

**Lancashire County Council**

**Childcare Sufficiency Assessment**  
**April 2024 – March 2025**  
**Executive Summary**



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## Introduction

The Childcare Act places a statutory duty upon local authorities to play a strategic role in facilitating the childcare market. Working in partnership with Private, Voluntary, Independent (PVI) sectors and schools to shape childcare services. The childcare sufficiency assessment provides an overview of the supply and demand of childcare in Lancashire. Having sufficient childcare means that families are able to access provision that meets their needs and enables parents to work or attend training.

Childcare providers have completed an on-line survey, the survey asked questions about their childcare places, opening times, cost, provision for children with special educational needs and or disabilities (SEND) and an understanding of the current position of their business. The report also includes the take up of Early Education Funding and the quality of provision. A sample of parents across Lancashire also completed an online survey to find out if their childcare needs were currently being met, the parental survey is updated every 3 years.

Over the past year, several new government initiatives have been introduced to support the expansion of childcare provision. The following section provides a summary of these new initiatives.

### Extension of Early Education Funding

- From April 2024, eligible working families with two year old children have been able to access 15 hours of Early Education Funding per week.
- From September 2024, this entitlement was extended to include working families with children aged 9 months and above.
- From September 2025, eligible working families will be able to access 30 hours of Early Education Funding per week, starting from when their child is 9 months old until they begin school.

### National Wraparound Programme

The National Wraparound Programme is to support families returning to work or increasing their working hours by improving access to before and after school childcare. To achieve this, the programme provided both capital and revenue funding to:

- Establish new wraparound childcare provision,
- Expand the number of places in existing settings.
- Extend provision hours to meet the core offer of 8:00am to 6:00pm.

### School Based Nursery Capital Funding

Between October and December 2024, schools were invited to apply to the Department for Education for capital funding to support the development of school-based nursery provision. Ten schools in Lancashire were awarded the capital funding and the projects will result in the creation of new early years places within school-based provision starting from September 2025.

## Demographics

Lancashire is the fourth largest local authority in the country. Lancashire is an area of contrasts with busy urban centres, coastal regions, and large agricultural areas. Lancashire also has some areas of affluence and others with higher levels of deprivation. Lancashire has 12 districts within its borders, the districts have been further broken down into localised areas.

The table below shows the 12 districts, the population data and those districts that are in the most 20% deprived.

Area	Total Population	0-1 year olds	1 year olds	2 year olds	3&4 year olds	5-11 year olds	IMD in 20% most deprived
Burnley	95553	1071	1028	1192	2331	8754	Yes
Chorley	118624	1096	1061	1157	2434	9943	No
Fylde	83008	621	641	653	1480	5626	No
Hyndburn	83213	991	949	960	2007	7493	Yes
Lancaster	144446	1275	1252	1360	2780	10487	No
Pendle	96100	1146	1072	1242	2338	9235	Yes
Preston	152582	1741	1846	1826	3744	13299	Yes
Ribble Valley	63107	498	528	594	1166	4504	No
Rossendale	71169	721	715	724	1571	6154	No
South Ribble	112116	980	1059	1072	2305	8949	No
West Lancashire	119367	1119	992	1061	2278	8681	No
Wyre	114809	860	927	1001	2001	8136	No
<b>Lancashire</b>	<b>1254094</b>	<b>12119</b>	<b>12070</b>	<b>12842</b>	<b>26435</b>	<b>101261</b>	<b>N/A</b>

## Parental Demand

As part of our statutory duty, parents were asked to complete a short online survey. We gathered the views of parents and families who use formal childcare. Our early year's providers also shared this to help us understand the childcare needs of parents.

There were 664 completions in total. Whilst the majority of responses were from Preston, Chorley, Lancaster and South Ribble we did receive submissions from all 12 districts. The summary below is provided at a Lancashire level.

Key findings from the survey are as follows:

- Nearly all respondents to our survey are married or living with a partner, in most cases both partners are working full time.
- The majority of those surveyed have children aged 0-4 years. The most used childcare provider types are After School Club and Day Nursery.
- Income was mixed across the county; the majority of people surveyed with a household income of between £40,000 & £60,000 per year.
- On average most parents/carers need between 10 and 30 hours of childcare per week. A small number of parents need childcare after 6pm or other patterns not specified.
- Nearly half of respondents said they use childcare because they work. 23% told us it is also for their child's learning and development and a small percentage state they use childcare for respite and to look for work. 5% of parents/carers access childcare solely to use their child's Early Education Funding
- Nearly three quarters of the respondents said that finding information about suitable childcare was easy.
- Most parents chose childcare based on the quality of provision and proximity to their home, followed by cost and reputation of the provider.
- Over half of parents/carers who completed our survey pay for their childcare using wages, followed by the Tax-Free Childcare scheme and finally using Early Education Funding.
- The highest number of children using formal childcare with SEND was in the 5-11 year old age category, followed by children aged 2-4 years.
- Nearly all our respondents were aware of Early Education Funding.
- 56% of those surveyed access a funded place however, 44% do not, this is due to the child's age either being too young or too old for funded places. Most parents access funded places at a Day Nursery or Pre-School Playgroup. 5% access funded places with a registered Childminder.

## Access to childcare

### Opening Times

Lancashire has flexible opening times of childcare provision, on average childcare is open 5 days per week, for 7 hours per day. Day Nursery is the provider type open all year round; on average they open for 49 weeks of the year. Only 1% of providers are open at weekends.

### Cost

Childcare providers supplied their hourly sessional, daily and weekly fees. On average a parent can expect to pay between £4.95 and £7.95 per hour. The table below shows the average cost per hour by district. Across the county the cost of childcare appears to be consistent without many extreme variables.

Area	Lowest	Highest
Burnley	£5.00	£9.00
Chorley	£5.00	£8.33
Fylde	£5.17	£7.25
Hyndburn	£5.46	£7.00
Lancaster	£4.71	£7.50
Pendle	£5.00	£8.21
Preston	£5.00	£8.38
Ribble Valley	£4.67	£9.00
Rossendale	£5.33	£6.93
South Ribble	£4.00	£7.73
West Lancashire	£5.00	£8.08
Wyre	£5.00	£8.00
<b>Lancashire</b>	<b>£4.95</b>	<b>£7.95</b>

### Quality

Quality of care and education is one of the most important aspects when a parent is choosing childcare for their child. Access to high quality childcare has long term benefits for children particularly those children from the most disadvantaged families. The inspection outcomes of providers with an Ofsted judgement of Outstanding and Good is 95%. Parents in Lancashire have access to high quality provision.

### Provision for Children with Special Educational Needs and/or Disabilities (SEND)

Childcare providers who completed our survey were asked about the provision they offer for children with special educational needs and/or disabilities. 95% of providers offer places for children with SEND. Over the last year 56% of childcare providers said demand for a SEND place has remained the same and 37% of providers said demand for a SEND Place has increased.

## Childcare Places

Across all districts in Lancashire there is sufficient childcare places for all age groups and at all provider types. Analysis of the survey data has been completed and 12 district reports have been produced. The data shows Lancashire has a good spread of places, across age groups, provider types and across all districts. The data is broken down further into more localised areas, some of these areas may identify a gap in places, further work will be undertaken with local providers and schools to understand the demand for places and if any further capacity is required. Any change in provision could have an impact on places available.

### Places for 0-4 year olds

Area	Population Requiring Childcare	Maximum Number of Places	Surplus Capacity (Maximum Places)	Working to Places	Surplus Capacity (Working to)
Burnley	3778	5162	1384	4640	862
Chorley	3687	6563	2876	6075	2388
Fylde	2131	3497	1366	3187	1056
Hyndburn	3259	4580	1321	4340	1081
Lancaster	4367	5416	1049	5163	796
Pendle	3814	4976	1162	4384	570
Preston	5903	8142	2239	7704	1801
Ribble Valley	1743	3773	2030	3543	1800
Rossendale	2441	4429	1988	3919	1478
South Ribble	3493	6092	2599	5542	2049
West Lancashire	3560	6446	2886	5709	2149
Wyre	3112	5073	1961	4727	1615
<b>Lancashire</b>	<b>41289</b>	<b>64149</b>	<b>22860</b>	<b>58933</b>	<b>17644</b>

### Places for 5-14 year olds

Area	Population Requiring Childcare	Maximum Number of Places	Surplus Capacity (Maximum Places)	Childcare places working to	Surplus Capacity (Working to)
Burnley	1176	1749	573	1674	498
Chorley	1330	2796	1466	2679	1349
Fylde	745	1126	381	1074	329
Hyndburn	999	2915	1916	2738	1739
Lancaster	1396	2473	1077	2403	1007
Pendle	1229	1426	197	1319	90
Preston	1783	2561	778	2294	511
Ribble Valley	600	1655	1055	1500	900
Rossendale	820	1760	940	1610	790
South Ribble	1197	2999	1802	2914	1717
West Lancashire	1153	2964	1811	2742	1589
Wyre	1083	1247	164	1131	48
<b>Lancashire</b>	<b>13511</b>	<b>25671</b>	<b>12160</b>	<b>24078</b>	<b>10567</b>

## Early Education Funding

Early Education Funding for 2,3&4 year olds is widely available at childcare providers across Lancashire. Take up of the Early Education Funding for 2,3&4 year olds is summarised in the tables below.

Area	Early Education Funding for 2 Year Olds								
	Summer Term 2024			Autumn Term 2024			Spring Term 2025		
	Eligible Population (DfE)	No of Children	% take up	Eligible Population (DfE)	No of Children	% take up	Eligible Population (DfE)	No of Children	% take up
Burnley	427	377	88%	439	373	85%	410	356	87%
Chorley	223	219	98%	226	215	95%	216	196	91%
Fylde	123	103	84%	132	100	76%	125	105	84%
Hyndburn	379	325	86%	376	299	80%	346	255	74%
Lancaster	354	336	95%	346	330	95%	367	330	90%
Pendle	397	306	77%	395	342	87%	384	292	76%
Preston	506	369	73%	479	375	78%	464	342	74%
Ribble Valley	68	76	112%	69	73	106%	67	61	91%
Rossendale	192	185	96%	183	154	84%	197	156	79%
South Ribble	199	214	108%	222	193	87%	217	184	85%
West Lancashire	303	248	82%	310	247	80%	292	215	74%
Wyre	233	232	100%	236	209	89%	232	198	85%
Unknown									
<b>Lancashire</b>	<b>3404</b>	<b>2990</b>	<b>92%</b>	<b>3413</b>	<b>2910</b>	<b>87%</b>	<b>3317</b>	<b>2690</b>	<b>82%</b>

Area	Early Education Funding for 3&4 Year Olds								
	Summer Term 2024			Autumn Term 2024			Spring Term 2025		
	Eligible Population (DfE)	No of Children	% take up	Eligible Population (DfE)	No of Children	% take up	Eligible Population (DfE)	No of Children	% take up
Burnley	2331	2234	96%	2331	2227	96%	2331	2187	94%
Chorley	2434	2208	91%	2434	2170	89%	2434	2180	90%
Fylde	1408	1221	87%	1408	1244	88%	1408	1233	88%
Hyndburn	2007	1819	91%	2007	1851	92%	2007	1838	92%
Lancaster	2780	2563	92%	2780	2540	91%	2780	2531	91%
Pendle	2338	2229	95%	2338	2269	97%	2338	2219	95%
Preston	3744	3599	96%	3744	3739	100%	3744	3665	98%
Ribble Valley	1166	1123	96%	1166	1145	98%	1166	1119	96%
Rossendale	1571	1322	84%	1571	1397	89%	1571	1358	86%
South Ribble	2305	2117	92%	2305	2144	93%	2305	2145	93%
West Lancashire	2278	1982	87%	2278	2001	88%	2278	2028	89%
Wyre	2001	1813	91%	2001	1819	91%	2001	1788	94%
Unknown									
<b>Lancashire</b>	<b>26363</b>	<b>24230</b>	<b>92%</b>	<b>26363</b>	<b>24546</b>	<b>93%</b>	<b>26363</b>	<b>24291</b>	<b>92%</b>

### Extension of Early Education Funding

- From April 2024, eligible working families with two-year-old children have been able to access 15 hours of Early Education Funding per week.
- From September 2024, this entitlement was extended to include working families with children aged 9 months and above.
- From September 2025, eligible working families will be able to access 30 hours of Early Education Funding per week, starting from when their child is 9 months old until they begin school.

To support this expansion, capital funding has been allocated to increase the availability of places for children under the age of two and for two-year-olds in priority areas.

During this year, we have supported 26 projects and created 289 new early education places for children aged two and under.



## Summary of key findings

The tables below highlight the key findings of our childcare sufficiency assessment by district.

Area	Summary of Key Findings by District 2024/2025
<b>Burnley</b>	Burnley has 89 Ofsted registered childcare providers. Over the last 12 months the net change in the number of providers is -4. 32 providers said they would increase their numbers if demand required it. Burnley district shows a surplus in places for 0-4 year olds, however, in North Burnley we have a shortfall of places. The average EEF2 take up for the district is 87% and the average take up for EEF 3&4 year olds is 95%. EEF2 take up has increased since our last CSA, whilst EEF3&4 has decreased. 89% of providers have received an Ofsted judgement that was Good or Outstanding, this is an increase from last year. 99% of providers offer places for children with SEND, 58% have said demand for these places has remained the same. This is a similar picture since our last CSA. 90% of Burnley providers are sustainable, however, 18% are concerned about their longer term viability within the next 12 months.
<b>Chorley</b>	Chorley has 126 Ofsted registered childcare providers. Over the last 12 months the net change in the number of providers is -8. 40 providers said they would increase their numbers if demand required it. Chorley district shows a surplus in places across all age groups. Average EEF2 take up for the district is 95% and the average take up for EEF 3&4 year olds is 90%. This is an increase in take up of EEF 2 since our last published CSA. 98% of providers have received an Ofsted judgement that was Good or Outstanding. 93% of providers offer places for children with SEND, 54% have said demand for places has remained the same. 93% of providers in Chorley are currently sustainable, this is an increase since last year, 24% are concerned about their longer term viability over the next 12 months.
<b>Fylde</b>	Fylde has 79 Ofsted registered childcare providers. Over the last 12 months the net change in the number of providers is -6. 48 providers said they would increase their numbers if demand required it. Fylde district shows a surplus in places across all age groups, however, there is a shortfall of 0-14 places in Singleton and Weeton. The average EEF2 take up for the district is 81% and the average take up for EEF 3&4 year olds is 88%. This is a decrease in take up of EEF 2,3&4 since our last published CSA. 93% of providers have received an Ofsted judgement that was Good or Outstanding. 95% of providers offer places for children with SEND, 64% have said demand for these places has remained the same. 90% of providers in Fylde are sustainable, however, 14% are concerned about their longer term viability over the next 12 months.
<b>Hyndburn</b>	Hyndburn has 131 Ofsted registered childcare providers. Over the last 12 months the net change in the number of providers is -1. 101 providers said they would increase their numbers if demand required it. Hyndburn district shows a surplus in places across all age groups. The average EEF2 take up for the district is 83% and the average take up for EEF 3&4 year olds is 92%. This is an increase in take up of EEF 2,3&4 since our last published CSA. 92% of providers have received an Ofsted judgement that was Good or Outstanding. 94% of providers offer places for children with SEND, 61% have said demand for these places has remained the same. 93% of providers in Hyndburn are currently sustainable, 8% are concerned about their longer term viability over the next 12 months, this is a decrease in concerns since our last CSA.
<b>Lancaster</b>	Lancaster has 141 Ofsted registered childcare providers. Over the last 12 months the net change in the number of providers is -4. 49 providers said they would increase their numbers if demand required it. Lancaster district shows a surplus in places for 0-4 year olds, however, there is a shortfall in Morecambe and Heysham. We have a shortfall of 5-14 year old places in, Carnforth. The average EEF2 take up for the district is 93% and the average take up for EEF 3&4 year olds is 91%. This is an increase in take up of EEF 2,3 & 4 since our last published CSA. 97% of providers have received an Ofsted judgement that was Good or Outstanding. 95% of providers offer places for children with SEND, 52% have said demand for these places has remained the same. 93% are sustainable this is an increase since last year however, 17% are concerned about their longer term viability within the next 12 months.
<b>Pendle</b>	Pendle has 77 Ofsted registered childcare providers. Over the last 12 months the net change in the number of providers is -1. 28 providers said they would increase their numbers if demand required it. Pendle district shows a surplus in places for 0-4 year olds, however, in Brierfield we have a shortfall of places. In Brierfield and Nelson we have a shortfall of 5-14 year old places. The average EEF2 take up for the district is 80% and the average take up for EEF 3&4 year olds is 96%. This is a very slight decrease in take up of EEF 2 since our last published CSA. 96% of providers have received an Ofsted judgement that was Good or Outstanding. 98% of providers offer places for children with SEND, 42% have said demand for these places has remained the same. 91% are sustainable, however, 15% are concerned about their longer term viability within the next 12 months.
<b>Preston</b>	Preston has 165 Ofsted registered childcare providers. Over the last 12 months the net change in the number of providers is -6. 45 providers said they would increase their numbers if demand required it. Preston district shows a surplus in places for 0-4 year olds. We have a shortfall in places for 5-14 year olds in Preston East and Preston West. The average EEF2 take up for the district is 75% and the average take up for EEF 3&4 year olds is 98%. This is an increase in take up of EEF2 since our last published CSA. 97% of providers have received an Ofsted judgement that was Good or Outstanding. 90% of providers offer places for children with SEND, 54% have said demand for these places has remained the same. 95% of providers in Preston are currently sustainable. 16% of providers in Preston have some concerns about their longer term viability within the next 12 months.

Area	Summary of Key Findings by District
<b>Ribble Valley</b>	Ribble Valley has 64 Ofsted registered childcare providers. Over the last 12 months the net change in the number of providers is -6. 21 providers said they would increase their numbers if demand required it. Ribble Valley district shows a surplus in places for 0-4 year olds, however, Chipping & Ribchester show a shortfall of places. Chipping & Ribchester, Bowland, Dunsop Bridge and Slaidburn also have a shortfall of 5-14 year old places. The average EEF2 take up for the district is 103% and the average take up for EEF 3&4 year olds is 97%. This is an increase in take up of EEF 2 and a decrease in EEF 3&4 since our last published CSA. 94% of providers have received an Ofsted judgement that was Good or Outstanding. 96% of providers offer places for children with SEND, 57% have said demand for these places has remained the same, this is a decrease in demand since last year. 84% of providers in Ribble Valley are currently sustainable. 9% of providers have concerns about their longer term viability within the next 12 months.
<b>Rossendale</b>	Rossendale has 87 Ofsted registered childcare providers. Over the last 12 months the net change in the number of providers is -5. 32 providers said they would increase their numbers if demand required it. Rossendale district shows a surplus in places for 0-14 year olds however Ramsbottom has a shortfall of places for 0-4s. The average EEF2 take up for the district is 86%, and the average take up for EEF 3&4 year olds is 86%. This is a decrease in take up of EEF 2, 3&4 since our last published CSA. 98% of providers have received an Ofsted judgement that was Good or Outstanding, this has remained the same since last year. 96% of providers offer places for children with SEND, 61% have said demand for these places has remained the same. 88% of providers in Rossendale are sustainable, however 21% of providers do have concerns about their longer term viability within the next 12 months.
<b>South Ribble</b>	South Ribble has 141 Ofsted registered childcare providers. Over the last 12 months the net change in the number of providers is 2. 92 providers said they would increase their numbers if demand required it. South Ribble district shows a surplus in places across all age groups. The average EEF2 take up for the district is 93% and the average take up for EEF 3&4 year olds is 93%. This is an increase in take up of EEF 2 since our last published CSA. 94% of providers have received an Ofsted judgement that was Good or Outstanding, this has remained the same since last year. 93% of providers offer places for children with SEND, 63% have said demand for these places has remained the same. 94% of childcare providers in South Ribble are sustainable. However, 15% are concerned about their longer term viability within the next 12 months. This is similar to last years CSA.
<b>West Lancashire</b>	West Lancashire has 114 Ofsted registered childcare providers. Over the last 12 months the net change in the number of providers is -1. 60 providers said they would increase their numbers if demand required it. West Lancashire district shows a surplus in places for 0-14 year olds. The average EEF2 take up for the district is 79%. The average take up for EEF 3&4 year olds is 88%. This is a decrease in take up of EEF 3&4 year olds since our last published CSA. 96% of providers have received an Ofsted judgement that was Good or Outstanding. 95% of providers offer places for children with SEND, 55% have said demand for places has increased. In West Lancashire 86% of providers are sustainable. 13% have concerns about their longer term viability within the next 12 months.
<b>Wyre</b>	Wyre has 97 Ofsted registered childcare providers. Over the last 12 months the net change in the number of providers is -3. 36 providers said they would increase their numbers if demand required it. Wyre district shows a surplus in places for 0-4 year olds. We have a shortfall of places for 5-14 year olds in Calder Vale & Cloughton, Fleetwood and Thornton Cleveleys, although we have created 270 new wraparound places since this data was collected. The average EEF2 take up for the district is 91% and the average take up for EEF 3&4 year olds is 92%. This is an increase in take up of EEF 2, and a decrease in take up of EEF 3&4 since our last published CSA. 96% of providers have received an Ofsted judgement that was Good or Outstanding. 94% of providers offer places for children with SEND, 52% have said demand for places has remained the same, this has decreased since last year. 92% of providers are currently sustainable, 20% of providers have concerns about their longer term viability within the next 12 months.

## Emerging Issues and Actions

### Childcare Places

We have sufficient childcare places across all districts in Lancashire. Some more localised areas may identify a gap in provision. Local providers may have existing capacity to support the need for any additional places. We will work with local providers and schools in any of these areas where availability of places may not meet anticipated demand. Market research would need to be undertaken and further understanding of how parents access provision in the area would be required.

With the roll out of the extended early years funding entitlements we will monitor places and take up of the early education funding to understand the demand for places. The increase in before and after school provision from the National Wraparound Programme, will continue to be monitored to understand the take up of these places and to support the sustainability of these places once the grant funding comes to an end. Ten School based Nurseries were awarded capital funding by the Department for Education in Spring term 2025, they will start to open from September 2025, we will support and monitor the places in these areas.

The table below summarises the number of places created through the Early Years Capital Expansion Funding and Wraparound Programme.

Programme Type	Places Created
Early Years Capital Expansion Funding	289
Wraparound Programme	2455

### Business and Finance

The general view of childcare providers who completed our survey shows that 91% have said they are sustainable. To support the Early Years and Wraparound sector, we have a business and sustainability package of support. The offer is available to support the creation of new childcare places. It also includes support for existing childcare providers who may be looking to reorganise their business model, help with financial planning, marketing, and promotion of their business.

### Early Education Funding

The take up of Early Education Funding for Spring term for 2 year olds is 87% and for 3&4 year olds is 92%. On average the take up has been consistent throughout the year. Accessing a funded place helps promote positive outcomes in children's health and wellbeing, learning and behaviour as well as preparing them for starting school. Increasing the take up of Early Education Funded places is key to helping ensure that all children have the best start in life and achieve their full potential.

Therefore, we will continue to monitor the take up of Early Education Funded places in relation to the introduction of the new working family entitlements.