

Childcare Sufficiency Assessment 2023



Hampshire County Council

2022/23



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1. Executive Summary

- 1.1. This Childcare Sufficiency Assessment (CSA) provides an overview of the childcare market and its sufficiency to provide access to childcare places in Hampshire for working families and those in learning. It focuses upon the current Early Years Education entitlements for funded two, three and four-year-olds. Following the Government's announcement in the spring 2023 budget to extend the childcare offer, this 2023 CSA includes information about the Early Years Education entitlement being introduced from April 2024 for working parents of 2-year-old children and for 9 months to under 2-year-olds from September 2024.
- 1.2. Hampshire has a mixed economy of childcare providers. Hampshire holds 4% of all childcare places and providers in All England. Comparing 2022 with 2023 Hampshire saw a greater reduction in both the percentage of providers and places when compared with All England and the South East. There are 63 fewer early years education providers delivering childcare when compared to the previous Childcare Sufficiency Assessment (CSA) (-23 PVI and -40 childminders). There is also a reduction of -33 non-EYE childminders and -60 Home Childcarers. The number of out of school services (activity club, breakfast club, after school club or wraparound care) increased by 12 against the previous year.
- 1.3. There is 94% (641) of PVI Group early years providers that offer extended 30 hours funding as do 100% (643) of early years approved childminders. There are 91% of providers offering to disadvantage 2-year-olds (PVI providers 592 and childminders 584).
- 1.4. There is a continued move towards providers offering full day care and a move to offer more than term time only. The majority (91%) of group provision is delivering full day care (offering more than 6 hours per day), which is a 1% increase against 2022. Most childminders (91%) offer more than 39 weeks, although this is a reduction from 2022 (93%). There is just under half (47%) group providers that offer more than 39 weeks, which is a 45% increase on 2022.
- 1.5. Data for Hampshire children for all ages and entitlements, shows there is a small increase from 2022 in the average universal hours claimed per week in Hampshire (+0.04), an increase in the average extended hours claimed (+0.06) and an increase in the average additional non-funded hours claimed (+0.17). Despite this, the average hours for each claim type has not returned to levels seen in Spring 2020 (start of the pandemic year). The numbers for 3-year-olds, shows there has been a decrease in the number of claims (-215). This is consistent with anticipated population reductions of the total number of 3-year-olds on roll at EYE registered providers at spring census 2023 with the number of 4-year-olds, showing a marginal increase in the number of claims (15).
- 1.6. Early Years attendance data at July 2023 suggests that 13.25% of the total EYE funded 2, 3 and 4-year-old children are from ethnic groups other than White British. A further 8.5% are categorised as either; information not yet obtained / refused / blank, with the remaining 78.25% White British.

- 1.7. Hampshire is a county that has eleven military bases. In the region of 33% (406) providers who deliver childcare for children aged 0 to 4-years-old indicated they provide services to military families.
- 1.8. At the end of March 2023, the Council's data showed that there were 185 breakfast clubs, 300 after school clubs, 29 activity clubs, 11 wraparound care services and 139 holiday playschemes, totalling 664 out of school services. This is a net increase of 19 services (+3%) when compared against the previous year. Further analysis and review of supply and demand will continue in readiness to deliver the new government wraparound programme that will roll from September 2024
- 1.9. The overall population of 0 to 14-year-olds is expected to reduce by 9,748 (-4%) from 245,328 children in 2022 to 235,580 in 2029. The forecast shows a continued reduction across the Early Years phase in 2026 of a further -245 children and -19 children in 2027, before increasing in 2028 by 673 children and 177 children in 2029. It is anticipated that the population will increase again, although does not increase back to the population at 2022. The range of change varies across the districts, with Winchester forecasting an increase each year from 2022 to 2025, and an overall increase to 2029.
- 1.10. The Early Years Education providers employ a workforce in the region of 7,300+ staff to deliver to 0 to 5-year-olds. In 2023 there is an increase in the number of staff that are unqualified or hold a level 1 or 2 qualification. There remains an -8% reduction for those staff that hold level 3 compared to 2022. Staff at levels 4, 5 and 6 also saw a reduction, with a small increase (3%) in the number of staff with a level 7 qualification. There has been a -3% reduction in the number of staff based at group providers that deliver to 3 and 4-year-olds. In contrast and despite there being a reduction in the number of providers there is an overall increase of 6% in the total number of staff delivering to 0 to 5-year-olds, which resonates with the increase in the number of 0 and 1-year-olds on roll.
- 1.11. In Spring 2023, 272 (42%) of EYE PVI providers stated they had staff vacancies, which varied by district (ranging from 36% to 47%). Winchester had the highest percentage of providers with vacancies (47%), shortly followed by Hart (46%). Additionally, four EYE registered childminders stated they had staff vacancies.
- 1.12. With the new younger years offer from April 2024 and September 2025, it is estimated that a further 1200 more childcare workers will be required. This together with the Wraparound childcare delivery for primary aged children from September 2025 will require significant additional new entrants into the workforce.
- 1.13. Compared to other local authorities, Hampshire has low levels of deprivation, however, there are concentrated areas across the County, focused on a few large neighbourhoods. Areas highlighted according to the Index of Multiple Deprivation (IMD)¹ which are the 20% most deprived places in Hampshire are:

¹ [PowerPoint Presentation \(hants.gov.uk\)](https://www.hants.gov.uk)

Andover, Farnborough, Aldershot, Havant, Gosport, Netley View, and Blackfield. Havant accounts for more than 50% of all deprived areas in Hampshire. Almost one in four of all lower super output areas (LSOAs) in Havant fall within the bottom 20% in England. Leigh Park accounts for two thirds of place deprivation in Havant and one third of place deprivation in Hampshire.

- 1.14. There is a reduction in the number of DWP notified children in spring 2023 when compared to spring 2022 (-331). Despite this, the take up of 2-year-old children has increased by 90 children in the same period, with 87% take up against DWP notified children, an increase of 14% from 73% in spring 2022. Nationally data outlines 74% take up and this was a 2% increase on 2022.²
- 1.15. There is a reduction in numbers of claims made for Early Years Pupil Premium against 2022. However, the year 2023 saw a 24% increase when compared to 2019 (the last pre-COVID impacted period).
- 1.16. The Hampshire County Council Holiday Activities and Food (HAF) Programme annual report for April 2022 to March informs 36% of eligible children attended provision during the year. During Easter there were 5,922 eligible children attending, 11,652 in the summer and 5,637 at Christmas. This was delivered through 59 HAF providers offering over 120 schemes. Many HAF providers offer paid for provision alongside their HAF funded places, supporting an inclusive and financially sustainable approach.
- 1.17. There have been increases in the number of children identified by providers with special educational need/disability in 2023 compared to spring 2022, with 13% of 0-4 year olds being identified by providers in the Spring Census as having some level of SEND. Numbers of children in receipt of Special Educational Needs Inclusion Fund (SENIF) rose from 318 to 411 (0.58% of population); numbers of children in receipt of Disability Access Fund (DAF) rose from 212 to 238 (0.34% of population); as well as increases seen in Portage case load where Children who spent one day on the portage case load rose from 691 to 766 (1.08% of population).
- 1.18. The council has collected data in the Spring 2023 period on the numbers of children aged 0 to 2 years to understand childcare needs. The number and percentage of 2-year-olds has reduced (from 72% to 68% of the population forecast). However, there is a substantial increase in the number of 0 to 1-year-olds in provision (+532 children) and in 2023, 25% of the forecasted population are attending provision. This data informs there is a high level of 2-year-olds already in provision and it is anticipated that these children will be the first claimants of the 15 hours in April 2024. Hampshire providers also support a high number of under 2s in provision. However, the demand for this age group is likely to increase due to parents' ability to have hours paid for by government funding. We anticipate that this is the age group where places growth, and training and learning in how to deliver to children younger than 2 is likely to be required in some areas.

² [Education provision: children under 5 years of age, Reporting year 2023 – Explore education statistics – GOV.UK \(explore-education-statistics.service.gov.uk\)](https://www.gov.uk/explore-education-statistics)

- 1.19. There continues to be a range of new housing developments across the county, with an estimated increase of 31,600 dwellings from 2023 to 2028 (43,900 from 2022 to 2029). This is forecast to result in a requirement to secure a minimum of 3,928 places (within the coming years, by 2028 with some building continuing beyond) across Hampshire, either through the developer contributions or to be met through the existing childcare market. Of these, approximately 1,500 places are yet to be secured.

2. Introduction

- 2.1. This Childcare Sufficiency Assessment (CSA) provides an overview of the childcare market and its sufficiency to provide access to childcare places in Hampshire for working families and those in learning. It focuses upon the current Early Years Education entitlements for funded two, three and four-year-olds. Following the Government's announcement in the spring 2023 budget to extend the childcare offer, this 2023 CSA includes information about the Early Years Education entitlement being introduced from April 2024 for working parents of 2-year-old children and for 9 months to under 2-year-olds from September 2024.
- 2.2. This report also covers assessment of out of school childcare including the Holiday Activity and Food programme (HAF). Hampshire County Council have been included in the Wraparound Pathfinder project, which seeks to ensure sufficient school age term-time childcare for school-aged children of working parents.
- 2.3. This aggregated CSA is supported by 11 district level assessments covering the local authority area.

3. Background

- 3.1. The Childcare Act of 2006 Section 6 places a duty on English local authorities to secure sufficient childcare for working parents. Section 7 also places a duty on local authorities to secure early years provision for young children in its area, free of charge and in accordance with the Local Authority (Duty to Secure Early Years Provision Free of Charge) Regulations 2014. The Local Authority needs to secure early years education places offering 570 hours a year, over no fewer than 38 weeks of the year, for every three and four-year-old child in their area from the term following their third birthday until the child reaches compulsory school age, known as "universal entitlement".
- 3.2. There is also a requirement to secure Early Years Education provision for eligible two-year-old children, from the term following their second birthday. Guidance confirming the eligibility for working parents of 2-year-olds and 9 months to 1-year-old children for the additional childcare offer is expected to be published later in 2023. Initial information indicates that eligibility will be similar to the extended 30 hour offer for eligible 3- and 4-year-olds of working parents. At the time of writing, we believe that, as a result of central Government consultations and implementation plans for the new childcare offers, statutory guidance may change to reflect the new offer.

- 3.3. In September 2017, the Childcare Act 2016 Section 2 placed a duty on the Local Authority to secure free childcare for qualifying children as set out at regulation 33 of Childcare (Early Provision Free of Charge) Extended Entitlement Regulations 2016. This requires childcare places to be made available to working parents who meet eligibility criteria, to secure for their three and/or four-year-old child/ren up to a further 15 additional hours, known as the “extended entitlement” on top of the “universal entitlement”.
- 3.4. Free early years education is available to all children from the term after their third and fourth birthday. Some children whose circumstances or family circumstances meet eligibility criteria can also receive free of charge Early Years Education with the funding period beginning after their second birthday.
- 3.5. Early Years Education and childcare provision should be accessible, flexible, inclusive, and provided through a range of settings to meet parental demand. Provision is required to meet statutory duties and responsibilities under the reforms in the Children and Families Act 2014 and associated regulations in relation to children in their care and children who may have special educational needs or disabilities (SEND).
- 3.6. Free Early Years Education in Hampshire is delivered through a mixed market of Ofsted registered Early Years Foundation Stage (EYFS) settings which include maintained nursery schools and nursery units of primary schools; private, voluntary, and independent (PVI) day nurseries; preschools; and registered childminders. For further details on Early Years and Childcare in Hampshire visit: [Services for Young Children | Children and Families | Hampshire County Council \(hants.gov.uk\)](https://www.hants.gov.uk/services-for-young-children)
- 3.7. There are a variety of sources of financial support for parents that influence demand for types of childcare. Currently the main sources are:
 - Universal and extended (30 hours) Early Years Education entitlement
 - Funded entitlement for two-year-olds
 - Tax Free Childcare
 - Childcare Tax Credit within the Universal Credit/Legacy benefit
- 3.8. The challenges for Hampshire are that its demography presents a wide range of needs and contexts, with deprivation indicators from the lowest to the highest quartiles located in urban cities/large towns to smaller towns and disparate rural villages. There are areas where there is significant housing growth, to areas of little change.
- 3.9. Employment in Hampshire supports a mixed economy from manufacturing, retail, service industries, health, leisure, and farming, etc. Generally, Hampshire has a history of higher-than-average employment rates when compared nationally. The economy of the county is also influenced by the Southampton International Airport in the Eastleigh area, Farnborough airport in the north of the county, access to the ports at Portsmouth and Southampton, the main Waterloo line into London and the two major

motorway links of the M3 south to north and M27 running from east to west across the south of the county.

Changes to the childcare offer and statutory duty

- 3.10. In 2019, the Government introduced the Holiday Activity and Food (HAF) Programme to support families on low incomes that met free school meals eligibility to access holiday activities that provide food as well as exercise and enriching activities.
- 3.11. Further information about the HAF Programme can be found on the Council's website: [Holiday Activities and Food \(HAF\) Programme | Children and Families | Hampshire County Council \(hants.gov.uk\)](https://www.hants.gov.uk/children-and-families/haf-programme)
- 3.12. In the spring 2023 budget, the Government announced that parents would be supported to return to work by increasing the entitlement to funded childcare. This will be implemented in stages to give the childcare market time to prepare for the changes:
 - 3.12.1. **From April 2024**, working parents of 2-year-old children will be entitled to 15 hours per week (570 hours per year) of funded childcare.
 - 3.12.2. **From September 2024**, all working parents of children from the age of 9 months will be entitled to 15 hours per week (570 hours per year) of funded childcare.
 - 3.12.3. **From September 2025**, working parents of children from the age of 9 months and under 5-years-old will be entitled to 30 hours per week of funded childcare.
- 3.13. The Government also announced an uplift to the average hourly rate paid to providers to deliver funded childcare from September 2023.
- 3.14. From September 2023, the staff to child ratios for 2-year-old children is changing from 1:4 to 1:5 to give providers more flexibility, without compromising children's safety or quality of provision. The new ratios are optional, with no obligation on providers to adopt them.
- 3.15. Furthermore, the Government will provide more funding to Local Authorities over two academic years, commencing September 2024, to set up wraparound provision in schools, to enable school-age children to access childcare in their local area from 8am to 6pm. Hampshire County Council is part of the Wraparound Pathfinder project to help shape the Department for Education (DFE)'s approach.

4. Methodology

- 4.1. This Childcare Sufficiency Assessment (CSA) has been produced based upon a measurement of the supply and demand for childcare using both local and national statistics and a variety of data collected by the Council. This data has

been reviewed at a district and borough level and brought together into an aggregated Hampshire Childcare Sufficiency Assessment, aimed at assessing whether supply is able to meet the demand for childcare.

- 4.2. The Council uses a range of data sources to compile the CSA including the Early Years Education spring census undertaken in January 2023, data provided from Ofsted direct to the Council's childcare and schools information management system, HAF data and key performance indicators and school survey data.
- 4.3. In June 2023, the Department for Education provided the Council with early analysis regarding supply and demand for the new Early Years entitlements from April 2024, and the number of schools providing out of school childcare on school sites. The Council has also been undertaking further analysis to help support the implementation of these new entitlements, modelling the potential demand and supply requirements.

5. Hampshire demographic and population

- 5.1. Hampshire is a large geographical area which has a range of urban, town and a significant area of rurality. The socio-economic profile of Hampshire 2016³ identified that rural communities made up 22% of Hampshire's population, living in over 85% of its geographic area.
- 5.2. The Hampshire Small Area Population Forecast (SAPF) information has been used to review population forecasts. This is produced and maintained by the Council using national data sets and local information, which is regularly updated (usually annually). This assessment, and subsequent actions, take account of the most recent population forecast available at the time of drafting the report.

<https://www.hants.gov.uk/landplanningandenvironment/facts-figures/population/estimates-forecasts>

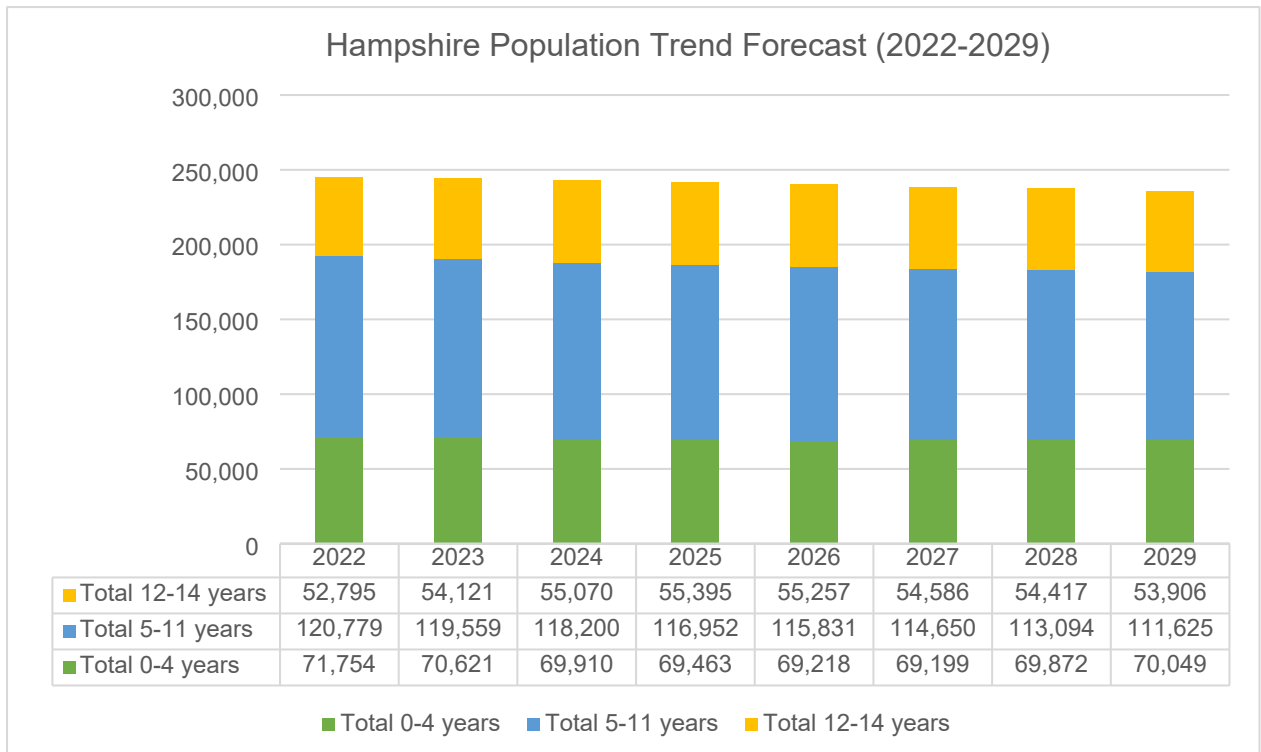
Population forecast (0 to 14-year-olds)

- 5.3. Graph 1 below shows the Hampshire SAPF 2022⁴ for 0 to 14-year-olds, using the data for 2022 to 2029 and split by early years, primary and secondary age groups. This suggests that the overall population of 0 to 14-year-olds is expected to reduce by 9,748 (-4%) from 245,328 children in 2022 to 235,580 in 2029.

Graph 1: SAPF 2022 population forecast for 2022 to 2029, aged 0 to 14-year-olds

³ [Socio-economic profile of rural Hampshire | Hampshire County Council \(hants.gov.uk\)](https://www.hants.gov.uk/landplanningandenvironment/facts-figures/population/estimates-forecasts)

⁴ SAPF – there are sometimes small variances between the total Hampshire SAPF depending on whether viewed at ward, district or overall Hampshire level. This is due to the rounding of numbers through the statistical calculations for the various levels at which the figures are produced.



Early Years population in Hampshire (0 to 4-year-olds)

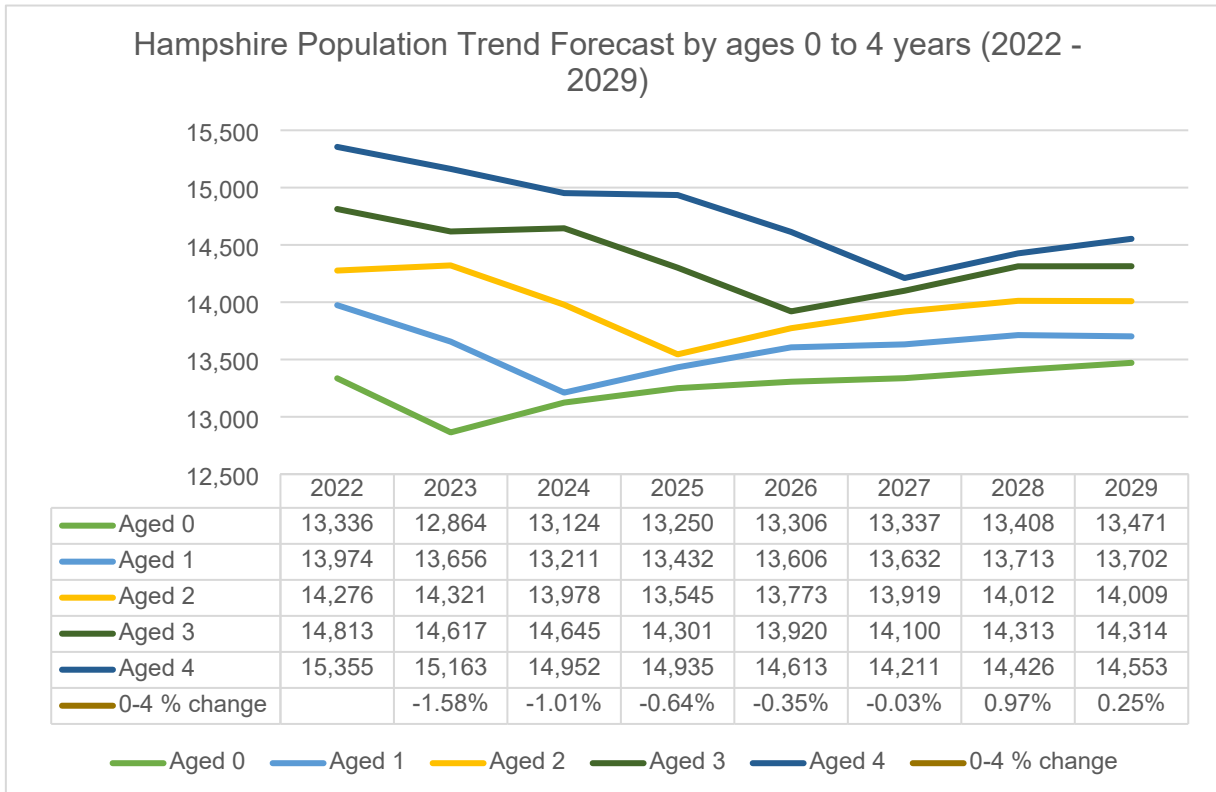
- 5.4. For the early years population, a reduction is initially forecast, following which it is anticipated that the population will increase again, although does not increase back to the population at 2022. Table 1 (see below) interrogates this pattern further and shows how this forecast reduction will impact on each age group from 2022 through to 2025.

Table 1: SAPF 2022 forecasted annual change from 2022 to 2025 by age

		2022	2023	2024	2025
Aged 0	Count	13,336	12,864	13,124	13,250
	Dif +/-		-472	260	126
	% change		-3.54%	2.02%	0.96%
Aged 1	Count	13,974	13,656	13,211	13,432
	Dif +/-		-318	-445	221
	% change		-2.28%	-3.26%	1.67%
Aged 2	Count	14,276	14,321	13,978	13,545
	Dif +/-		45	-343	-433
	% change		0.32%	-2.40%	-3.10%
Aged 3	Count	14,813	14,617	14,645	14,301
	Dif +/-		-196	28	-344
	% change		-1.32%	0.19%	-2.35%
Aged 4	Count	15,355	15,163	14,952	14,935
	Dif +/-		-192	-211	-17
	% change		-1.25%	-1.39%	-0.11%
Total 0 to 4	Count	71,754	70,621	69,910	69,463
	Dif +/-		-1,133	-711	-447
	% change		-1.58%	-1.01%	-0.64%

- 5.5. There is a significant reduction of 1,133 0 to 4-year-olds in 2023, which includes a reduction of 472 in the number of 0-year-olds and is reflected in the older age groups in the following years.
- 5.6. In addition to the significant reduction in 0-year-olds forecast for 2023, there is also a notable reduction for those aged 1 (-318 children), aged 3 (-196 children) and aged 4 (-192 children), giving a total reduction for 2023 of -1,133.
- 5.7. Whilst this analysis looks ahead to 2025, our SAPF modelling includes data up to 2029 (see graph 2 below). The forecast shows a continued reduction across the Early Years phase in 2026 of a further -245 children and -19 children in 2027, before increasing in 2028 by 673 children and 177 children in 2029. For the period however, the numbers of children by 2029 see an overall reduction of 1,705 (-2.4%) and will not recover back to the numbers indicated in 2022.

Graph 2: SAPF 2022 Hampshire Population Forecast from 2022 to 2029 (aged 0 – 4 years)



Early years population by district (aged 0 to 4-year-olds)

- 5.8. Table 2 (see below) shows the total population of 0 to 4-year-olds and the % change from 2022 to 2029, by district.

Table 2: Hampshire district summary change for 0 to 4-year-old Early Years children

	0 to 4-year-olds			
	2022	2029		
	Total 0 to 4-year-olds	Total 0 to 4-year-olds	Change from 2022	% change from 2022
Basingstoke and Deane	10,734	10,260	-474	-4.42%
East Hampshire	6,012	5,934	-78	-1.30%
Eastleigh	7,602	7,595	-7	-0.09%
Fareham	5,038	5,226	188	3.73%
Gosport	4,162	3,983	-179	-4.30%
Hart	5,133	5,005	-128	-2.49%
Havant	6,111	5,802	-309	-5.06%
New Forest	7,081	6,845	-236	-3.33%
Rushmoor	6,450	5,998	-452	-7.01%
Test Valley	7,103	6,701	-402	-5.66%
Winchester	6,328	6,700	372	5.88%
Hampshire Total	71,754	70,049	-1,705	-2.38%

- 5.9. The range of change varies across the districts, with Winchester forecasting an increase each year from 2022 to 2025, and an overall increase to 2029. Fareham is also forecasting an overall increase to 2029 although there is a notable reduction in 2023. All other districts are forecasting an overall reduction between 2022 and 2029.

Statutory school-age population (5 to 14 years-old: 5-11 primary phase and 12 – 14 secondary phase)

- 5.10. Table 3 (see below) shows the total population of 5 to 11-year-olds and % change from 2022 to 2029, by district.

Table 3: Hampshire district summary change for 5 to 11-year-old primary age children

	5 to 11-year-olds			
	2022	2029		
	Total 5 to 11-year-olds	Total 5 to 11-year-olds	Change from 2022	% change from 2022
Basingstoke and Deane	17,012	15,608	-1,404	-8.25%
East Hampshire	10,591	10,181	-410	-3.87%
Eastleigh	12,070	11,230	-840	-6.96%
Fareham	9,084	8,359	-725	-7.98%
Gosport	6,922	6,006	-916	-13.23%
Hart	9,620	8,687	-933	-9.70%
Havant	10,401	9,327	-1,074	-10.33%
New Forest	13,105	11,701	-1,404	-10.71%
Rushmoor	8,742	8,184	-558	-6.38%
Test Valley	11,804	10,882	-922	-7.81%
Winchester	11,428	11,460	32	0.28%
Hampshire Total	120,779	111,625	-9,154	-7.58%

- 5.11. Based on SAPF 2022, there are a total of 120,779 five to 11-year-olds in 2022 which decreases annually from 2023 (-1%), 2024 (-1.1%) and 2025 (-1.1%). The total number of children in the primary phase reduces every year from 2022 to 2029, and the overall reduction in Hampshire is forecast as -9,154 children (-7.6%) compared to the 2022 population.
- 5.12. In this age group, nine out of the 11 districts show a reduction in the number of children each year between 2022 to 2025. East Hampshire shows a small increase in 2025. Winchester is the only district forecasting a small increase in the number of children from 2022 to 2029. All other districts are forecasting an overall reduction, the largest of which can be seen in Gosport followed by New Forest and Havant.
- 5.13. Table 4 shows the total population of 12 to 14-year-olds and % change from 2022 to 2029, by district.

Table 4: Hampshire district summary change for 12 to 14-year-old secondary age children

	12 to 14-year-olds			
	2022	2029		
	Total 12 to 14-year-olds	Total 12 to 14-year-olds	Change from 2022	% change from 2022
Basingstoke and Deane	6,939	7,139	200	2.88%
East Hampshire	4,859	4,878	19	0.39%
Eastleigh	5,139	5,386	247	4.81%
Fareham	4,094	4,348	254	6.20%
Gosport	3,015	2,919	-96	-3.18%
Hart	4,297	4,253	-44	-1.02%
Havant	4,557	4,685	128	2.81%
New Forest	5,984	5,799	-185	-3.09%
Rushmoor	3,650	3,756	106	2.90%
Test Valley	4,960	5,083	123	2.48%
Winchester	5,301	5,660	359	6.77%
Hampshire Total	52,795	53,906	1,111	2.10%

- 5.14. Based on SAPF 2022, there are a total of 52,795 12 to 14-year-olds in 2022 which increases annually from 2023 (2.5%), 2024 (1.8%) and 2025 (0.6%). Whilst the total number of children in the secondary years phase does show a reduction in 2026, 2027, 2028 and 2029, an overall increase remains in Hampshire (1,111 children, 2.1% against 2022).
- 5.15. In this age group, nine out of the 11 districts show an increase in the number of children each year between 2022 to 2025. Both Hart and Rushmoor show a small reduction in 2025. Overall change between 2022 to 2029 shows a reduction in Gosport, New Forest and Hart, with all remaining districts showing an increase.

6. Economy

- 6.1. Hampshire has a diverse economy and, as with the rest of the country, there are ongoing challenges for the childcare market in recovery from COVID19 and responding to the national and international economic conditions affecting inflation, employment and consumer spending.
- 6.2. Childcare, along with other businesses, during COVID, were able to take advantage of the government schemes of furlough, grants and bounce back loans. However, even with this support, the market has not fully financially recovered with many providers finding their reserves depleted. This leads to

limited capacity to manage new cash flow stresses. Some providers are also still paying back monies borrowed under the bounce back loan scheme.

- 6.3. To manage cashflow, some Early Years and childcare providers increase their prices at a rate that matches the increase to operating costs. Affordable childcare may not always be compatible with hourly rates that seek to recover operating costs or investment into the setting.
- 6.4. Affordable and accessible childcare supports infrastructure for employment in Hampshire for working parents. The new childcare offer further encourages parents of the youngest age groups to return to work.
- 6.5. The Early Years Education providers employ a workforce in the region of 7300+ staff to deliver to 0 to 5-year-olds. Staffing represents 70-80% of all costs associated with delivery⁵. Therefore, a large proportion of staff costs are funded by the Early Years Block of the Designated Schools Grant, of which c. £94m will be distributed throughout the 2023/24 financial year. Government funding is generally supplemented by parental fee income for hours outside of the DfE funded universal and extended entitlements. Providers can register to receive Tax Free Childcare⁶ from parents who are working who are eligible to access additional financial support for childcare fees from the Government. There is also other government funded childcare support for fees for eligible parents who receive Universal Credit⁷.
- 6.6. The childcare sector has seen significant numbers of staff leaving, with providers anecdotally reporting that they are struggling to compete with supermarkets and retail in attracting staff where the latter are able to offer increased pay, business stability and a less stressful environment. The spring census 2023 confirms that the Hampshire childcare workforce currently has approximately 5,200 staff delivering to 3 and 4-year-olds which is a 3.7% reduction on spring census 2022. The population forecast for these age groups also shows a reduction from 2022 to 2023.
- 6.7. Current data on Hampshire's economy⁸ (excluding IoW) suggests that there are approximately 667,000 people in work with those in the Early Years Education sector making up 1.2% of the total. The Early Years Funding has provided access to childcare for c. 11,000 working parents, further supporting the economy of Hampshire and surrounding areas.
- 6.8. The two cities of Southampton and Portsmouth are both important employment, retail and cultural centres and contain two ports and two major regional hospitals. These see significant cross-boundary travel to and from Hampshire. Coastal areas of southern Hampshire between the two cities of Southampton and Portsmouth along the M27 corridor are heavily urbanised

⁵ [Providers' finances: Evidence from the Survey of Childcare and Early Years Providers 2021 \(publishing.service.gov.uk\)](https://publishing.service.gov.uk)

⁶ [Tax-Free Childcare - GOV.UK \(www.gov.uk\)](https://www.gov.uk)

⁷ [Help paying for childcare: Universal Credit and childcare - GOV.UK \(www.gov.uk\)](https://www.gov.uk)

⁸ Information taken from [Business, economy and consumers | Business and economy | Hampshire County Council \(hants.gov.uk\)](https://hants.gov.uk) June 2023.

and have been a strong focus for new development. The economy is also influenced by local airports in the Eastleigh and Farnborough areas.

- 6.9. There are eleven military bases (Air Force, Army and Navy) across Hampshire, details of which are available on the County Council's website: [Military bases in Hampshire | Hampshire County Council \(hants.gov.uk\)](https://www.hants.gov.uk/military-bases) The dynamics of service family deployment can impact childcare needs, both in terms of increasing demand and removing demand.

Labour market

- 6.10. The Hampshire Monthly Labour Market ([EBIS reports | Business and economy | Hampshire County Council \(hants.gov.uk\)](https://www.hants.gov.uk/ebis-reports)) update provides national headlines (survey-based) on employment, unemployment and economic inactivity.
- 6.11. For Hampshire and the Isle of Wight combined, the provisional number of employees on payroll in April 2023 reduced from the previous month (-5,000), however is 0.7% (6,400) higher on the previous year. The number of online job postings in Hampshire and the Isle of Wight combined remains elevated in April 2023, and are 25% higher than a year ago. The employment rate (of 16-64 years) in Hampshire for the year to December 2022 was 77.9% (641,200). The rate for the year to December 2021 was 79.6% (650,400), which is a change of -1.7%, however is higher than the UK (75.5%). The Hampshire rate is lower than the South East (78.1% for the period to end December 2022), and the South East also saw growth against the previous year, unlike Hampshire.
- 6.12. To provided information of the number of working age that are not in work but are job seeking, the Office for National Statistics Claimant Counts provide a snapshot in time of the number of people claiming Jobseeker's Allowance plus those who claim Universal Credit and are required to seek work and be available for work. In April 2023 this snapshot of working aged population outlined there was 2.3% (19,275) people in Hampshire claiming support/unemployment benefit, which is lower than the UK (3.8%) and the South East region (2.9%). There was an increase in the number of claimants against the previous month, however the rate was unchanged. The claimant count for April 2023 remains higher (by approximately 38%) than before the pandemic (February 2020).
- 6.13. For Hampshire, 19.7% (162,000) of working age residents (16-64 years) were economically inactive for the year to December 2022. This is an increase in rate of 2.1% on the previous year, and is higher than the South East (19.3%) although lower than the UK (21.7%).

- 6.14. A district level summary of changes to employment, unemployment and economic activity is provided in Table 5 (below).

Table 5: Employment, unemployment, and economic activity in Hampshire (April 2023).

District	Employment rate	Unemployment rate	Economic inactivity
Basingstoke and Deane	Increase	Reduction	Reduction
East Hampshire	Reduction	No change	Increase
Eastleigh	Increase	Reduction	Reduction
Fareham	Increase	No change	Reduction
Gosport	Increase	Reduction	Reduction
Hart	Reduction	Increase	Increase
Havant	Increase	Increase	No change
New Forest	Reduction	Reduction	Increase
Rushmoor	Reduction	Increase	Reduction
Test Valley	Reduction	Increase	Increase
Winchester	Reduction	Increase	Increase

- 6.15. The latest Hampshire Economic and Business Intelligence information can be found on the following link: [EBIS reports | Business and economy | Hampshire County Council \(hants.gov.uk\)](https://www.hants.gov.uk/economic-intelligence)

Deprivation

- 6.16. There is research that outlines the educational and attainment gap⁹ in children from identified areas of deprivation or whose family characteristics identify them as poor and/or lower income. The cost-of-living rises have seen more families needing support through initiatives such as the Council's Connect4Communities.
- 6.17. Compared to other local authorities, Hampshire has low levels of deprivation, however, there are concentrated areas across the County, focused on a few large neighbourhoods. Areas highlighted according to the Index of Multiple Deprivation (IMD)¹⁰ which are the 20% most deprived places in Hampshire are: Andover, Farnborough, Aldershot, Havant, Gosport, Netley View, and Blackfield. Link to ONS maps showing Hampshire levels of deprivation: <https://documents.hants.gov.uk/Economy/IndexofMultipleDeprivation.pdf>
- 6.18. Havant accounts for more than 50% of all deprived areas in Hampshire. Almost one in four of all lower super output areas (LSOAs) in Havant fall within the bottom 20% in England. Leigh Park accounts for two thirds of place deprivation in Havant and one third of place deprivation in Hampshire.

⁹ [Poorer children's educational attainment: how important are attitudes and behaviour? | Joseph Rowntree Foundation \(jrf.org.uk\)](https://www.jrf.org.uk/poorer-childrens-educational-attainment-how-important-are-attitudes-and-behaviour/)

¹⁰ [PowerPoint Presentation \(hants.gov.uk\)](https://www.hants.gov.uk/economic-intelligence)

- 6.19. This information indicates that employment and economic activity are most vulnerable in the areas of Test Valley, Basingstoke and Deane and Gosport. Added to this Andover in Test Valley and Gosport are in the 20% most deprived places in Hampshire.
- 6.20. The government has supplementary index specifically in relation to children in low income families and uses the Income Deprivation Affecting Children Index (IDACI) which measures the proportion of all children aged 0 to 15 living in income deprived families. It is a subset of the Income Deprivation Domain which measures the proportion of the population in an area experiencing deprivation relating to low income. The definition of low income used includes both those people that are out-of-work, and those that are in work but who have low earnings (and who satisfy the respective means tests).

7. Housing Developments

- 7.1. The published Small Area Population Forecast (SAPF) 2022 includes an estimated forecast on the number of dwellings in Hampshire. There is an estimated increase in the region of 31,600 dwellings between 2023 to 2028 (43,900 from 2022 to 2029). The table below summarises this by each district council area. Changes in the number of dwellings can impact demand for childcare, depending on the type of dwelling and its capacity to support families with young children.

Table 6: Change in the number of dwellings in Hampshire between 2023 to 2028

District	Number of dwellings 2023	Number of dwellings 2028	Difference 2023 to 28	% change 2023 to 28
Basingstoke and Deane	80,577	84,679	4,102	5%
East Hampshire	55,980	58,967	2,987	5%
Eastleigh	61,170	65,037	3,867	6%
Fareham	50,964	54,212	3,248	6%
Gosport	38,306	39,477	1,171	3%
Hart	42,530	44,139	1,609	4%
Havant	57,056	59,122	2,066	4%
New Forest	83,378	85,990	2,612	3%
Rushmoor	41,850	45,149	3,299	8%
Test Valley	58,571	60,756	2,185	4%
Winchester	56,348	60,858	4,510	8%
Hampshire total	626,730	658,386	31,656	5%

- 7.2. The various District Council Local Plans contain a core strategy which sets out the planning authorities' policies and general location for housing and these plans are at various stages of development.
- 7.3. Table 7 below shows a summary of larger housing developments, or some smaller developments within proximity of each other and considered together, that are currently being considered for early years childcare. The larger developments within spaces that are not connected to urban conurbations, will likely require new settings to fit within the new communities being developed. These developments are likely to secure developer contributions (Section 106) or considerations from developers of land for childcare settings.
- 7.4. There is continued regular review needed to consider build out plans and the smaller developments assessed against the market context to ensure sufficient childcare places are maintained.
- 7.5. The minimum number of Early Years places required is based on the current Council's Developers' Guide (funded places for eligible 2, 3 and 4-year-olds). The Developers' Guide is in review to meet the new early years entitlements for younger years. There is need to review current assessed need for childcare places in new developments against the changed government policy for younger years places.

Table 7: District summary of housing developments under review for childcare requirements

District	Minimum early years places needed based on developers' guide (for developments detailed in appendix)	Early Years places secured (either Developer Contributions or to be met through existing childcare market)	Places to be confirmed (see appendix 1 for further information)	Early Years provision
Basingstoke and Deane	629	680	124	680 places secured through developer contributions. Pre-planning response provided for East of Basingstoke.
East Hampshire	381	289	92	289 places to be met through existing provision. Clarification required for 92 places.
Eastleigh	395	376	42	260 places secured through developer contributions. 116 places expected to be met through existing provision, continual review required.
Fareham	682	579	104	553 places secured through developer contributions. 26 places expected to be met through existing provision, continual review required. Developer discussions continue for Longfield Avenue.
Gosport	98	0	98	A review of existing provision will be undertaken as and when planning applications for housing developments are submitted. Where appropriate developer contribution will be sought.
Hart	130	130	0	130 places secured through developer contributions.
Havant	77	0	77	Feedback provided to planning application.
New Forest	292	131	161	131 places secured through developer contributions. Continual review of need with local supply required for 161 places.
Rushmoor	440	185	255	105 places expected to be met through existing provision. Continual review of need with local supply required. In discussion with developers

				regarding Aldershot Urban Expansion.
Test Valley	126	52	74	52 places expected to be met through existing provision. Continual review of need with local supply required. In discussion with developers regarding Whitenap.
Winchester	678	200	479	147 places expected to be met through existing provision. Continual review of need with local supply required. Barton Farm has provision made in S106 for full day care. North Whiteley has new pre-school on school site (since Sep 2022) prior to main development.

7.6. Where there are large single developments with mixed housing, identifying the need and securing additional childcare is more straightforward through the developer contributions model. Smaller and infill developments are more challenging to manage potential increase in childcare demand where they are numerous in one area. In these cases, S106 funds for new provision cannot be secured from this type of development and existing provision may or may not have capacity. Therefore, careful monitoring and review, including feedback through planning process of any implications is required.

8. Out of School Provision and Holiday Activities and Food Programme

8.1. Out of School provision comprises before and after school childcare, which is collectively known as 'wraparound' if both elements coexist. These provisions can be complemented with holiday activities. Wraparound is primarily delivered on school premises, with some community-based provision, typically supporting several local schools. Registered childminders often also provide a local solution for many families.

8.2. Holiday provision is typically based within schools (maintained and independent), community sites or specialist sites such as outdoor activity centres or sports/leisure centres. Holiday provision is largely run by PVI providers with the exception being a small number of school-led provisions. The Government's Holiday Activity and Food programme for children eligible for free school meals has seen an increase in the range and type of schemes.

8.3. Since May 2016, parents have had a Right to Request ¹¹wraparound provision. Schools who receive a request must investigate how this request can be facilitated and must demonstrate a clear decision-making process should it be denied. Likewise, providers of out of school provision have a right to request access to a school to deliver their services. Schools must consider

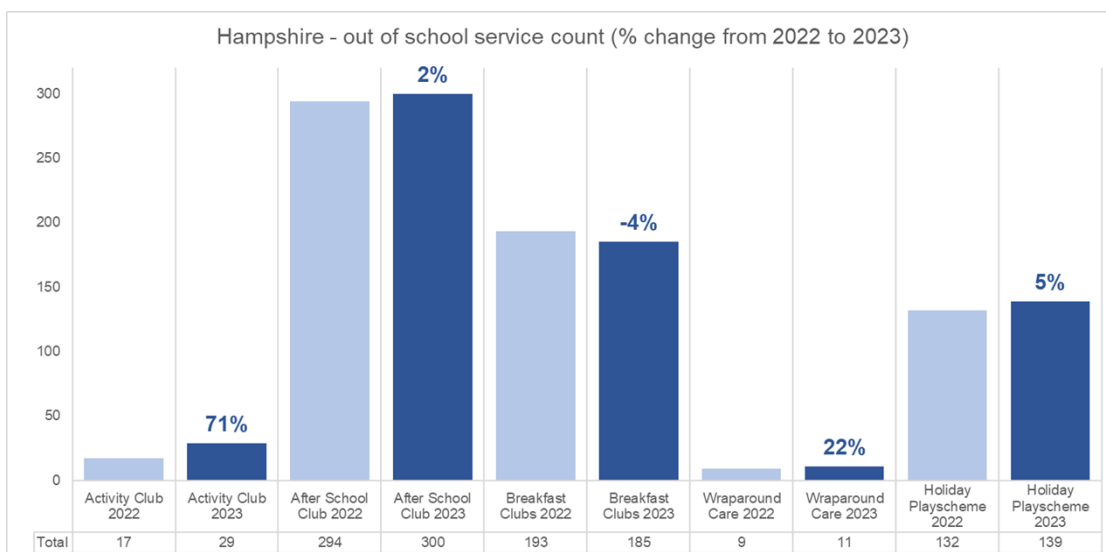
¹¹ [Department for Education \(publishing.service.gov.uk\)](https://publishing.service.gov.uk) Wraparound and holiday childcare Parent and childcare provider 'rights to request'

this request and demonstrate clear reasoning should it be denied. As these are local decisions made by schools and their governing bodies, there is no coordinated data available to understand the number of requests made nor the outcomes of those requests.

- 8.4. In July 2022, the Government announced a Wraparound Childcare (WAC) scheme to provide up to 20 hours per week of free childcare for eligible military parents with children aged 4 to 11-years-old, before and after school during school term time. This scheme was rolled out for the Autumn term 2022. There is limited data available to the Council to understand how many school/wraparound facilities have taken advantage of this funding. More information is available on the Government's website.¹²
- 8.5. In October 2023, the Chancellor announced £289m of Pathfinder funding to ensure that all schools can provide a 08:00-18:00 Wraparound offer for working parents. Hampshire County Council was selected as one of sixteen local authorities to help co-design the Pathfinder programme. The Pathfinder will begin nationally in September 2024, ending in May 2026. Funding will be available via the local authority to schools, PVI providers, childminders and community-based organisations.
- 8.6. Funding will help facilitate existing provision to extend to provide the full 08:00-18:00 requirement and will pump-prime and initiate new provision where there is currently none. Funding will taper over five academic terms, with expectation of self-sustainability when the funding ends. The business model anticipates that parents will pay fees for their child to attend and will use Government funding from Tax Free Childcare to receive Government support to do so.
- 8.7. At the end of March 2023, the Council's recorded data showed that there were 185 breakfast clubs, 300 after school clubs, 29 activity clubs, 11 wraparound care services and 139 holiday playschemes, totalling 664 out of school services. This is a net increase of 19 services (+3%) when compared against the previous year, although the change varies by type of service. These figures differ from the survey as school-run provision may not always be recorded by the Council.

¹² [Military families to benefit from £3,000 of childcare support - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/news/military-families-to-benefit-from-3000-of-childcare-support)

Graph 3: Out of school services in Hampshire, including percentage change against end of March 2022



- 8.8. In spring 2023, the Council undertook a school survey to better understand the out of school services that are available in Hampshire. Responses were encouraged from all school types. There was a 63% (384) response rate overall for all school types, with 78% (331 of 424 total) of primary schools and 100% (2 of 2 total) of all-through schools responding (those schools delivering to primary aged children and therefore likely to have the greatest need for out of school childcare). The Council are seeking further information regarding any out of school provision that is available at SEND schools.
- 8.9. The response rate from primary schools varied by district, ranging from 63% (Fareham) to 88% (Winchester) of the total primary schools in each district submitting a response to the survey.
- 8.10. The Local Authority ran another survey, encouraging responses from external providers delivering out of school childcare services. There were 91 responses, of which 70% were matched to a school site with the remaining 30% delivering out of school childcare from a site other than a school.
- 8.11. Schools are also required to complete a census return for the Department for Education (DfE), which includes information on out of school childcare that is available to their pupils: [Complete the school census – Guidance – GOV.UK \(www.gov.uk\)](https://www.gov.uk/guidance/complete-the-school-census). By reviewing schools’ responses to the DfE census alongside our own data, the Council can identify the childcare offer at schools who did not submit a response to the Council’s survey (93 primary schools). This review has also highlighted some discrepancies between the responses, and further exploration is required to confirm the out of school childcare offer that is available at these schools.

Breakfast Clubs

- 8.12. When analysing responses received to the Council's out of school childcare survey, the largest percentage of primary and all-through schools that responded (51%) confirmed that breakfast provision was run by the school on site. 32% stated that an external provider ran the club on the school site and a further 10% said that children access breakfast provision off site. To meet the wraparound childcare needs for working parents, the areas of focus are those schools where the school does not have a breakfast club available (6% of respondents), and those where a response was not received.
- 8.13. Of the primary and all-through schools who stated they run their own breakfast provision, 12% said they offer the club to children from another school.

After School Clubs

- 8.14. Responses to the Council's out of school survey suggest that, for primary and all-through schools, the largest proportion of after school clubs are run by an external provider on the school site (39% of those who submitted a response). 34% of schools indicated that they ran their own after school provision, and a further 18% stated that children access an after school club off site. The remaining 9% of primary and all-through schools who responded to the survey said that there was no after school provision known to the school.
- 8.15. Of the schools who run their own after school provision, 11% said they offer the club to children from another school.

Wraparound

- 8.16. Of the responses received to the Council's survey, 235 (55%) of primary and all-through schools have both breakfast and after school clubs available on site. Of the 333 responses received, 41 stated their out of school provision was available from at least 08:00 to 18:00, however schools only provided this information for provision run by the school, and this information was not requested for provision run on site by an external provider.

Signposting

- 8.17. Where out of school provision is not offered on the school site, the Council's survey asked schools to identify whether children can access provision off site instead. Of the responses received, 34 primary and all-through schools (10% of the responses received) said that children access a breakfast club off site, and 59 schools (18% of responses received) said children access breakfast provision off site.
- 8.18. The DfE school's census includes a similar question, however schools are asked to identify if they signpost parents to a provider with whom they have a formal arrangement off site (including transport) or whether the school

signposts parents to off-site providers (who will pick up from the school). Schools may have provision on site whilst also signposting parents.

- 8.19. The discrepancies between responses to the Council's survey and the DfE census, as mentioned earlier in this assessment, must be explored to identify the true out of school childcare offer for those schools, as this could materially affect the overall view of wraparound sufficiency. Additionally, the Council plans to reissuing the survey to those schools who did not respond earlier in the year to encourage further responses.

Holiday Activity and Food Programme

- 8.20. The Holiday Activity and Food Programme (HAF) is a DfE funded programme to provide enriching activities and meals for school aged children who receive benefit related free school meals. Local authorities have the discretion to use 15% of the funding to include vulnerable children who don't currently meet the Benefit Related Free School Meals threshold. This could include children with access to early help and social care and those with Special Educational Needs and Disabilities. The HAF programme was initiated nationally in Spring 2021, with funding currently committed until March 2025. HAF is delivered in a number of ways; either as part of an existing holiday provision; or through the procurement of specialist HAF programmes.
- 8.21. The Hampshire County Council Holiday Activities and Food Programme annual report for April 2022 to March 2023 ([C4C-HAF-Annual-Report-2022.pdf \(hants.gov.uk\)](#)) shows 36% of eligible children attended provision during the year. During Easter there were 5,922 eligible children attending, 11,652 in the summer and 5,637 at Christmas.
- 8.22. There were 53 HAF providers offering over 120 schemes. Many HAF providers offer paid for provision alongside their HAF funded places, supporting an inclusive and financially sustainable approach. Data received from HAF providers suggests that at Easter 43%; 51% summer and 28% at Christmas of the total attendance at a HAF provision was from fee paying children.

9. Childcare Market

- 9.1. Hampshire has a mixed economy of childcare providers. The Council has reviewed the current childcare market, and has noted changes from the previous year, in order to assess the sufficiency of childcare places that are available. We have used DfE published statistics¹³ for the period 31 August 2022 to 31 March 2023 which provides information from Ofsted on registered providers for all Local Authorities. The table below outlines that Hampshire holds 4% of all childcare places and providers in All England.

¹³ [Childcare providers and inspections as at 31 March 2023 - GOV.UK \(www.gov.uk\)](#)

Table 8: Comparison of the change in providers from 31 August 2022 to 31 March 2023 between Hampshire, All England, the South East and bordering authorities. This data includes childminders, childcare on domestic premises, childcare on non-domestic premises and home childcarers.

	Early Years Register providers					
	Providers at start	Places at start	Providers at end	Places at end	% change in providers	% change in places
All England	51,147	1,281,027	49,084	1,266,741	-4.03%	-1.12%
South East	9,958	239,138	9,546	236,547	-4.14%	-1.08%
Hampshire	1,637	40,295	1,556	39,386	-4.95%	-2.26%
Bournemouth, Christchurch & Poole	328	8,289	316	8,049	-3.66%	-2.90%
Dorset	269	6,261	265	6,226	-1.49%	-0.57%
Isle of Wight	75	2,311	69	2,214	-8.00%	-4.18%
Portsmouth	161	4,859	157	4,653	-2.48%	-4.24%
Southampton	209	5,667	201	5,652	-3.83%	-0.26%
Surrey	1,699	37,534	1,641	37,019	-3.41%	-1.37%
West Berkshire	201	4,861	193	4,743	-3.98%	-2.43%
West Sussex	920	21,820	884	21,750	-3.91%	-0.32%
Wiltshire	591	13,236	568	12,956	-3.89%	-2.12%

- 9.2. This data suggests that Hampshire saw a greater reduction in both the percentage of providers and places when compared with All England and the South East. Except for the Isle of Wight, Hampshire had a higher percentage reduction in the number of providers than other bordering authorities, although bordering authorities included in table 6 are showing a reduction in both providers and places for the period. The published data set determines that, of the 81 fewer EY registered providers in Hampshire, 62 (77%) were childminders, 18 (22%) childcare on non-domestic premises and 1 (1%) childcare on domestic premises.
- 9.3. Hampshire County Council is required to keep a register of all approved childcare and early years provision that provide the government's free early years entitlement. Free of charge Early Years Education (EYE) places are available in school nursery classes, state or private nursery schools, day nurseries, playgroups, or pre-schools and with approved childminders.
- 9.4. Table 9 provides a summary by district of all childcare providers that deliver early years education to 2, 3 and 4-year-old children and out of school childcare as of April 2023.

Table 9: Childcare delivery by district, as of April 2023

District	EYE Providers				Number of non-EYE Childminders**	Number of Out of School providers*	No of Home Childcarers**
	Number of EYE PVI (excl. school run)	Number of school run	Number of EYE Childminders**	Total number of EYE provider			
Basingstoke and Deane	86	6	97	189	36	71	20
East Hampshire	59	7	43	109	24	65	16
Eastleigh	57	2	87	146	16	46	13
Fareham	39	4	45	88	19	40	7
Gosport	30	4	23	57	8	23	4
Hart	47	0	93	140	28	33	21
Havant	53	2	32	87	12	29	9
New Forest	69	7	49	125	12	59	10
Rushmoor	36	4	64	104	12	36	17
Test Valley	58	5	77	140	21	60	19
Winchester	69	4	35	108	22	63	39
Total	603	45	645	1,293	210	525	186

*Out of School includes: Activity club / After school club / Breakfast club / Wraparound care

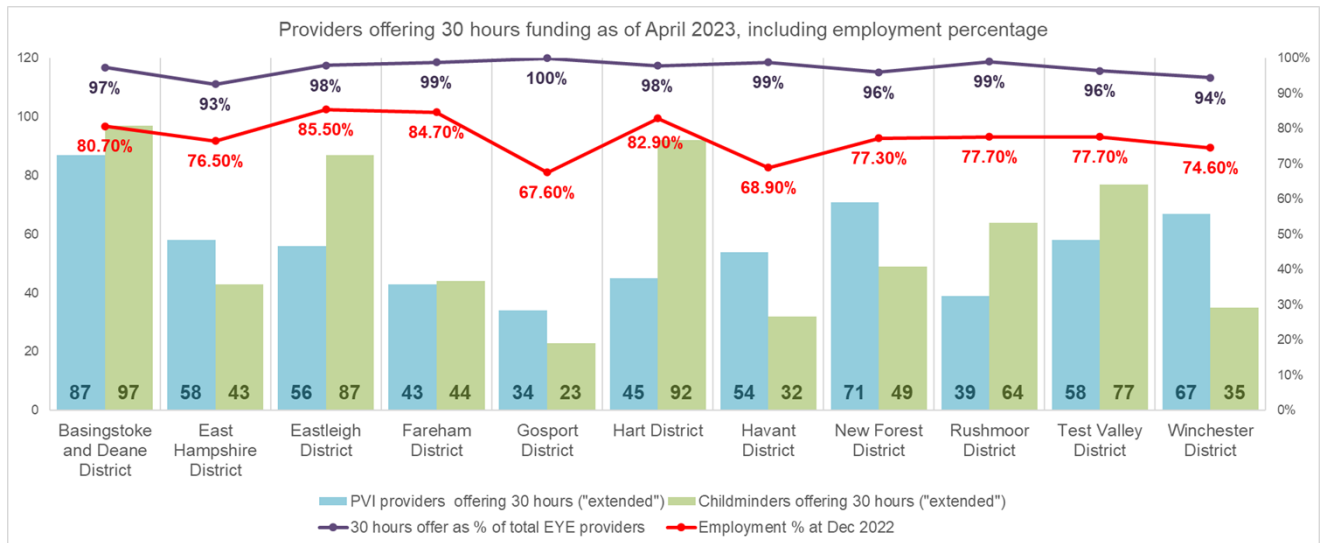
** (If no note of places for childminder = 3 places and if no note of places for home childcarer = 1 place)

- 9.5. There are 63 fewer EYE providers delivering childcare when compared to the previous CSA (-23 PVI and -40 childminders). There is also a reduction of -33 non-EYE childminders and -60 Home Childcarers. The number of out of school services (activity club, breakfast club, after school club or wraparound care) increased by 12 against the previous year.

Providers offering 30 hours funding

- 9.6. At the point of registration for Early Years Education funding, it is recorded whether a provider is planning to offer places for the extended 30 hours offer. Graph 4 (see below) shows the current recorded status across the county. This graph also includes the employment percentage of working age residents in Hampshire at December 2022 (source: Hampshire Monthly Labour Market bulletin).

Graph 4: Providers offering extended 30 hours as of April 2023



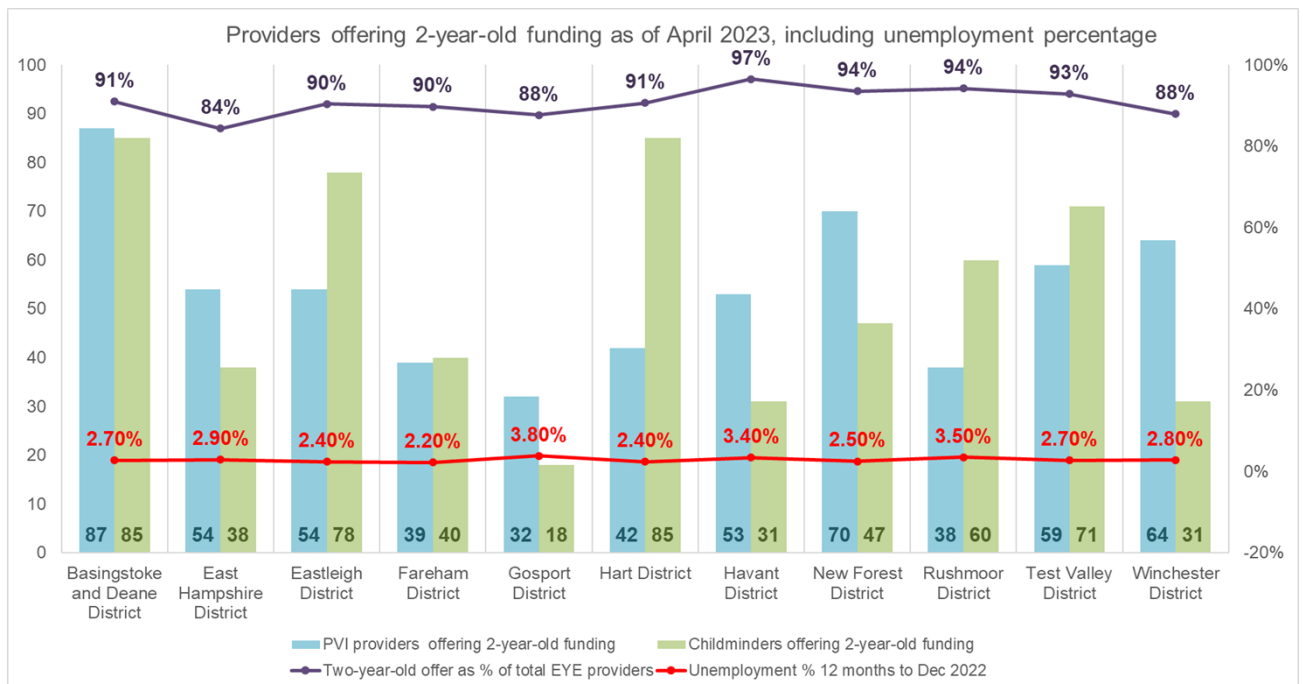
9.7. By benchmarking each district against the whole of Hampshire, we are able to consider how the market is performing. This shows that at least 93% of providers in each district are currently offering the extended 30 hours funding, with a Hampshire average of 94% (612) for PVI providers and almost 100% for childminders (643). The number and percentage of PVI providers has reduced against 2022 (previously 630, 95%). Both the number of childminders offering 30 hours and the percentage have increased from 2022 (previously 621, 91%).

9.8. The graph above indicates that the districts with the highest percentage of employed working age residents also have a high percentage of providers offering the current 30 hours entitlement for 3 and 4-year-olds.

Providers offering 2-year-old funding

9.9. At the point of registration for Early Years Education funding, it is recorded whether a provider is planning to offer places to 2-year-old funded children. Graph 5 (see below) shows the current recorded status across the county.

Graph 5: Providers offering 2-year-old funding as of April 2023



9.10. Overall, whilst not as high as the average number of providers offering 30 hours to 3 and 4-year-olds, there is still a high average of 91% of providers offering to disadvantaged 2-year-olds (PVI providers 592 and childminders 584). Whilst the number of providers (both PVI and childminders) has reduced, the percentage of those offering 2-year-old funding has remained consistent against 2022. The graph indicates that there is some variance across the districts in the proportion of providers delivering the disadvantaged 2-year-old funding offer.

9.11. There are 13 PVI providers and two childminders who currently offer 2-year-old funding that do not offer funded places for the extended offer (30 hours) to eligible working parents. From 2025, when the new entitlement will offer 30 hours for all eligible working parents, these providers may find that the families they support will require some access to 30 hours of funded childcare per week.

Early Years Education Providers Market Mix

9.12. The childcare offer differs by provider. The DFE outlines in the Early Years Census that settings that open for up to 6 hours per day are referred to as sessional care and those that are open for more than 6 hours per day are referred to as full day care. There are some settings that provide a term time offer open for up to 39 weeks, whereas others open for more weeks of the year. The Council has used these characteristics to assess the mix in the Early Years childcare market.

Sessional Care and Full Day Care

Table 10: Summary of EYE providers recorded as offering sessional care (up to 6 hours a day), full day care (equal to or more than 6 hours a day), and those offering childcare for up to 39 weeks and over 39 weeks.

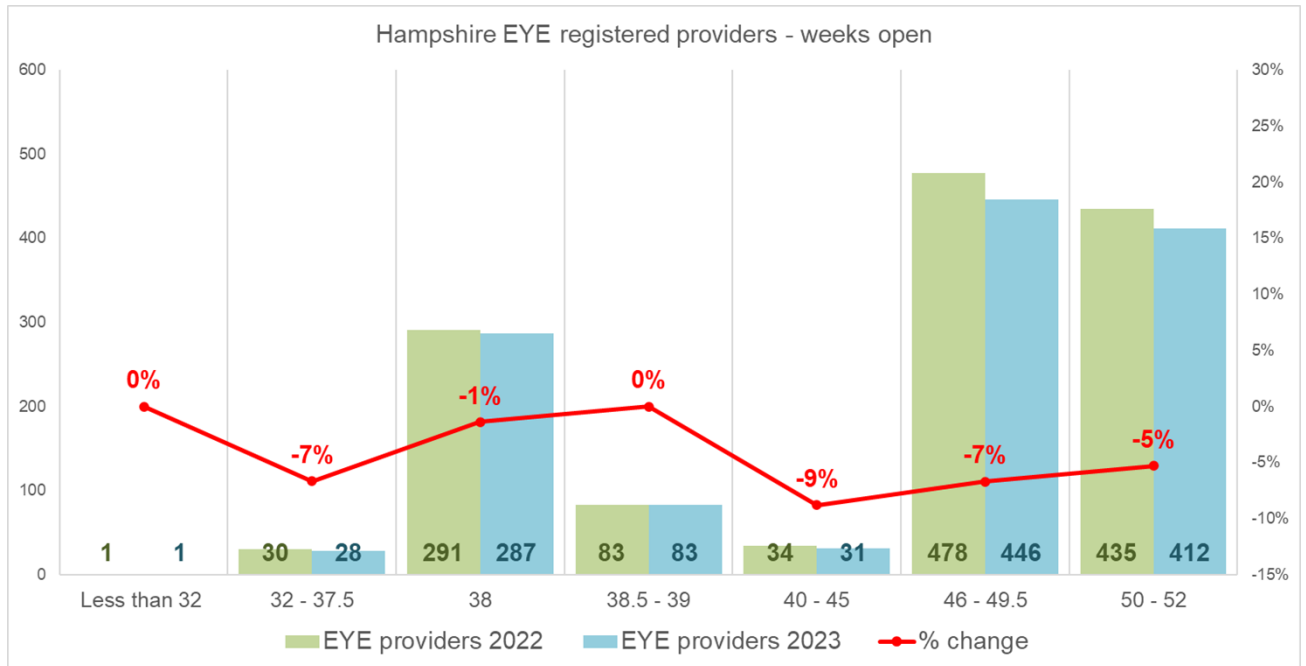
	Providers offering sessional care (up to 6 hours)	Providers offering Full Day Care (>=6 hours)	<i>Information not available</i>	Up to 39 weeks	Over 39 weeks	<i>Information not available</i>
Group providers	54	591	7	343	304	6
Childminders	0	645	0	56	585	4
Hampshire total	54	1,236	7	399	889	10

9.13. There is a continued move towards offering full day care and a move to offer more than term time only. The majority (91%) of group provision is delivering full day care (offering more than 6 hours per day), which is a 1% increase against 2022. Most childminders (91%) offer more than 39 weeks, although this is a reduction from 2022 (93%). There is just under half (47%) group providers that offer more than 39 weeks, which is an increase on 2022 (45%). This change has become more apparent since the introduction of the 30 hours (extended) entitlement for working parents for 3 and 4-year-olds, which is indicative of working parents' requirement to access childcare all day and year-round.

Weeks provided

9.14. Graph 6 (see below) shows the change from 2022 to 2023 in the number of weeks being provided by EYE registered group providers and childminders.

Graph 6: Comparison between 2022 and 2023 in the number of weeks Hampshire providers are open



9.15. There has been an overall reduction in the number of EYE providers in Hampshire, therefore it is expected that there would be a reduction in at least some of the ranges detailed in the graph above. In terms of the number of providers, the largest change can be seen in those offering 46-49.5 weeks (-32 providers). Despite this reduction, many providers (66%) are open for 46+ weeks of the year which ensures childcare accessibility in Hampshire beyond school term time that will meet the needs of working parents' requirements.

Closing at 1pm or earlier

9.16. There are currently 87 unique EYE providers recorded as closing at 1pm or before, offering a half day at least one day a week. The distribution of this is seen in table 11 (see below). Some providers close early on more than one day per week.

Table 11: Providers closing at 1pm or earlier

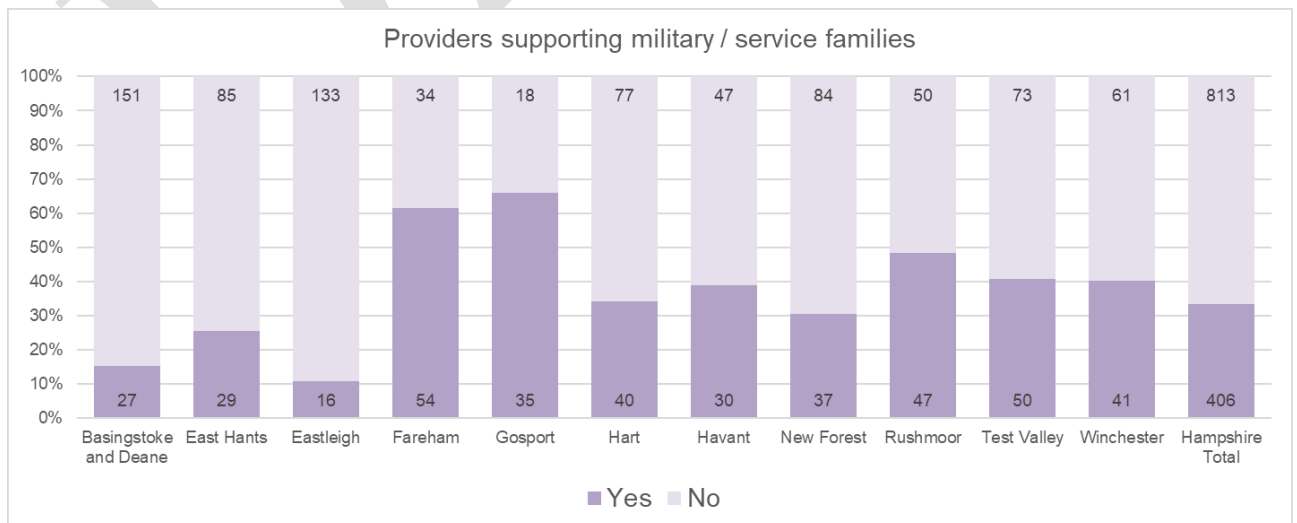
	Providers closing at 1pm or earlier				
	Monday	Tuesday	Wednesday	Thursday	Friday
Number of EYE Providers (2023)	13	17	18	21	55
<i>Providers closing <=13:00 as % of total EYE providers</i>	1.01%	1.31%	1.39%	1.62%	4.25%
Number of EYE Providers (2022)*	13	18	20	24	62
<i>Providers closing <=13:00 as % of total EYE providers</i>	0.96%	1.33%	1.48%	1.77%	4.58%
<i>Difference in number of providers 2023 / 2022</i>	0	-1	-2	-3	-7

9.17. The numbers above represent a small percentage of the overall number of providers. It is understood that the number of providers closing for half days on a regular basis has been reducing since the introduction of the 30 hours offer, and this is evidenced in a reduction from 95 unique providers in 2022 to 87 unique providers in 2023.

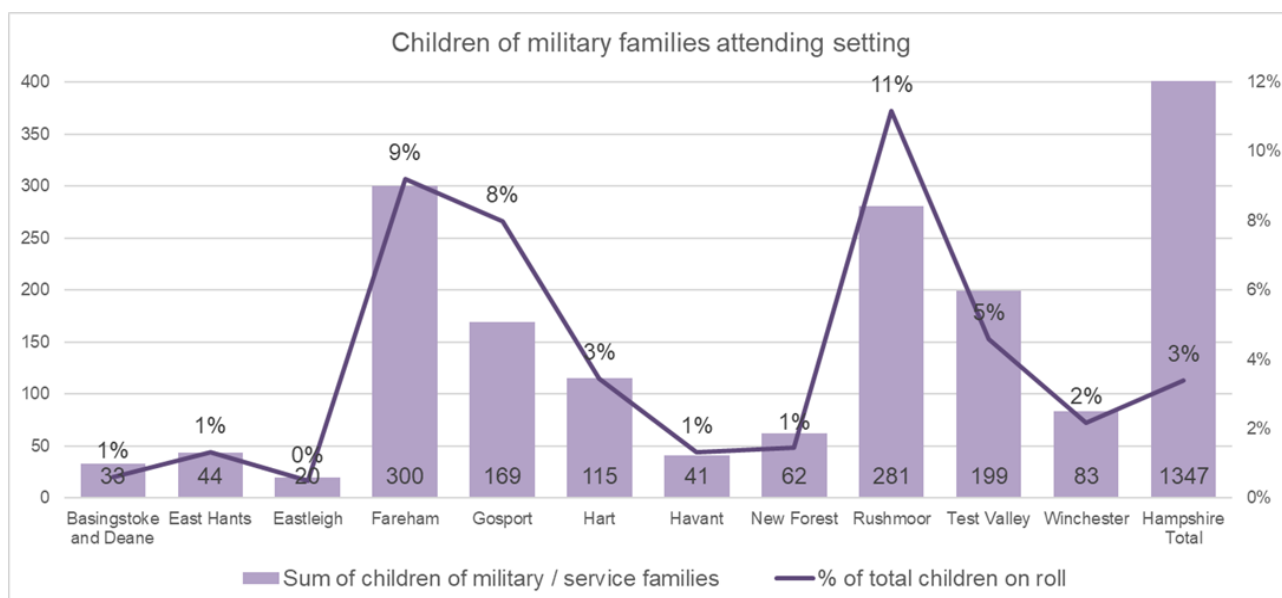
Providers supporting military / service families

9.18. Hampshire is a county that has eleven military bases. In the region of 33% (406) providers actively indicate they provide services to military families. The following information was provided at spring census 2023 by EYE registered providers who are providing childcare for children aged 0 to 4-years-old.

Graph 7: Number and percentage of providers currently providing a childcare offer to military / service families at spring census 2023.



Graph 8: Number of early years children of military / service families attending a setting in the district and percentage of total children on roll at spring census 2023.



Changes in the childcare market

9.19. Table 12 (see below) details changes in the number of places in the childcare market from April 2022 to March 2023. Due to a reduction in population a reduction in the childcare market has been expected. In addition to the reduction in EYE registered providers (-63) as seen in section 8.5 of this assessment, the total difference in the number of places (offered at both EYE and non-EYE settings) has also reduced by -372 (-1%) in Hampshire overall.

Table 12: Childcare places change by type April 2022 to March 2023

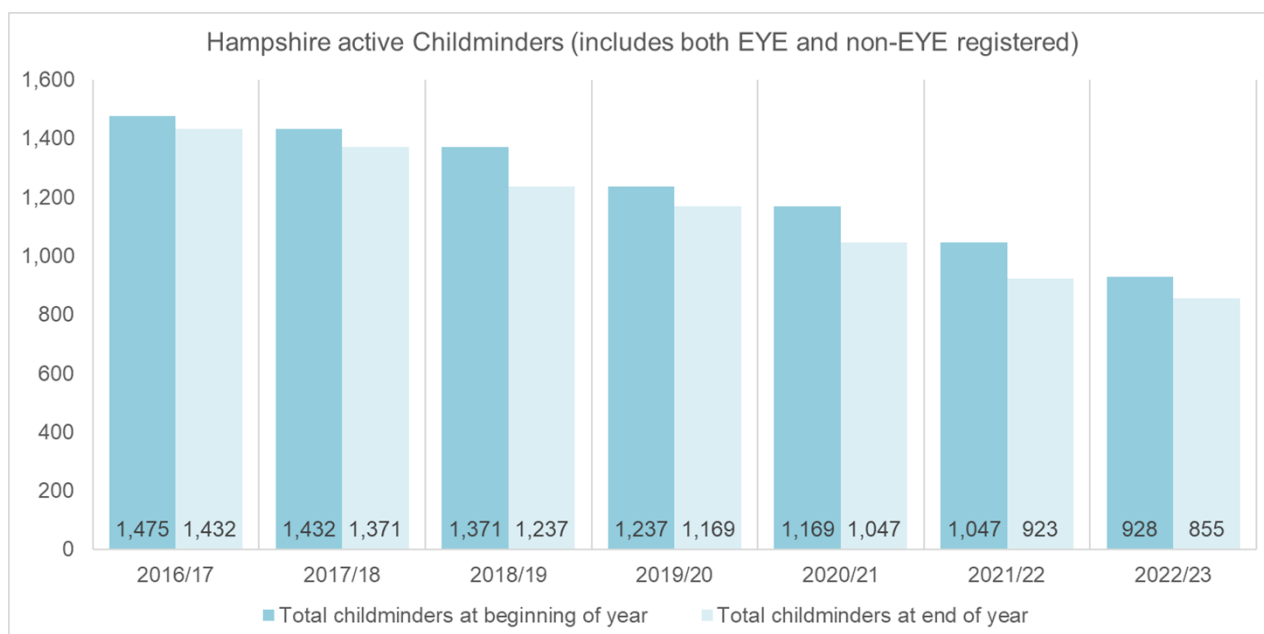
District	EYE Providers					Non-EYE providers			
	No. EYE PVI (excl. school run)	No. school run	No. EYE Child minders*	Total	Net difference from 2022	No. non-EYE Child minders*	No. of Home Childcarers*	Total	Net difference from 2022
Basingstoke and Deane	3,395	258	463	4,116	-12	115	20	135	4
East Hampshire	2,067	238	177	2,482	1	93	16	109	4
Eastleigh	2,347	100	337	2,784	-31	59	13	72	-14
Fareham	1,975	135	256	2,366	-68	69	7	76	6
Gosport	1,286	292	90	1,668	-25	24	4	28	-4
Hart	2,198	0	428	2,626	38	100	21	121	-47
Havant	2,376	85	149	2,610	-18	36	9	45	-10
New Forest	2,714	204	215	3,133	-90	50	10	60	-12
Rushmoor	1,444	212	307	1,963	14	45	17	62	-18
Test Valley	2,757	260	341	3,358	-40	69	19	88	-3
Winchester	2,967	106	154	3,227	59	76	44	120	-26
No District Recorded	0	0	0	0	-30	0	0	0	-42
Other Local Authority	0	0	0	0	0	0	11	11	-8
Total	25,526	1,890	2,917	30,333	-202	736	191	927	-170

*Where the number of places for a childminder is not known, it is estimated at 3

**The number of places per Home Childcarer is estimated at 1

9.20. Graph 9 (see below) reviews the changes seen with childminders over a longer period and highlights how the current market has reduced in size over the last seven years.

Graph 9: Trend in registered childminders in Hampshire



9.21. In the last seven years, there has been a net reduction in childminders (both EYE and non-EYE). The reducing trend of childminders joining the sector has been seen nationally and is not limited to Hampshire. The Council is conducting a recruitment campaign to attract more childminders to the sector which has already seen a positive impact in the number of enquiries from possible childminders.

9.22. Childminders generally work on their own (sole traders), however there are 102 childminders who reported working with assistants at spring census 2023, which enables them to look after more children whilst keeping within ratios for each age group.

Early years and childcare provision under threat of closure known as of April 2023

- 9.23. As of the end of March 2023, there are three settings in Hampshire that have notified the Council of their intention to close with no continuity plans in place for another provider to take over. These settings are all PVI providers offering full day care, in East Hampshire, Fareham and New Forest, and offering 24 places each.

Hampshire Childcare Workforce

- 9.24. At spring census 2023, providers were asked to confirm the number of staff in their setting that are working with children aged 0 to 5-years-old, and also the number of staff working with 3 and 4-year-old children.

Table 13: Comparison of all group providers, including school run provision, and staff numbers in 2023 against 2022

District	CSA 2022			CSA 2023			Comparison between 2022 and 2023					
	Group provision	Staff numbers		Group provision	Staff numbers		Difference in number of group providers and staff			% Difference in number of group providers and staff		
		3-4s	0-5s		3-4s	0-5s	Group provision	3-4s	0-5s	Group provision	3-4s	0-5s
Basingstoke and Deane	97	696	919	92	657	1,062	-5	-39	143	-5%	-6%	16%
East Hants	65	437	706	66	389	667	1	-48	-39	2%	-11%	-6%
Eastleigh	60	431	673	65	443	699	5	12	26	8%	3%	4%
Fareham	48	323	577	45	310	593	-3	-13	16	-6%	-4%	3%
Gosport	34	274	389	36	247	405	2	-27	16	6%	-10%	4%
Hart	47	349	511	46	326	516	-1	-23	5	-2%	-7%	1%
Havant	61	411	611	54	360	590	-7	-51	-21	-11%	-12%	-3%
New Forest	78	575	758	78	585	803	0	10	45	0%	2%	6%
Rushmoor	41	273	377	41	266	427	0	-7	50	0%	-3%	13%
Test Valley	66	407	635	62	412	724	-4	5	89	-6%	1%	14%
Winchester	74	433	731	68	471	802	-6	38	71	-8%	9%	10%
Hampshire Total	671	4,609	6,887	653	4,466	7,288	-18	-143	401	-3%	-3%	6%

- 9.25. Overall, there has been a -3% reduction in the number of staff based at group providers that deliver to 3 and 4-year-olds. In contrast, however, there is an overall increase of 6% in the total number of staff delivering to 0 to 5-year-olds, which resonates with the increase in the number of 0 and 1-year-olds on roll, despite there being an overall reduction in the number of providers in Hampshire.

9.26. Table 14 (see below) shows the trend in workforce collected in each spring census since 2014.

Table 14: change in Hampshire childcare workforce delivering Early Years childcare to 3 and 4-year-old children (including provision run by a school):

Hampshire Childcare Workforce delivering EYFS to 3 and 4-year-olds			
Spring census	Workforce	Change per year	% change per year
Spring 2014	6,401		
Spring 2015	6,453	52	1%
Spring 2016	6,073	-380	-6%
Spring 2017	6,388	315	5%
Spring 2018	6,255	-133	-2%
Spring 2019	5,937	-318	-5%
Spring 2020	6,112	175	3%
Spring 2021	5,433	-679	-11%
Spring 2022	5,392	-41	-1%
Spring 2023	5,164	-228	-4%
Change 2014 to 2023		-1,237	-19%

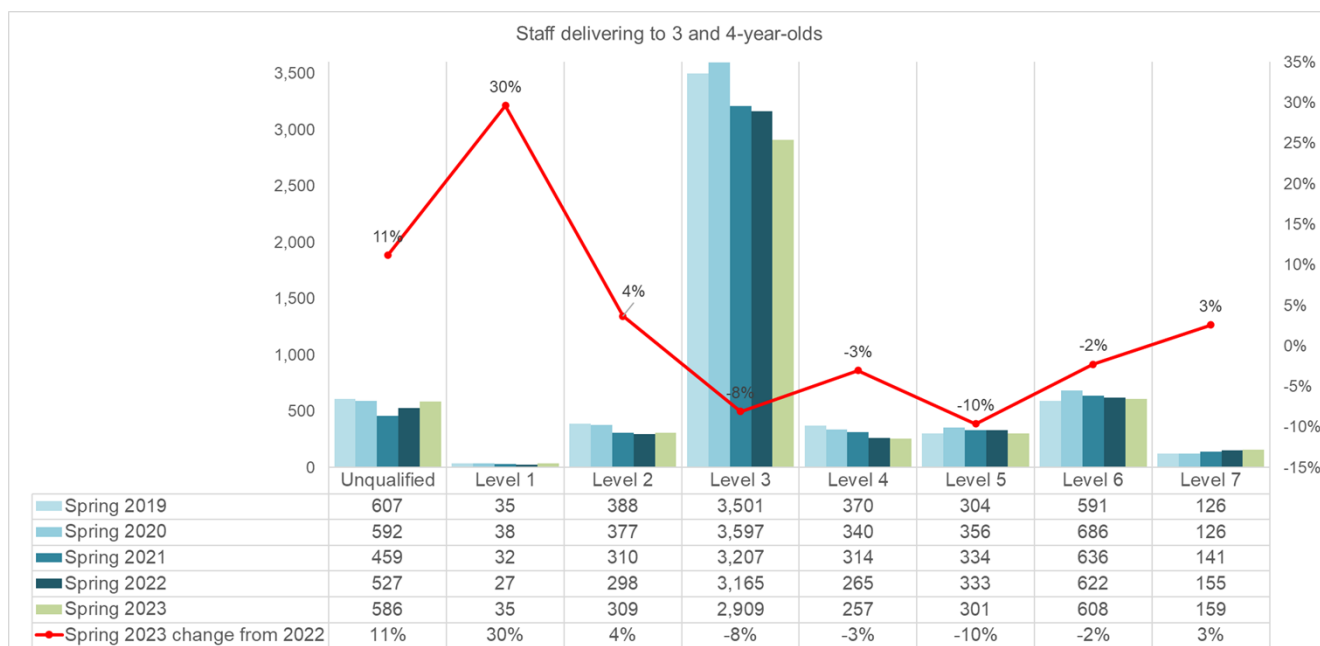
9.27. This table shows a drop in overall staff numbers of -19% since 2014. The loss of expertise and qualified staff to meet EYFS regulations is a national challenge. In Hampshire, there has been a trend of decline in staff numbers since 2015. The most significant decrease in spring 2021 was following the main periods of COVID lockdowns.

9.28. The reduction in staffing could also, in part, be attributed to settings responding to financial tensions in affordable childcare and reducing their staffing models to meet statutory ratios rather than go beyond these. Anecdotal feedback from providers has indicated that some staff have left employment to secure an increase in salary in alternative employment outside of childcare. The Early Years Foundation Stage¹⁴ (EYFS) has specific requirements regarding the ratio of staff looking after children which varies according to age group, and these will provide optional change from September 2023 to support increased ratios of 1 adult to 5 children aged 2 years, currently 1:4.

9.29. The EYE spring census provides a snapshot into the level of qualifications the workforce currently holds. Graph 10 (see below) details the change in staff qualifications, for those delivering to 3 and 4-year-olds, between 2022 and the most recent spring census in 2023.

¹⁴ [Early years foundation stage \(EYFS\) statutory framework - GOV.UK \(www.gov.uk\)](https://www.gov.uk/guidance/early-years-foundation-stage-eyfs-statutory-framework)

Graph 10: change in staff qualifications from 2022 to 2023



9.30. This graph shows the trend by qualification level since 2019 for staff delivering to 3 and 4-year-olds. Despite an overall reduction, in 2023 there is an increase in the number of staff that are unqualified or hold a level 1 or 2 qualification. Anecdotally, this may be a reflection in the difficulty that providers are having with recruiting qualified staff.

9.31. There remains an -8% reduction for those staff that are level 3 from 2022. These staff are recognised as key amongst qualified practitioner staff who have the most impact in allowing delivery of the childcare EYFS ratio requirements. Staff at levels 4, 5 and 6 also saw a reduction, with a small increase (3%) in the number of staff with a level 7 qualification.

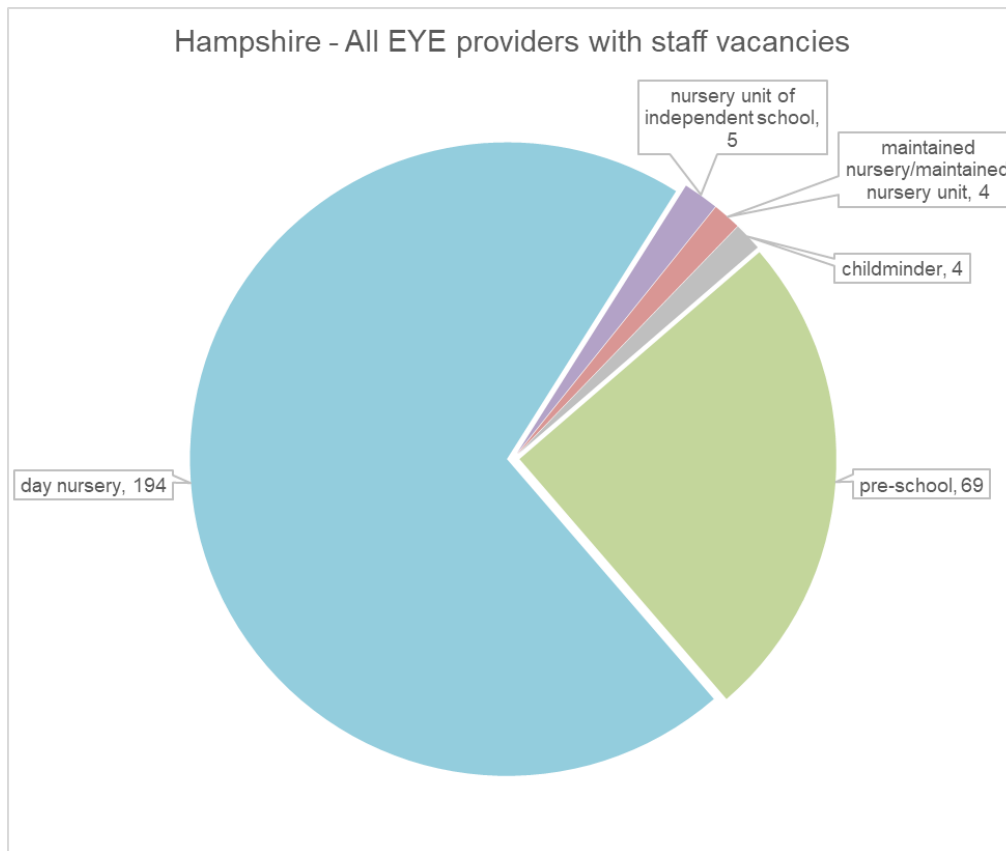
9.32. The reduction in staff numbers is cause for concern when considering the expansion of places for younger years as more staff will generally be required, despite there being an optional 1:5 ratio of staff to 2-year-old children being introduced from September 2023. Anecdotally, providers are indicating that they will only use this change in ratio for emergencies.

9.33. The ratios for group providers are: 1:3 for children aged 0 and 1-years-old; 1:4 from September 2023; 1:5 for children aged 2-years-old; and 1:8 for children aged 3 and 4-years-old. For childminders the ratios differ - a childminder may care for a maximum of six children under the age of 8-years-olds. Of these six children, a maximum of three may be younger children and there should only be one child under the age of 1-year-old. There are some exceptions to these ratios for childminders, which are detailed in the EYFS.

9.34. At spring census 2023, 272 (42%) of EYE PVI providers stated they had staff vacancies, which varied by district (ranging from 36% to 47%). Winchester had the highest percentage of providers with vacancies (47%), shortly

followed by Hart (46%). Additionally, four EYE registered childminders stated they had staff vacancies.

Graph 11: Count of EYE providers with staff vacancies



- 9.35. Of these 272 EYE PVI providers, 230 (85%) said they had issues with staff recruitment, which varied by district (ranging from 72% in Eastleigh and Test Valley to 95% in Havant).
- 9.36. In 2022, Hampshire put in place a workforce strategy to support the childcare sector with interest and recruitment into childcare as a career. We are actively working with childcare providers and partners through the following channels, focussing on the mission that it “is not just a job, it’s a profession”. This strategy is constantly under review and has been updated for 2023/24:
- Working with Job Centre Plus (JCP), HCC Skills & Participation team, careers, Libraries, Colleges, Army, Refugees, The Apprenticeship Hub, Food Banks, etc.
 - Targeting work with JCP in districts.
 - Regular dedicated blog bulletin – top tips / information to support recruitment / job adverts and factsheet for providers when closing their provision to support staff being made redundant.
 - Signposting providers interested in offering apprenticeships to The Apprenticeship Hub.
 - South East Local Authorities Recruitment Group relaunched– although only one meeting has been held in 2022.

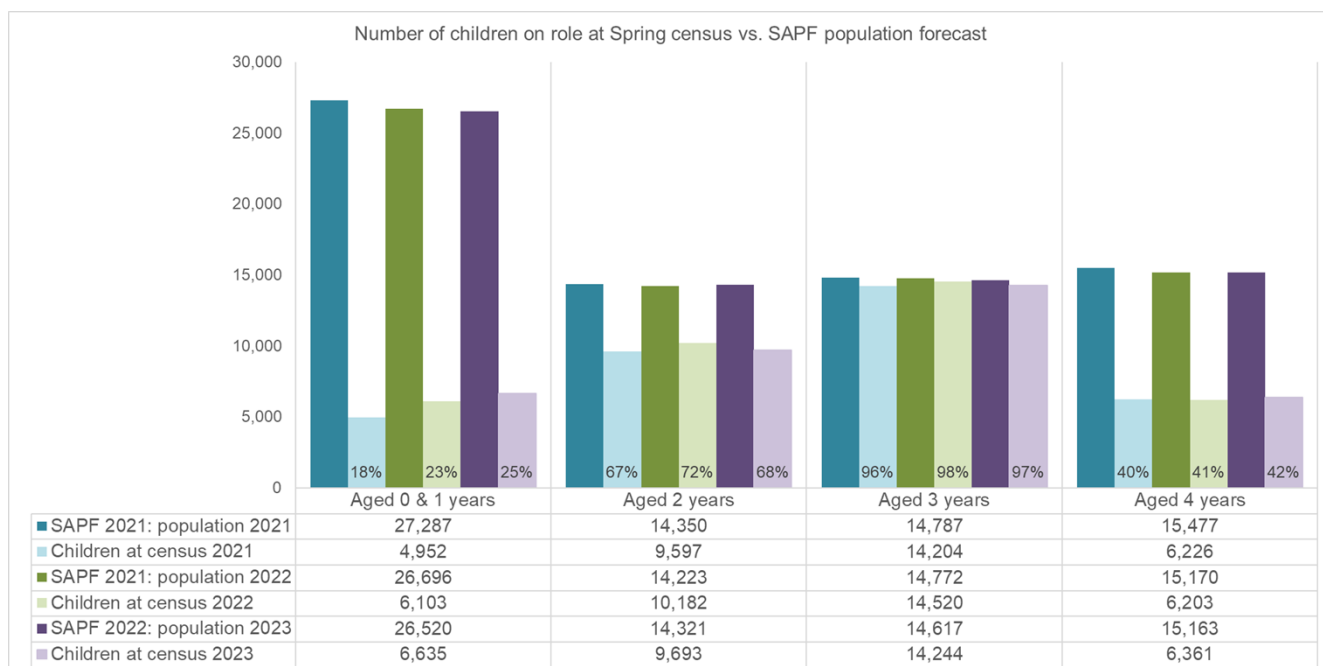
- Regular social media posts by the Council to raise the profile / career in early years.
- Delivery of “Becoming a Childminder in Hampshire” and “Childminder Chatter” sessions, supported by four experienced childminders.
- Recruitment film, day in the life of ..., and website changes to improve engagement and support from Corporate Marketing to review the Council’s dedicated recruitment site to prepare for a further social media campaign.
- Working with another Council department with the expertise to support a marketing campaign (using social media and other channels)
- Promoting childcare and Early Years at dedicated recruitment and other events within the county.

9.37. One of the areas of focus is to address the retention of workforce as well as recruitment into the sector. There are now several Government funded courses and mentor schemes to upskill, refresh and provide support to practitioners.

10. Early Years Entitlement take-up

- 10.1. Early Years Education is a significant part of the childcare market and is defined as provision which delivers the Early Years Foundation Stage (EYFS) and attracts Early Years Education (EYE) funding. Currently, all 3 and 4-year-olds plus eligible 2-year-olds are entitled to up to 570 hours per child from their eligible birthday year. This equates to a maximum of 15 hours over 38 weeks. The 570 hours can instead be “stretched” over more than 38 weeks and the number of hours claimed per week is reduced accordingly. Parents can purchase additional hours above the funded offers by separate arrangement made directly with the provider. This will change following the roll out of the new entitlements announced in the Spring Budget 2023, where working parents of children in the younger age groups will become entitled to funded childcare over the coming two years.
- 10.2. Each spring, when undertaking the EYE spring census, the Council collects data regarding the attendance of all children, (whether they are funded by the local authority or not) aged 0 to 4 years, that attend provision at an EY registered provider in Hampshire. Graph 12 (see below) shows a comparison of **all** children aged 0 to 4 years in childcare settings that offer early years education funding compared to population as per SAPF 2022. It is likely that the attendance data collected at census is a numerical count from providers which will include children residing in Other Local Authorities and may also include children attending more than one setting (not unique children).

Graph 12: Number of all 0 to 4-year-old children in childcare (excluding YR 4-year-olds) compared to SAPF 2022 population data:



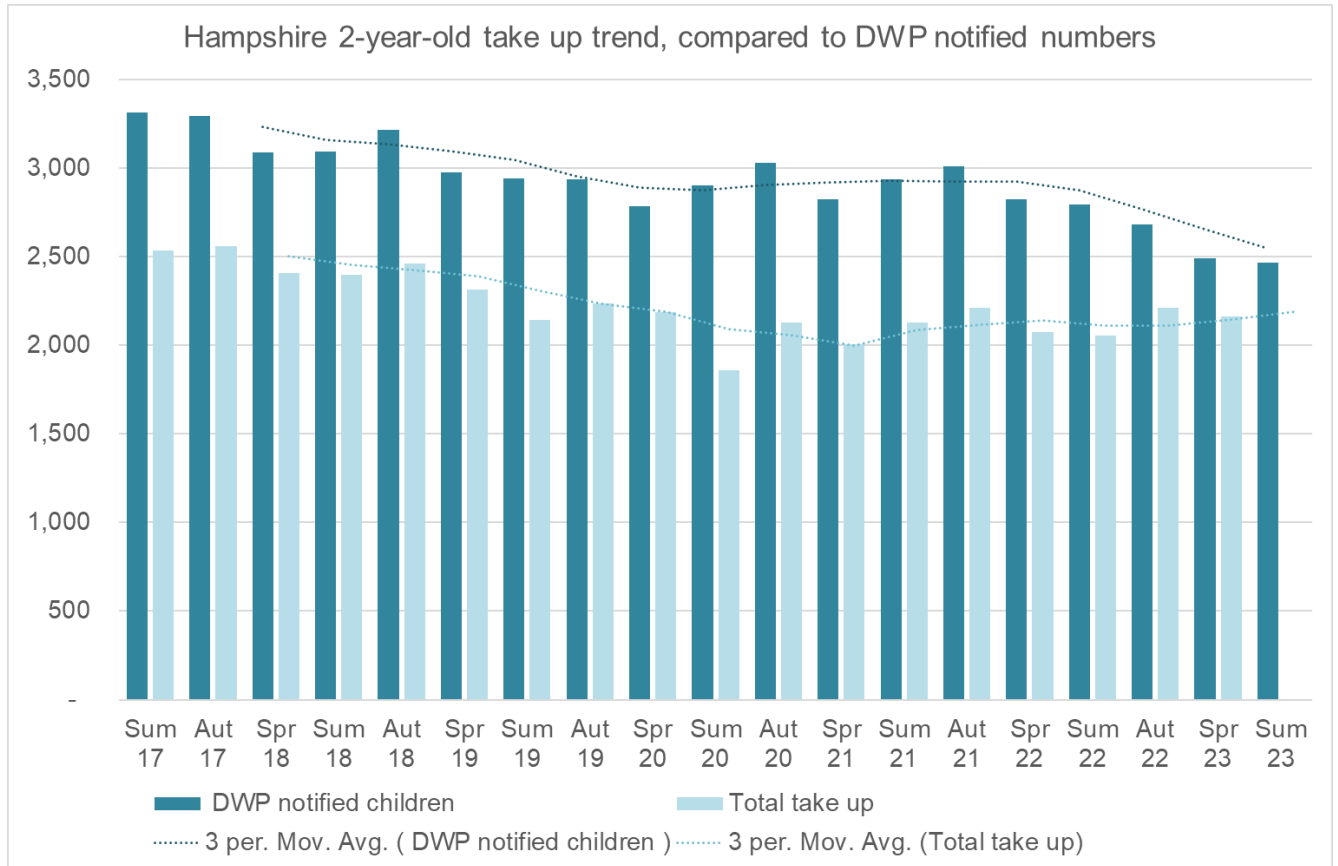
- 10.3. This demonstrates that the total number of children aged 0 to 4 years attending provision in Hampshire in 2023 was slightly less than 2022 (-75 children), however this varies by age group. It is likely that some children living in Hampshire attend childcare out of county.
- 10.4. The number and percentage of 2-year-olds has reduced (from 72% to 68% of the population forecast), as has the number and percentage of 3-year-olds (from 98% to 97%). However, there is a substantial increase in the number of 0 to 1-year-olds in provision (+532 children) and in 2023, 25% of the forecasted population are attending provision. Additionally, there is a 1% increase in the number of 4-year-olds attending Hampshire provision in 2023, with the remaining 4-year-olds in Year R at school.
- 10.5. This information suggests that in Hampshire, there needs to be a childcare market that can provide for an average of 52% of the total Hampshire 0 to 4-years childcare population, which is the same as 2022.

Funded two year olds

- 10.6. Two-year-old funding forms part of the national offer from the Department for Education (DfE) and has been developed to improve outcomes for identified two-year-olds who meet the low income and other disadvantage eligibility criteria.
- 10.7. The DfE, in partnership with the Department for Work and Pensions (DWP), provide the local authority with the numbers of families who are most likely to meet eligibility criteria for 2-year-old funding (further details can be found at

10.8. Graph 13 compares the 2-year-old take up against the number of families notified by the DWP who are most likely to meet the eligibility criteria.

Graph 13: 2-year-old % take up against DWP estimate



10.9. There is a reduction in the number of DWP notified children in spring 2023 when compared to spring 2022 (-331). Despite this, the take up of 2-year-old children has increased by 90 children in the same period, with 87% take up against DWP notified children, an increase of 14% from 73% in spring 2022. Nationally, data outlines 74% take up and this was a 2% increase on 2022.¹⁵

¹⁵ [Education provision: children under 5 years of age, Reporting year 2023 – Explore education statistics – GOV.UK \(explore-education-statistics.service.gov.uk\)](#)

Table 15: Spring 2023 percentage of eligible 2-year-olds taking up the funded Early Years Education offer against DWP notified children, by district

Spring term 2023 data provided by DWP as @ 14 September 2022 (Includes Universal Credit recipients)					Capita One headcount spring 2023 (Headcount - Unique Children - Multiple Terms v3.0) - data extracted 29 March 2023		Capita One eligible ref and matched to DWP but no claim as @ 29 March 2023 (HCC 2YO Take Up Report 2023 a. Spring)				
District	1 Term: Jan 23	2 Terms: Jan 23, Apr 23	3 Terms: Jan 23, Apr 23, Sep 23	Spring 2023 DWP Grand Total	%	No children	% take-up	No. eligible to take up a place in the spring term 2023 based on 2YO portal applications	Possible revised position if all coded children took up place	Possible revised % of Grand Total	Total no. eligible children to take up a place in the summer term 2023
Basingstoke and Deane	95	148	110	353	14.2%	301	85%	69	370	105%	112
East Hants	51	68	64	183	7.3%	149	81%	44	193	105%	54
Eastleigh	62	124	72	258	10.4%	203	79%	40	243	94%	73
Fareham	35	59	45	139	5.6%	100	72%	33	133	96%	51
Gosport	75	105	95	275	11.0%	244	89%	30	274	100%	49
Hart	32	42	32	106	4.3%	92	87%	16	108	102%	27
Havant	79	148	104	331	13.3%	291	88%	78	369	111%	116
New Forest	65	108	70	243	9.8%	236	97%	43	279	115%	89
Rushmoor	51	81	59	191	7.7%	135	71%	57	192	101%	91
Test Valley	70	92	79	241	9.7%	167	69%	48	215	89%	67
Winchester	44	87	41	172	6.9%	160	93%	29	189	110%	50
Hampshire	659	1062	771	2492	100%	2078	83%	487	2565	103%	779
OOC*						84		118			115
Total all claims						2162	87%	605	2767	111%	894

Data shows numbers of unique children.

Includes Out of County (OoC), no postcode recorded, no postcode match.

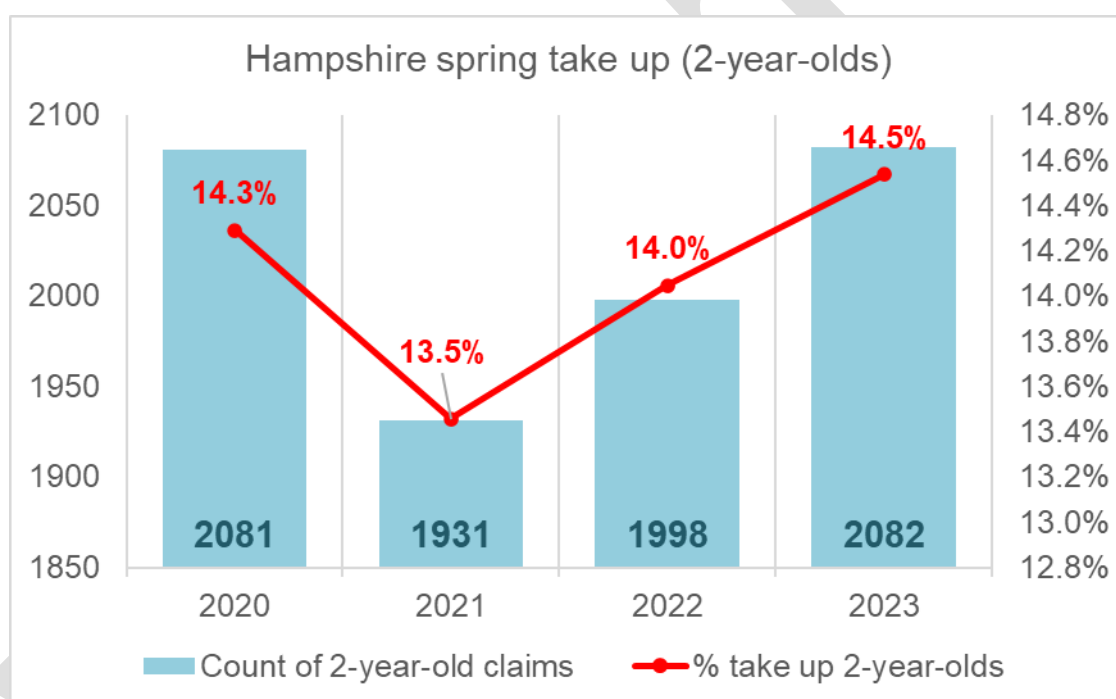
Source: HCC Early Years Tool Headcount DWP data (2-year-old)

- 10.10. The highest number of potentially eligible children are in Basingstoke and Deane and Havant, which is consistent with 2022. In Basingstoke and Deane, analysis shows that 91% of EYE registered providers offer funded 2-year-old places, and 97% of Havant providers also provide the offer.
- 10.11. The areas with the highest take up against the DWP potential eligibility are in New Forest (97%) and Winchester (93%). Analysis for Winchester shows that their group providers and childminders offer funded 2-year-old places at a lower percentage than the Hampshire average (88%), although their take up is the second highest, indicating that eligible children are able to access their offer.
- 10.12. There were also 84 eligible children from other local authorities taking up their 2-year-old offer with Hampshire providers in spring 2023.
- 10.13. The Council currently has a process in place to contact families who confirm their eligibility but have not yet taken up a place, to remind them of the benefits of the offer and to prompt action to book in with a provider. The Council has been part of a pilot where the DWP provide contact details for eligible families so that the Local Authority can more easily contact parents of eligible children. This contact has been trialled via email, SMS text messaging and postal letters. The table also shows that there are a possible further 487 children living in Hampshire and 118 out of county children who have

confirmed their eligibility, but for whom a claim was not made for them in spring 2023.

10.14. Generally, the DWP information on potentially eligible children in Hampshire is in the region of 18-20% of the 2 year old Small Area Population Forecast. Graph 14 below details the claim count of Early Years Education funding for 2-year-old Hampshire residents that met the disadvantaged 2 year old funding criteria and their child attended in the spring 2023 headcount. This shows the data as a percentage against the population forecast to provide an indicative level of take-up. This graph is based on children residing in a Hampshire district and attending a Hampshire provider.

Graph 14: 2-year-old claim count at spring



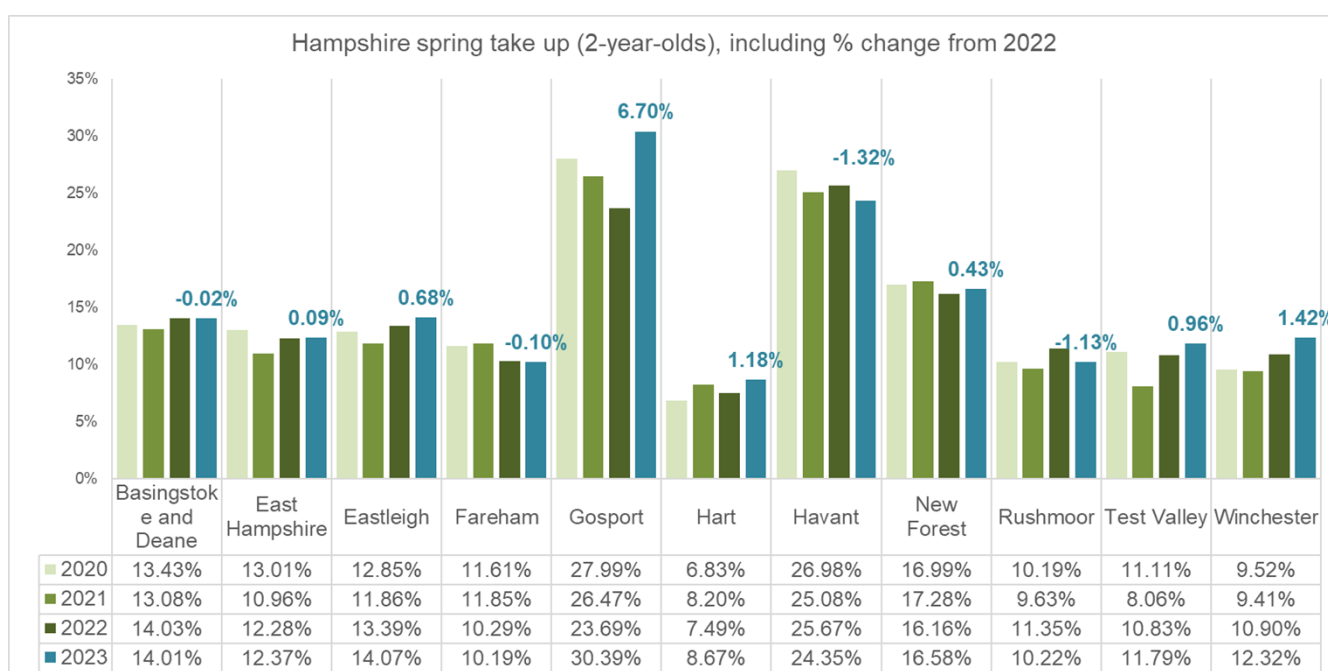
10.15. This graph shows the impact that the COVID pandemic had on attendance. Some recovery is evidenced in 2022, with full recovery back to pre-COVID levels in 2023 in terms of claim count, and an increase in percentage against SAPF.

10.16. For 2-year-olds, there is generally up to 18% of the population who may meet the eligibility criteria¹⁶, although this percentage of population has been reducing in Hampshire.

10.17. Graph 15 (see below) highlights the variance in take up between the districts from 2020 to 2023, including the % change of claims against population forecast from 2022 to 2023.

¹⁶ [Help paying for childcare: Free education and childcare for 2-year-olds - GOV.UK \(www.gov.uk\)](https://www.gov.uk/help-paying-for-childcare)

Graph 15: Take up of 2-year-olds in Hampshire, by district



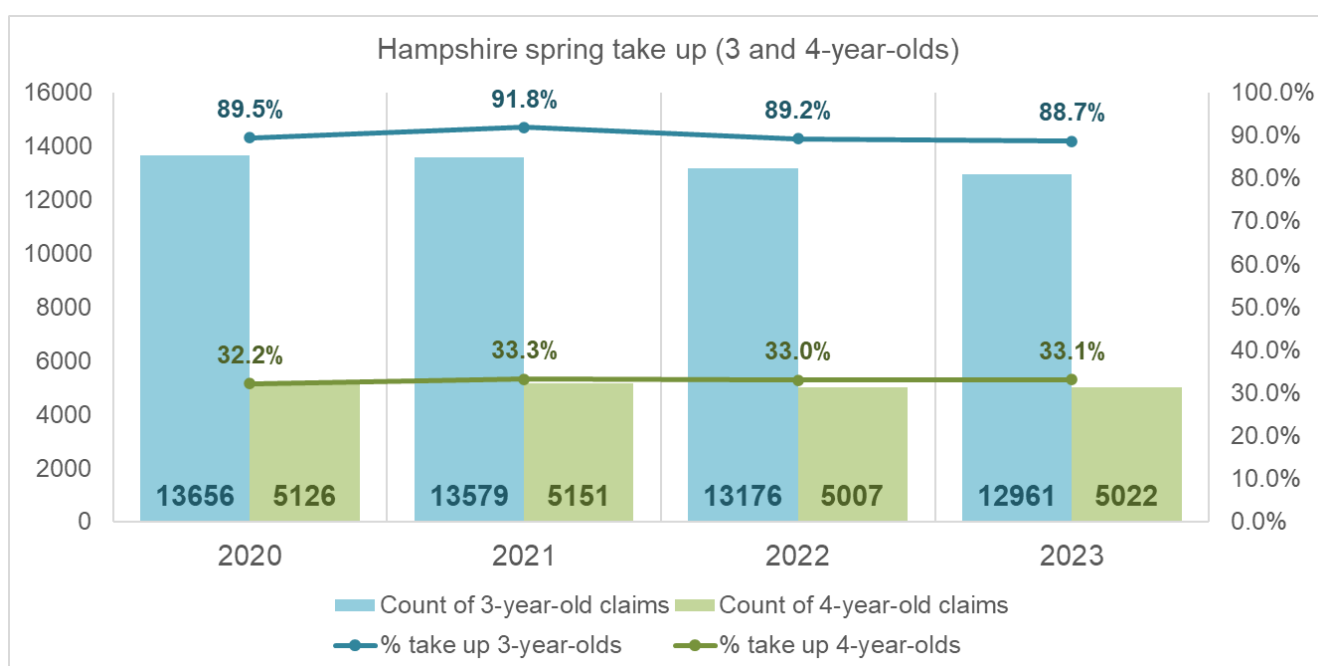
10.18. The take up of each offer may reflect the demographic features of the local area.

10.19. Whilst the total number of funded and non-funded 2-year-olds on roll at Early Years registered settings decreased (from 10,182 at spring 2022 to 9,693 at spring 2023), the number of claims made for disadvantaged 2-year-old funding and percentage take up of funded places for disadvantaged 2-year-olds has increased for the same period (from 1998 claims at spring 2022 to 2082 claims at spring 2023). This increase may be a result of the current cost of living pressures and impact of greater level of promotion in the DFE Pilot and also promotion more locally through Household Support Fund providers.

3 and 4-year-olds

10.20. Graph 16 below details the claim count of Early Years Education funding for 3 and 4-year-old Hampshire residents (spring 2023 headcount) and shows this as a percentage against the population forecast to provide an indicative level of take-up. This graph is based on children residing in a Hampshire district and attending a Hampshire provider.

Graph 16: 3 and 4-year-old claim count at spring



10.21. For 3-year-olds, there has been a decrease in the number of claims (-215) against the population forecast when comparing against spring 2022, which is consistent with the reduction in the total number of 3-year-olds on roll at EYE registered providers at spring census 2023.

10.22. For 4-year-olds, there is a marginal increase in the number of claims (15) against the population forecast when comparing against spring 2022, which is consistent with the increased number of children aged 4 on roll at spring census, despite a small forecast reduction in the population.

10.23. To understand how the market is performing in its ability to provide access to the EYE offers, the three year old cohort is currently the best age group to use as this age group is not affected by admission to school in year R which can skew market performance data in the PVI sector. Three year olds are entitled to universal entitlement which is a maximum of 15 hours over 38 week and those of working parents can access up to 30 hours.

Extended Entitlement (30 hours) offer

10.24. Children aged 3 and 4-years-old are entitled to 15 universal funded hours per week (over 38 weeks per year). Children aged 3 and 4-years-old of working families who meet the eligibility criteria are also entitled to the 'extended offer' (also known as the '30 hours offer') of an additional 15 hours per week (over 38 weeks).

10.25. Children taking up the extended hours offer are usually also taking up universal hours in a Hampshire setting, although this is not always the case.

Table 16 below reviews the proportion of children taking up universal hours who are also taking up the extended hours, which includes children living out of county who travel into Hampshire to access childcare.

Table 16: unique child count (3 and 4-year-olds) and total hours claimed for period, including comparison against March 2022. This table includes children from out of county attending a Hampshire setting.

Funding period	3 and 4-year-olds only (includes out of county children)				
	Universal offer		Extended offer		% Extended children of Universal take up
	Children	Total hours in period	Children	Total hours in period	
Spring 2022	19,100	3,029,636	9,855	1,381,866	51.6%
Spring 2023	18,865	3,006,238	10,359	1,465,356	54.9%
Difference	-235	-23,399	504	83,490	

10.26. This table shows that there are fewer funded 3 and 4-year-olds taking up the universal offer (-1.23%) in spring 2023 when compared to spring 2022, which is consistent with the reducing 3 and 4-year-old population from 2022 to 2023 (-1.32% and -1.25 change respectively). There is also a reduction in the number of universal hours (-0.77%) claimed for the period.

10.27. The table also shows an increase in the number of 3 and 4-year-olds taking up the extended offer in Hampshire (+5.1% from March 2022), with a 6% increase in the number of extended hours being claimed for the same period. This indicates working parents accessing EYE hours for their children.

Early Years Education take up of 2, 3 and 4-year-olds as at spring 2023 – average hours

10.28. Table 17 (see below) outlines the average funded hours taken up per week in spring 2023 for children aged 2, 3 and 4 years by district, and split by universal and extended hours. The table also includes the average additional paid for hours recorded by providers (for children who also use funded hours only). For comparison, the table also includes the totals for 2020 to 2022. *Note that this is not a unique count of children (children are counted for each entry in the Headcount period, for example where they have attended more than one setting, or where their hours have changed during the period).*

Table 17: average take up per week in spring 2023, by district

Child District	Total No. of children	Average Universal Hours	Average Extended Hours	Average Additional Hours Week
Basingstoke and Deane District	3,063	13.02	11.69	4.21
East Hampshire District	1,751	13.28	11.06	3.28
Eastleigh District	2,391	12.81	10.60	2.60
Fareham District	1,533	12.55	11.11	3.83
Gosport District	1,418	13.52	12.15	3.07
Hart District	1,582	12.87	10.42	3.77
Havant District	1,954	13.35	11.49	1.37
New Forest District	2,299	12.79	10.56	2.79
Rushmoor District	1,575	13.51	11.38	2.00
Test Valley District	2,089	12.75	10.93	3.37
Winchester District	1,998	12.72	10.94	4.98
Total (Hampshire residents only)	21,653	13.00	11.09	3.25
Total (including Out of County children)	22,802	12.99	11.09	3.29
<i>Hampshire 2022</i>	<i>21,792</i>	<i>12.96</i>	<i>11.03</i>	<i>3.08</i>
<i>Hampshire 2021</i>	<i>21,691</i>	<i>13.37</i>	<i>11.14</i>	<i>3.13</i>
<i>Hampshire 2020</i>	<i>22,061</i>	<i>13.44</i>	<i>11.31</i>	<i>3.72</i>

10.29. When reviewing Hampshire residents only for all ages and entitlements, there is a small increase from 2022 in the average universal hours claimed per week in Hampshire (+0.04), an increase in the average extended hours claimed (+0.06) and an increase in the average additional non-funded hours claimed (+0.17). Despite this, the average hours for each claim type has not returned to levels seen in Spring 2020 (start of the pandemic year).

10.30. Across the county, Basingstoke and Deane has the highest cohort of children using EYE funded hours. Winchester has the highest average for additional parent purchased hours (4.98 per week), followed by Basingstoke and Deane (4.21 per week). Havant has the lowest level of additional parent purchased hours. Most districts have seen an increase in the average additional hours per week purchased by parents when compared to 2022, with the greatest increases seen in Hart (+0.49, 15% increase) and East Hampshire (+0.44, 15% increase). However, families have purchased an average of -0.05 (-1%) hours fewer in Fareham and -0.34 (-20%) fewer in Havant when compared to 2022.

10.31. The average universal hours claimed (13) represents an average between those children taking up a full-term time offer of 15 hours a week to those children taking up a 51- or 52-week offer stretched which is approximately 11 hours a week across the year. The extended hours showing an average of

11.09 hours per week is consistent with the expectation that these hours are delivered to working families requiring a stretched offer.

- 10.32. In Hampshire at spring 2023, 70% of 3 and 4-year-old children used their universal hours against the standard offer (spread over 38 weeks), whereas the remaining 30% chose to use their hours against the stretched offer (spread over more than 38 weeks). This differs by district, with more families in East Hampshire, Gosport, New Forest and Rushmoor opting to use the standard offer than the Hampshire average, whereas in Fareham, 38% opt to use the stretched offer.
- 10.33. For 2-year-olds, the Hampshire average is 81% for standard hours and 19% for stretched hours. Rushmoor has the greatest weighting of families using standard hours (90%), whereas families in Fareham have the greatest percentage of families using the stretched offer (30%).
- 10.34. On average, 45% of those using standard hours in Hampshire take up the extended offer, in contrast to those using the stretched offer where the Hampshire average is 78%. This supports the idea that working families in Hampshire require more access to childcare throughout the year as opposed to during school term time only. Whilst this is the current position, the new entitlements may impact on the take up of the stretched offer.

Ethnicity

- 10.35. Parents are asked to inform of their child's ethnicity through the parental declaration form which enables a provider to claim early years education funding for their child. Ethnicity disclosure is voluntary.
- 10.36. Our data at July 2023 suggests that 13.25% of the total EYE funded 2, 3 and 4-year-old children are from ethnic groups other than White British. A further 8.5% are categorised as either; information not yet obtained / refused / blank, with the remaining 78.25% White British, as shown in table 18 below.
- 10.37. Comparing the ethnicity take up against the 2021 national census for Hampshire we can see that the majority of ethnic groups in Hampshire are represented albeit that some are in much lower percentage than the 2021 census would suggest. Some of this difference may be explained through the 8% that have not declared ethnicity.

Table 18: percentage ethnicity of EYE funded children.

Ethnicity	HCC Census 2021*	% at July 2023	% at 2022	Difference
ABAN - Bangladeshi	0.19%	0.16%	0.20%	-0.04%
AIND - Indian	1.2%	1.52%	1.47%	0.05%
AOTH - Any Oth Asian b'ground	1.64%	1.24%	1.31%	-0.07%
APKN - Pakistani	0.25%	0.36%	0.30%	0.06%
BAFR - Black African	1.02%	0.98%	0.88%	0.10%
BCRB - Black Caribbean	0.23%	0.13%	0.10%	0.03%
BOTH - Any Oth Black b'ground	0.15%	0.22%	0.21%	0.01%
CHNE – Chinese	0.47%	0.38%	0.19%	0.19%
MOTH - Any Oth Mixed b'ground	0.68%	1.57%	1.63%	-0.06%
MWAS - White and Asian	0.68%	1.20%	1.18%	0.02%
MWBA - White and Black African	0.28%	0.58%	0.67%	-0.09%
MWBC - White & Black Caribbean	0.42%	0.59%	0.70%	-0.11%
NOBT - Info not yet obtained		7.61%	3.98%	3.63%
OARA - Arab Other	0.12%	0.04%	0.02%	0.02%
OOEG - Other Ethnic Group	0.68%	0.47%	0.30%	0.17%
REFU – Refused		0.82%	0.57%	0.25%
WBRI - White British	87.92%	78.25%	81.02%	-2.77%
WIRI - White Irish	0.55%	0.20%	0.13%	0.07%
WIRT - Traveller - Irish Herit	0.17%	0.02%	0.03%	-0.01%
WOTH - Any Oth White b'ground	3.85%	3.40%	3.52%	-0.12%
WROM - Gypsy/Roma	0.07%	0.20%	0.22%	-0.02%
Blank		0.06%	1.37%	-1.31%

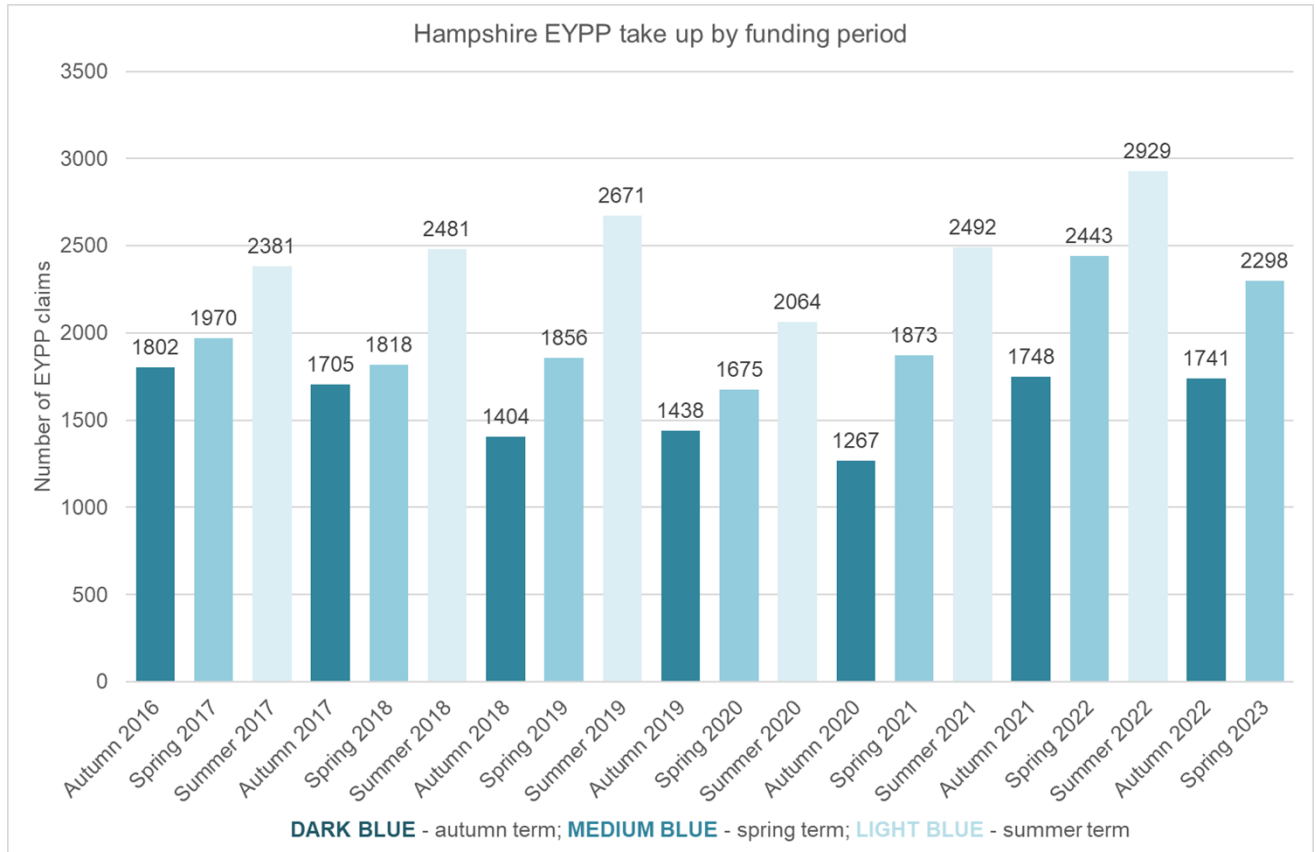
**Ethnicity* data from 2021 Census for Hampshire but may not fully match category [2021 Census | Hampshire County Council \(hants.gov.uk\)](https://www.hants.gov.uk/2021-census)

Early Years Pupil Premium (EYPP)

10.38. Early Years Pupil Premium is paid to providers for Early Years children who meet similar criteria to school age children eligible for Free School Meals, where parents provide evidence that they meet the eligibility criteria. Parents who are eligible to claim EYPP are usually in receipt of certain benefits (including Universal Credit) and are not eligible for 30 hours childcare.

10.39. The amount per hour added to the funding paid to providers increased from 60p per hour to 62p per Early Years Education hour claimed from 1 April 2023.

Graph 17: shows the Hampshire trend in take up of EYPP



10.40. This shows the pattern of 3 and 4-year-old children where providers have claimed Early Years Pupil Premium since autumn 2016. Autumn is always a low claim period as 4-year-old children move to school, and numbers of 3 and 4-year-olds increase in spring to summer, leading to the highest number of child claims. The effect of COVID can be seen in summer and autumn 2020 with numbers gradually increasing to spring and summer 2022. The number of EYPP claims dropped slightly (-7 claims) in autumn 2022 against autumn 2021, with a larger decrease in spring 2023 against the year before. However, both terms still show claims in excess of the pre-COVID period. Anecdotally, the increases in spring and summer 2022 could be attributed to the Household Support Grant where Food Vouchers were introduced in Autumn 2020 for parents who met EYPP eligibility and as this became established, more parents submitted the required information for providers to claim EYPP.

10.41. Table 19 (see below) looks at EYPP spring trend from 2017 to 2023 at a district level, including a comparison of 2023 against 2022. The district refers to the area in which the setting is located.

Table 19: EYPP from 2017 to 2023 by district, including 2023 comparison against 2022.

District	Spring term							Difference (2023 against 2022)	% difference against 2022
	2017	2018	2019	2020	2021	2022	2023		
Basingstoke and Deane	276	228	220	193	271	352	335	-17	-5%
East Hampshire	116	99	122	90	117	176	156	-20	-11%
Eastleigh	205	216	197	193	174	247	244	-3	-1%
Fareham	129	112	106	94	113	131	134	3	2%
Gosport	191	187	198	190	216	280	248	-32	-11%
Hart	97	98	79	65	61	108	103	-5	-5%
Havant	294	269	275	244	284	351	354	3	1%
New Forest	234	210	222	222	243	288	263	-25	-9%
Rushmoor	147	132	147	125	109	155	160	5	3%
Test Valley	147	154	160	156	148	196	150	-46	-23%
Winchester	134	113	130	103	137	159	151	-8	-5%
Grand Total	1,970	1,818	1,856	1,675	1,873	2,443	2,298	-145	-6%

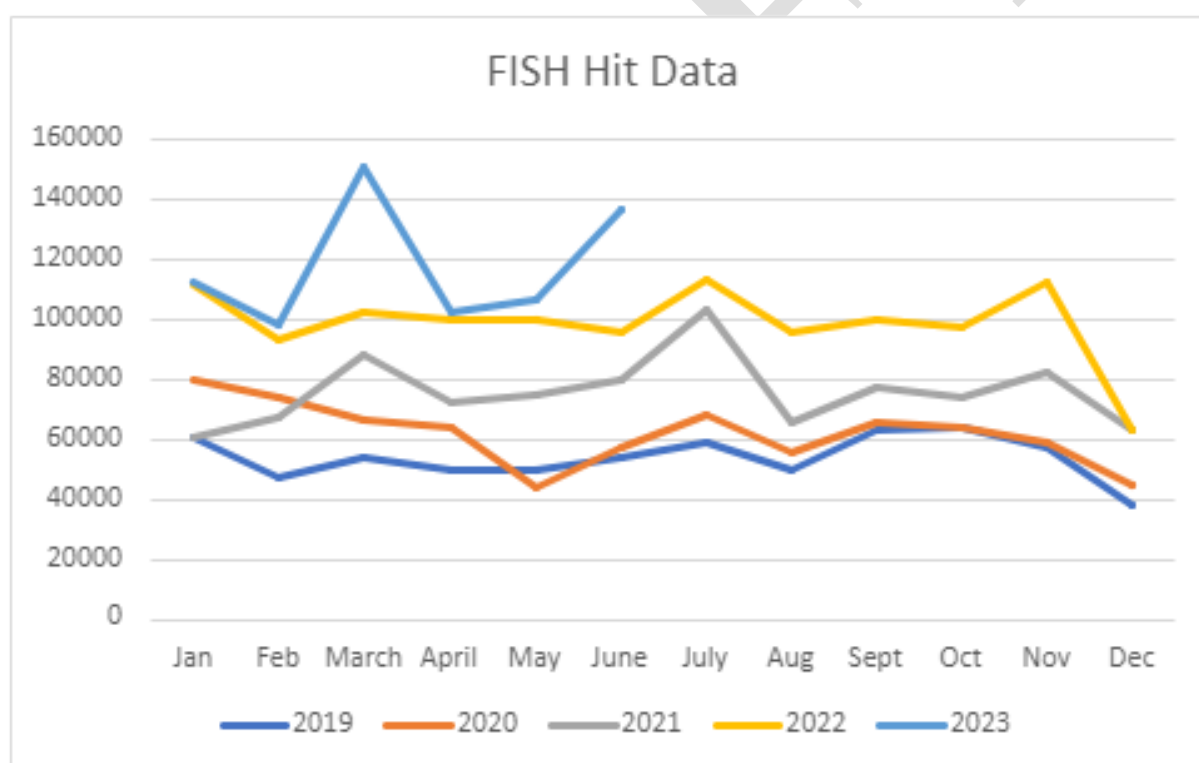
10.42. The greatest change in EYPP claims can be seen in Test Valley which saw a reduction of -46 claims (-23%), despite there being a 0.2% forecast increase in the 3 and 4-year-old population for the district. Similarly, East Hampshire saw an -11% reduction in the number of EYPP claims despite there being a 1.8% forecast increase in the population for these age groups. However, this may be explained by reduction in the number of 2 year olds that are eligible by DWP figures which dropped by 30 for Test Valley and 20 for East Hampshire from 2022 to 2023 suggesting less children meeting low income eligibility criteria.

10.43. Despite this reduction against 2022, there is still a substantial increase (24%) across Hampshire in the number of EYPP claims when compared to 2019 (the last pre-COVID impacted period), with Test Valley as the only district showing a reduction for this period.

10.44. Awareness of Early Years Pupil Premium is raised to parents through social media campaigns and to providers through social media blogs and provider briefings.

Family Information and Services Hub (FISH)

- 10.45. The Childcare Act 2006¹⁷ places a duty on local authorities to ensure that parents and prospective parents can access online, or are provided with, comprehensive and up to date information about childcare and early education, including free places in their area, usually via the Family Information Service. Hampshire County Council does this through its Hampshire's Family Information Services Hub (FISH).
- 10.46. FISH provides parents with details of childcare organisations, along with other family services, across the county. The pages provide information about early years providers along with out of school and holiday club providers, including HAF.
- 10.47. In the 22/23 school year there were over 1,083,811 hits on the FISH website from parents accessing the information. Our data trends show that we see a spike in the lead up to Easter, Summer and Christmas holidays, and we can assume that this is from parents seeking information about childcare for these holiday periods. See graph 17 below.



11. Quality of Ofsted Registered Provision

- 11.1. The DfE published statistics¹⁸ reporting on the number of settings with a current inspection and the % at each outcome.

¹⁷ [Early education and childcare - Statutory guidance for local authorities \(publishing.service.gov.uk\)](https://www.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/362222/early-education-and-childcare-statutory-guidance-for-local-authorities.pdf)

¹⁸ [Childcare providers and inspections as at 31 March 2023 - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/statistics/childcare-providers-and-inspections-as-at-31-march-2023)

Table 20: Hampshire inspections compared to all England, the South East and Benchmark Authorities (March 2023)

	Number of providers		Percentage of inspected providers			
	EYR providers	Total number inspected	Outstanding	Good	Requires Improvement	Inadequate
All England	49,084	38,855	14%	82%	2%	1%
South East	9,546	7,357	16%	82%	2%	1%
Hampshire	1,556	1,194	15%	83%	1%	1%
Leicestershire	698	550	6%	90%	2%	1%
Warwickshire	493	412	18%	78%	3%	1%
Worcestershire	453	352	22%	74%	3%	2%
Cambridgeshire	768	574	21%	77%	2%	0%
Central Bedfordshire	366	294	15%	82%	1%	2%
West Berkshire	193	148	9%	89%	1%	1%
Gloucestershire	581	451	12%	84%	3%	2%
North Somerset	209	167	12%	83%	3%	2%
South Gloucestershire	287	221	11%	83%	5%	1%

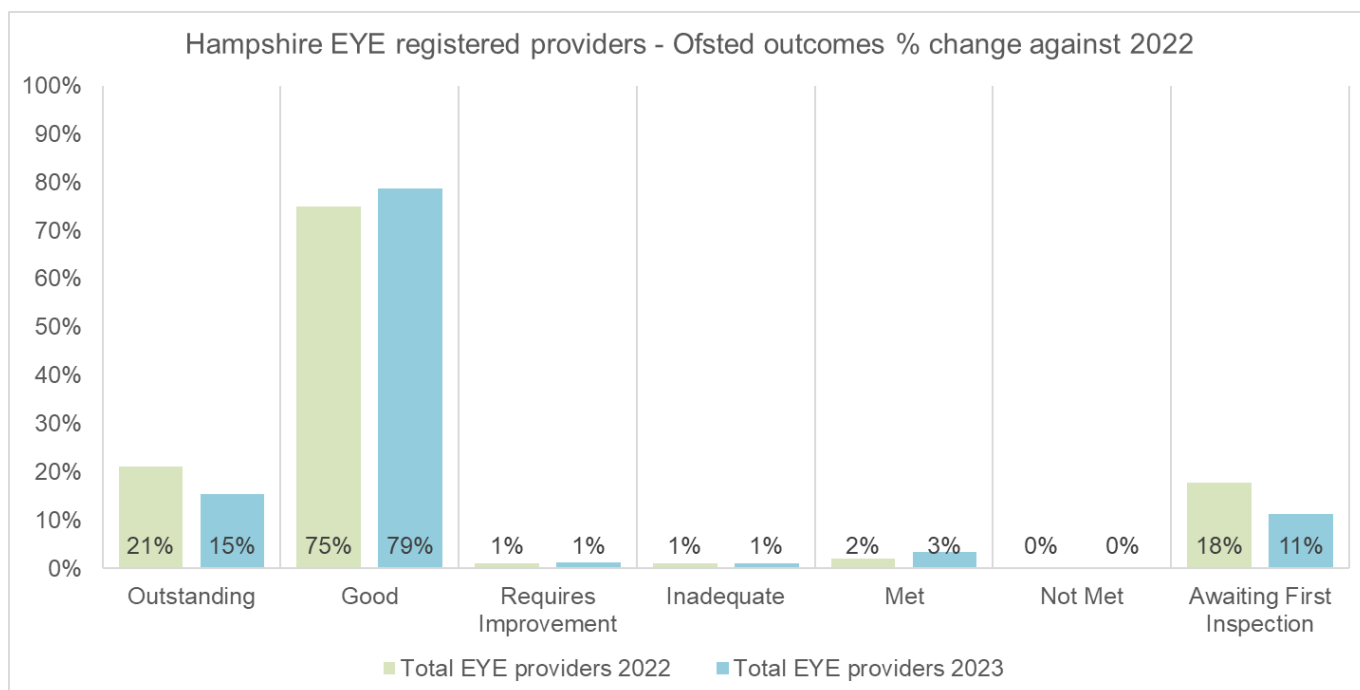
11.2. This shows a positive position for Ofsted outcomes with 1% more of Hampshire providers achieving Good or Outstanding than the All England average. When compared against the South East, 1% fewer providers in Hampshire are rated Outstanding, however 1% more are rated Good. The percentage of providers in Hampshire with Requires Improvement is lower than All England, the South East and seven of the benchmark authorities.

Table 21: Percentage Ofsted rating of total provision type as at April 2023

Provider type	% of total provision type (excludes those "awaiting first inspection")						Awaiting First Inspection
	Outstanding	Good	Requires Improvement	Inadequate	Met	Not Met	
EYE PVI Providers	14%	80%	2%	2%	2%	0%	15%
EYE Childminders	17%	77%	1%	1%	5%	0%	8%
Non-EYE Childminders	8%	53%	2%	0%	35%	1%	34%
Out of School	2%	23%	0%	1%	69%	5%	66%
Holiday Playscheme	2%	29%	0%	4%	60%	4%	64%
Home Childcarers	0%	0%	0%	0%	96%	4%	43%
<i>Total EYE providers 2023</i>	<i>15%</i>	<i>79%</i>	<i>1%</i>	<i>1%</i>	<i>3%</i>	<i>0%</i>	<i>11%</i>
<i>Total all providers</i>	<i>12%</i>	<i>64%</i>	<i>1%</i>	<i>1%</i>	<i>21%</i>	<i>1%</i>	<i>31%</i>

11.3. This shows that the majority (94%) of EYE registered providers (groups and childminders) that have had an inspection are rated as Good or Outstanding in Hampshire, whilst 11% of the total are awaiting their first inspection.

Graph 18: Comparison of EYE funded providers from Spring 2022 and Spring 2023



11.4. Since spring 2022, there has been a decline (-55) in the number of EYE registered providers rated Outstanding, however an increase (+63) in providers rated Good. Whilst the percentage may not have changed from 2022, there has also been a small increase in the number of providers rated both Requires Improvement (+7 providers) and Inadequate (+2 providers). As reported earlier in this document, there is a reduction of 66 fewer EYE providers at April 2023, therefore it is to be expected that we would also see a reduction in the number of providers with a rating.

11.5. Providers with a Requires Improvement or Inadequate outcome receive an offer of support through the Hampshire Improvement Support Programme (ISP) to address the Ofsted actions identified and make improvements.

11.6. The HAF Programme requires providers to register with Ofsted on the Childcare and Early Years registers as appropriate.

Number of funded children in provision with an Ofsted rating of less than Good

11.7. Funded entitlement for disadvantaged 2-year-olds is expected to be provided through Ofsted Early Years registered provision that has an inspection outcome of Good or Outstanding. The Council will only fund 2-year-olds in provision less than Good where continuity of care for children is required or there is insufficient choice in the market. Such providers have a support offer in place provided by the Council.

Table 22: Number of funded 2, 3 and 4-year-olds in provision with an Ofsted rating less than Good

District	Number of funded children in setting rated Inadequate or Requires Improvement		
	2-year-olds	3-year-olds	4-year-olds
Basingstoke and Deane	10	90	36
East Hampshire	1	6	2
Eastleigh	17	102	48
Fareham	11	36	15
Gosport	8	42	11
Hart	0	0	0
Havant	10	20	16
New Forest	0	14	8
Rushmoor	5	72	35
Test Valley	10	29	7
Winchester	8	13	7
Hampshire Total (2023)	80	424	185
<i>Hampshire Total (2022)</i>	<i>48</i>	<i>324</i>	<i>140</i>
<i>Difference 2023 / 2022</i>	<i>32</i>	<i>100</i>	<i>45</i>

- 11.8. As of April 2023, there were 27 settings holding a grade lower than Good or Outstanding in Hampshire. In total there are 689 funded children aged 2, 3 or 4 years attending a setting with a rating less than good, which is 3% of the total number of funded children attending a Hampshire setting at spring 2023 (22,802).

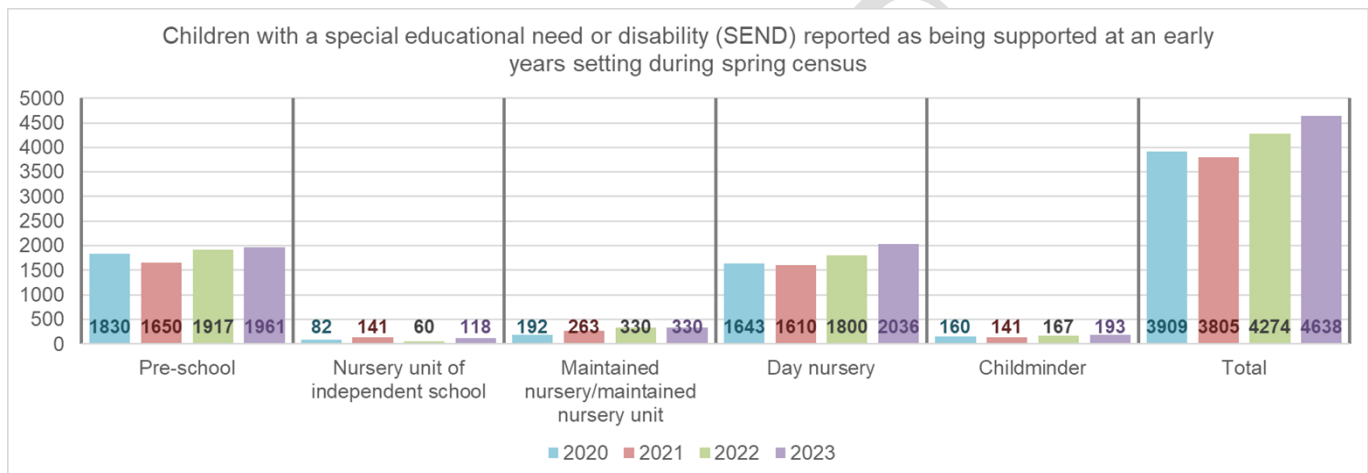
12. Provision for Special Educational Needs and Disability

- 12.1. Local authorities must ensure that all providers in the maintained and private, voluntary and independent sectors that they fund to the free entitlements are aware of the requirement on them to have regard to the Special Educational Needs and Disability Code of Practice: 0-25. This clearly sets out the details of the legal requirements under the Children and Families Act 2014 for local authorities to publish a Local Offer. The Local Offer must set out in one place, comprehensive information about provision they expect to be available in their area across education, health and social care for children and young people in their area who have SEN or are disabled, including those who do not have EHC plans. The council publishes its local offer through FISH. [Family Information and Services Hub | Hampshire's Local Offer for Special Educational Needs and / or Disabilities \(hants.gov.uk\)](#)
- 12.2. The Council is committed to ensuring that all eligible children can attend an Early Years or childcare setting including children with special educational need or disability (SEND). Where possible, children attend their local setting

or the parents' choice of setting. Providers can access a range of support from the Early Years Inclusion Team to support the child's access, however where a child's needs cannot be met by a provider, we will work to support the identification of an appropriate alternative.

- 12.3. The graph below demonstrates an increasing trend of children with a special educational need or disability being reported since the pre-COVID data collection in January 2020.

Graph 19: EYE spring census children with special educational needs or developmental delay by type of provision



- 12.4. There is an increase in the number of children with a special education need or disability attending childcare in 2023 (+364) in comparison to 2022. This increase is seen in all types of provision except maintained nursery / maintained nursery units where there is no change. This would be expected as the three maintained nurseries are a county council special educational need resourced provision called a Special Educational Need Hub where children's needs are assessed by local SEND panel prior to being offered a place.

- 12.5. The table below shows the number of children and the percentage of those children compared to the 0 to 4-year-olds SAPF 2022 for 2023 population as a comparator for children:

- who providers identified as having a developmental delay in spring 2023,
- who met the criteria for and were in receipt of the SEN Inclusion Funding (SENIF)
- who met the criteria for the provider to claim Disability Access Funding (DAF)
- who in summer 2022 spent one day on the Portage caseload.

Table 23: cohorts of SEN children compared to SAPF 2022 population forecast for 2023

District	SAPF 2022 population forecast for 2023	SEN children at setting at spring census	% of population	Number of children in receipt of SENIF at spring census 2023	% of population	Number of children in receipt of Disability Access Fund at spring census 2023	% of population	Number of children who spent one day on portage caseload in spring 2023	% of population
Basingstoke and Deane	10,606	753	7.10%	57	0.54%	31	0.29%	106	1.00%
East Hampshire	5,990	328	5.48%	35	0.58%	17	0.28%	69	1.15%
Eastleigh	7,395	455	6.15%	43	0.58%	52	0.70%	96	1.30%
Fareham	4,897	341	6.96%	21	0.43%	10	0.20%	32	0.65%
Gosport	4,064	414	10.19%	53	1.30%	16	0.39%	53	1.30%
Hart	5,168	342	6.62%	19	0.37%	14	0.27%	47	0.91%
Havant	6,043	438	7.25%	71	1.17%	25	0.41%	92	1.52%
New Forest	6,951	503	7.24%	36	0.52%	19	0.27%	82	1.18%
Rushmoor	6,137	253	4.12%	16	0.26%	16	0.26%	64	1.04%
Test Valley	7,005	425	6.07%	30	0.43%	19	0.27%	78	1.11%
Winchester	6,365	386	6.06%	30	0.47%	19	0.30%	47	0.74%
Grand Total	70,621	4,638	6.57%	411	0.58%	238	0.34%	766	1.08%

12.6. Compared to 2022 there is a 9% increase with an additional 364 children identified with special educational need and disability by providers. This increase is despite an overall reduction of 240 (1%) children in the population. The early years census indicates that an average of 51% of all 0 to 4-year-olds attend some provision. The number of children on roll with an SEND is 13% of the total 0 to 4-year-olds on roll at spring census. As a comparison, the national average for children with SEN in primary schools with no EHC plan (SEN support) for 2023 is 13% up from 12.6% in 2022¹⁹. This demonstrates a similar trend of increase to that of schools and now matches the number of children without an EHCP in the schools data set published by the DfE.

12.7. 358 children in receipt of SEN Inclusion Funding had an EHCP (87% of those in receipt of SENIF at spring census). This included only two 2-year-olds and eleven 3-year-olds. All remaining children were 4-year-olds, including 14 who had decelerated from their initial start in school.

12.8. Within early years children who have specific need can be supported with specific offers. These are Portage which is a service that supports a child both at home and in a provision; Disability Access Fund which is a one off government funding to support a child with SEN access to provision and there

¹⁹ [Special educational needs in England, Academic year 2022/23 – Explore education statistics – GOV.UK \(explore-education-statistics.service.gov.uk\)](https://www.gov.uk/explore-education-statistics)

is Special Educational Needs Inclusion Fund (SENIF) that provides support to children in an EYE approved provider based on the hours they attend and where a child's special need is emerging. For children with moderate to complex need there is assessment that supports a child's access to a specialist provision or special educational need hub place. There have been increases in the number of children across all SEN offers in 2023 compared to spring 2022. This information excludes SEN Hubs:

- children in receipt of SENIF from 318 to 411 (0.58% of population);
- children in receipt of DAF from 212 to 238 (0.34% of population);
- children who spent one day on the portage case load from 691 to 766 (1.08% of population).

Table 24: Take up of children in receipt of SENIF (Special Educational Needs Inclusion Fund) Early Years Education funding

District	Number of SENIF funded children claiming universal EYE hours	Average universal hours claimed per week	Number of SENIF children claiming extended EYE hours	Average extended hours claimed per week	Number of SENIF children with non-funded additional hours	Average of non-funded hours
Basingstoke and Deane	43	10.83	26	6.65	35	4.08
East Hants	27	12.79	12	6.32	19	4.50
Eastleigh	40	13.62	22	5.94	9	1.68
Fareham	19	11.21	13	6.78	9	3.46
Gosport	41	14.40	23	8.09	28	8.09
Hart	19	12.61	7	3.62	2	2.80
Havant	67	12.85	24	3.91	18	1.50
New Forest	33	13.16	12	4.16	12	2.33
Rushmoor	16	13.05	8	6.02	6	2.37
Test Valley	27	12.91	14	5.32	6	2.62
Winchester	20	12.53	16	5.44	6	4.53
Total	352	12.72	177	5.66	150	3.45
Hampshire average*		13.00		11.09		3.25

12.9. This includes the hours of take up for standard and stretched offer across universal and extended entitlement.

12.10. There are 411 children in receipt of SENIF in spring 2023, of which 352 (86%) are claiming universal hours and 177 (43%) children are also claiming 30 hours childcare. Some children have a claim for the extended hours only and are likely to be funded through a SEN Hub. The data for 2023 shows a difference in percentages against 2022, with a small reduction of children claiming universal reduced from 88% to 86% however for extended a reduction from 66% to 43%.

- 12.11. The percentage of SENIF children taking up extended entitlement and also claiming universal has reduced from 75% to 50%. This does bring the claiming pattern more in line with general trends seen in both the 3 and 4-year-old universal and extended hours.
- 12.12. To support parents to find childcare that is inclusive and meets a wide range of needs, providers are encouraged to create a Local Offer that explains how their service can meet particular Special Educational and Disability Needs within their service. Hampshire has 63% of EYE group providers and 10% of childminders with a SEND Local Offer, offering childcare to children with Special Educational Needs and Disabilities. We are continuing to gain more Local Offers across the broader childcare sector, including HAF, in order to help parents identify suitable childcare.

13. Childcare Changes (extended entitlements for younger years)

- 13.1. The Early Years Education entitlement will be extended from April 2024 for working parents of 2-year-old children, and for 9 months to under 2-year-olds from September 2024. This increased entitlement will be rolled out in stages as detailed in section 2 of this assessment.
- 13.2. The DfE have provided the Council with some initial estimated data to assist with planning for the roll out of the extended entitlements for younger years. This has used data of known aged children attending GPs and has made assessment using OFSTED data of known childcare and places. The DfE has informed they will continue to review and revise their data over the course of the implementation.
- 13.3. Additionally, the Council has undertaken its own initial assessment of estimated potential need for childcare places from April 2024 and September 2024. We have used our informed position of the 30 hours take up of our 3 year olds and aligned these trends to small area population forecasts of the younger years for 2 year olds and 9months to <less than two. We have allowed made allowance for 2 year olds that will continue to be eligible for the “disadvantaged” 2 year old funding within our calculations. We have used a nominal figure of 25% of 0-1 year olds based on our current trends of these age groups attending provision and to take account that children must have reached 9 months by the time of the first claim period September 2024. Using our numbers of places and current access to places Hampshire sees that for every place there is a ratio of 1:2 children accessing these. We have therefore continued to use this ratio of places in our initial assessment. The difference between the estimated demand minus the supply (the number of places available at EYE registered providers including childminders and non-EYE registered childminders) to give a potential estimated need of places
- 13.4. The table 25 below provides our first assessment of the potential growth of places needed across each of the districts. Further refinement at ward level and consideration of any current temporary changes in places due to

recruitment issues continues to inform and develop the strategy for targeted growth.

Table 25: net initial estimate of growth need assessment for April 2024 and September 2024, at district level

District	GOWTH OF PLACES COUNT (April 2024) 2 year olds	GROWTH OF PLACES COUNT (September 2024)2 year olds and 9mths to <2 year olds
Basingstoke and Deane	305	738
East Hampshire	218	456
Eastleigh	561	880
Fareham	159	370
Gosport	24	173
Hart	-205	4
Havant	53	276
New Forest	443	728
Rushmoor	118	363
Test Valley	-345	-63
Winchester	-101	155
Hampshire Total	1,231	4,080

- 13.5. This initial assessment assumes that children will travel outside of the ward and/or district they live in to attend a childcare setting, and takes account of all surplus, unused places within each district. However, whilst the Council's headcount information for March 2023 indicates that this may be true for some children, this will depend on where any surplus places are located in relation to where children live and choose to attend provision. Analysing the data at ward level will give us a better understanding of where any surplus places may be used and help to identify those areas where there may be a need greater than supply.
- 13.6. There are 210 non-EYE registered childminders in Hampshire, offering 736 places (where the number of places is unknown, it is assumed as 3). It is unknown how many of these places are currently being used by children aged 9 months to 2-years-old and who may be entitled to funded hours following the roll out of the expanded entitlements. These places have been included in the need assessment above although it is currently unknown how many, if any, of these places may become available for children to use their funded hours. A survey will be undertaken with non-EYE registered childminders to

understand who may be considering registering for Early Years Education funding. Support will be offered to register those childminders.

- 13.7. There is a workforce need to accommodate the new younger years offers. It is assumed that the current workforce is fully engaged in the delivery of the current offer – the current 0-5 workforce is 8,065 FTE (7,288 PVI providers and 777 EYE registered childminders) delivering to 39,912 children. Based on the assessment of need and demand outlines above, an initial estimated workforce requirement is shown below.

Table 26: Childcare workforce growth to meet estimated younger years assessed need

Apr-24			Sep-24			Estimated totals unique head count of staff based on adult to child ratios to fulfil the growth in places	
Initial estimate of places need (2-year-olds only)	Workforce (1:4 staff: children ratio)	Workforce (1:5 staff: children ratio)	Initial estimate of places need (total for 0 to 2-year-olds)	Initial estimate of places need for 9 months to 1-year-olds only	Workforce for 9 months to 1-year-olds only (1:3 children: staff ratio)	Potential staff requirement by Sep 24 (1:4 for 2YO and 1:3 for 0-1YO)	Potential staff requirement by Sep 24 (1:5 for 2YO and 1:3 for 0-1YO)
1231	308	246	4,080	2,848	949	1,257	1,196

14. Parental demand

- 14.1. Appendix 2 includes analysis of the most recent customer engagement survey which was undertaken over summer 2022 to assist with ensuring sufficient childcare places in Hampshire and the understanding of:
- Parents’ future childcare requirements to inform this Childcare Sufficiency Assessment.
 - How the COVID pandemic has changed parents’ attitudes to childcare.
- 14.2. The parental survey confirmed the need for places that support working parents, especially those with children of SEND. It also outlined there was limited change in attitudes towards childcare at that time.

15. Conclusion

- 15.1. Hampshire continues to have a high quality and responsive childcare market, with 94% of EYE registered providers (with an assessment) achieving ‘Good’ or higher Ofsted rating. There is a good mix of provision, including childminders, although the market has seen a reduction in recent years, both in the number of providers and the childcare workforce.

- 15.2. Overall in Hampshire, the early years population is forecasting a reduction in the coming years, although there are some areas forecasting growth. This suggests that monitoring of the impact on the local childcare market is required to ensure sufficient access to childcare in areas of growth, and to support management or exit from the market in areas where low attendance becomes an ongoing issue. The longer-term forecast does begin to increase again, and this needs to be monitored to ensure the market can meet demand in later years. Population changes across the age ranges must be considered alongside the implementation of the expanded entitlements to funded Early Years Education for younger years, and also the expansion of access to wraparound care for school age children.

Places and Providers

- 15.3. The number of providers delivering childcare in Hampshire, and the number of places available, has reduced. The greatest change in providers can be seen in the number of childminders, with a reduction of -40 EYE registered and -33 non-EYE registered against the previous year. The Council has a workforce strategy to aid interest and recruitment into childcare as a career and is working with childcare providers and partners via various channels.
- 15.4. The majority of EYE registered providers (66%) are open for 46 weeks or more per year, which provides accessible childcare beyond the school term time that should meet working families' requirements. Additionally, 91% of group provision is delivered as full day care (open for more than 6 hours per day). There has also been a marginal increase in the percentage of group providers open for more than 39 weeks per year (+2%), and the majority of EYE registered childminders (91%) offer the same. This is especially important to note with the coming increased eligibility that will enable younger children of working parents to access funded childcare.

Workforce

- 15.5. The vulnerability of recruitment and retention in the sector is directly impacting on the Council's childcare sufficiency, which is of high concern. (see section 8.24). At spring census, 42% of EYE registered PVI providers stated they had staff vacancies, with 85% of these providers having issues with recruitment.
- 15.6. The issue of recruitment and retention for Early Years has been highlighted at a national level and Hampshire County Council has developed and implemented a workforce strategy to support interest and recruitment into childcare as a career.
- 15.7. The reduction in staffing could also be attributed to settings responding to financial tensions in affordable childcare and reducing their staffing models to meet statutory ratios rather than go beyond these. Although we do know through anecdotal evidence that many settings will not use the increased 1:5 ratio for children aged 2 year olds other than for exception and emergencies.

- 15.8. As well as the workforce numbers declining, there has also been a change in the qualification levels for practitioners delivering childcare to 3 and 4-year-olds. There is a -8% reduction in the number of practitioners that hold a level 3 qualification, who have a key impact on settings' ability to meet the EYFS ratio requirements. Level 3 qualification remains the minimum qualification level for managing childcare provisions.
- 15.9. The requirement remains to ensure that the workforce numbers continue to meet regulatory requirements and can support a robust and flexible childcare offer.
- 15.10. The new younger years offer from April 2024 and September 2025 estimate a further 1,200 more childcare workers are likely to be needed to meet the needs of working families in line with Government requirements. This, together with the wraparound childcare delivery for primary aged children from September 2025, will require significant additional new entrants into the workforce and/or creative pathways for childcare workforce across the different opportunities presented by the new and existing offers.

Take up

- 15.11. The childcare market will need to continually adapt to the change in population and the change in demand from parents, particularly with the introduction of the extended entitlements for younger years from 2024. Whilst there was a small overall reduction (-75) in the total number of funded and non-funded 0 to 4-year-old children on roll in Hampshire settings at spring census, this varies by age group and there was actually an increase in both the number of 0 to 1-year-olds on roll (+532) and the percentage against the forecast population for the age group (2% more than compared to spring 2022). Whilst we see a forecast reduction in the total 0 to 4-year-old population in the coming years, the increase in 0 to 1-year-olds accessing provision may suggest any over provision in older children could be redirected to supply for younger children.
- 15.12. Despite there being a reduction in the total number of 2-year-olds on roll at spring census (-489 children) and a reduction in the number of DWP notified families, there was an increase in the number of claims for funded 2-year-olds at spring 2023, and an increase in the percentage take up against the number of DWP notified families. This could be a reflection on the current cost of living pressures meaning more 2-year-olds may access the funded offer as they meet the eligibility criteria. The Council has processes in place to reach out to eligible Funded Two families to support improvement in take up across the county.
- 15.13. More 3 and 4-year-old children are accessing the extended (30) hours offer than in 2022 (+504 children). The number of additional hours purchased per week, over and above the funded entitlements, varies by district and those with a low average may impact on the overall financial sustainability for a setting.

15.14. At spring 2023, 30% of 3 and 4-year-olds and 19% of 2-year-olds were using their hours over the stretched offer (spread over more than 38 weeks). The new entitlements may impact on take up of the stretched offer, where working families may require more access to childcare throughout the year as opposed to term time only.

Housing developments

15.15. There continues to be a range of new housing developments across the county, with an estimated increase of 31,600 dwellings from 2023 to 2028 (43,900 from 2022 to 2029). This is forecast to result in a requirement to secure a minimum of 3,928 places (within the coming years, by 2028 with some building continuing beyond) across Hampshire, either through the developer contributions or to be met through the existing childcare market. Of these, approximately 1,500 places are yet to be secured. Ongoing review and monitoring of local requirements and capacity as consultations on planning applications are circulated will be necessary.

Support for vulnerable children

15.16. The number of EYPP claims at spring 2023 has reduced against spring 2022, although still remains higher than before COVID. Whilst this differs by district, the largest percentage reductions against the previous year can be seen in Test Valley, East Hampshire and Gosport districts. There were small increases to the number of EYPP claims in Fareham, Havant and Rushmoor.

15.17. The number of children reported by providers as having a level of SEND has been increasing (+364 children when compared to spring census 2022), despite there being a small reduction in the total number of 0 to 4-year-olds on roll at spring census 2023. The highest number of children and percentage against the population of children in receipt of SENIF are in Gosport and Havant, which is consistent with 2022. The average number of universal and extended hours claimed per week for SENIF children is lower than the Hampshire average, however the average number of non-funded additional hours is higher (3.55 hours per week compared to Hampshire average of 3.25 hours per week).

Out of School

15.18. The DFE is establishing Wraparound Pathfinder funding to be made available nationally to ensure that schools can provide wraparound childcare (between 08:00 – 18:00) for working parents. The Government funding will be available via the Local Authority to schools PVI providers, childminders and community-based organisations. This will facilitate the extension of existing provision to provide the full 08:00 – 18:00 offer, and to initiate new provision where there is none.

15.19. The Council's out of school survey, at spring 2023, provided some understanding of the out of school services available in Hampshire, with 78% of the total 426 primary and all-through schools submitting a response, which

varied by district. The survey has recently been reissued to encourage responses from the remaining 22% (93) of primary schools. The Council also ran a survey aimed at PVI providers of out of school services, to which 91 responses were received. Schools are also required to complete a census return for the DfE which includes information on the out of school childcare available to their pupils. Discrepancies between responses to the Council's survey and the DfE census will be explored to confirm the out of school childcare offer at these schools.

- 15.20. Of the responses received to the Council's survey, 93% of primary and all-through schools that submitted a response stated that there was some access to a breakfast club (either on site, delivered by the school or an external provider, or that children access off site), and 91% stated there was some access to after school provision. Of the total 333 responses received from primary and all-through schools, 235 have both breakfast and after school clubs available on the school site.
- 15.21. The Councils Market Lead on Out of School childcare has been part of a DfE working group to help define the operational guidance that will support the programme to meet the wraparound childcare needs for working parents. The areas of focus are those schools where there is no known provision (either before or after school or both), those schools who did not respond to the survey to understand what is available, and those where provision is not available between 08:00 – 18:00. Our approach will be to support a mixed economy and where needed a collaborative model of delivery.

Holiday Activity and Food Programme

- 15.22. The Hampshire Holiday Activities and Food Programme annual report for April 2022 to March 2023 shows that 36% of eligible children attended provision during the year. During Easter there were 5,922 eligible children attending, 11,652 in the summer and 5,637 at Christmas. The childcare market continues to respond positively to supporting this programme that currently is confirmed by DfE to March 2025.

Entitlement changes for younger years

- 15.23. The government is updating statutory guidance to incorporate the younger years offers. The Council must prepare for the roll out of the new entitlements to the younger years, following the Government's announcement at spring 2023. This assessment includes a summary of the Council's initial estimate on demand and need of childcare places. This assessment currently assumes that children will travel to another district and / or ward in Hampshire to attend a childcare setting, and therefore takes account of all surplus places within each district. Further assessment at ward level, analysing attendance data from spring 2023 will give a better understanding of where surplus places may be used and will help identify areas where there may be a need greater than supply. A ward level assessment may change the overall picture for a district and may identify specific areas of need for places despite there being an overall surplus in the district. The provider surveys being undertaken in

Autumn 2023 will help the Council to understand the markets' intentions and readiness to deliver the new entitlements.

15.24. There is a high level of 2-year-olds already in provision and it is anticipated that these children will be the first claimants of the 15 hours in April 2024. Hampshire providers also support a high number of under 2s in provision. However, the demand for this age group is likely to increase due to parents' ability to have hours paid for by government funding. We anticipate that this is the age group where places growth, and training and learning in how to deliver to children younger than 2 is likely to be required in some areas.

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District summary

	Early years population trend (total 0 to 4-year-olds) from 2022 to 2029 (shows trend only, bars are not indicative of actual figures)	EYE providers (groups) - compared to 2022 CSA	EYE providers (childminders) - compared to 2022 CSA	EYE PVI workforce (including school run provision) 0 to 5-year-olds	% of EYE registered PVI providers with staff vacancies	% issues with recruitment (of those with vacancies)	Average universal hours (standard and stretched) for 3 & 4-year-olds (above or below Hampshire average)	Average extended hours for 3 & 4-year-olds (above or below Hampshire average)	Younger years - places count April 24	Increase of need of places as % of total places in the market	Younger years - places count Sep 24	Increase of need of places as % of total places in the market	Rating for younger years (April 24) - gap analysis	Rating for younger years (Sep 24) - gap analysis
Hampshire Total		↓	↓	↑	42%	85%	13 hours per week	11.09 hours per week	1231	-	4080	-	-	-
Basingstoke and Deane		↓	↓	↑	39%	94%	Above	Above	305	7%	738	17%	Moderate	Major
East Hampshire		↑	↓	↓	44%	83%	Above	Below	218	8%	456	18%	Moderate	Major
Eastleigh		↓	↑	↑	45%	72%	Below	Below	561	20%	880	31%	Major	Major
Fareham		↓	↑	↑	44%	85%	Below (lowest)	Above	159	7%	370	15%	Moderate	Moderate
Gosport		No change	↓	↑	36%	92%	Above (highest)	Above (highest)	24	1%	173	10%	Minor	Moderate
Hart		No change	↓	↑	46%	90%	Below	Below (lowest)	-205	-8%	4	0%	Meets estimated need	Meets estimated need
Havant		↓	↓	↓	42%	95%	Above	Above	53	2%	276	10%	Minor	Moderate
New Forest		↓	↓	↑	38%	86%	Below	Below	443	14%	728	23%	Moderate	Major
Rushmoor		↓	↓	↑	41%	76%	Above	Above	118	6%	363	18%	Moderate	Major
Test Valley		↓	↓	↑	41%	72%	Below	Below	-345	-10%	-63	-2%	Meets estimated need	Meets estimated need
Winchester		↓	↓	↑	47%	84%	Below	Below	-101	-3%	155	5%	Meets estimated need	Minor

16. Action plan

- 16.1. It should be noted that childcare sufficiency is a dynamic process of which the childcare market changes according to demand and supply and other environmental and regulatory factors. The Council keeps childcare providers informed of known changes through regular communications through the Services for Young Children blog and termly provider briefings. Parents are kept informed via the Council's Family Information Services Hub of childcare operators and providers' SEND Local Offers, together with a termly newsletter for parents and stakeholders.
- 16.2. The childcare sufficiency assessment has outlined some areas where further action is needed to understand specific elements of the changing childcare market. The action plan has set out the key areas that will be addressed over the next 2 years, including the roll out of the extended entitlements for younger years and wraparound care.

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Business area	Action
Childcare changes (younger years and wraparound)	
Childcare Market – extended entitlements	<ul style="list-style-type: none"> Establish governance and implementation team for roll out of extended entitlements to younger years. Establish new metric for assessing that supply meets the assessed demand for each existing and new offers : Meets expected need: Minor gap identified; Moderate gap identified; Major gap identified. Review the support and resources (business tools) that may be useful for providers to deliver the younger years entitlements and make changes to existing resources where this is required. Undertake a survey with EYE registered providers (including childminders) and non-EYE registered childminders to understand the market’s intentions and readiness to deliver the new entitlements.
Out of School childcare - new wraparound offer	<ul style="list-style-type: none"> Reissue the Council’s out of school survey to encourage responses from the 93 primary and all-through schools who did not submit a response in spring 2023. Confirm the out of school childcare gaps and engage with schools. Set up implementation team to support the Wraparound development.
Housing developments	<ul style="list-style-type: none"> Update the early years section of the Council’s developers guide to include the new entitlements for younger children. Review that the existing development plans for housing, and the suggested early years requirements will be sufficient to meet the new entitlements.
Childcare Market	
Childcare Market - communications	Strengthen the coordination of the support and training to the childcare workforce in support of the younger years, early years, wraparound offers and career pathways.
Childcare Market - workforce	<p>Extend the existing activity around recruitment and retention to include the following new initiatives:</p> <p><u>Social media:</u></p> <ul style="list-style-type: none"> Library Service social media and screens National Careers Service joint marketing activities Pen pictures and case studies <p><u>Courses/qualifications:</u></p> <ul style="list-style-type: none"> Early Years skills bootcamps Webinars to include Continuous Professional Development tasters <p><u>Recruitment fairs / outreach activities:</u></p> <ul style="list-style-type: none"> Link with Corporate HCC recruitment events Development of ‘Childminder Champions’ in each district to promote childminding as a career. <p><u>Networking and promotion:</u></p> <ul style="list-style-type: none"> Hampshire Careers Partnership Network Hampshire Employability and Skills Hub work experience placements for young people

	<ul style="list-style-type: none"> • Councillor communications • Employers – HCoC <p>Newsletters / direct mail / guidance:</p> <ul style="list-style-type: none"> • Signposting social media training to aid providers with recruitment • Attracting level 3 returns via The Apprenticeship Hub, Further Education (FE) Colleges, Job Centre Plus (JCP)s, Libraries etc. • Provider guidance for employing overseas workers.
Childcare Market - finance	Undertake statutory consultation with providers on changes to the early years rates in accordance with DfE revised guidance when published.
Childcare Market - EYPP	Maximise use of additional Early Years Pupil Premium (EYPP) funding, through promotion to parents and providers to support providers claiming. Provide further guidance and approaches for providers to use the funding to support the most vulnerable children.
Childcare Market – SEND take up	Undertake a review of Special Education Needs Inclusion Fund to ensure it is responsive to need and compliant to statutory guidance.
Out of School	
Out of School childcare – data and information	Ensure that the Council’s Family Information Services Hub (FISH) is updated with Wraparound information to support parents and also delivery of the HAF programme.
Communications	
Communications	Publicise through social media, website, and stakeholder newsletters and groups all childcare offers, including Tax Free Childcare and support for military families
Communications	Publicise through social media, website and stakeholder newsletters and groups, Family Information Service Hub to parents/employers to support parents to search for childcare and use search metrics to help inform parental demand.

17. Appendices

APPENDIX 1: housing developments

District	Development	Planning status	Number of dwellings	Minimum early years places needed based on developers' guide	Early Years places secured <i>(either Developer Contributions or to be met through existing childcare market)</i>	Places to be confirmed	Period for housing build out	Early Years provision
Basingstoke & Deane	East of Basingstoke	Local Plan allocation	Up to 450 with opportunity to grow to 900	118	0	118	2027+	Requested new 40 place pre-school to be delivered in the community centre (pre-planning stage) and a day nursery on site (in a hub) for the remaining need of places.
	Hounsome Fields	On Site	750	110	110	0	2021 to 28+	New childcare of 110 places, planned to be delivered in line with school (proposed September 2025).
	Golf Course	Granted	1,100	96	90	6	2022 to 28+	Full day care 90 place nursery, land available for purchase and build. There are existing childcare settings also in close proximity to the development site.

	Manydown	Pending	Up to 3500	305	480	0	2024 to 28+	Early years facilities requested: at least 3 x nurseries (with capacity for 360 places). Pre-school places (for 120 children to be provided within development or community facilities).
	Hazelton Farm (East Horndean)	Pending	800	92	0	92	2024 to 28+	Clarification required on early years facility.
	Whitehill / Bordon	On Site	2900	199	199	0	2021 to 28+	Childcare expected to be met through existing provision.
East Hampshire	Petersfield	240 new homes permitted in three areas. 155 homes are under construction and going to be complete 2025.	240	21	21	0	2022 to 28+	No developer contributions available. Continual review of local provision required.
	Alton	576 permitted and under construction	777	50	50	0	2021 to 28	One new setting has opened in area (Sep 2022) which supports current market demand from new homes (full day care). Continual review of need with local supply required.

		214 permitted and under construction Will be finished by 2026	214	19	19	0	2021 to 26	There are two new day nurseries (Sep 2022 and Jan 2023) in the area which are meeting demand.
Eastleigh	Liphook							
	Boorley Park	On Site	1400	122	80	42	2021 to 28	Delay in provision of 80 place full day care provision, the Council is regularly seeking updates.
	Boorley Gardens, Hedge End	Granted	680	59	59	0	2021 to 28	Childcare expected to be met through existing provision, to be considered in conjunction with the new proposed provision in Boorley Park.
	Woodhouse Lane, Hedge End	On Site	680	57	57	0	2022 to 28	Review required. To be considered in conjunction with the new proposed provision in Boorley Park.
	One Horton Heath / Fir Tree Lane	Granted outline consent	2500	157	180	0	2023 to 28+	HCC and EBC discussions have agreed the early years requirements in the region of 180 places over the development over up to 3 sites.
Fareham								
	Welborne	Granted	Up to 6000	522	523	0	2024 to 28+	Plans for Early Years nurseries and pre-schools agreed through S106 to accommodate approximately 300 full day care and 223 sessional care childcare places. This site also borders Winchester district.

	Longfield Avenue	Pending	Up to 1200	104	0	104	Unknown	Additional early years places are required with a mixture of full and sessional day care. Developer discussions continue.
	Land at Down End Road, Portchester	Approved	350	30	30	0	2023 to 28	S106 agreed with funding for extension to existing nursery provision in the area.
	Warsash	Under consideration/ Approved	Over 300 combined across various smaller developments	26	26	0	2022 to 27	The number of smaller developments together require up to 26 places. Continual review of need with local supply required.
Gosport	Royal Haslar Hospital	Under construction	486	42	0	42	2022 to 28+	A review of existing provision will be undertaken as and when planning applications for housing developments are submitted. Where appropriate developer contribution will be sought.
	Gosport Waterfront	Under construction	645	56	0	56	2022 to 28+	A review of existing provision will be undertaken as an when planning applications for housing development are submitted. Where appropriate developer contribution will be sought.
	Hartland Park	On Site	1500	130	130	0	2021 to 28+	On site early years provision of 130 place nursery delivery by developer under S106. To be delivered in line with
Hart								

								school (scheduled Sep 2026).
Havant	Campdown, Purbrook – combined development	Under consultation	Approximately 750	77	0	77	Unknown	There is a requirement for approximately 77 early years places. Feedback provided to the planning application.
	Fawley Power Station	Approved	1500	131	131	0	2024 to 28+	Site reserved for childcare provision. (Timing issues as infrastructure required). Not likely to be delivered by 2028.
New Forest	Land North of Totton	Number of different sites	900	87	0	87	2022 - 28+	Continual review of need with local supply required (potential need for new full day care in the area).
	Land South of Bury Road, Marchwood	Local Plan allocation	850	74	0	74	Unknown	Continual review of need with local supply required.
Rushmoor	Aldershot Urban Expansion	On Site	3500	335	80	255	2021 to 28+	The Council is still in discussion with developers regarding the early years provision. Anticipating planning application submission in coming months for early years provision to open in 2025.
	The Galleries	Not started	500	44	44	0	2025 to 27	Current early years provision in the ward can meet demand.

	Civic Quarter	Not started	700	61	61	0	2027 to 28+	Childcare expected to be met through existing provision. Continual review of need with local supply required.
	Whitenap	Local Plan allocation	1300	74	0	74	2026 to 28+	Early years places required which will either be provided through land made available at the Whitenap site, or new provision nearby. Discussions with developers continue.
Test Valley	Hoe Lane	Started summer 2022	300	26	26	0	2023 to 26	Childcare expected to be met through existing provision. Continual review of need with local supply required.
	Picket Twenty Extension	Underway	300 new homes	26	26	0	2021 to 23	Original Picket Twenty development provided 72 place setting, which is well used by local community. The expansion of 300 dwellings and additional 26 early years places to be continually monitored.
Winchester	Barton Farm	On Site	2000	174	0	174	pre-2021 to 28+	New school in place and provision made in S106 for full day care nursery. This is unlikely to be in place before 2028. The school have opened their own pre-school which will help to meet demand. Continual review of need with local supply required.

West of Waterlooville (Grainger) Newlands Lane	Granted	1408	122	122	0	2021 to 28+	Review of need with local supply required (site close to Havant developments). Current market demand is being met by provision both in Winchester and Havant, as there are four day nurseries just across the district border.
North Whiteley	Granted	3500	305	0	305	pre-2021 to 28+	Provision of 2 x 100 place day nurseries and potential for additional pre-school provision in the community centres. New pre-school on school site since September 2022 to meet immediate need prior to main development.
Bishops Waltham	Permission and under construction for 289	289 (some delivered)	25	25	0	2021 to 28+	Childcare expected to be met through existing provision. Continual review of need with local supply required.
Wickham (Winchester Road and School Road)	Under construction and permission for 202 new homes	202 (some delivered)	18	18	0	2021 to 26	Childcare expected to be met through existing provision. Continual review of need with local supply required.
Alresford	Under construction 320 at Sun Hill Alresford and 76 homes at the Dean	396	34	35	0	2021 to 28	Local Primary School has started the process for running their own provision which will help to meet market demand. Continual review of need with local supply required.

APPENDIX 2: Parental survey 2022 report



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