) and Scotland (£71.08), while childminder costs are highest in Scotland (£94.31) and lowest in Wales (£81.81).



Figure 14 - Weekly costs of an after-school club or childminder for children aged 5 - 11



As well as using formal after-school clubs, parents may also use activity clubs after school as childcare. Costs for this are not captured in our survey. Because clubs providing a specific activity such as football or dance for children over eight do not have to be registered and regulated as childcare by Ofsted, they are not officially counted as childcare, and so parents will not usually be able to pay for them using Tax-Free Childcare or childcare support through the benefits system. Additionally, they usually do not offer enough hours of care per week, or for enough weeks per year, to provide reliable childcare for working parents.

English regional differences:

- The most expensive region for after-school clubs is the South East (£83.93), which is 54% higher than the lowest cost found in the North West (£54.57).
- The cost difference is even more pronounced for childminders, with Inner London (£131.57) being 98% higher than Yorkshire and the Humber (£66.57).
- The difference in cost between after-school clubs and childminders is particularly notable in Inner London, where a childminder (£131.57) costs 93% more than an after-school club (£68.07). Again, this difference is likely due to after-school costs being subsidised by local authorities.
- In London, some local authorities have been running after-school clubs in-house for some time, bringing down the average cost in an otherwise high-cost area. Childminders are less likely to be subsidised, and so the cost differences between childminders and after-school clubs is likely to be greater in regions where subsidised after-school clubs are more common.



Section 3 - Childcare sufficiency - is there enough childcare?

This section outlines the legal duties on local authorities around monitoring the local childcare market and then presents data on whether there is enough childcare across Great Britain.

Last year, we changed the questions we asked local authorities about childcare sufficiency in order to increase the accuracy and reliability of data. This year we have made further small changes to the survey questions, which are outlined below.

A. Childcare sufficiency - legal duties

Local authorities are required to manage the market for childcare in their local area, which means they need to know whether enough childcare is available for key groups. The precise rules vary between the nations of Great Britain:

- In England, local authorities have to audit childcare sufficiency annually, including considering the funded early education entitlements, childcare for school age children, disabled children, and different types of families.
- In Scotland, local authorities have a statutory duty to consult with parents on the delivery of early education and childcare, and to publish a plan based on the results of their consultation.
- Welsh local authorities were required to produce a sufficiency assessment and action plan in 2017 and every five years thereafter, and report to the Welsh government annually through a progress update.

As these duties vary across different parts of the UK, we have presented sufficiency data separately for the three nations. The data is based on local authorities' assessments at the time of the survey, which may differ from their published Childcare Sufficiency Assessments if the local situation has changed since this was last published.

B. Childcare sufficiency in England

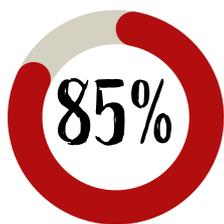
Local authorities were asked to report the percentage of children in their area for whom they have enough childcare. This year, we separated the question on childcare sufficiency for children with special educational needs and disabilities (SEND) into two: early years children with SEND, and school-age children and young people with SEND, allowing for more detailed information. We also updated the question about children aged two and under eligible for the working parent entitlement to reflect the final expansion to 30 hours (expanded from 15 hours last year) and separated this into two age categories.

- Availability of places for children eligible for funded entitlements increases with the age of children. Sufficiency for those eligible for the working parent entitlement increases by 4 percentage points between under twos and two-year-olds, and by 4 percentage points again for three- and four-year-olds. This is similarly true for the 15-hour entitlements, with sufficiency for the universal offer for three and four-year-olds being 5 percentage points higher than for two-year-olds eligible for Families Receiving Additional Support.
- Similar to last year, most local authorities are able to say whether there is enough childcare for children in their area, with the exception of 12-to-14 year olds before and after school, school age children and young people with SEND, and children of parents working atypical hours.
- Sufficiency is highest for three- to four-year-olds entitled to the 15-hour and 30-hour funded entitlements, with 85% and 83% of local authorities who responded reporting sufficiency for at least 75% of children in their area respectively, and for two-year-olds entitled to the 15-hour funded entitlement for Families Receiving Additional Support (80%). These categories also have the highest proportion of local authorities who report 100% sufficiency (45%, 42%, and 33% of local authorities).

Table 15 - Childcare sufficiency in England

	100%	75% to 99%	50% to 75%	25% to 50%	Less than 25%	Data not held or cannot tell	Total responses
Children under two (entitled to 30-hour funded entitlement for working families)	26%	50%	7%	1%	1%	16%	137
Children under two (not entitled to any funded entitlement)	16%	42%	5%	1%	0%	36%	137
Two-year-olds (entitled to 15-hour funded entitlement for Families Receiving Additional Support)	33%	47%	7%	1%	0%	12%	137
Two-year-olds (entitled to 30-hour funded entitlement for working families)	29%	50%	5%	1%	0%	15%	137
Two-year-olds (not entitled to any funded entitlement)	23%	43%	3%	0%	0%	31%	137
Three- to four-year-olds (entitled to 30-hour funded entitlement for working families)	42%	42%	2%	1%	4%	14%	137
Three- to four-year-olds (entitled to 15-hour universal funded entitlement)	45%	41%	2%	0%	3%	12%	137
Children with SEND (early years)	10%	35%	9%	2%	2%	43%	137
5- to 11-year-olds before school (e.g. breakfast club or childminder)	18%	48%	5%	1%	3%	26%	136
5- to 11-year-olds after school until around 6pm (e.g. after school clubs or childminder)	12%	52%	7%	1%	2%	26%	137
12- to 14-year-olds before school (e.g. breakfast club or childminder)	4%	12%	4%	4%	1%	75%	136
12- to 14-year-olds after school until around 6pm (e.g. after school clubs or childminder)	3%	10%	4%	4%	5%	77%	137
Children and young people with SEND (school age)	3%	20%	9%	6%	1%	61%	134
Children of parents working full time (9am to 5pm on weekdays)	18%	42%	2%	0%	0%	38%	136
Children of parents working atypical hours (outside 9am to 5pm on weekdays)	7%	20%	9%	4%	2%	58%	137
Children living in rural areas (please leave this question blank if there are no rural areas in your local authority)	8%	33%	10%	0%	0%	49%	72

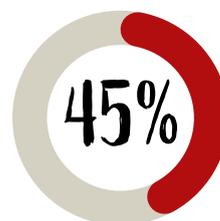
Sufficiency is lowest for 12- to 14-year-olds after and before school (13% and 15% of local authorities reporting sufficiency for at least 75% of children, respectively), for school age children and young people with SEND (23% reporting sufficiency for at least 75% of children) and for children of parents working atypical hours (27% reporting sufficiency for at least 75% of children). However, it is important to note that local authorities also report the highest levels of uncertainty for these categories of childcare.



OF LOCAL AUTHORITIES WHO RESPONDED HAVE AT LEAST 75% SUFFICIENCY FOR THE 15 HOUR ENTITLEMENT FOR 3- TO 4-YEAR-OLDS

Separating out the category of children with SEND by age shows that local authorities have higher levels of sufficiency for early years children (45% of local authorities report sufficiency for at least 75% of children), compared to school aged children and young people (23%). However local authorities report more uncertainty around sufficiency of places for school age children with SEND compared to early years children with SEND.

To understand the geographical spread of childcare in each local authority, we ask a question about the percentage of wards in which local authorities have enough childcare for early years children, and for school age children and young people.



OF LOCAL AUTHORITIES WHO RESPONDED HAVE AT LEAST 75% SUFFICIENCY FOR CHILDREN WITH SEND IN THE EARLY YEARS

Table 16 - Childcare sufficiency in England as a percentage of wards

	100%	75% to 99%	50% to 75%	25% to 50%	Less than 25%	Data not held or cannot tell	Total responses
For early years children	10%	60%	9%	4%	0%	16%	135
For school age children and young people	10%	48%	7%	1%	2%	34%	136

70% of local authorities who responded say they have sufficient childcare for early years children in at least 75% of wards, a small decrease of 2% from last year's findings.

57% of local authorities say they have sufficient childcare for school age children and young people in at least 75% of wards, an 8% increase from last year.

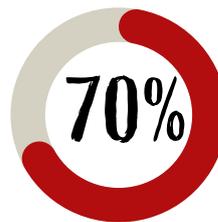
Inner London has the lowest levels of provision across all early years categories, but most notably for children with SEND (9%), and children under two who are not eligible for any funded entitlement (18%).

Within the West Midlands, all local authorities who responded report having enough childcare for at least 75% of children entitled to the 15-hour universal entitlement for three- to four-years old. The West Midlands also reports the highest levels of sufficiency for three- to-four-year-olds entitled to the 30- hour funded entitlement for working families (92%), as well as for early years children with SEND (62%).

Of all the English regions, Outer London report the highest levels of sufficiency for two-year-olds entitled to the 15-hour funded entitlement for Families Receiving Additional Support. Availability is also high for the universal 15-hour entitlement for three- and four-year-olds (both 94%).

Across all the English regions, the South East reported the highest levels of sufficiency for two-year-olds entitled to 30-hour funded entitlement for working families (89%), and for children under two not entitled to any funded entitlement (72%).

However, it is worth noting that some English regions contain fewer local authorities than others and therefore responses from a few authorities in those regions can make a noticeable difference to the regional figure.



OF LOCAL AUTHORITIES WHO RESPONDED SAY THEY HAVE SUFFICIENT CHILDCARE FOR EARLY YEARS CHILDREN IN AT LEAST 75% OF WARDS.

Table 17 - Childcare sufficiency defined as LAs responding that they have sufficient childcare for '100%' or '75 to 99%' of children in English regions, for early years (% local authorities)

	Children under two (not entitled to any funded entitlement)	Children under two (entitled to 30-hour funded entitlement for working families)	Two-year-olds (entitled to 15-hour funded entitlement for Families Receiving Additional Support)	Two-year-olds (entitled to 30-hour funded entitlement for working families)	Two-year-olds (not entitled to any funded entitlement)	Three- to four-year-olds (entitled to 15-hour universal funded entitlement)	Three- to four-year-olds (entitled to 30-hour funded entitlement for working families)	Children with SEND (early years)
England	58%	75%	80%	79%	66%	85%	83%	45%
EM	63%	75%	63%	75%	63%	75%	75%	38%
EoE	70%	70%	70%	70%	70%	80%	80%	50%
London, Inner	18%	45%	45%	45%	36%	55%	55%	9%
London, Outer	69%	88%	94%	88%	75%	94%	88%	44%
NE	42%	58%	58%	58%	42%	75%	75%	33%
NW	68%	82%	86%	86%	73%	91%	91%	45%
SE	72%	83%	89%	89%	67%	89%	89%	50%
SW	42%	67%	92%	83%	75%	83%	83%	58%
WM	62%	85%	92%	85%	69%	100%	92%	62%
Y&H	53%	80%	87%	87%	73%	93%	87%	53%

Table 18 - Childcare sufficiency defined as LAs responding that they have sufficient childcare for '100%' or '75% to 99%' of children in English regions, for other groups (% local authorities)

	5- to 11-year-olds before school (e.g. breakfast club or childminder)	5- to 11-year-olds after school until around 6pm (e.g. after school clubs or childminder)	12- to 14-year-olds before school (e.g. breakfast club or childminder)	12- to 14-year-olds after school until around 6pm (e.g. after school clubs or childminder)	Children and young people with SEND (school age)	Children of parents working full time (9am to 5pm on weekdays)	Children of parents working atypical hours (outside 9am to 5pm on weekdays)	Children living in rural areas (please leave this question blank if there are no rural areas in your local authority)
England	66%	64%	15%	13%	23%	60%	27%	39%
EM	75%	75%	25%	25%	38%	63%	38%	50%
EoE	60%	40%	22%	20%	30%	67%	30%	43%
London, Inner	55%	55%	0%	0%	0%	36%	27%	N/A
London, Outer	69%	75%	13%	13%	13%	50%	25%	0%
NE	67%	58%	17%	8%	17%	50%	17%	33%
NW	64%	64%	18%	18%	23%	68%	27%	36%
SE	67%	67%	17%	17%	28%	61%	33%	58%
SW	67%	58%	8%	0%	18%	50%	8%	38%
WM	62%	62%	23%	23%	33%	77%	46%	50%
Y&H	79%	80%	13%	7%	36%	67%	20%	44%

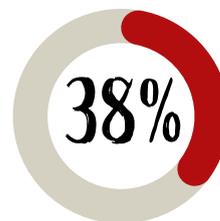
Yorkshire and the Humber report the highest levels of provision for 5- to 11-year-olds for both before and after school provision (79% and 80% respectively).

The East Midlands report the highest levels of provision for children and young people with SEND (38%).

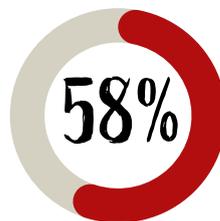
The West Midlands has the highest levels of provision for both children of parents who work full time, as well as those working atypical hours (77% and 46% respectively).

The South East reports the highest levels of provision for rural families (58%).

Within Inner London, no local authorities who responded have enough places for at least 75% of 12-to-14-year-olds before or after school, or school age children and young people with SEND. Inner London also reports the lowest sufficiency for children of parents working full time (36%), and 5-to 11-year-olds before school (55%).



38%
OF LOCAL AUTHORITIES WHO RESPONDED IN THE EAST MIDLANDS HAVE AT LEAST 75% SUFFICIENCY FOR CHILDREN AND YOUNG PEOPLE WITH SEND



58%
OF LOCAL AUTHORITIES WHO RESPONDED IN THE SOUTH EAST HAVE AT LEAST 75% SUFFICIENCY FOR CHILDREN LIVING IN RURAL AREAS

Table 19 - Childcare sufficiency defined as LAs responding that they have sufficient childcare for '100%' or '75 to 99%' of wards in their local authority, in English regions

	For early years children	For school age children and young people	Region response
England	70%	57%	138/153
EM	75%	63%	8/10
EoE	73%	55%	11/11
London, Inner	36%	27%	11/13
London, Outer	88%	50%	16/20
NE	42%	33%	12/12
NW	81%	73%	22/24
SE	78%	67%	18/19
SW	67%	50%	12/15
WM	67%	58%	13/14
Y&H	79%	79%	15/15

In line with last years findings, Outer London report the highest levels of sufficiency for early years children as a percentage of wards; 88% of local authorities in this region say that at least 75% of wards in their area have enough childcare for this group.



OF LOCAL AUTHORITIES WHO RESPONDED IN OUTER LONDON HAVE AT LEAST 75% SUFFICIENCY FOR EARLY YEARS CHILDREN

Yorkshire and the Humber report the highest levels of sufficiency for school age children and young people as a percentage of wards; 79% of local authorities in this region say that at least 75% of wards in their area have enough childcare for this group.



OF LOCAL AUTHORITIES WHO RESPONDED IN YORKSHIRE AND THE HUMBER HAVE AT LEAST 75% SUFFICIENCY FOR SCHOOL AGED CHILDREN AND YOUNG PEOPLE

Inner London has the lowest level of provision as a percentage of wards for both early years children (36%) and school age children and young people (27%).

C. Childcare sufficiency in Scotland

Differences in statutory requirements in Scotland mean that local authorities tend to have less knowledge than their English counterparts about the availability of childcare outside of the funded entitlements. For the categories of childcare outside of the funded entitlements, Scottish local authorities report between 48% and 96% as 'Data not held or cannot tell'. It is important to take this into consideration to avoid misinterpretation of the reported figures.

As in the survey for local authorities in England, local authorities in Scotland were asked to report the percentage of children in their area for whom they have enough childcare.

This year we updated the wording to ask about childcare for 'children and young people with additional support needs' rather than 'children and young people with SEND' to reflect terminology used in Scotland and separated the question into two: early years children with additional support needs, and school age children and young people with additional support needs. We have also updated age categories, separating out under-twos and two-year-olds.

Local authorities in Scotland report high levels of uncertainty across categories (as demonstrated by 'data not held' responses), with the exception of two-year-olds entitled to the 1,140-hour funded entitlement, three-to four-year-olds, and early years children with additional support needs.

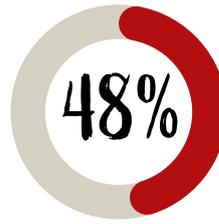
In line with last year's findings, sufficiency in Scotland is high for children entitled to the 1,140-hour funded entitlement; 74% of local authorities who responded say they have enough provision for at least 75% of children aged three-to-four (all of whom are entitled to 1,140 funded hours), and 67% of local authorities also report high levels of provision for two-year-olds who are entitled to the 1,140-hour funded entitlement on a targeted basis.



Table 20 - Childcare sufficiency in Scotland

	100%	75% to 99%	50% to 74%	25% to 49%	Less than 25%	Data not held or cannot tell	TOTAL no. of LAs
Children under two	0%	4%	0%	12%	0%	85%	26
Two-year-olds (entitled to the 1,140-hour funded entitlement)	56%	11%	4%	0%	4%	26%	27
Two-year-olds (not entitled to the 1,140-hour funded entitlement)	4%	8%	4%	8%	0%	77%	26
Three- to four-year-olds	74%	0%	0%	4%	0%	22%	27
Children with additional support needs (early years)	44%	4%	0%	0%	4%	48%	27
5- to 11-year-olds before school (e.g. breakfast club or childminder)	7%	4%	4%	0%	4%	81%	27
5- to 11-year-olds after school until around 6pm (e.g. after school club or childminder)	4%	7%	4%	0%	11%	74%	27
12- to 14-year-olds before school (e.g. breakfast club or childminder)	0%	4%	0%	0%	0%	96%	27
12- to 14-year-olds after school until around 6pm (e.g. after school club or childminder)	0%	4%	0%	0%	0%	96%	27
Children and young people with additional support needs (school age)	11%	7%	0%	4%	4%	74%	27
Children of parents working full time (9am to 5pm on weekdays)	4%	4%	0%	4%	0%	89%	27
Children of parents working atypical hours (outside 9am to 5pm on weekdays)	0%	0%	4%	0%	7%	89%	27
Children living in rural areas (please leave this question blank if there are no rural areas in your local authority)	17%	0%	0%	4%	4%	74%	23

Separating out the category of additional support needs by age has revealed that, as in England, local authorities have higher levels of sufficiency for early years children (48% of local authorities report sufficiency for at least 75% of children), compared to school aged children and young people (19%). However, local authorities are much more uncertain about sufficiency levels for school aged children with additional support needs than they are for early years children with additional support needs.



OF LOCAL AUTHORITIES WHO RESPONDED IN SCOTLAND HAVE AT LEAST 75% SUFFICIENCY FOR EARLY YEARS CHILDREN WITH ADDITIONAL SUPPORT NEEDS

Please note that Scotland has relatively few local authorities (32, compared to 152 in England) and therefore responses from a few authorities can make a noticeable difference to the overall figures.

Table 21 - Childcare sufficiency in Scotland as a percentage of wards

	100%	75% to 99%	50% to 75%	25% to 50%	Less than 25%	Data not held or cannot tell	Total responses
For early years children	44%	7%	4%	0%	0%	44%	27
For school age children and young people	7%	0%	7%	0%	7%	78%	27



D. Childcare sufficiency in Wales

Welsh local authorities were required to produce a statutory five-yearly Childcare Sufficiency Assessment in 2022. This initially led to a decrease in the proportion of local authorities reporting that they do not know whether they have enough childcare across a range of categories, however in recent years this proportion has again increased as the time since these assessments passes.

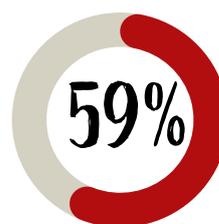
As in the survey for local authorities in England and Scotland, local authorities in Wales were asked to report the percentage of children in their area for whom they have enough childcare.

This year we updated the wording to ask about childcare for 'children and young people with Additional Learning Needs' rather than 'children and young people with SEND' to reflect terminology used in Wales and separated the question into two: early years children with Additional Learning Needs, and school age children and young people with additional learning needs. We have also updated age categories, separating out under-twos and two-year-olds.

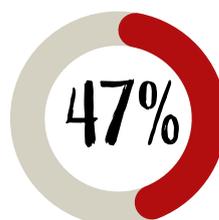
- 47% of local authorities who responded say they have enough places for at least 75% of three-to-four-year-olds entitled to the 30 hours Childcare Offer, compared to 35% of three-and-four-year-olds entitled only to the universal 10 hours of nursery education. However, these figures are also affected by the high levels of uncertainty from local authorities who responded.
- Separating out the category of additional learning needs by age shows that local authorities report higher levels of uncertainty for school age children and young people with additional learning needs (76%), compared to early years children with additional learning needs (59%).

However, as Wales (similarly to Scotland) has relatively few local authorities (22, compared to 152 in England), responses from a few authorities can make a noticeable difference to the overall figures.

- This year local authorities in Wales report high levels of uncertainty across categories (as demonstrated by an increase in 'data not held' responses), with the exception of for two-year-olds entitled to Flying Start.
- Local authorities in Wales report the highest levels of both certainty and sufficiency for two-year-olds who are entitled to Flying Start, with 59% of local authorities who responded saying they have enough places for at least 75% of children in their area.
- Local authorities reported the highest levels of uncertainty for 12-to 14 year-olds both before and after school, with almost all (94% for both) local authorities who responded reporting 'data not held or cannot tell'.



59%
OF LOCAL AUTHORITIES WHO RESPONDED SAY THEY HAVE ENOUGH PLACES FOR AT LEAST 75% OF CHILDREN IN THEIR AREA ENTITLED TO FLYING START



47%
OF LOCAL AUTHORITIES WHO RESPONDED SAY THEY HAVE ENOUGH PLACES FOR AT LEAST 75% OF 3-TO-4 YEAR OLDS IN THEIR AREA ENTITLED TO THE 30 HOURS CHILDCARE OFFER

Table 22 - Childcare sufficiency as a percentage of wards

	100%	75% to 99%	50% to 75%	25% to 50%	Less than 25%	Data not held or cannot tell	Total responses
For early years children	6%	35%	0%	0%	0%	59%	17
For school age children and young people	0%	12%	6%	0%	0%	82%	17

Table 23 – Childcare sufficiency in Wales

	100%	75% to 99%	50% to 75%	25% to 50%	Less than 25%	Data not held or cannot tell	Total responses
Children under two	6%	41%	0%	0%	0%	53%	17
Two-year-olds (entitled to Flying Start)	12%	47%	0%	0%	0%	41%	17
Two-year-olds (not entitled to any funded hours)	0%	41%	0%	0%	0%	59%	17
Three- to four-year-olds (entitled to the 10 hours of nursery education)	6%	29%	0%	0%	0%	65%	17
Three- to four-year-olds (entitled to 30 funded hours under the Childcare Offer for Wales)	12%	35%	0%	0%	0%	53%	17
Children with Additional Learning Needs (early years)	0%	24%	12%	6%	0%	59%	17
5- to 11-year-olds before school (e.g. breakfast club or childminder)	0%	29%	0%	0%	0%	71%	17
5- to 11-year-olds after school until around 6pm (e.g. after school club or childminder)	0%	24%	12%	0%	0%	65%	17
12- to 14-year-olds before school (e.g. breakfast club or childminder)	0%	0%	0%	0%	6%	94%	17
12- to 14-year-olds after school until around 6pm (e.g. after school club or childminder)	0%	0%	0%	0%	6%	94%	17
Children and young people with Additional Learning Needs (school age)	0%	12%	6%	0%	6%	76%	17
Children of parents working full time (9am to 5pm on weekdays)	6%	41%	0%	0%	0%	53%	17
Children of parents working atypical hours (outside 9am to 5pm on weekdays)	0%	6%	12%	6%	18%	59%	17
Children living in rural areas (please leave this question blank if there are no rural areas in your local authority)	0%	21%	7%	0%	0%	71%	14

Section 4 - An in-depth look at parents' views and experiences of childcare

This year's Childcare Survey builds on last year's findings, exploring what parents value the most about their childcare provider, how far their experiences have matched this, and the differences they have seen in their children since attending childcare.

We ran three online focus groups, with a total of 24 parents. The discussions followed the same themes as last year, with an extra question on funded entitlements.

The importance of making friends

Across all the themes discussed, parents most often mentioned how attending childcare supported their child's socialisation and how they felt that this was a key benefit.

- Parents stressed how important it was that their child learned to interact with others and be away from their parents.
- Many parents mentioned that attending childcare helped their child to trust adults outside of the immediate family.
- One parent praised their child's nursery for supporting their child in managing conflict and anger, whilst helping their child to understand appropriate social behaviour and boundaries.

"She's very social, and she's made such good friends. We've attended children's parties and stuff... It brought out her confidence as well."

Parent

"For us, the biggest one has definitely been him learning to be away from us and being OK with that. We do the childcare just between us, and no one else has been involved until he's at age three. So it was really important for us that he got used to being away from us and feeling safe."

Parent

"For us, it was his confidence in making friends first and foremost."

Parent

"It really helped with socialising her because we don't have family where we are, and so it helped her realise that there are other safe adults and other children to play with that became a familiar, recognisable set of faces. That was really, really helpful."

Parent



Being part of a community

Many parents reported that access to childcare helped them to feel part of a community, with more than one parent saying that **'it takes a village to raise a child'**.

- There was a consistent view that parents felt supported in the childcare community, valuing friendships, relationships with staff and other parents at the setting.

"We don't have a lot of good family support, so it's sort of almost like a second family for us."

Parent

"I think as soon as you send your child to childcare, it gives you from my view, emotionally, mentally, everywhere support because first coming out of giving birth and looking after kids for full time, this is the first time that you get some time."

Parent

- Some parents shared that access to childcare had given them time to reconnect with their partners.
- Another parent spoke of how their husband had also made friendships through the nursery:

"My husband, who does the majority of the school drop off and some pick ups because I work Monday to Friday at home, he's met other dads [and seen] other dads doing childcare."

Parent

- Parents felt they had improved their parenting skills with support from the setting staff and other linked services.

"For me it was actually learning different strategies on how to cope with children because you've got professional help..."

Parent

- Those parents of babies born during Covid-19 talked about how the supportive staff and nurturing ethos of the setting was crucial in helping them feel comfortable leaving their child:

"My baby was born on the first day of lockdown, so as I was leaving the hospital, it all got announced. It was crazy and it was a hard experience."

When he did go to nursery, it was bittersweet. I don't know how the other COVID mums and dads felt about it, but when he went, it was bittersweet."

It did feel like it gave a bit of my mental health and wellbeing back to me and I started slowly, feeling a bit like me as I went back to work, had human interaction and started seeing other adults."

Parent

Developing new skills

Many parents spoke about how attending childcare had helped their children with language skills, motor skills, and life skills.

- The majority of parents valued their child's educational development focusing on learning experience and how the early years setting had prepared their child for school.

"School readiness is key, mainly getting her ready to make friendships, get used to the environment, getting used to the setting, being with a big group of children."

Parent

- Many parents spoke about the benefit of children getting to do things in nursery that they would not be able to access at home, such as train trips to the next town, swimming lessons, art, and sports/physical activity with other children.

"We've enjoyed seeing our children come home with things that they have created, the arts and crafts side of things. Messy play; that was really important to us because that's something we wouldn't focus on so much at home."

Parent

- Some parents spoke about how their children's English language skills had developed after attending childcare. One parent said that nursery significantly supported their child to learn English and express themselves confidently, despite little prior exposure to English. This benefit was not exclusive to children for whom English is an additional language; parents of children who speak English as a first language also mentioned improvements in speech after their child attended nursery.

"At home she hears lots of different languages and up until the point that she went to nursery, it was quite clear that she was absorbing both of the other languages at home, and then the moment that she hit nursery, English rapidly took over."

Parent

- Some parents mentioned improvements in motor skills. One parent said that this was due to mobility therapy specifically, while another attributed it simply to being able to play with other children.
- Parents also mentioned how childcare introduced routine and structure, and helped their child to follow rules, noting how this had helped their child prepare to go to school.
- Other life skills that parents mentioned having improved as a result of their child attending childcare included potty training and general hygiene such as washing hands, developing good habits around food, putting on their own coat and shoes, and learning to count.
- One parent highlighted the difference nursery had made to their child's feelings about food, saying that "Sometimes it's like they're a different child" when talking about what they would eat at nursery in contrast to at home.

Happiness, confidence, and independence

A major theme for parents was that childcare had boosted their children's confidence.

- Parents frequently mentioned how their child's independence increased after attending childcare and how this in turn had improved their children's confidence.
- Parents talked about children feeling more comfortable being away from them, speaking their mind more and overcoming shyness.
- One parent of a child with SEND praised their nursery for encouraging their child's special interest in fire engines and how this had improved his confidence.

"I think the biggest thing that my daughter has taken away is being more confident. She was painfully shy, but managed to make a good little circle of friends... and learnt how to navigate those friendships".

Parent

"My daughter's an only child, and for one or two years it was just me and her dad, and me and her did everything together all the time. There was very little breathing room for either of us.

So I think seeing how much she grew as a person and how much she developed [after going to nursery], and how much more confident she got... She learned to speak her own mind more. She was very shy, and if someone did something that she didn't like, she wasn't very good at saying 'No' or 'Stop' or anything.

Being in nursery really helped her gain those skills and not just get pushed over... It really helped with starting school and the transitions that she has to go through."

Parent

"[The nursery] has an on-site handyman who's very involved with the kids. He got an old bit of tubing and said, 'We'll make a fire hose out of that'. Then my son was using it to put out [imaginary] fires in the den that they built earlier in the week...

They spark levels of creativity that I don't think I'd be able to magically have at home... It's helped his confidence grow and it's helped him feel like he can fit in a bit more."

Parent

Choosing childcare

Most parents were interested in flexible childcare that could accommodate their working lives.

"I think having the ability to have extended hours easily [is important]. So when you're working 9 to 5 it can be really difficult if pick up is at half three."

Parent

- Parents were interested in early years settings which offered breakfast and after-school clubs, extended hours and holiday clubs to help fit in with shift work.
- Many parents talked about the indoor and outdoor environment, with cleanliness and safety often cited as the most important factors when choosing a nursery.
- One parent talked about the lack of availability of childcare, sharing their experience of having to change nursery when they no longer needed full-time care, and about the **"ludicrous"** waiting lists – **"you'd have to apply before conception"**.

"ludicrous" waiting lists – "you'd have to apply before conception"

Parent

- One parent mentioned that they looked for nurseries with small ratios, good quality equipment, and large open indoor and outdoor spaces.

Parents also talked about the importance of the setting's location:

"There's factors in that neighbourhood, for example, crime and criminality. The people are doing drug dealing; people are doing illegal activities and say you've got a nursery in that area. The problem is the effect it has on the child."

Parent

- Many parents mentioned that their child's diet whilst in childcare was important to them, with one mother saying they would like their setting to have:

"Different kind of like menus, if they're quite varied and obviously healthy and nutritious"

Parent

- Along with nutrition, some parents were also concerned with a nursery's willingness and ability to cater for religious dietary requirements. Other parents were concerned about their provider being aware of allergies and food hygiene.



Staff, relationships and inclusion matters

- Several parents highlighted the importance of staff and workforce diversity, valuing staff from similar backgrounds to their children, as well as from other backgrounds.

"Also looking at different teachers from different cultures, as it kind of helps you if you know someone from the same culture or religion is there as well, so you can always relate back to them"

Parent

- Parents had mixed views on male and female staff, one parent expressed a preference for at least one male staff member to be a positive role model for their son, while another said that they preferred all female staff for their daughter.

"What was important for me when looking for my son's place was looking for staff that had male staff as well. There are not a lot of males in our family other than his dad. So I felt having a male presence and energy would be really helpful for him and also just a mixture of staff, so different ages, cultures, religions just to gain the most out of it."

Parent

- Parents recognised the link between staff satisfaction and strong relationships, especially with their child's key workers, and expressed concern about the challenges caused by high staff turnover. One parent said that they want **"preferably a lower staff turnover, so it's not constantly changing."**

"I would probably say for me, most importantly was the setting, but also that the staff actually are happy to be there because if your staff are happy to be there then they're going to actually pass that positive energy to your children."

Parent

- Parents were not just interested in staff having formal childcare qualifications but also focused on observable signs of quality.

"I wouldn't leave them with anyone that I didn't feel comfortable with... [It is] not necessarily qualifications, but their experience and their passion and enthusiasm as well; that's a big thing for me."

Parent

- Some parents felt that communication was an important factor and appreciated regular updates on their child's progress.
- A few parents expressed a need for greater support with special educational needs and disabilities (SEND), they would like settings to provide additional information that supports early diagnosis of SEND issues.
- One parent with a son who had autism felt that SEND can get **"a bit lost"** in nurseries, with varying levels of staff training on SEND issues, and that their experience could have been a lot better.



Supporting parental wellbeing

Most parents felt they were able to gain more independence while their child was in a childcare setting. This ranged from the ability to attend appointments to not needing to rely on family members for support.

- Many parents shared that childcare had a direct impact on supporting their wellbeing and mental health. One parent was able to complete her treatment as a direct result of using childcare:

"I suffer with personality disorder, so I just finished therapy and putting her in childcare has enabled me to complete that treatment. I feel like I've come out the other side."

Parent

- Another parent spoke about how their mental health had improved after childcare gave them time to look for work and eventually find a part-time role.
- Parents expressed that childcare helped them build better relationships with their children, one parent said that having their oldest child in childcare helped them to bond more with their second child.

"Getting to experience that feeling of missing them and then that also being actually all the more sweeter when we get together. Baby days can be very intense, and that first year has got so much in it."

"So I think just having that small time apart actually makes me treasure the days that I am with them even more so."

Parent

Experiences with early education entitlements

As part of the focus groups, we also asked parents about their experience with the funded early education entitlements, and how easy they have found claiming and using them.

The most frequently mentioned issue with the funded entitlements raised by parents in the focus groups, was a general lack of clarity and poor communication about the scheme. Parents frequently said that they were either unaware of the entitlements before being told about them by their nursery or community centre, or said that they were confused by them.

"You need a maths degree to understand funding and what you actually need to pay"

Parent

- One parent said that they were only aware of the entitlements because of Parent Champions^[3], while another said that they were informed about the entitlements by their community centre.
- Another parent said that while they were aware of the entitlements, they were confused by them until their nursery published a chart explaining all of the funding avenues available to parents. This parent believed that this should not be down to the nurseries, and felt that the government needs to provide clearer information. One parent summarised this by saying:

"Getting help – great. Totally clear about how it all works? No."

Parent

- One parent pointed to the confusion caused by some local authorities providing additional support, while others do not. Another noted that the messages they received from the Department for Education about the entitlements did not match what parents actually get.

[3] Parent Champions are parent volunteers who give a few hours a week to talk to other parents about the local services available to families. Coram Family and Childcare developed the Parent Champions programme to help marginalised or isolated parents who miss out on vital information about how to access local family services.

In addition to the focus groups, we asked local authorities in England how many enquiries their Family Information Service (FIS) had received from parents since April 2025. We asked them what percentage of these queries had required support in understanding or clarifying any element of the funded entitlements, and which three issues were most frequently encountered.

- A total of 106,891 queries had been received by the 74 local authorities since April 2025 (during a period of time averaging seven months) that responded to these questions.
- 54,420 (51%) of these queries from parents required support in understanding the entitlements.

The most frequently encountered point of confusion was around funded entitlements being ‘free’; 65% of local authorities put this in their top three issues with which parents required support. This was closely followed by start dates for the entitlement being the term after their child reaches qualifying age, ranked in the top three by 60% of LAs, and then confusion between the different entitlements (52%). The full results are summarised in Table 24, below.

Table 24 - Issues that callers to Family Information Services between April and December 2025 have most frequently needed support with

Issue	No. of LAs for which this was one of their three most encountered queries	Percent of LAs for which this was one of their three most encountered queries
Funded entitlements being “free” (e.g. not expecting to pay for, or to provide, consumables such as food, or pay refundable deposits)	60	65%
Start dates being the term after their child reaches qualifying age (e.g. expecting the working parent entitlement to start as soon as their child turns nine months old)	56	60%
Confusion between entitlements (e.g. those eligible for the 15-hour FRAS entitlement for two-year-olds thinking they need to be in work to qualify)	48	52%
Parent work and earning criteria (e.g. thinking they need to earn more or less than is needed, or not being aware that both parents (or partners) must be working)	42	45%
The number of funded hours each week (e.g. not being aware that the number of funded hours per week will be fewer if ‘stretched’ over more than 38 weeks)	22	24%
How the start date of the working parent entitlement is affected by the date of returning to work after maternity, paternity, shared parental, or adoption leave	17	18%
Which types of providers funded entitlements can be taken up with (e.g. not knowing they can be taken with a childminder or school-based nursery)	5	5%
Other	33	35%
TOTAL	93*	100%

*Note that more local authorities answered this question than the questions about number of enquiries, explaining why n is higher here.

Additional charges

In our survey of local authorities, confusion about funded entitlements not being free was in the top three most-encountered issues for 65% of local authorities, more than any other issue. This was also reflected in the focus groups, with many parents reporting issues around fees, additional charges and transparency around funding.

- One parent felt that because nurseries charge additional fees, the entitlement hours are not actually free, saying:

“They say it’s free but it’s not”

Parent

- Another parent echoed this sentiment, saying that they did not realise that they would have to pay for consumables, or for care before 9am.
- Another parent said that **“the thing I found most complicated was finding a nursery or pre-school that actually honoured the [funded entitlement] hours completely”**, without requiring them to purchase additional hours and spoke of how this had caused them stress as a family.

“the thing I found most complicated was finding a nursery or pre-school that actually honoured the [funded entitlement] hours completely”

Parent

Confusion about start dates

Confusion over start dates for funded entitlements being the term after a child reaches qualifying age was the second most frequently encountered issue in our survey of local authorities.

“I couldn’t send him to nursery until the term after his second birthday. He’s an April baby, so that would be in September... But the problem I’m finding getting back into work... is that a lot of it doesn’t kick in until you’re already working. You can’t attend interviews and find a job with very little childcare and support, if you don’t already have that help.”

Parent

- Parents in all three focus groups mentioned that start dates being the date of the first term after the child’s birthday was inconvenient. One parent said that this was **“a huge pain”**, and not well communicated, while another said that **“children are penalised for being born earlier in the year”**. The same parent also said that they were confused about the date the entitlement would begin and that they had needed help from the nursery to manage their claim for the entitlement.
- As well as confusion over the start dates for funded entitlements, 14 local authorities used the ‘Other’ box to tell us that parental confusion over deadlines for applying for, or reconfirming, the entitlement code for the working parent entitlement was in their top three most encountered queries.

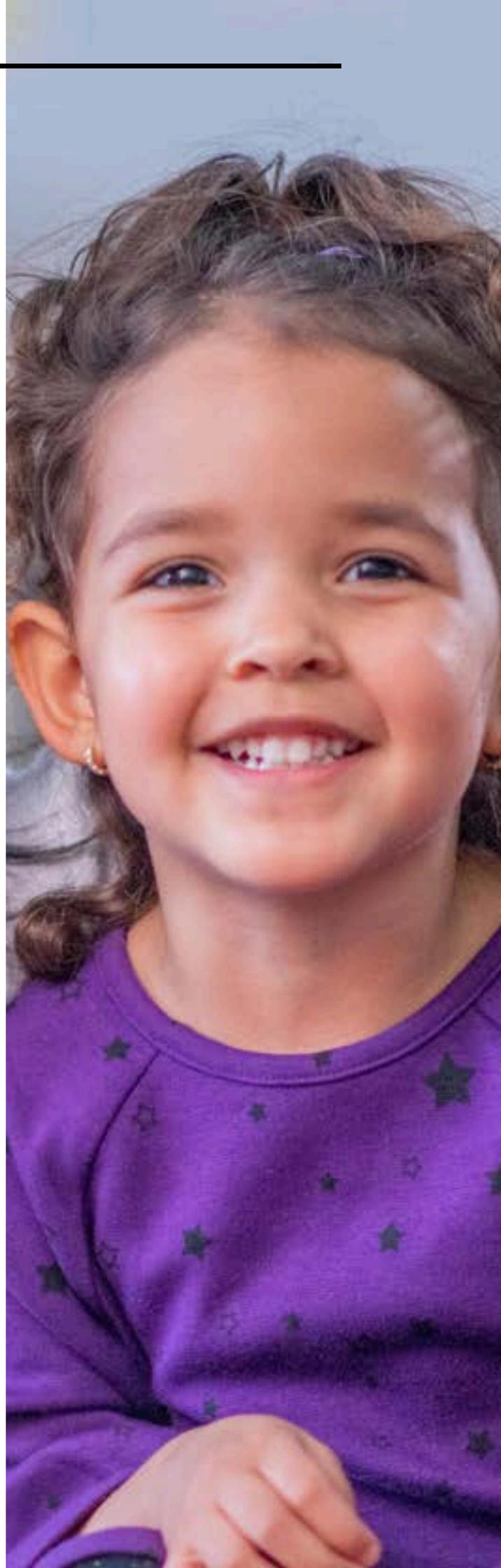
Coverage across the full year

The issue of the entitlements only covering 38 weeks rather than a full year was less prevalent in our survey of local authorities, with less than a quarter (24%) placing this in their top three most encountered issue. However, parents in the focus groups mentioned being confused about this element of the entitlements, saying that it wasn't clear, or that they didn't realise that the entitlements only covered 38 weeks.

- One parent said that the different permutations of stretching care over more than 38 weeks was very confusing, one said that they only understood this due to help from their nursery and another said that they were frustrated that the entitlements don't cover school holidays.

"I'm really happy with it [my nursery]. They send out so much information and with all the funding, they did this really nice, clear graph where they explained it all with the term-time, 38 hours... My nursery made it all really clear and concise with the food and everything else that's not included... My sister's nursery... weren't really good at explaining it. I ended up downloading all of my nursery's fact sheets and showing them to her. Then she understood it more."

Parent



Conclusion

Viewing changes in the cost of childcare over the last 25 years shows how crucial it was that the government in England stepped in with the expansion of funded hours for younger children of working parents.

Costs had been climbing, exceeding what would have been expected if in line with inflation, and increasing the proportion of a family's income needed for childcare bills.

While there are many complexities and caveats around this entitlement, described at various points in this report, it is undoubtedly a welcome help for working families. The cost of a full-time place is 39% lower than last year for children under three due to the final phase of the expansion, from the 15 funded hours per week in last year's calculation, to 30 per week this year.

In comparison, costs have increased for three- to four-year-olds (for whom the 30-hour entitlement was already in place), and for all age groups in Scotland and Wales.

We also see the result of the national and local drive to make the entitlements a reality, with sufficiency highest for funded entitlements. Around 8 in 10 local authorities have enough places for at least three quarters of children in their area for all the funded entitlements, along with a sound knowledge of their local position in this respect.

However, viewing cost changes across the years also shows how deeply divided circumstances now are between those eligible for the entitlement, and those who are not. Children whose parents have lower incomes, irregular incomes, no recourse to public funds, are in education or training or who are unable to work, do not benefit from the expansion.

In our analysis we have shown the costs that ineligible families will need to cover if they want to bridge the gap and pay for a part-time place – the same part-time place that an eligible child will now, theoretically, get for “free”. On average, that cost is £189 per week for a child under the age of two. This will be out of reach for most families in this position and they will have no choice but to continue their wait to access early education.

At age two, children may become eligible for 15 funded hours per week provided the family meets eligibility criteria, such as receiving certain benefits. This is 15 months later than children with eligible working parents, and for half the number of hours per week.

What's more, increased parent income can call a halt to that eligibility but may not be enough to transition families to the working parent entitlement. It is far from seamless, far from fair, and unhelpfully unclear, as we heard directly from the parents in this year's focus groups.

The parent section of this year's report shows loud and clear why equity in the entitlements matters. We heard from parents about the difference that attending childcare makes to both children and their family. For the second year running, parents shared stories of seeing their child grow and develop in a nurturing, positive environment and of the huge value childcare holds for them, too. Far from being solely about work, parents talked about the community, support and friendships they had found, and of growing their own skills as a parent.

As the spotlight now turns to helping more children reach a good level of development, and much talk of children being 'school ready', it is clear how much more difficult this could be to achieve for disadvantaged children who now receive only a third of the government-funded early education that children with working parents receive, by the time they start school.

But we have seen what can be achieved with central drive and resourcing, followed by huge local effort. Delivering the expanded entitlements was always going to be a big task for local authorities and childcare providers, and it would be unwise to think that work ended with the September 2025 milestone, but a great deal has been realised. Think what could be achieved if the same importance was placed on early education for disadvantaged children.

When the government starts their work to design and deliver a simpler system, making the entitlements universal must be at the top of the priority list.



Areas for action

The analysis clearly shows the disparity in access to early education for disadvantaged children whose parents do not qualify for extra government-funded childcare hours. This is at odds with school entitlements, and results in an age inequality for children. Low sufficiency and poor communications blight children's opportunities, particularly where they have SEND.

We call on all Governments in Great Britain to rebalance the system to enable all parents and carers to work and to ensure that children have the best start in life during their essential early years.

Immediate actions:

1. **Extend the working parent funded early education entitlement to children whose parents are in training or education, are migrants who meet the work criteria, or who are unable to work due to terminal illness.**
2. **Make the 15-hour funded entitlement for two-year-olds universal**, to remove the need for parents to navigate complicated criteria, increase take-up and eradicate the issue of overlap and gap between the two entitlements.
3. **Provide clearer communication on entitlements**, working directly with a diverse range of parents to coproduce simple, understandable messages.
4. **Further increase the early years pupil premium to bring it in line with the primary pupil premium** and support achievement of a good level of development for disadvantaged children.
5. **Ensure that new local authority-led proposals for school-based nurseries include plans for wraparound and holiday childcare**, to avoid exacerbating employment barriers for disadvantaged families.
6. **Update the funding model to ensure rates cover the true cost of provision** as part of the upcoming funding system review, to support sustainability of the sector and prevent costs being passed on to parents.
7. **Protect the rights of preschool children with SEND** by ensuring early years is a central consideration in the upcoming reform of the SEND system and that children's rights and experiences are equal across all types of provision.

Long term actions:

1. **Remove the parental work criteria from the 30-hour childcare entitlement**, giving all children an equal right to 30 hours per week of early education from the age of nine months until they start school, and introduce a single, means-tested co-payment system for families wishing to access additional hours, with families below the poverty line paying nothing.
2. **Extend the entitlement to 48 weeks per year**, to reflect the year-round need of families.
3. **Allow use of the childcare element of Universal Credit for reasonable additional charges** such as food and other consumables, bringing it in line with Tax-Free Childcare usage and removing barriers for low-income families.
4. **Work towards extending free meals in early years to all settings**, using the same criteria as free school meals.
5. **Safeguard access to provision for disadvantaged children** by extending the duty to accept children with an EHCP, and to give priority admission to looked-after and previously looked-after children, to all registered early years settings as a condition of receiving government funding.
6. **Create a workforce strategy** that addresses the issues of staff recruitment, retention and skills, with specific consideration of and action on childminders.
7. **Allocate separate and dedicated funding to LAs to support their role**, delinked from the rate paid to providers.

Methodology

Childcare survey

Timescales

This report is based on surveys sent to all Family Information Services at local authorities in November 2025. Respondents were able to fill in a form or reply online. After a month, we sent Freedom of Information requests to those local authorities that had not responded. The last Freedom of Information request returns were received in January 2026. Authorities who responded without the need for a Freedom of Information request were promised that individual responses would not be published, with only regional/ national averages provided in the report. This is consistent with previous surveys, and we do this to encourage honest and accurate data reporting. When Freedom of Information requests are used, some local authorities automatically publish their own responses, so we cannot make the same promise. However, we do not report these Freedom of Information individual responses in this report, and nor do we say which responses were acquired through Freedom of Information requests and which through our initial survey request.

Data sources

Average, maximum and minimum childcare prices are provided by local authorities rather than being calculated by Coram Family and Childcare from information gathered directly from providers. Similarly, assessments of sufficiency are provided by local authorities rather than being based on data collected by Coram Family and Childcare's research team. Where possible, we have kept questions consistent with previous versions of the survey to allow for tracking over time. However, this year we have made a number of changes to the questions that we ask. We did this largely due to the changes in childcare policy since the previous edition of the survey (such as the September 2025 expansion of the working families entitlement from 15 to 30 hours), but also to update terminology, to gather more detailed information and to make the survey easier for respondents to complete. We used slightly different surveys for local authorities in England, Scotland and Wales to reflect the different policy environments in the three nations.

When asked about costs of childcare, local authorities were given the option of providing full-time childcare prices for two-year-olds and under twos, either before or after the 30-hour entitlement was taken into account, allowing responses to be calculated for either scenario. In addition, local authorities in England were also given the option of providing part-time childcare prices for two-year-olds either before or after the 15-hour entitlement for Families Receiving Additional Support (FRAS) was taken into account, again allowing responses to be calculated for either scenario.

Similarly, local authorities in all three nations were given the option of providing part-time (except Scotland) and full-time childcare prices for children aged three and four, either before or after their respective entitlements were taken into account, allowing responses to be calculated for either scenario.

Response rates

The overall response rate for the survey was 89%. For Section 2 (Cost) and Section 3 (Sufficiency) of the survey we received responses from 79% and 88% of local authorities respectively. The lowest overall response rate for any region was 77%. Some local authorities did not give data for all questions, or gave data in a format that we could not use, which accounts for the different response rates per section.

Weighting

In line with recent surveys, we have weighted cost data within regions and nations. This ensures that results from small local authorities which have relatively little childcare do not unduly influence overall results. Data on childcare for each age group was weighted against the total population for that age group, based on the latest Office for National Statistics (ONS) mid-year population estimates for England and Wales (from June 2024) and the latest National Records Scotland (NRS) mid-year population estimates for Scotland (from June 2024).

Within local authorities, we have weighted cost data for PVI and maintained setting providers against the number of providers in that area. This is based on an assumption that these types of settings will have the same number of children on average. Childminder cost data is presented separately and not as part of the local weighted average for non-domestic settings. This is because of difficulties accurately estimating the number of children using childminders as opposed to nondomestic settings on a local level, and the unique role childminders play in the market. Sufficiency data is not weighted.

Tracking change over time

Our comparison does not include any use of childcare subsidies through Tax-Free Childcare or the benefits system. When comparing prices over time, we only include local authorities where we have data for both this year and the previous year. This is to avoid results being skewed by different local authorities having missing data year on-year. This approach produces different results than would be reached simply by comparing the overall price figure from this year's survey against the overall price figure from last year. We believe this gives a more accurate reflection of the changes experienced by families. Changes are weighted against this year's population data as described above. In some cases, we received 2025 data after the survey deadline for the year, but 2026 data within the deadline: in these cases, we have included the data in our calculations although they do not appear in the 2025 survey. This approach produces slightly different results to comparing regional weighted prices from the 2025 survey to regional weighted prices in the 2026 survey – we believe it gives a more accurate reflection of the changes experienced by families.

Data we do not collect

We do not collect data on the costs and availability of nannies and au pairs. This is because this data is not held by local authorities, and because they are used by a very small proportion of the population. Necessarily, the survey also excludes all types of informal childcare (e.g. grandparents, friends, babysitters). Information on families' use of formal and informal childcare can be found in the latest release of Childcare and Early Years Survey of Parents: 2023 (Department for Education, 2024)*. We exclude Northern Ireland because the childcare funding system is very different, making it hard to draw direct comparisons.

Parent focus groups

This section of the report is based on three focus groups carried out online in November 2025. Participants were recruited via forms on our website and Survey Monkey, sent out via social media and our existing networks such as Parent Champions.

The three focus groups involved a total of 24 parents, including 7 in the first group, 8 in the second, and 9 in the third. Each focus group session lasted for approximately one hour, and the sessions were transcribed and thematically analysed before being written up into the final report.

25th Anniversary Retrospective

The figures in this section of the report track the change in childcare costs from the first Childcare Costs survey in 2001, to this edition of the survey. This data has been used to compare childcare costs to inflation and median household income across that period.

Childcare costs data

Due to changes in the data collected in the survey over this time period, we are only able to consistently track costs for children aged under two back to the inception of the survey, as costs for other age groups were not collected until much later. Additionally, the initial survey only asked for costs for children aged two, so we have given this figure for 2001, with all subsequent figures being for children aged under two.

Between 2001 and 2009, only the cost of 50 hours of childcare was reported, while between 2010 and 2014, only the cost of 25 hours of childcare was reported. Therefore, costs for 25 hours between 2001 and 2009 are simply the relevant 50 hour cost halved, while the 50 hour cost between 2010 and 2014 is simply the 25 hour cost doubled. This might not be entirely representative; for example, some providers may charge slightly less per hour for full-time care compared to part-time care.

Comparison to inflation

All inflation figures are taken from the ONS's dataset entitled 'RPI All Items: Percentage change over 12 months: Jan 1987=100'. The inflation figures used are for year ending February of each year, as the Childcare Survey has always been published in February or March. The inflation figure for 2026 is for year ending November 2025, as this was the most recent inflation figure available at the time of the analysis.

The figures for childcare costs had they risen in line with inflation are indexed to 2002. This is because the 2001 Cost Survey only gives a figure for children aged two, and not children aged under two. Therefore, we felt that this method provided a fairer point on which to base our inflation figures.

Comparison to median household income

All household income figures up to the year 2024 are taken from the most recent ONS dataset, entitled 'Average household income, UK: Financial Year Ending 2024'. The figures for 2025 and 2026 were taken from the Office for Budget Responsibility's 'Household disposable income' projections.



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