

# **The London Borough of Harrow**

## **Childcare Sufficiency Assessment**

**9<sup>th</sup> August 2024**

## Executive summary

This Childcare Sufficiency Assessment was undertaken by Coram Family and Childcare with input from the London Borough of Harrow.

From the evidence assessed as part of this Childcare Sufficiency Assessment, it appears that the London Borough of Harrow **currently has sufficient provision to meet demand in most areas, with some key areas for improvement**. However, this is a snapshot in time and could change substantially as the new funded entitlements to early years childcare and school-age wraparound childcare are introduced and parental demand, as well as provider supply, is impacted.

### New funded entitlements to early years childcare and school-age wraparound childcare.

In Spring 2023 the government announced expansions to early years funded entitlement:

- Since **April 2024**, working parents of 2 year olds can access 15 hours per week
- From **September 2024**, working parents of children aged 9 months up to 3-years-old can access 15 hours per week
- From **September 2025**, working parents of children aged 9 months up to 3-years-old can access 30 hours free childcare per week.

The government also announced the national wraparound childcare programme to provide before and after school childcare from September 2024 for primary school aged children during term time, such as breakfast clubs and regular afterschool provision.

The assessment that the London Borough of Harrow has **sufficient provision** in most areas of childcare is evidenced by the fact that:

- Providers in the London Borough of Harrow said they have **vacancies** for typical hours care, holiday care for school age children, and for the funded childcare entitlements.
- While the number of providers has been falling over the past five years, the **number of places** has been steadily increasing.
- **Take up rates** for the three and four-year-old funded entitlements are higher than the national average
- Three-quarters of parents say that they are able to find childcare at the **right times** for them, and 92 percent say that they are able to find childcare in in the **locations** they want.

However, there are areas of concern, as well as significant challenges to future provision, including:

- **Take up rates for the two year old funded entitlement for disadvantaged children** is much lower than the national average as well as the average for local authorities in outer London.
- **Government expansion to childcare** – early years entitlement expansion for children aged 9 months to three years and funding for wraparound care for primary school age children is likely to substantially increase expectations around childcare and demand by parents, which will be a challenge to all providers and local authorities.

- The **number of providers** has been steadily falling in the past five years, while the number of places has been rising. This concentrates more places in fewer providers, meaning that any closures or changes to operating practices could have a very large effect on provision.
- **Affordability** – the London Borough of Harrow is much more expensive for childcare than the average for local authorities in Outer London, as well as the national average. Half of parents surveyed who were not currently using childcare said that affordability was preventing them from accessing childcare. Additionally, 39 percent of providers had increased prices in the last six months, with the same proportion planning to do so in the next six months.
- **Care in atypical hours** – there was a lack of supply of childcare in atypical hours and there was demand from a significant minority of parents.
- **Gaps in awareness of support for childcare** – of parents surveyed, there was significant variability in knowledge of the different types of government support for childcare.

Recommendations for improving childcare sufficiency in the London Borough of Harrow include:

- Continue to map supply and demand, especially for the new funded entitlements
- While understanding that many aspects of childcare provision is not in the remit of local authorities, the London Borough of Harrow should endeavour to work closely with providers and the childcare workforce to provide what help they can with recruitment, training for staff, and support for providers to help staff to attend training events without negatively impacting provider capacity.
- Support providers to offer more flexible, atypical hours for early years childcare, and work with them and existing wraparound providers to support them to work together to offer wraparound childcare.
- Improve access to information, including an update and redesign of the childcare section of the London Borough of Harrow website.
  - For SEND, the Local Offer website is currently undergoing a refresh, which is due to be completed in September 2024. This represents an excellent opportunity to get parents involved with design and evaluation of the new web pages to ensure that it meets their needs

The methodology used to undertake this Childcare Sufficiency Assessment is set out in Annex 1. Coram Family and Childcare undertook this Childcare Sufficiency Assessment and has written the report, which had input from the London Borough of Harrow.

## Glossary of acronyms and key terms

### 1.1.1 Acronyms

- **CSA:** Childcare Sufficiency Assessment
- **SEND:** Special Educational Needs and Disabilities
- **EHCP:** Education, Health and Care Plan
- **DLA:** Disability Living Allowance
- **IDACI:** Income Deprivation Affecting Children Index
- **ONS:** Office for National Statistics
- **PVI:** Private, Voluntary and Independent
- **EYFS:** Early Years Foundation Stage

### 1.1.2 Key Terms

- **Childcare on non-domestic premises:** Refers to nurseries
- **Childcare on domestic premises:** Providers registered under this category are providing care from a home, but with three or more people providing care on those premises. While childminders can work with other childminders or assistants, a separate childcare on domestic premises registration with Ofsted or a childminder agency is required when the number of people providing care exceeds three.
- **Home childcarer:** Refers to nanny or au pair, that takes care of the child in the child's own home
- **Funded early education entitlements:** Refers to the 2-year-old entitlement for disadvantaged children, 2-year-old entitlement for children of working parents, 3-year-old and 4-year-old early education funding provided by the government
- **Wraparound childcare:** Refers to before and after school childcare such as breakfast clubs and after school clubs
- **Atypical hours:** Refers to childcare provided outside of standard 9am-6pm weekday hours
- **Take-up rate:** The proportion of eligible children accessing funded early education place
- **Maintained nursery:** Refers to nursery classes in state-funded primary schools
- **Private, voluntary and independent nurseries:** Refers to non-maintained early years settings
- **Sustainability:** The ability of childcare providers to continue operating

## Purpose & legal context

It is a requirement by law for each local authority to report annually to elected members on how they meet their statutory duty to secure sufficient childcare and to make their report available and accessible to parents. This report has been prepared in line with the requisite statutory duties. It is intended to provide an overview of the current childcare market sufficiency, an assessment of the challenges, local impact and priority actions moving forward.

Good quality care and education in the early years, in which the PVI sector plays a crucial role, is instrumental in raising the educational achievement of young children and supports the wider economy by supporting parents to work or take up training. The following legislation outlines the specific statutory duties placed on the local authority.

The Childcare Act 2006 places a statutory duty on Local Authorities to secure sufficient childcare for working parents or those taking up training to work

<https://www.legislation.gov.uk/ukpga/2006/21>

The Childcare Act 2016 extends the entitlement to 30 hours free childcare for working parents

<https://www.legislation.gov.uk/ukpga/2016/5/enacted>

The Children and Families Act 2014 places a duty on Local Authorities to report annually to elected council members and to make this report available and accessible to parents.

<https://www.legislation.gov.uk/ukpga/2014/6/contents/enacted>

Under the Children and Families Act (2014), the role of the local authority is one of good market management and facilitation, as well as assessing supply and demand. Securing sufficient childcare does not mean that the local authority must provide early years and childcare provision itself, although they can and may do so where deemed necessary.

Local authorities are required to publish their Local Offer as part of reforms to SEND provision. You can access the London Borough of Harrow's Local Offer information by following this [link](#).

## Data Sources

- Centrally held data from locality action planning and information management systems
- [Education Provision Statistics](#) from the Department for Education
- [Office for National Statistics](#) (ONS)
  - [Nomis](#), a database maintained by Durham University on behalf of ONS

## 2 Childcare context in the London Borough of Harrow

This section sets the scene for demand and supply of childcare in the London Borough of Harrow, using data from national and local sources, as well as from two provider surveys (one sent to early year providers, and one sent to schools) and a parent survey carried out in Harrow as part of this Childcare Sufficiency Assessment (CSA). It includes child population and characteristics (ethnicity and deprivation), number of providers in the borough, take up of the funded early education entitlements and quality of childcare.

### 2.1 What does the supply of childcare look like in the London Borough of Harrow?

In order to assess the sufficiency of childcare in the London Borough of Harrow, this assessment looked at trends in the number of providers and places, estimated vacancy rates, and providers' views on changes they have recently made and will likely make in the near future.

#### 2.1.1 Number of providers and places

The latest data from Ofsted's '[Childcare providers and inspections](#)' dataset (from 31 Aug 2023) shows that there are a total of 318 childcare providers in the London Borough of Harrow, 213 of which are on the Early Years Register (EYR). Of these 213 providers, 94 are childminders, 117 are classified as 'childcare on non-domestic premises, and 2 are classified as 'childcare on domestic premises'<sup>1</sup>.

There are 7 childminders who are not on the EYR, along with 40 providers of 'childcare on non-domestic premises', and 58 providers classed as 'home child carers' (providers such as nannies, who provide care in the child's own home). None of these providers have any registered places.

The number of registered places represents the maximum number of children who can be on the premises at any given time. In practice, many providers choose to operate below their number of registered places.

According to Ofsted, the London Borough of Harrow has 6,345 registered childcare places, of which 600 are with childminders, and 5,695 are with providers classed as 'childcare on non-domestic premises'. Children may attend childcare full time or part time.

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<sup>1</sup> Providers registered under this category are usually childminders working out of their home, but with three or more people providing care on those premises. While childminders can work with other childminders or assistants, a separate childcare on domestic premises registration with Ofsted or a childminder agency is required when the number of people providing care exceeds 3.

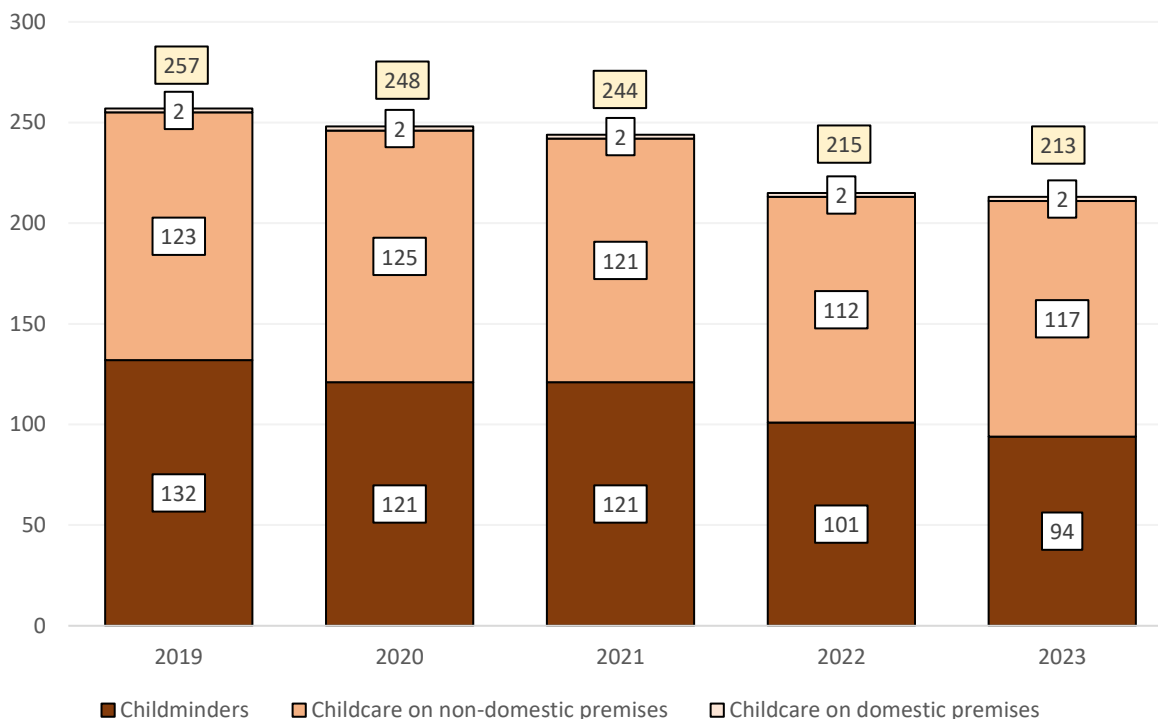
Table 1: Number of providers and registered places, by provider type<sup>2</sup>

Type of provision	Number of EYR providers	Number of EYR registered places
Childminders	94	600
Childcare on non-domestic premises	117	5,695
Childcare on domestic premises	2	50
Home child carer	0	0
<b>TOTAL</b>	<b>213</b>	<b>6,345</b>

Source: [Ofsted - Childcare providers and inspections as at 31 August 2023](#)

The numbers of EYR-registered providers in the London Borough of Harrow has been steadily decreasing over the last five years, going from a total of 257 providers in August 2019 to 213 in August 2023. This has largely been driven by declining numbers of childminders; there are 38 fewer childminders in August 2023 than in August 2019, compared to seven fewer providers classified as childcare on non-domestic premises.

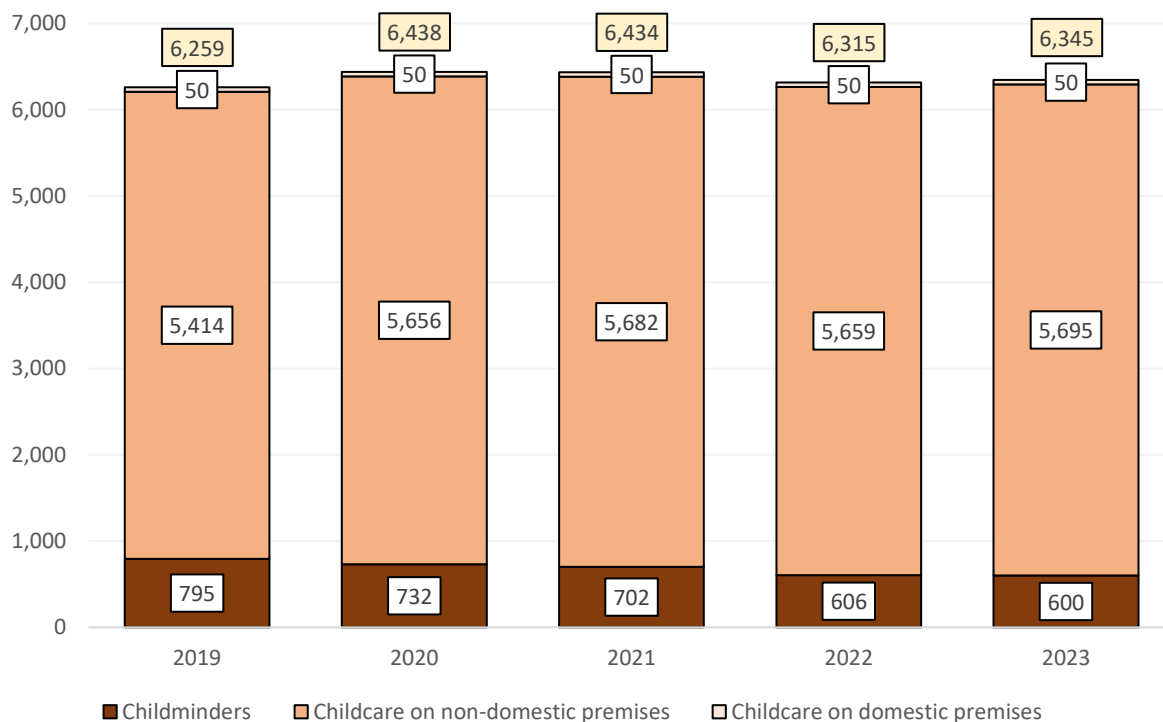
Table 2: Number of EYR-registered providers in the London Borough of Harrow, 2019-2023



Source: [Ofsted - Childcare providers and inspections as at 31 August 2023](#); [2022](#); [2021](#); [2020](#); [2019](#)

<sup>2</sup> The figures in this table record places for children who are attending full time, or for as many hours as the setting is open. In some cases, two or more children attending part time may use one full time equivalent place. For example, one child may attend in the morning and one child may attend in the afternoon.

Table 3: Number of EYR-registered places in the London Borough of Harrow, 2019-2023



Source: [Ofsted - Childcare providers and inspections as at 31 August 2023](#); [2022](#); [2021](#); [2020](#); [2019](#)

### 2.1.2 Vacancy rates

To assess the supply of childcare in the London Borough of Harrow, Coram Family and Childcare surveyed providers and calculated vacancy rates by looking at the number of vacancies as a percentage of the total number of places<sup>3</sup>. This analysis provided an *estimation* of the total number of vacancies to support an assessment of sufficiency, not the actual number of vacancies for pre-school providers in the London Borough of Harrow.

In total, 41 providers responded to questions regarding **pre-school** vacancy rates in Coram Family and Childcare’s survey of providers in the London Borough of Harrow. Of the 41 providers who responded, 23 (56 percent) said that they had at least one vacancy. These 23 providers had a total of 144 vacancies available, averaging 6.3 vacancies per provider. This equates to an estimated vacancy rate of 14 percent for pre-school providers.

<sup>3</sup> More information on the survey can be found in the Methodology section at the end of this document



*Table 4: Vacancies by provider, for pre-school children*

	Vacancies	Of which, how many are:			
		Sessional	Full day	Term time	Year round
Total vacancies	199	149	93	167	56
Providers with at least one vacancy	14	17	14	19	11
Providers with no vacancies	17	7	10	7	10
Average vacancies (only providers with at least one vacancy)	8	9	7	9	5
Average vacancies (including providers with no vacancies)	5	6	4	6	3
Vacancy rate	14%	28%	20%	29%	16%
Question asked in survey: <i>As of today, how many vacancies do you have?</i>					

As shown in Table 5 (below), 32 providers responded to the question about **wraparound childcare** for school-age children in our survey of childcare providers. Of these, 12 providers (38 percent) had at least one vacancy. These 12 providers had 104 vacancies available, averaging 9 vacancies per provider, equating to an estimated vacancy rate of 43 percent.

Similarly, 25 providers responded to the question about **holiday childcare** for school-age children in our survey of childcare providers, but again, only 8 (32 percent) of these providers had at least one vacancy. These 8 providers had 103 vacancies available, averaging 13 vacancies per provider and equating to an estimated vacancy rate of 38 percent.

*Table 5: Wraparound term-time and holiday childcare vacancies for school-age children*

	Wraparound term-time childcare	Holiday childcare
Total number of vacancies	104	103
Providers with at least one vacancy	12	8
Providers with no vacancies	20	17
Average vacancies (providers with at least one vacancy)	9	13
Average vacancies (including providers with no vacancies)	3	4
Vacancy rate	43%	38%
Question asked in survey: <i>As of today, how many vacancies do you have for:</i>		

We also asked about wraparound term-time childcare and holiday childcare in our survey of schools. Schools were far less likely than other providers to have any vacancies. In total, 9 schools responded to questions about vacancies, but none of these had any vacancies (either Ofsted-registered or not Ofsted-registered) for wraparound and holiday childcare. One school said that there are 10 wraparound vacancies and 20 holiday childcare vacancies for school-age children at an external provider that operates on their premises.

For the **15 hours funded childcare for disadvantaged 2 year olds** offer, 21 out of 38 providers in the survey of early years providers responded that they have at least one vacancy (Table 6). These 21 providers had 113 vacancies available, averaging 5 vacancies per provider.

For the newly-introduced (as of April 2024) **15 hours funded childcare for 2 year olds with eligible working parents** offer, 19 out of 37 providers responded that they have at least one vacancy. These 19 providers had 109 vacancies available, averaging 6 vacancies per provider.

For the **15 hours funded childcare for 3 and 4 year olds** offer, 22 out of 36 providers responded that they have at least one vacancy. These 22 providers had 146 places available, averaging 7 vacancies per provider.

For the **30 hours funded childcare for 3 and 4 year olds** offer, 19 out of 36 providers responded to that they have at least one vacancy. These 19 providers had 153 places available, averaging 8 vacancies per provider.

*Table 6: Vacancies for funded entitlements*

	15 hours funded childcare for disadvantaged 2 year olds	15 hours funded childcare for 2 year olds with eligible working parents	15 hours funded childcare for 3 and 4 year olds	30 hours funded childcare for 3 and 4 year olds
Total number of vacancies	113	109	146	153
Providers with at least one vacancy	21	19	22	19
Providers with no vacancies	17	18	14	17
Average vacancies (providers with at least one vacancy)	5	6	7	8
Average vacancies (including providers with no vacancies)	3	3	4	4
Question asked in survey: <i>How many vacancies do you have for the following funded entitlements?</i>				

Breaking down vacancies for pre-school children by postcode area (see Table 7, below), we can see that there is substantial variation in where vacancies are available across the London Borough of Harrow. Providers in the HA54 postcode area, for example, provide 1 in 5 vacancies in the borough, while several postcode areas (HA27, HA35, HA38, HA71) have no vacancies at all.

As with pre-school vacancies, there is also a significant range in the number of vacancies for school-age providers (see Table 8, below). Providers in just three postcode areas (HA12, HA37, and HA86) provide more than two-thirds of wraparound term-time childcare vacancies in the London Borough of Harrow. This concentration of provision is even more pronounced for holiday childcare, with providers in four postcode areas (HA12, HA26, HA37, and HA86) providing 95 percent of holiday childcare vacancies for school-age children.

Table 7: Vacancies by postcode area, for pre-school children

Postcode area	No. of vacancies, pre-school children	Of which, how many are...			
		Sessional	Full day	Term time	Year round
HA11	0	0	0	0	0
HA12	25	10	15	25	25
HA13	2	0	0	2	0
HA14	1	1	0	0	1
HA20	4	1	2	0	1
HA26	8	6	7	6	2
HA27	0	0	0	0	0
HA29	3	0	0	5	0
HA35	0	0	0	0	0
HA36	3	3	0	3	0
HA37	12	12	12	12	0
HA38	0	0	0	0	0
HA39	10	10	10	10	0
HA51	3	3	3	3	0
HA52	2	1	1	0	2
HA53	8	0	8	0	8
HA54	40	40	20	20	0
HA55	14	14	0	14	0
HA71	0	0	0	0	0
HA72	15	8	3	15	3
HA73	1	0	1	0	1
HA74	12	10	0	12	0
HA86	35	30	10	40	12
<b>TOTAL</b>	<b>198</b>	<b>149</b>	<b>92</b>	<b>167</b>	<b>55</b>

Question asked in survey: *As of today, how many vacancies do you have?*

Table 8: Vacancies by postcode area, for school-age children

Postcode area	Wraparound, school age, term time	Holiday, school age
HA11	0	0
HA12	26	35
HA13	6	0
HA14	0	0
HA2	0	0
HA20	0	0
HA26	0	15
HA27	8	0
HA29	2	0
HA35	3	3
HA36	0	0
HA37	30	30
HA38	0	0
HA39	0	0
HA51	2	0
HA52	0	0
HA53	8	0
HA54	0	0
HA55	0	0
HA71	0	0
HA72	3	4
Ha73	0	0
HA74	1	1
HA86	15	15
<b>TOTAL</b>	<b>104</b>	<b>103</b>
Question asked in survey: <i>As of today, how many vacancies do you have?</i>		

## 2.2 How is supply likely to change in the near future?

To assess future supply of childcare in the London Borough of Harrow, providers were asked in the survey what changes they had made in the last 6 months and would be making in the next 6 months, as well as their views on their sustainability.

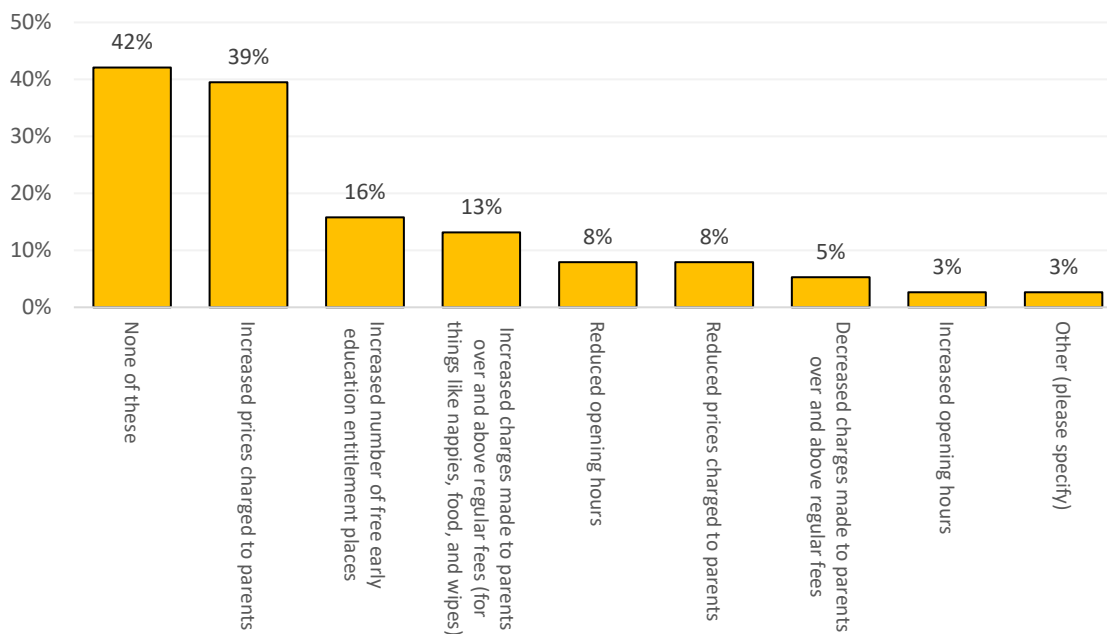
### 2.2.1 Provider changes to prices, places and opening hours

Of the providers surveyed, 42 percent had not taken any actions around prices, opening hours, or the number of free early education places being offered in the 6 months prior to the survey, with slightly fewer (39 percent) also not expecting to take any of these actions in the next six months. However, 39 percent of providers surveyed had increased **prices** charged to parents in the last six months, and 39 percent also plan to do so in the next six months. In addition, 13 percent of

providers had increased **charges** to parents over and above regular fees (for things like nappies and food) and 14 percent are planning on increasing charges in the next 6 months.

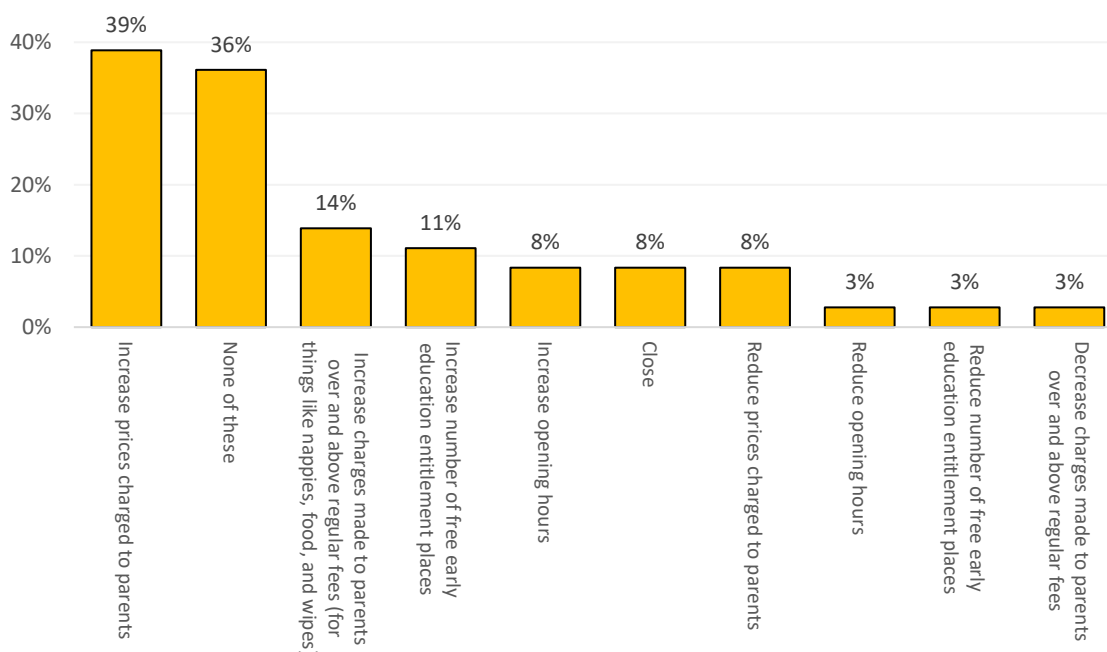
Around a sixth of providers (16 percent) have increased the number of **free early education entitlement places** over the last six months, with 11 percent expecting to do so in the next six months. Eight percent of providers expect to have to close in the next six months.

*Table 9: Actions taken by providers in the last 6 months (n=38)*



Question asked in survey: *Have you taken any of the following actions in the last six months?*

*Table 10: Actions providers expect to take in the next 6 months (n=36)*



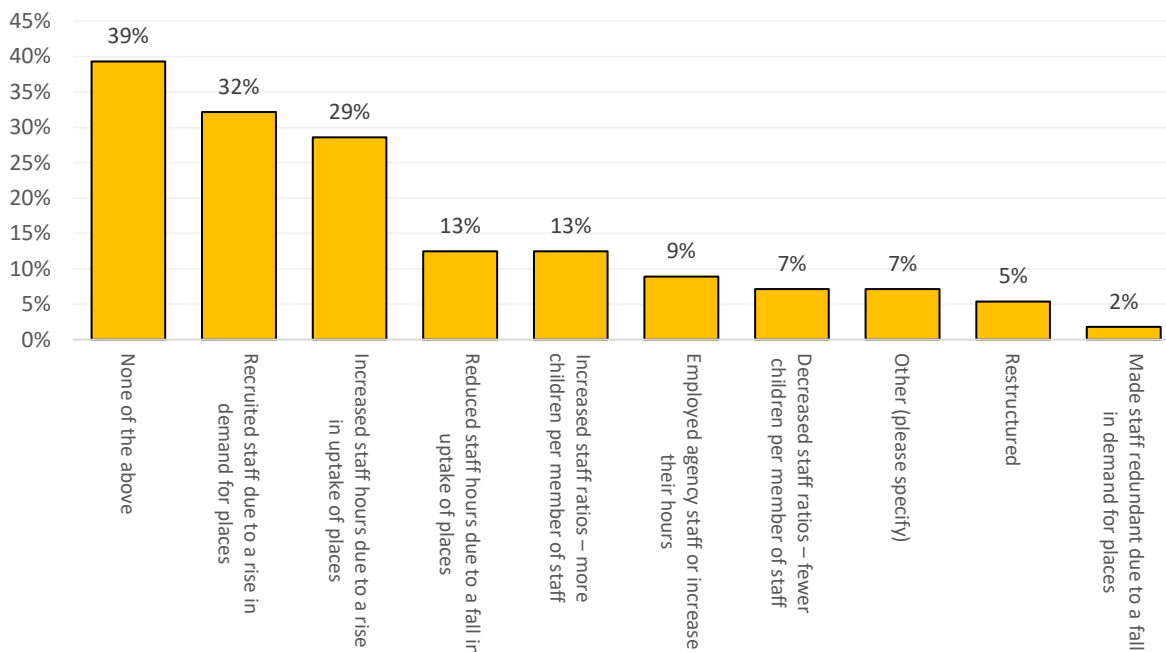
Question asked in survey: *Do you expect to take any of the following actions in the next six months?*

When looking specifically at actions around prices, places and opening hours taken during the last academic year by **schools** providing wraparound care ( $n=7$ ), over half said that they had increased prices charged to parents, and one said that they have increased opening hours. Three schools said that they had not taken any action over prices, places and opening hours. Only one school said that they expect to increase prices charged to parents in the next academic year, with two schools saying that they don't expect to take any actions around prices, places and opening hours in the next academic years ( $n=5$ ). Two schools selected 'Other' when asked this question; one said that they would be bringing wraparound provision in-house, while another said that they might be able to open a holiday programme and extend afterschool provision.

### 2.2.2 Provider changes to staffing

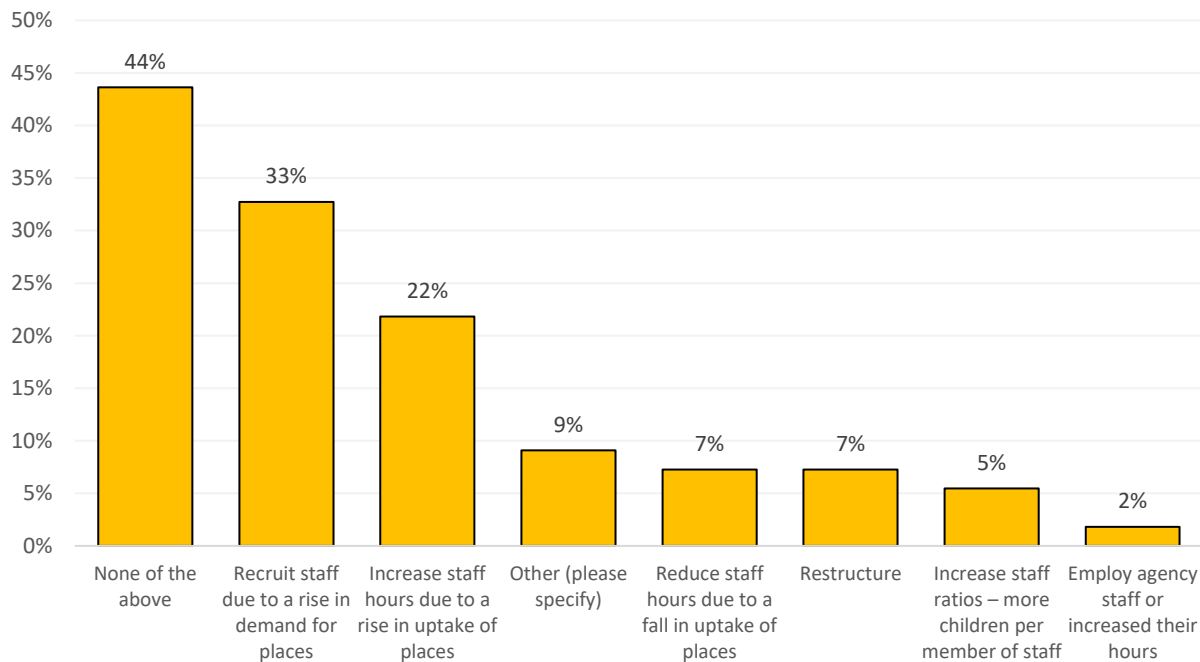
In terms of changes to staffing, 39 percent of providers responded that they had not taken any staffing actions in the last six months, with 44 percent also not expecting to take any actions in the next six months. However, in the last six months, just under a third of providers have recruited staff due to a rise in demand for places, while 33 percent intend to do so over the next six months. Similarly, 29 percent had increased staff hours due to a rise in uptake in places, with 22 percent expecting to do so in the next six months. This could suggest that these providers are looking to increase their capacity, possibly with the upcoming expansions to free early education places in mind.

*Table 11: Staffing actions taken by providers in the last 6 months (n=38)*



Question asked in survey: *Have you taken any of the following actions in the last six months?*

Table 12: Staffing actions providers expect to take in the next 6 months (n=36)



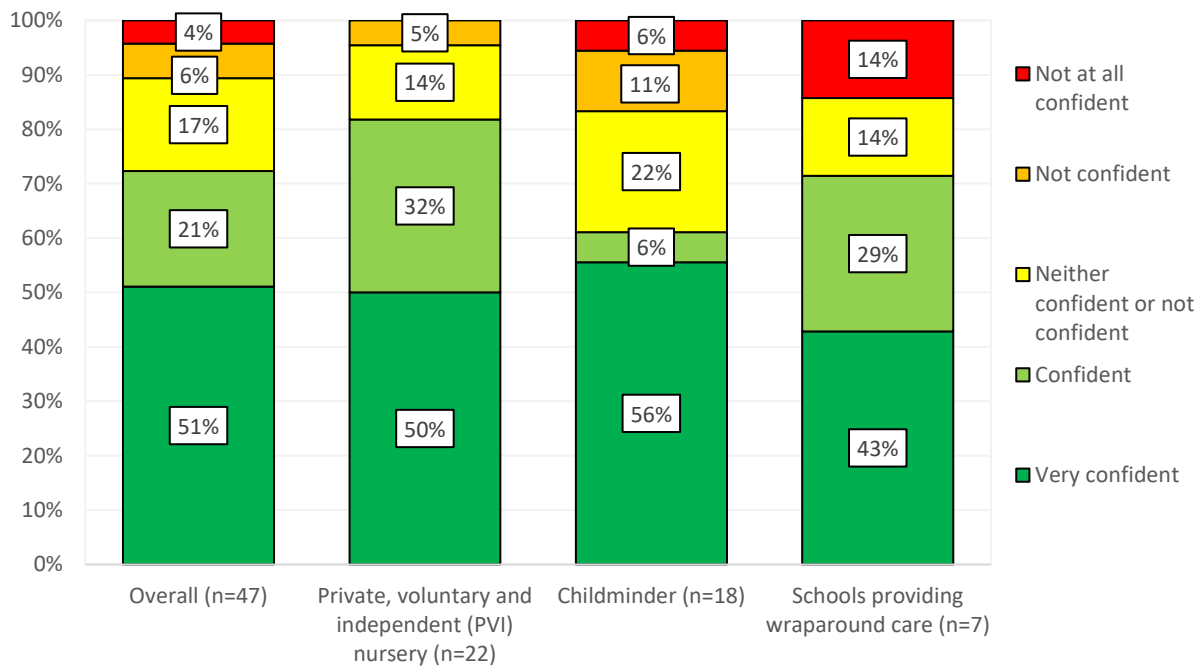
Question asked in survey: *Do you expect to take any of the following actions in the next six months?*

When looking specifically at staffing actions taken during the last academic year by schools providing wraparound care (n=7), two schools said that they had recruited staff due to a rise in demand for places, and the same number had engaged an external provider to provide wraparound care on their premises. Another two schools said that they had not taken any actions around staffing in the last 6 months. In the next academic year, four (n=7) schools providing wraparound care said that they do not expect to take any actions around staff. One school each said that they expect to recruit staff due to a rise in demand for places and increase staff ratios.

### 2.2.3 Provider sustainability

Despite the pressures facing childcare providers, almost three-quarters (73 percent) were confident or very confident that their setting would still be operating in six months. Only 11 percent said that they were not confident or not at all confident that their setting would be open in six months. However, as shown in Table 13 (below), there were differences between provider types. PVI providers were much more confident than childminders that they would still be operating in six months' time: 82 percent of PVI providers answered, 'very confident' or 'confident', compared to 62 percent of childminders. Only one nursery class in a primary school and one after school club responded to this question in the survey. Both said that they are very confident that they will still be operating in six months' time.

**Table 13: Confidence that settings will still be operating in six months' time (n=40)**



**Questions asked in survey:** *How confident are you that your childcare setting will be operating in six months' time? Please select one answer. (n=40); How confident are you that you will still be providing wraparound care at the start of the new academic year? (n=7)*

Overall, providers surveyed were confident in their sustainability in the next 6 months. Some had increased their prices and recruited more staff, or planned to do so in the next 6 months.

### 2.3 What is the current take up of childcare in the London Borough of Harrow?

As part of this Childcare Sufficiency Assessment, Coram Family and Childcare undertook a survey of parents in the London Borough of Harrow<sup>4</sup>. The survey received a total of 137 responses, and while this represents a small snapshot of the total number of parents in the London Borough of Harrow, it allows us to make some generalisations about parents' needs. As shown in Table 14 (below), our survey of parents suggests that around 82 percent of parents in the London Borough of Harrow are currently using childcare, compared to 16 percent who do not (see Table 14, below). There is very little difference between parents who have at least one child with SEND and parents of no children with SEND in their use of childcare for children under the age of 14 (80 percent for parents of at least one child with SEND, 83 percent for parents with no children with SEND).

<sup>4</sup> More information on the survey can be found in the Methodology section at the end of this document



*Table 14: Number of parents currently using childcare*

Type of childcare	Number of parents	Percent of parents
Yes – I use childcare for my child(ren) under the age of 14	93	82%
Yes – I use childcare for my child(ren) aged 14 to 18 with additional needs	2	2%
No – I do not use childcare	18	16%
<b>TOTAL</b>	<b>113</b>	<b>100%</b>
Question asked in survey: <i>Do you currently use childcare for your child or children (please select all that apply). By childcare we mean formal childcare such as nursery; childminder; nanny/ au pair; before and after school clubs and holiday clubs as well as informal childcare such as grandparents and friends.</i>		

Of the parents currently using childcare, the majority (57 percent) use a nursery not in a school, with the next most frequent type of childcare used being informal childcare (40 percent), such as with grandparents, friends, or family. A quarter (25 percent) of parents are using a nursery class in a primary school, with 13 percent using a childminder and 12 percent using a nanny or au pair.

Looking at wraparound childcare specifically, the most frequently used provider type was after school activities such as sports and music that cannot be used 5 days a week (39 percent), and after school clubs, which can be used 5 days a week (36 percent). Only 16 percent used a breakfast club, although 29 percent used full day (e.g. 8am-6pm) care for children under 5 (see Table 15, below). Just over a quarter (27 percent) of parents are using a holiday play scheme.

*Table 15: Number of parents currently using childcare, by provider types*

Type of childcare	Number of parents	Percent of parents
Nursery class in a primary school	23	25%
Nursery not in a school	52	57%
Childminder	12	13%
Nanny or au pair	11	12%
Breakfast club	15	16%
After school club (can be used up to 5 days a week)	33	36%
After school activities e.g. sports, music (cannot be used 5 days a week)	36	39%
Holiday play scheme	25	27%
Informal childcare e.g. grandparents, friends, family	37	40%
Sessional childcare – that is, childcare that runs for less than 6 hours for children under 5	5	5%
Full day (e.g. 8am to 6pm) childcare for children under 5	27	29%
Childcare that only runs during term time for children under 5	20	22%
Childcare that runs through the whole year for children under 5	17	18%
Other (please describe)	1	1%
<b>TOTAL (Any response)</b>	<b>92</b>	<b>100%</b>
Question asked in survey: <i>What type of childcare do you use for your child(ren)? Please select all that apply</i>		

When comparing the types of childcare used by parents who have at least one child with SEND against those who do not, we see some substantial differences in the types of childcare being accessed, as well as the overall observation that parents with at least one child with SEND are using a more diverse range of childcare types. Some of the most substantial differences include parents of at least one child with SEND being 43 percentage points more likely to use after school

activities, 41 percentage points more likely to be using informal childcare and 25 percentage points more likely to be using a holiday play scheme. On the other hand, parents of at least one child with SEND are 12 percentage points less likely to use childcare for a full day (e.g. 8am to 6pm) and 3 percentage points less likely to use either a nursery not in a school or an after school club.

*Table 16: Number of parents using different provider types, by SEND (n=92)*

	Parents of child(ren) with SEND	Parents with no children with SEND	% point diff., SEND vs. no SEND
Nursery class in a primary school	38%	21%	+17%
Nursery not in a school	54%	57%	-3%
Childminder	13%	13%	-1%
Nanny or au pair	29%	6%	+23%
Breakfast club	25%	13%	+12%
After school club (can be used up to 5 days a week)	33%	37%	-3%
After school activities e.g. sports, music (cannot be used 5 days a week)	71%	28%	+43%
Holiday play scheme	46%	21%	+25%
Informal childcare e.g. grandparents, friends, family	71%	29%	+41%
Sessional childcare – that is, childcare that runs for less than 6 hours for children under 5	13%	3%	+10%
Full day (e.g. 8am to 6pm) childcare for children under 5	21%	32%	-12%
Childcare that only runs during term time for children under 5	29%	19%	+10%
Childcare that runs through the whole year for children under 5	21%	18%	+3%
Other (please describe)	0%	1%	-1%
<b>TOTAL (Any response)</b>	<b>24</b>	<b>68</b>	<b>-</b>
Question asked in survey: <i>What type of childcare do you use for your child(ren)? Please select all that apply</i>			

### 2.3.1 Why do parents use childcare?

Parents who were using childcare were asked ‘Why do you use childcare for your children?’ Among the 92 parents in the survey who answered that they were using childcare, the vast majority (80 percent) were doing so in order for them to be able to go to work, with just over one in five (21 percent) also saying that they use childcare in order to be able to work more hours than they would otherwise be able to.

As shown in Table 17 (below), just over half (53 percent) stated they used childcare ‘For my child(ren)’s educational development’ with slightly less stating: ‘So that my child(ren) can take part in different activities (47 percent), ‘Because my child(ren) enjoy it’ (43 percent), and ‘So my child(ren) can make friends (42 percent). Although the survey was a small sample of the total population of parents in the London Borough of Harrow, it does suggest that while most parents use childcare to facilitate them being able to work, many also appreciate the developmental benefits to children that can come from using childcare.

Table 17: Reasons for childcare use

	Count	%
<b>Work-related</b>		
So that I can go to work	74	80%
So that I can work more hours	19	21%
So that I can study/train	6	7%
So that I can look for work	4	4%
<b>Child development</b>		
For my child(ren)'s educational development	49	53%
So that my child(ren) can take part in different activities	43	47%
Because my child(ren) enjoy it	40	43%
So my child(ren) can make friends	39	42%
<b>Parental wellbeing</b>		
So that I can look after the home or other children	5	5%
So that I can take a break from looking after my child(ren)	8	9%
So that I can socialise	5	5%
<b>TOTAL (Any response)</b>	<b>92</b>	<b>-</b>
Question asked in survey: <i>Why do you use childcare for your children? (select all that apply)</i>		

## 2.4 What does the take up and supply of government-funded childcare look like in the London Borough of Harrow?

Part of the duty of local authorities to ensure childcare sufficiency includes access to government-funded childcare places. In order to assess government-funded childcare, this section looks at the take up of government funded places and the future supply of these places.

### 2.4.1 Current eligibility for 2-year-old funded places

At the time of writing (June 2024)<sup>5</sup>, some parents of two-year-old children are eligible for 15 hours of free childcare per week if they claim certain benefits, including income support, Universal Credit, and income-based Jobseeker's Allowance, or if their child has an EHCP or receives DLA. In the London Borough of Harrow, 23 percent of 2 year olds are entitled to use this offer. This equates to around 736 children per year in 2023. This figure was calculated from the 2 year old population eligible for a 2 year old funded place<sup>6</sup>, divided by the total 2 year old population<sup>7</sup> shown in section 2.6.1 (below).

### 2.4.2 Take up of 2, 3, and 4-year-old funded places

The proportion of eligible children taking up their funded place (for at least some of the available hours) in the London Borough of Harrow is shown in Table 18, below.

<sup>5</sup> Please note that this data reflects the state of the field before the new entitlement for working parents of 2 year olds was rolled out in April 2024

<sup>6</sup> [Education Provision: Children under 5 years of age](#)

<sup>7</sup> Please note that this population figure is from the 2021 census, and so does not exactly match the data from 2022.

*Table 18: Take up of 2, 3, and 4-year-old funded places*

Age	No. of registered children	No. of eligible children	% of eligible children registered
Age 2	389	659	59.0%
Age 3 and 4	5,693	6,192	91.9%
3 year olds	2,629	3,028	86.8%
4 year olds	3,064	3,165	96.8%

Source: [Education Provision: Children under 5 years of age](#)

Take up of the 2-year-old entitlement for disadvantaged children has increased from 47.1 percent in 2021 to 59.0% percent in 2024, although this is slightly lower than the 59.3 percent figure from 2022. While data specifically showing the take-up rates for this entitlement for children with SEND are not available, DfE data<sup>8</sup> does show that no children in the London Borough of Harrow registered for this entitlement qualify on the basis of having high-level SEND needs, with 99.3 percent qualifying on the basis of economic reasons. Take-up of the three- and four-year-old funded entitlement has also increased steadily over the last four years, from 83.1 percent in 2021 to 91.9 percent in 2024<sup>9</sup>.

*Table 19: Take-up of funded early education places over time, 2021-2024*

Age	2024	2023	2022	2021
Age 2 – targeted	59.0%	54.9 %	59.3%	47.1%
Age 3 and 4	91.9%	91.6 %	85.8%	83.1%

Source: [Education Provision: Children under 5 years of age](#)

Take-up of funded places for the 2 year old entitlement for disadvantaged children in the London Borough of Harrow is lower than in England, the London region overall and the neighbouring Boroughs of Redbridge and Ealing. For 3 and 4 year olds, take up in the London Borough of Harrow is lower than in England as a whole, but higher than the London average. However, take-up for this age group is lower in the London Borough of Harrow than in the neighbouring boroughs of Redbridge and Ealing.

*Table 20: Comparative take-up of funded early education entitlements, 2024*

Age	Harrow	England	London	Redbridge	Ealing
Age 2 – targeted	59.0%	74.8%	66.9%	59.4%	67.3%
Age 3 and 4	91.9%	94.9%	82.7%	103.6%	97.9%

Source: [Education Provision: Children under 5 years of age](#)

<sup>8</sup> From the 2024 version of the Department for Education (DfE) dataset '[Education provision: children under 5 years of age](#), spreadsheet number 3: '3\_early\_years\_provision\_disadvantaged\_children\_2018\_2024.csv'

<sup>9</sup> In-house data from the London Borough of Harrow suggests a higher take-up for the two-year-old offer than in the data from the DfE. The in-house data puts take-up at 442 places, compared to 389 in the DfE data. This would make the take-up rate 67.1 percent, and not 59.0 percent. This would also put the take-up rate in the London Borough of Harrow above the London average, as well as the average for the neighbouring borough of Redbridge, although still marginally below Ealing.

### 2.4.3 Supply of government-funded childcare

Providers are paid directly by government for delivering funded early education. They are not required to offer funded places to parents. Some providers offer a restricted number of funded places.

According to the London Borough of Harrow’s return for Coram Family and Childcare’s 2024 Childcare Survey, 61 percent of childminders, 84 percent of PVI nurseries, all standalone (maintained) nurseries, and 54 percent of nursery classes in schools offer the 30 hour extended entitlement for at least some children. This is compared to the national averages of 80 percent of childminders, 91 percent of PVI settings, 71 percent for standalone (maintained) nurseries, and 92 percent of nursery classes in schools. This means that with the exception of standalone (maintained) nurseries, a lower percentage of all types of providers in the London Borough of Harrow are offering the 30 hour extended entitlement for at least some children than the national average.

Responses to the provider survey suggest that most childcare providers in the London Borough of Harrow would be willing to increase the number of children attending their setting who receive the current government-funded childcare entitlements. This was highest for the new offer for 2 year olds with eligible working parents using 15 hours of funded childcare, at 77 percent. This figure was only slightly lower for the 3 and 4 year olds using 30 hours childcare offer, at 73 percent, and the disadvantaged 2 year old offer and the universal 3 and 4 year old 15 hour offer (both at 72 percent).

*Table 21: Providers willing to increase places for children using government-funded childcare*

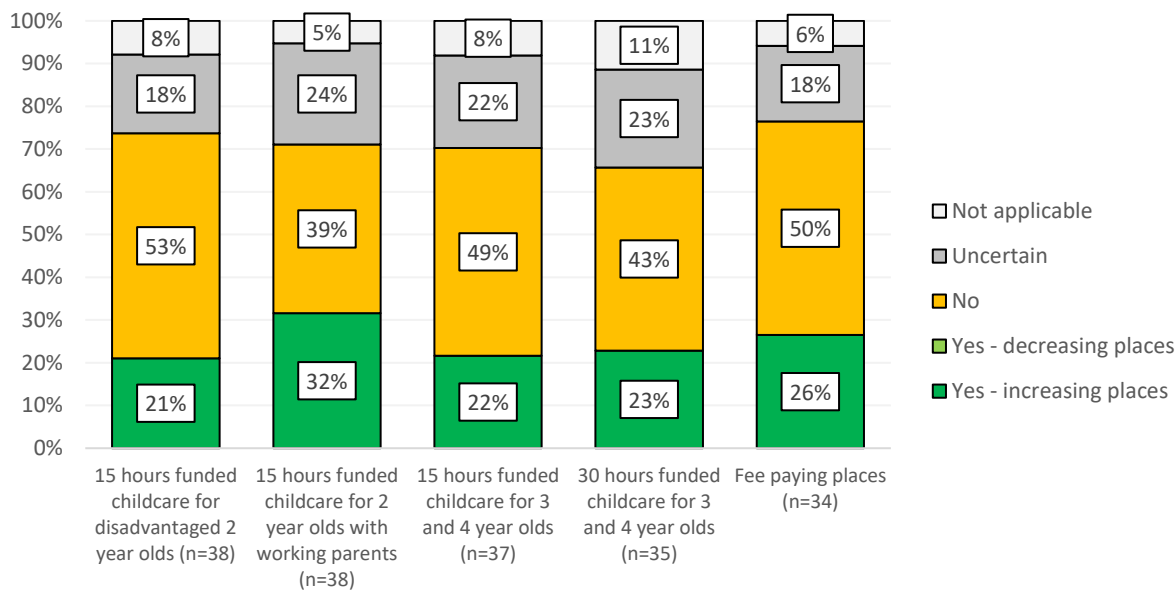
	Yes	No	TOTAL
<b>Disadvantaged 2 year olds using 15 hours funded childcare</b>	72%	28%	39
<b>2 year olds of working parents using 15 hours funded childcare</b>	77%	23%	39
<b>3 and 4 year olds using 15 hours funded childcare</b>	72%	28%	39
<b>3 and 4 year olds using 30 hours funded childcare</b>	73%	28%	40
Question asked in survey: <i>Would you be willing to increase the number of children attending your setting who use the following kinds of government-funded childcare?</i>			

When asked if they would be changing how they offer government funded childcare in the next six months, providers most frequently responded ‘No’ (see Table 22, below). This ranged from 39 percent saying they would not be changing how they offer the 15 hour entitlement for two year olds with eligible working parents to 53 percent for the 15 hour entitlement for disadvantaged two year olds.

Around a quarter of providers said that they would be increasing places, ranging from 21 percent for the 15 hour entitlement for disadvantaged two year olds to 32 percent for the 15 hour entitlement for two year olds with eligible working parents. No providers said that they would be decreasing places. There was also some uncertainty around this question, with between 18 and 24 percent of providers being unsure if they would be changing how they offer the different government-funded childcare entitlements.

These findings suggest that providers will be looking to increase funded places for two year olds with working parents and places for fee-paying parents to a higher degree than the 15 or 30 hour entitlements for three and four year olds.

**Table 22: Will providers be changing how they offer government-funded childcare in the next six months?**



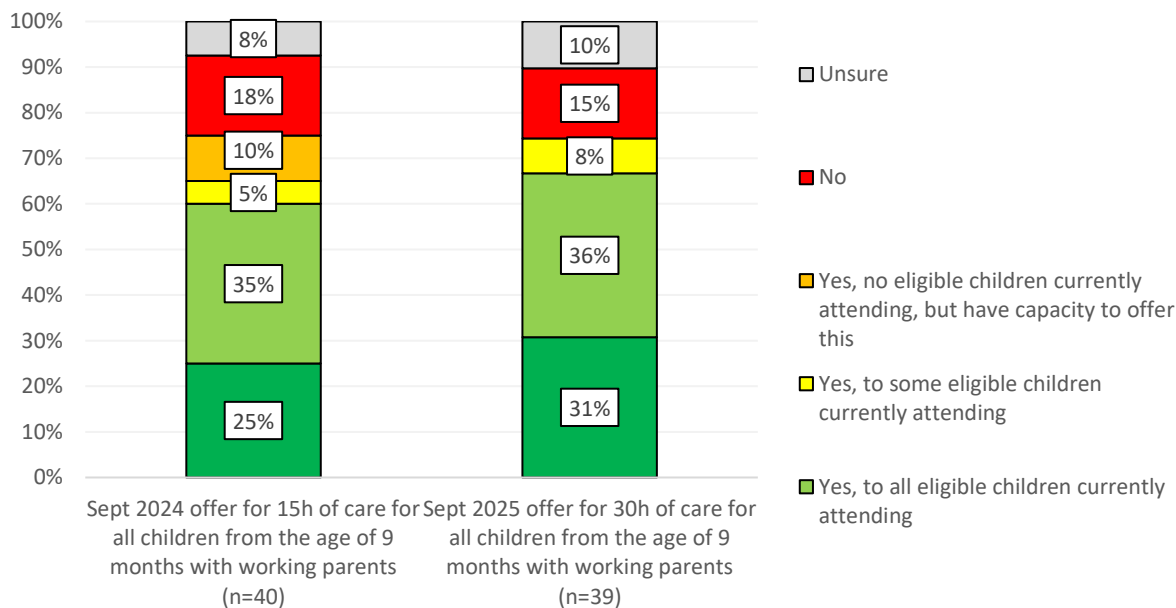
**Question asked in survey:** Will you be changing how you offer government-funded childcare in the next six months?

### 2.4.4 Future expansions of government-funded childcare

From September 2024, the government will be funding 15 hours of childcare for children with eligible working parents from the age of 9 months. We asked providers if they planned on offering places for this entitlement. In total, 74 percent of providers are planning to offer the entitlement in some capacity. A quarter of providers (25 percent) said that they would be offering places to all eligible children currently attending their setting, with capacity to offer more, with a further 35 percent planning to offer the entitlement to all children currently attending. A smaller number of providers are planning to offer the entitlement to some children currently attending their setting (5 percent), and 10 percent said that they have capacity to offer this entitlement but don't currently have any eligible children attending their setting. Just over one in six (18 percent) providers said that they will not be offering any places for the government funded expansions.

From September 2025, the government will be funding 30 hours of childcare for children with eligible working parents from the age of 9 months. Three-quarters (75 percent) of providers plan to offer this entitlement in some capacity. Almost a third of providers (31 percent) said that they would be offering places to all eligible children currently attending their setting, with capacity for more, with a further 36 percent planning to offer the entitlement to all children currently attending. Both of these figures are slightly higher than for the September 2024 expansion. A further 8 percent said that they would offer places to some children currently attending, while no providers answered that they had no eligible children currently attending but have capacity to offer the entitlement. Just under one in six (15 percent) providers said that they will not be offering any places for the government funded expansions. Overall, this suggests that providers are planning to increase the number of new government funded places they offer between the two expansions, perhaps reflecting that providers feel better placed to prepare for the September 2025 expansion given the longer time-frame involved.

*Table 23: Providers planning to offer new government-funded expansions*



Questions asked in survey: (1) From Sept 2024, Government will be funding 15 hours of childcare to children with working parent(s) from the age of 9 months. Are you planning on offering these places? (2) From September 2025, Government will be funding 30 hours of childcare for all children with working parent(s) from the age of 9 months. Are you planning on offering these places?

## 2.5 Do parents want to use more childcare than they currently do?

There is the possibility for a considerable increase in demand for childcare in the London Borough of Harrow given that the upcoming expansions to funded early education entitlements are all aimed at working parents, and that 80 percent of parents surveyed said that they use childcare so that they can go to work (see Table 17, above).

Almost half of parents (47 percent) surveyed said that they want to use more childcare, and 18 percent more said that they may want to. This was particularly pronounced for parents of at least one child with SEND, 60 percent of whom said they would like to use more childcare than they currently do, compared to 42 percent for parents without any children with SEND.

*Table 24: Do parents want to use more childcare?*

	Count	%
Yes	43	47%
No	28	30%
Maybe	17	18%
Don't know	4	4%
TOTAL	92	-

Question asked in survey: *Would you like to use more childcare than you currently do?*

By far the biggest driver of parents not using as much childcare as they would like to is cost. When asked 'Why are you not using as much childcare as you would like to?', almost two-thirds (64 percent) of parents said 'It's too expensive/I can't afford it' (n=80). The next most frequently-

selected reason were: ‘I cannot find an available place’ (18 percent); ‘Sessions are not available at the times I want’ (16 percent); and ‘The childcare provider cannot meet my child’s SEN and/or disability needs’ (15 percent). When looking only at parents of at least one child with SEND who answered this question, this figure rises to almost half (48 percent), indicating that providers being unable to meet the needs of children with SEND is a major problem.

Less than a quarter (22 percent) of parents surveyed are currently using childcare at extended times. The most frequent time of use is weekends, used by 12 percent of parents, followed by before 7:30am on weekdays (6 percent) and after 6:30pm on weekdays (4 percent). However, many more parents would like to use childcare at extended times, even if they are currently not doing so. The biggest difference between current use and what parents would like to use is for care after 6:30pm on weekdays, with a 12 percentage point difference between parents who are currently using childcare at this time and those who would like to do so. The difference is 9 percentage points for care before 7:30am on weekdays, and 5 percentage points for weekends (see Table 25, below).

*Table 25: Are parents currently using extended hours care, and would they like to do so if not?*

	Currently use	Would like to use	Difference
Before 7:30am on weekdays	6%	15%	-9%
After 6:30pm on weekdays	4%	15%	-12%
Weekends	12%	17%	-5%
No or N/A	78%	67%	+11%
N/A	7%	8%	-1%
TOTAL	82	92	-
Question asked in survey: <i>Do you use childcare at the following times? Would you like to use childcare at the following times?</i>			

Coram Family and Childcare’s survey findings suggest that there is a demand among parents in the London Borough of Harrow for more childcare, especially if that childcare is affordable, and available during extended hours. It is therefore possible that the upcoming expansion of funded childcare for eligible working parents of children aged 9 months and above from September 2024 (for 15 hours of care; 30 hours expansion in September 2025) will increase demand from working parents. As shown in Table 23 (above), around a third of providers are planning to provide places for these expansions to more children than are currently attending their settings, while three-quarters of providers are planning to offer places for these entitlements in some capacity. With this in mind, it seems that the London Borough of Harrow is well-placed to meet this potential expansion in demand. However, given that only 35 percent of providers say they have space for more children than are currently attending, it should be noted there is still a possibility that demand could outstrip supply if more families who are not currently using childcare start to do so after the new offer begins.

## 2.6 What could future demand for childcare in the London Borough of Harrow look like?

This section looks at a number of demographic indicators to assess what future demand for childcare in the London Borough of Harrow could look like.



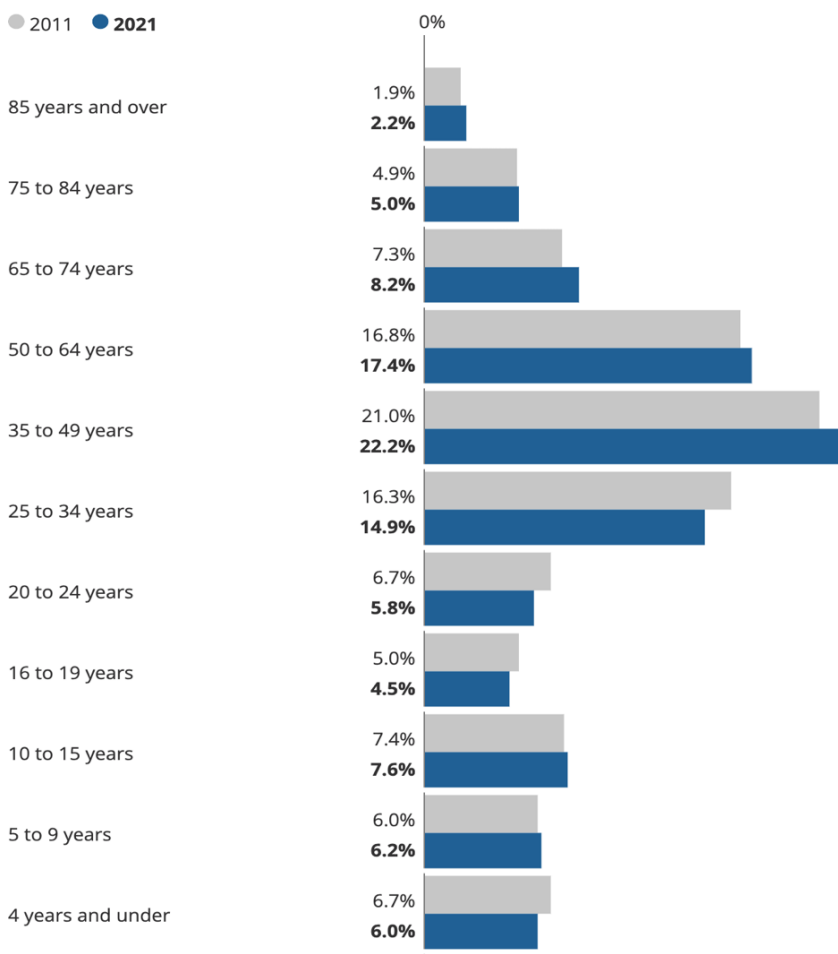
### 2.6.1 General population changes and projections

Between the last two censuses, held in 2011 and 2021, the population of the London Borough of Harrow increased by 9.3%, from just under 239,100 in 2011 to around 261,200 in 2021. The population here increased by a greater percentage than the overall population of London which was up by 7.7% , and by a greater percentage than the overall population of England which was up 6.6% since the 2011 Census.

Between the last two censuses, the average median age in the London Borough of Harrow increased by two years, from 36 to 38 years of age. This area had a higher average median age than London as a whole in 2021 which is 35 years, but a lower average median age than England which is 40 years.

The percentage of households including a couple but no children fell in the London Borough of Harrow, but rose across London. In the London Borough of Harrow, the percentage of households including a couple without children fell from 12.3% in 2011 to 11.0% in 2021.

*Table 26: Population change by age group in the London Borough of Harrow, 2011 to 2021*



Source: [ONS 2021](#)

Over the next decade from 2022 to 2032 the population is projected to grow by 17,581 persons (6.6 percent). By 2041 the population is projected to reach 292,300 persons, an 18.3 percent increase on the 2011 population.

Looking at pre-school children specifically, according to census data, as of 2021, there are 15,700 children under five living in the London Borough of Harrow who may require childcare, higher than the total number in 2017. In addition, there are more 'older pre-school' children than 'younger pre-school' children living in the area, which suggests a declining number of children in the pre-school population over the coming years. This is similar to the national average.

*Table 27: Early years population, by age*

Age	Number of children (2017)	Number of children (2021)
Age 0	3,497	3,034
Age 1	3,491	3,183
Age 2	3,317	3,142
Age 3	3,377	3,197
Age 4*	3,434	3,143

\* Some four-year-olds will have started reception

[Source: Census 2021](#)

Looking at school-aged children, according to 2021 Census data, there were 22,706 children aged 5 to 11, and 9,908 children aged 12-14 living in the London Borough of Harrow. Overall, there were more 5-7 year olds in 2017 compared to 2021, but overall more 8-14 year olds in 2021.

*Table 28: School age population, by age*

Age	Number of children (2017)	Number of children (2021)
Age 5	3423	3,164
Age 6	3425	3,244
Age 7	3395	3174
Age 8	3284	3314
Age 9	3292	3237
Age 10	3091	3364
Age 11	3014	3209
Age 12	3089	3281
Age 13	3052	3233
Age 14	3026	3394

[Source: Census 2021](#)

## 2.6.2 Number of children with special educational needs and/or disabilities (SEND)

Children with special educational needs and/or disabilities (SEND) can receive:

- SEN support - support given in school, such as additional targeted help from teachers or a learning support assistant
- An education, health and care (EHC) plan - a plan of care for children and young people aged up to 25 who have more complex needs

Children with special education needs and disabilities (SEND) are entitled to support with childcare up to the age of 18 (age 14 for children who do not have a special need or disability). In the London Borough of Harrow, 10 percent of all children receive SEN support (without an EHC plan), lower than the national average of 13 percent. Additionally, 3.4 percent of all children have an EHC plan, lower than the national average of 4.3 percent.

As of 2023, there are 5,831 children in the London Borough of Harrow that receive SEN support.

*Table 29: Children receiving SEN support (without an EHCP)*

Age	Number of children (2023)	Number of children (2022)	Number of children (2021)
0-5 years	654	549	524
6-12 years	2203	2165	2176
13- 18 years	997	883	933

Source: [Statistics: Special Educational Needs, GOV.UK, 2023](#)

As of November 2023, the number of children with an EHCP in the London Borough of Harrow is 1,977. There have been rises in the number of children with an EHCP plan across all age groups.

*Table 30: Number of children with SEND who have an EHCP*

Age	Number of children (2023)	Number of children (2022)	Number of children (2021)
0-4 years	93	76	77
5- 10 years	799	760	720
11-15 years	688	631	596
16- 19 years	397	391	377

Source: [Statistics: Special Educational Needs, GOV.UK, 2023](#)

## 2.6.3 Households with dependent children

According to the [2021 Census](#), there were 20,606 couple family households with dependent children, making up 23% of all households in the London Borough of Harrow. There were an additional 9,738 single parent households with dependent children in the London Borough of Harrow, making up 10.9% of all households in the London Borough of Harrow.

## 2.6.4 Child ethnicity, 2021 census

Table 31: Child population by ethnicity

Ethnicity	Number of children	Percent of children
White	17,110	28%
Mixed/ Multiple	4,905	8%
Asian/Asian British	28,430	47%
Black/African/Caribbean/Black British	5,095	8%
Other ethnic groups: Total	5,500	9%

Source: [Census 2021](#)

According to 2021 census data, the London Borough of Harrow's youth population (children aged 0-17) is predominantly Asian/ Asian British, with 46.6% of its population of 0-17 year olds falling into this category. The largest non-Asian/ Asian British ethnic group is 'White', with 28% of 0-17-year-olds, followed by 'Mixed/ Multiple' and 'Black/ African/ Caribbean/ Black British'. There have not been substantial changes to the child population by ethnicity since the 2011 census.

## 2.6.5 Deprivation

Looking at the [Income Deprivation Affecting Children Index](#) 2019 (IDACI),<sup>10</sup> the London Borough of Harrow has a lower-than-average score of 0.123, meaning that 12.3 percent of children in the London Borough of Harrow live in income-deprived families. A higher score indicates a higher proportion of children in income deprivation, while a lower score indicates a lower proportion. This was the third-lowest score in all of London, with the mean for all London Boroughs (excluding City of London) being 0.179, meaning that 17.9 percent of children across London are living in income-deprived families.

According to data from [Explore Education Statistics](#), in the academic year of 2023/2024, there were a total of 39,174 pupils attending state schools in the London Borough of Harrow. Of these, 7,020 (17.9 percent) were known to be eligible for free school meals. This is much lower than the average for both London (26.6 percent), and for England as a whole (24.6 percent).

Edgware ward contains the local super output area (LSOA) with the greatest proportion of pupils eligible for free school meals at 23.7 percent. This is followed by LSOAs in Harrow on the Hill at 22 percent, and Stanmore Park at 21.5 percent. By contrast four LSOAs have no pupils eligible for free school meals – two in Pinner ward, and one each in Pinner South and Headstone North.

According to the 2019 [English Indices of Deprivation](#), two of the London Borough of Harrow's LSOAs are amongst the 20 percent most deprived in England - the same number as in 2015. The London Borough of Harrow's most deprived LSOA is in Stanmore Park ward (LSOA 227) and is the area covering the Woodlands and Cottesmore Estates. The second most deprived LSOA is in Hatch End ward (LSOA 151) and includes parts of the Headstone and Headstone Lane Estates. The most deprived ward in the London Borough of Harrow, according to the 2019 index, was Wealdstone.

<sup>10</sup> IDACI measures the proportion of all children aged 0 to 15 living in income-deprived families. The more deprived an area, the higher the score, but the lower the rank.

However, it should be noted that this information is from before the changes to electoral wards in 2021, and Wealdstone ward has now been split into Wealdstone North and Wealdstone South.

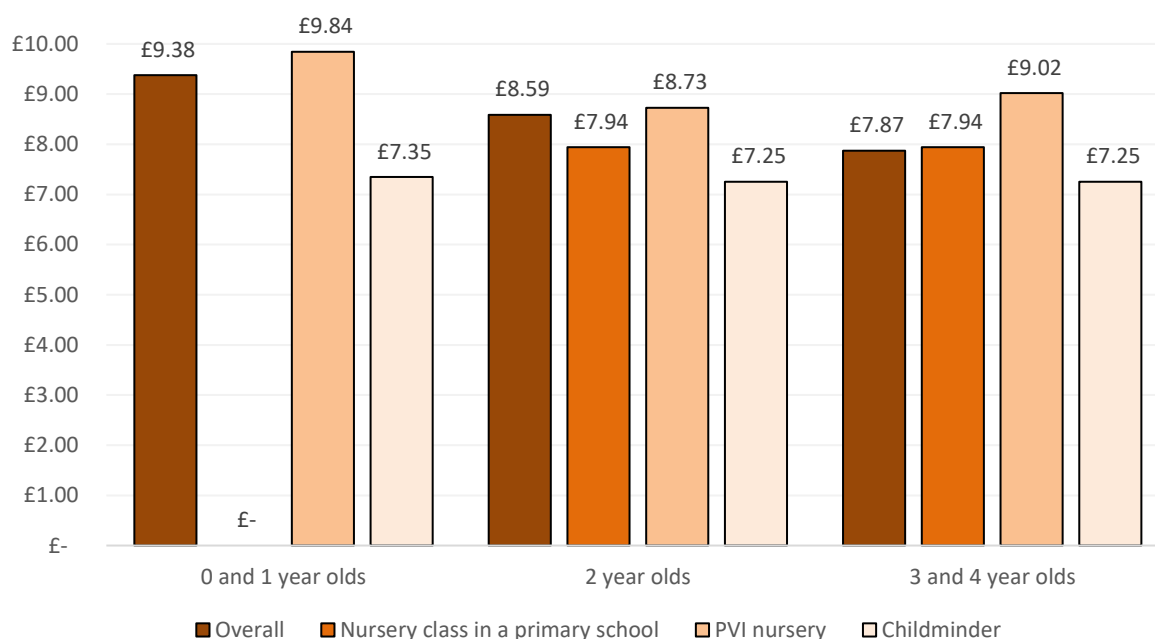
## 2.7 What is the cost and affordability of childcare in the London Borough of Harrow?

### 2.7.1 How much does childcare in the London Borough of Harrow cost?

According to findings from Coram Family and Childcare’s provider survey, the average price that parents pay for childcare in the London Borough of Harrow varies substantially across age groups and provider types (see Table 32, below). On average, across all provider types, parents pay £9.38 per hour for 0-1 year olds, £8.59 per hour for 2 year olds, and £7.87 per hour for 3-4 year olds.

Group-based providers are more expensive than childminders across all age groups, with the biggest difference being for 0-1 year olds, who are charged an average of £7.35 by childminders and £9.84 by group-based providers. Within group-based providers, PVI nurseries are more expensive than nursery classes in primary schools<sup>11</sup>

Table 32: Childcare prices, by provider type



Question asked in survey: *Early years providers – group based and childminders - Please tell us the hourly price (£) that parents pay for childcare for the following age groups.*

Comparing to national and regional averages, childcare in the London Borough of Harrow for **children under two years old** is more expensive. According to figures from Coram Family and Childcare’s 2024 Childcare Survey<sup>12</sup>, the average cost of an hour of childcare for a child aged 0-1

<sup>11</sup> It should be noted here that only one nursery class in a primary school gave any price data in the survey.

<sup>12</sup> Please note that while these figures are included for broad comparisons, data collection methods will differ slightly between those used for this CSA, and those used by other local authorities for the Childcare Survey, and so comparisons should be used with care.

years old in a nursery<sup>13</sup> is £6.38 in England and £7.25 in Outer London, compared to £9.84 in the London Borough of Harrow. Prices for children under two years of age with childminders in the London Borough of Harrow are generally more expensive than other areas; average prices are £5.29 in Great Britain, £5.31 in England and £6.81 in Outer London, compared to £7.35 in the London Borough of Harrow.

For **children aged two**, the average cost of an hour of care in a nursery is £6.15 in England and £6.97 in Outer London. In the London Borough of Harrow, the average hourly cost for a nursery class in a primary school is £7.94<sup>14</sup>, while the average cost for a PVI nursery is £8.73. This makes the London Borough of Harrow more expensive than both the national average and the average for Outer London, for both types of nursery care. Prices for children aged two years old with childminders in the London Borough of Harrow are generally more expensive than average; average prices are £5.26 for England and £6.67 in Outer London, compared to £7.25 in the London Borough of Harrow.

For **children aged three and four**, the average cost of an hour of care in a nursery (before entitlements are taken into account) is £6.35 in England, and £8.14 in Outer London. In the London Borough of Harrow, the average cost is £7.94 in a nursery class in a primary school and £9.02 for a PVI nursery, making nursery classes in a primary school slightly lower than the regional average (although higher than the national average) and PVI nursery places slightly more expensive than the regional average. Prices for children aged three and four years old with childminders in the London Borough of Harrow are more expensive than the national and regional average. Average prices are £5.22 for England and £6.45 in Outer London, compared to £7.25 in the London Borough of Harrow.

### **2.7.2 Is this affordable for parents?**

Affordability was a key issue found in both Coram Family and Childcare's parent survey and focus groups. When parents who do not use childcare were asked why they did not do so, half (50 percent) said 'It's too expensive/I can't afford it'. In another question, parents were asked how much they agree with the statement 'Childcare is affordable for me', and more than half (56 percent) of parents said that they disagree (36 percent) or strongly disagree (20 percent), compared with just 30 percent saying they agree (22 percent) or strongly agree (8 percent).

Parents in the focus groups<sup>15</sup> ran by Coram Family and Childcare mentioned the high cost of childcare, especially for parents of children with SEND, although parents also expressed relief and gratitude for both the current funded early education entitlements and the upcoming expansions to government-funded childcare for working parents of children from the age of 9 months. However, even despite these entitlements, one parent expressed disbelief that anybody could afford to work full time and send their child to nursery.

Affordability should be seen in the context of 39 percent of providers who responded to Coram Family and Childcare's survey reporting that they have increased charges in the last six months, with the same percentage intending to do so in the next six months.

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<sup>13</sup> Based on 25 hours of childcare

<sup>14</sup> Based on a weighted average of the cost in PVI nurseries and nursery classes in primary schools (weighted by number of places)

<sup>15</sup> Please see the Methodology Section in Annex 1 for additional information about the parent focus groups

## 2.8 How do parents feel about SEND provision in the London Borough of Harrow?

Difficulties in accessing childcare for parents of children with SEND was a recurring theme in the parent survey (which included responses from 30 parents of at least one child with SEND) and focus groups which suggested issues of *adequate* and *affordable care*, although *availability* of provision appears to be far less of an issue in the London Borough of Harrow. When parents were asked about their reasons for not using childcare, 11 percent of *all* parents who answered the survey (not just those with at least one child with SEND) said that they are not currently using childcare said that they did not use childcare because their child has SEND and they cannot find a provider to meet their child’s additional needs.

Among parents of children with SEND who are not using childcare, this figure rises to one third, with 33 percent of parents of at least one child with SEND who do not use childcare saying that this is because they could not find provision to meet their child’s additional needs (*adequate provision*). Two-thirds (67 percent) of parents of children with SEND said that childcare is too expensive or they can’t afford it, 25 percentage points higher than for parents who have no children with SEND (*affordability*). Parents with at least one child with SEND are also 17 percentage points less likely to say that they are not using childcare because they do not need it.

*Table 33: Reasons for not using childcare, for parents of children with SEND*

	No children with SEND	At least one child with SEND	Diff. – SEND vs No SEND
My child has SEND I cannot find a childcare provider to meet my child’s additional needs	N/A	33%	+33%
It’s too expensive/ I can’t afford it	42%	67%	+25%
My child is too young	8%	0%	-8%
I cannot find an available place	8%	0%	-8%
I don’t know how to find out about getting help with the cost of childcare	8%	0%	-8%
I am not happy with the quality available	8%	0%	-8%
Sessions are not available at the times I want	8%	0%	-8%
I do not need childcare	50%	33%	-17%
I cannot find a place in childcare which is nearby	17%	0%	-17%
Total (any response)	12	6	18

Focus groups run by Coram Family and Childcare (including one specifically for parents of children with SEND) found that parents of child(ren) with SEND had very mixed feelings about the availability and quality of childcare for their child(ren) with SEND. On the one hand, a number of parents recognised and applauded the crucial role that childcare settings can, and had, played in their child’s ongoing SEND support. One parent recounted how their children’s nursery helped to identify that their children had developmental delays, and provided them with the knowledge and support that they needed to access funding for speech therapy. They highlighted that their children were very happy at their childcare setting, and that they “really developed”.

However, other parents raised the issue that not all providers were similarly knowledgeable and sensitive in dealing with children with SEND. One parent recounted how their child's behavioural issues were not recognised by their setting, and were instead misconstrued as poor behaviour which led to their child being excluded from group activities. Another said that a member of staff at a nursery had used inappropriate and offensive language when referring to her child, and stressed the need for staff to have better training in both recognising and supporting children with additional needs.

Another parent raised issues with having to pay for childcare that was not being used due to their child's continued need to attend multiple medical appointments. The parent said that when childcare is paid for in advance, this can unfairly burden parents of children with ongoing medical needs that require regular appointments that often fall in hours at which the child would usually be in childcare. Because these parents are not reimbursed for the sessions that they must miss by medical necessity, they are effectively paying a higher price, or a "hidden tax", compared to other parents for whom this is not an issue.

## 2.9 How aware are parents of support for childcare costs and entitlements?

Accessible information is a crucial component of parents knowing what support for childcare is available to them. There are large differences in awareness levels for the different types of help with childcare costs between the government funded entitlements and other support.

More than half (52 percent) of parents of pre-school children were aware of the **government funded entitlement** to 30 hours of childcare for 3 and 4 year old children of working parents. Over half of parents (58 percent) stated they knew about the 15 hours of childcare for 3 and 4 year olds entitlement, while only 37 percent were aware of the entitlement for 15 hours of childcare for eligible 2 year olds with parents claiming certain benefits. This could be due to only those on certain benefits being eligible for the 2 year old offer. Awareness was slightly higher for the 15 hours entitlement for eligible 2 year olds with working parents, at 45 percent, although with the entitlement only introduced in April 2024, this may rise.

Looking at awareness of **other schemes** (besides the offers for two-year olds and three and four-year olds and therefore also including parents with school-aged children) to help with the cost of children, the Tax Free Childcare entitlement was also relatively well known, with 52 percent of parents saying that they were aware of this entitlement. However, no other entitlement was known of by more than 1 in 5 parents, including Universal Credit for childcare, childcare vouchers from employers<sup>16</sup>, and tax credits for childcare. Almost 1 in 10 (9 percent) parents were not aware of any entitlements.

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<sup>16</sup> This scheme has been closed to new applicants since October 2018, which helps to explain why only a small proportion of parents are aware of it. Parents who joined the scheme before this date may still be able to continue to get vouchers.



*Table 34: Awareness of help with childcare costs for pre-school children*

	Count	%
30 Hours Free Childcare for eligible working parents of 3 and 4 year olds	32	52%
15 Hours Free Childcare for all 3 and 4 years olds	36	58%
15 Hours Free Childcare for eligible 2 year olds with parents claiming certain benefits	23	37%
15 Hours Free Childcare for eligible 2 year olds with working parents	28	45%
TOTAL (any response)	62	-
Question asked in survey: <i>Before today, which types of help with childcare costs were you aware of, if any? (Please select all that apply)</i>		

*Table 35: Awareness of help with childcare costs for all children*

	Count	%
Tax Free Childcare (20% discount on childcare fees)	46	52%
Universal Credit for childcare	14	16%
Childcare vouchers from your employer (closed to new applicants)	17	19%
Tax Credits for childcare	14	16%
None of the above	8	9%
Support while you study	6	7%
TOTAL (any response)	88	-
Question asked in survey: <i>Before today, which types of help with childcare costs were you aware of, if any? (Please select all that apply)</i>		

Breaking down the data by whether children are of pre-school age or school age reveals that parents of school age children are generally more aware than parents of pre-school children of help with childcare costs for which they are potentially eligible. Aside from the now-closed childcare vouchers from your employer scheme, the next biggest difference is in awareness of Tax Free Childcare, with parents of school age children 10 percentage points less likely than parents of pre-school children to be aware of this entitlement. However, this was by far the most well-known entitlement by both groups of parents, with 53 percent of parents of pre-school children and 43 percent of parents of school-age children aware of this entitlement.

*Table 36: Awareness of help with childcare costs, by age of child*

	Pre-school	School age	Difference - school age vs. pre-school
Childcare vouchers from your employer (closed) <sup>17</sup>	13%	30%	+17%
Tax Credits for childcare	16%	22%	+5%
Universal Credits for childcare	15%	14%	-1%
Support while you study	8%	8%	+0%
Tax Free Childcare (20% discount on childcare fees)	53%	43%	-10%
None of the above	5%	11%	+6%
TOTAL	62	37	-
Question asked in survey: <i>Before today, which types of help with childcare costs were you aware of, if any? (Please select all that apply)</i>			

<sup>17</sup> While this represents the largest difference in awareness, this is explained by this scheme closing in October 2018; while those already enrolled at that time may be able to still get vouchers, no new applicants have been accepted since then.

Table 37: Awareness of help with childcare costs, by SEND

	No SEND	SEND	Diff. – SEND vs. no SEND
Tax Free Childcare (20% discount on childcare fees)	59%	36%	-23%
15 Hours Free Childcare for eligible 2 year olds with parents claiming certain benefits	43%	20%	-23%
15 Hours Free Childcare for eligible 2 year olds with working parents	44%	32%	-12%
15 Hours Free Childcare for all 3 and 4 years olds	59%	40%	-19%
30 Hours Free Childcare for eligible working parents of 3 and 4 year olds	62%	20%	-42%
Tax Credits for childcare	16%	16%	+0%
Universal Credits for childcare	19%	8%	-11%
Support while you study	6%	8%	+2%
Childcare vouchers from your employer	22%	12%	-10%
None of the above	8%	12%	+4%
TOTAL	25	63	
<i>Question asked in survey: Before today, which types of help with childcare costs were you aware of, if any? (Please select all that apply)</i>			

Parents of at least one child with SEND were almost universally less aware of help with childcare costs than parents without any children with SEND<sup>18</sup>. The biggest difference is in awareness of the 30 hours free childcare entitlement for eligible working parents of 3 and 4 year olds, which parents of at least one child with SEND were 42 percentage points less likely to be aware of. Parents with at least one child with SEND were also less likely to be aware of Tax Free Childcare (23 percentage points less likely), 15 hours free childcare for all 3 and 4 year olds (19 percentage points less likely), and 15 hours free childcare for eligible 2 year olds with parents claiming certain benefits (23 percentage points less likely).

Lack of awareness of 15 hours free childcare for eligible 2 year olds with parents claiming certain benefits among parents of child(ren) with SEND is a particular area of concern given that children with an Education, Health and Care Plan (EHCP) or on Disability Living Allowance (DLA) are also eligible for these hours. Parents of children with SEND not being aware of this entitlement prevents them from accessing additional help that could alleviate some of the pressures they are facing that have been identified in other parts of this document. However, according to [DfE data](#), there are no children in the London Borough of Harrow who qualify for this entitlement based on high level SEND needs. This should be monitored for the future.

### 2.9.1 Sources of information about childcare

An internet search was identified by parents in Coram Family and Childcare’s survey as the most frequently-used source of information (65 percent). Other regularly used methods include word of mouth (49 percent), the London Borough of Harrow website or Family Information Service (43

<sup>18</sup> Currently, the number of children with SEND in the London Borough of Harrow is increasing, and the SEND Team are supporting their needs, including by providing SEN Inclusion Funding and supporting with pathways.

percent)<sup>19</sup>, visiting local childcare providers (37 percent) and schools (30 percent), family hubs and children’s centres (22 percent) and social media (19 percent).

*Table 38: Sources of information about childcare*

	Count	%
Internet search	54	65%
Family or friends/word of mouth	41	49%
The London Borough of Harrow Website/Family Information Service	36	43%
Visiting local childcare providers	31	37%
Visiting local schools	25	30%
Family Hub/ Children's Centre	18	22%
Social media	16	19%
Childcare Choices	15	18%
Ofsted website	12	14%
Harrow Local Offer website	3	4%
Parent support officer	3	4%
Library	3	4%
Not applicable/I haven't gone to find out about childcare	7	8%
TOTAL (any response)	83	
Question asked in survey: <i>Where would you go to find out about childcare? Please select all that apply (up to 5).</i>		

In focus groups run by Coram Family and Childcare, parents with pre-school aged children had not routinely used the London Borough of Harrow website for information about childcare, although parents had found the website useful to check the eligibility for the new free offer and were able to phone to clarify points about the offer over the telephone, which they found useful. The parents mostly found out about childcare through Googling local childcare provision and visiting their shortlisted choices. Parents looked at the individual websites of nurseries and Ofsted reports. One of the parents had not liked her eldest child’s nursery and so relied more heavily on word of mouth recommendations when her youngest was ready to start nursery.

However, parents whose children had additional needs particularly struggled with finding accurate and up to date information about childcare. A number had looked at the London Borough of Harrow website but felt that it did not include enough information for them to make an informed choice for their child. They felt they had to contact every setting to see whether they had experience of dealing with a particular need and some had put their child in a setting which they then realised was not suitable. They stressed that parents should not have to rely on “trial and error” to find a place for their children due to a lack of specific information.

Parents also expressed confusion about what entitlements they could use with different types of provision. For example, parents who had children with primary school aged children were familiar with the tax-free childcare offer partly because they had accessed that support during the time their children were at nursery. However, they were not routinely told about using tax free childcare through their after-school club. One parent was accessing support for childcare through Universal Credit. Parents found that whilst they could use tax free childcare and Universal Credit

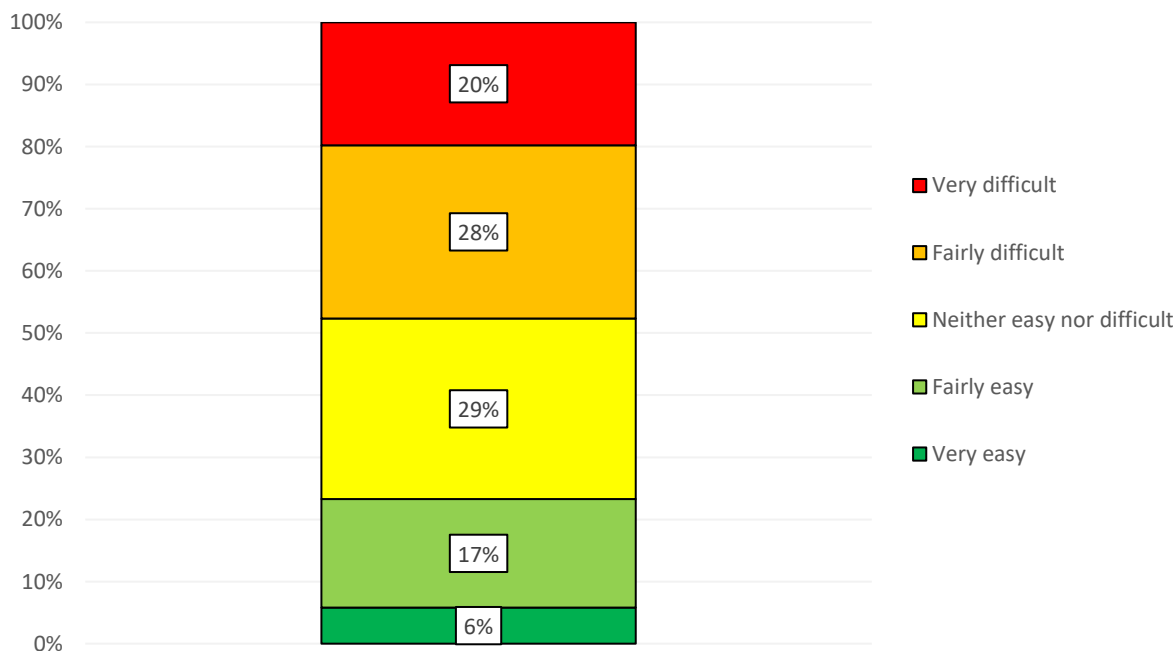
<sup>19</sup> These two information sources have been grouped together as the London Borough of Harrow website’s childcare page is the Family Information Service’s homepage.

childcare support for after school provision, this was not the case for the school breakfast club or for many of the activity clubs at the schools.

## 2.10 How easy is it for families to access suitable childcare?

As part of Coram Family and Childcare’s parent survey, parents were asked how easy it is for them to find suitable childcare for their child(ren). Overall, parents seemed to find it difficult to find suitable childcare, with only 23 percent answering that it was ‘Very easy’ or ‘Fairly easy’ to do so, compared to 48 percent answering ‘Fairly difficult’ or ‘Very difficult’. 29 percent answered ‘Neither easy nor difficult’.

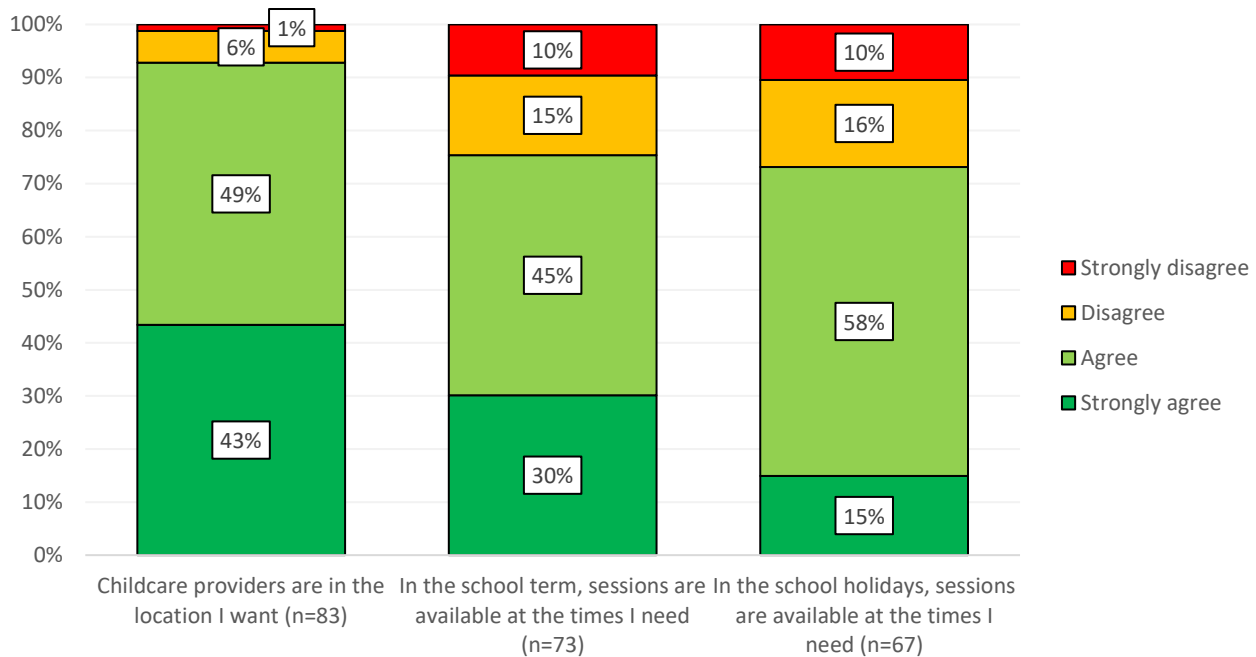
Table 39: How easy is it to find suitable childcare for your child or children? (n=86)



Source: Parent survey. ‘Not applicable or not needed’ answers removed (n=5).

Findings from the survey of parents suggested that families are more likely to struggle with finding childcare at the **right time** than in the **right places**, especially in school holidays. As Table 40 shows, 92 percent of parents strongly agree or agree that childcare providers are in the locations they want. By comparison, 75 percent of parents surveyed agree or strongly agree that childcare sessions are available at the times they need in the school term, and 73 percent who say that they agree or strongly agree that childcare sessions are available at the times they need in the school holidays.

**Table 40: Ease of accessing childcare, location and time**



Question asked in survey: *How far do you agree or disagree with the following statements? 'Don't know' and 'NA' answers removed.*

**2.10.1 Are there enough childcare places at the right times for families?**

There seems to be very few early years providers providing childcare during **extended hours**. Only 17 percent of providers responding to Coram Family and Childcare’s survey stated that they offered childcare before 7:30am on weekdays, with only 2 percent offering childcare after 6:30pm on weekdays, or on weekends. Of the four schools who answered this question, all of them said that they regularly offered childcare before 8am on weekdays, while none said that they regularly offer childcare after 6pm on weekdays, or on weekends.

**Table 41: Early Years providers offering childcare for extended hours**

	Before 7.30am weekdays		After 6.30pm weekdays		Weekends	
	Count	%	Count	%	Count	%
Yes	7	17%	1	2%	1	2%
No	35	83%	41	98%	41	98%
TOTAL	42	100%	42	100%	42	100%

Question asked in survey: *Do you regularly offer childcare at the following times?*

Of the parents surveyed, 78 percent stated they are not using childcare at extended times, or selected N/A. However, as shown in Table 42, the survey suggested **demand for more extended hours places**:

- 15 percent of parents said they would like to use childcare **before 7:30am on weekdays**, compared to 6 percent doing so at the time of the survey;
- 15 percent of parents would like to use childcare **after 6:30pm on weekdays**, compared to 4 percent doing so at the time of the survey;

- 17 percent of parents said that they would like to use childcare on **weekends**, compared to 12 percent doing so at the time of the survey.

In addition, a sixth (16 percent) of parents said ‘sessions are not available at the times I want’ when asked ‘why are you not currently using as much childcare as you would like to?’

*Table 42: Current and desired use of extended hours childcare*

	<b>Do you use childcare at the following times?</b>	<b>Would you like to use childcare at the following times?</b>
No or N/A	78%	67%
Before 7:30am on weekdays	6%	15%
After 6:30pm on weekdays	4%	15%
Weekends	12%	17%
<b>TOTAL (any response)</b>	<b>82</b>	<b>98</b>

Alongside the survey information, the parent focus groups found that parents are struggling to access information about wraparound care, and the care itself. Some parents did not think that there was any planned extension of wraparound provision at their children’s schools despite the government’s policy announcement to support expansion, while others talked about the need for wraparound provision to be expanded and that it cannot be assumed that everyone can work from home post-COVID. The parents at both the SEND and primary school focus groups said that they needed the same amount of wraparound provision as they had before COVID. Parents also talked about the increasing pressure from employers to go into the office more and stressed that it was not realistic to work from home and supervise children at the same time. This suggests that it should not be presumed that wraparound childcare demand will be significantly different now than it was before the pandemic.

### **2.10.2 What can the perspective of providers tell us about wraparound care in the London Borough of Harrow?**

In addition to the parent survey and focus groups, we also interviewed three schools that either provide wraparound care currently, or did not feel able to do so at the current time. For more information on these interviews, please see the Methodology section in Annex 1.

The three schools that we spoke to had various levels and types of wraparound care. The first school has an in-house breakfast club that starts at 7:45am every day, and an after-school club provided by an external provider that runs until 6:00pm. The second has an in-house breakfast club that runs from 7:30am, and an in-house afterschool club that runs until 5:30pm. The final school is a special school without any dedicated wraparound care, with the exception of an enrichment club on Wednesdays that allows children to take part in various extracurricular activities. However, it was stressed that this was about enrichment for the child, and not about providing wraparound care.

These three schools provided some valuable insight about demand for wraparound care. The special school that does not currently offer wraparound provision said that they did not do so for reasons of child welfare. They stressed that by the end of the school day, in their opinion the children that attended the school were already exhausted, and need the comfort and familiarity of

their parents or carers and their home environment. This highlights that there is a need for more of a focus on the intersection of SEND and wraparound care, and whether this is always in the best interests of the child. Further research on this topic with professionals working with SEND children would be of great benefit.

The school that provides an afterschool club that runs until 5:30pm expressed the view that this finish time very much reflected the needs of their community, and that there was no great need to expand care up until 6:00pm. They said that they initially provided care up until this hour, but there was no demand for it; indeed, the only person using it was the head teacher themselves, who used the provision for their own children.

This was a sentiment echoed by another school, who stressed the need to cater to the needs of the community by being flexible with the wraparound care provided. They employ a drop-in system for their breakfast club, in which parents do not need to book in advance, and do not always need to pay, depending on their circumstances. The other school that provides wraparound care also expressed flexibility in how parents pay, and highlighted that because they use regular school staff for their wraparound care, it was much easier for them to be able to be flexible with fees. Both of these settings expressed the view that before school care seems to be more important to parents, with the rationale that employers are often more flexible with parents leaving earlier to collect children from school rather than starting work later.

Both the schools providing wraparound care spoke about the impact of COVID-19 on demand for care. One of the schools noticed a large drop in demand in the immediate post-COVID period, which they attributed not only to more parents working from home, but also to a reluctance among parents to have their children gathered together in a small space any more than strictly necessary. However, this school highlighted that while numbers for the breakfast club have returned to pre-COVID levels, the after-school club was seeing reduced numbers. This was attributed to rising costs, as well as the rise in home working. For many parents, it is more affordable to work part time, than to pay for afterschool care.

The other school said that while demand for wraparound care dropped drastically during COVID, there are now far more children attending than before, although it took more than a year for numbers to return to pre-COVID levels. The increase in the number of parents using wraparound care was attributed largely to the community realising the quality of the wraparound care provided at the school, and generally being aware of the positive difference that wraparound care could make to them personally.

In terms of barriers to provision, a number of issues were raised by all three schools. The school not currently providing wraparound care, as mentioned above, raised the issue of wraparound care not necessarily being suitable for all children with additional needs. However, the school also mentioned that a major barrier for them in facilitating wraparound care for parents is transport. They spoke about how plenty of wraparound providers exist, but that they are not necessarily geographically accessible to parents. They mentioned that the London Borough of Harrow used to provide transport to help children get from school to an after-school club, but that this provision stopped. As a result, parents can no longer access wraparound provision, as it is impractical for them to leave work, travel to the school to collect their child(ren), then travel to another setting for an extra hour of care, and then get back to work. Doing so would leave them very little extra time to work, and is less practical than simply working fewer hours.

Another school spoke about staffing and physical space as being the primary barriers to expanding the number of places they provide. They said that alongside it being very difficult to recruit staff to work long hours, the school itself is quite limited for space, and does not have a large playing field for sports or other outside activities. The other school said that there is very little standing in the way of them expanding the number of wraparound places they provide, and indeed said that wraparound is incredibly easy for them to provide, as it is provided totally in-house, and staff are very willing to extend their hours. They instead expressed that it would be very useful for the London Borough of Harrow to provide them with a forum by which to share best practice with other schools, and learn about ways to *improve*, rather than *expand*.

### **2.10.3 Are there enough childcare places in the right locations for families?**

Of the parents surveyed, 92 percent said that they agree or strongly agree with the statement ‘childcare providers are in the location I want (e.g. near to home, work etc.)’. Furthermore, when asked about their reasons for not using childcare, only 11 percent of parents said that ‘I cannot find a place in childcare which is nearby’, and no parents said that ‘it is difficult to travel to available childcare’. This suggests that in terms of location, childcare in the London Borough of Harrow is accessible to most parents.

### **2.10.4 Is childcare of a high enough quality?**

According to Ofsted data, 94 percent of providers in the London Borough of Harrow were rated ‘Outstanding’ or ‘Good’ as of August 2023, with 13 percent of these rated ‘Outstanding’. Only 6 percent of providers were rated ‘Inadequate’ or ‘Requires improvement’ (see Table 43, below).

However, the number of providers rated ‘Good’ or ‘Outstanding’ has been slightly but steadily dropping over the last five years, albeit with a slight upturn in the last year. In 2019, 98 percent of providers achieved a rating of ‘Good’ or ‘Outstanding’, dropping to 97 percent in 2020, 96 percent in 2021, and 93 percent in 2022. This figure recovered slightly to 94 percent in 2023. The number of providers rated ‘Outstanding’ has also fallen over the last five years, from 19 percent in 2019 to 13 percent by the time of the most recent report in August 2023.

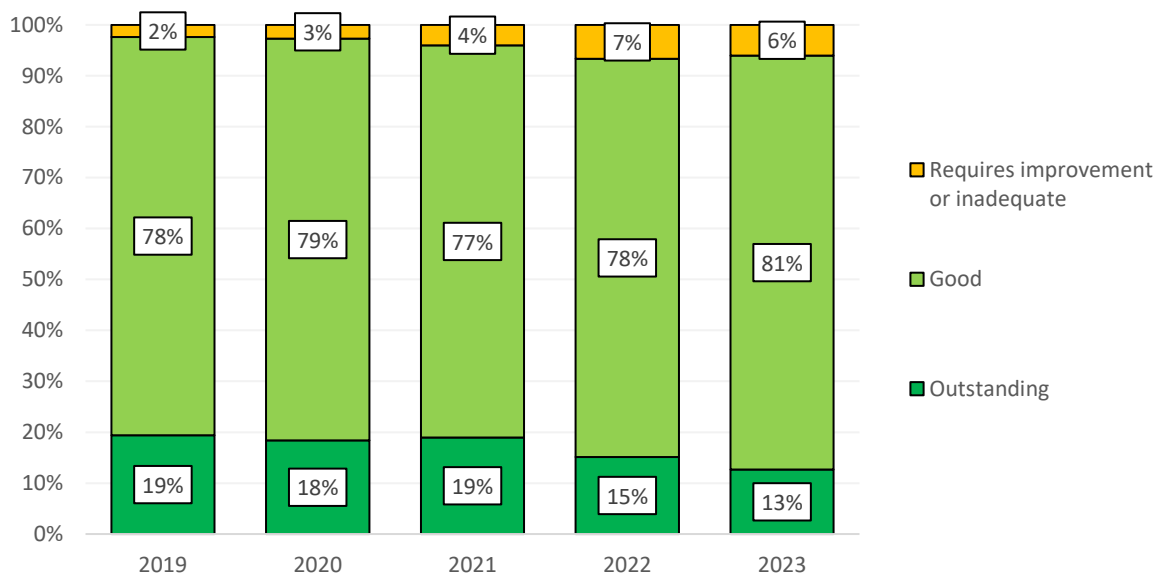
Additionally, as Table 44 (below) shows, there is a difference in ratings between the different types of childcare providers. While 96 percent of providers classed as ‘childcare on non-domestic premises’ are rated ‘Outstanding’ or ‘Good’, for childminders this figure is 92 percent. While 100 percent of providers classed as ‘childcare on domestic premises’<sup>20</sup> were rated as ‘Outstanding’ or ‘Good’, it should be noted that there were only two providers (providing 50 places) under this classification in the London Borough of Harrow (as of 31<sup>st</sup> August 2023, the time of the most recent Ofsted report).

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<sup>20</sup> Providers registered under this category are usually childminders working out of their home, but with three or more people providing care on those premises. While childminders can work with other childminders or assistants, a separate childcare on domestic premises registration with Ofsted or a childminder agency is required when the number of people providing care exceeds 3.

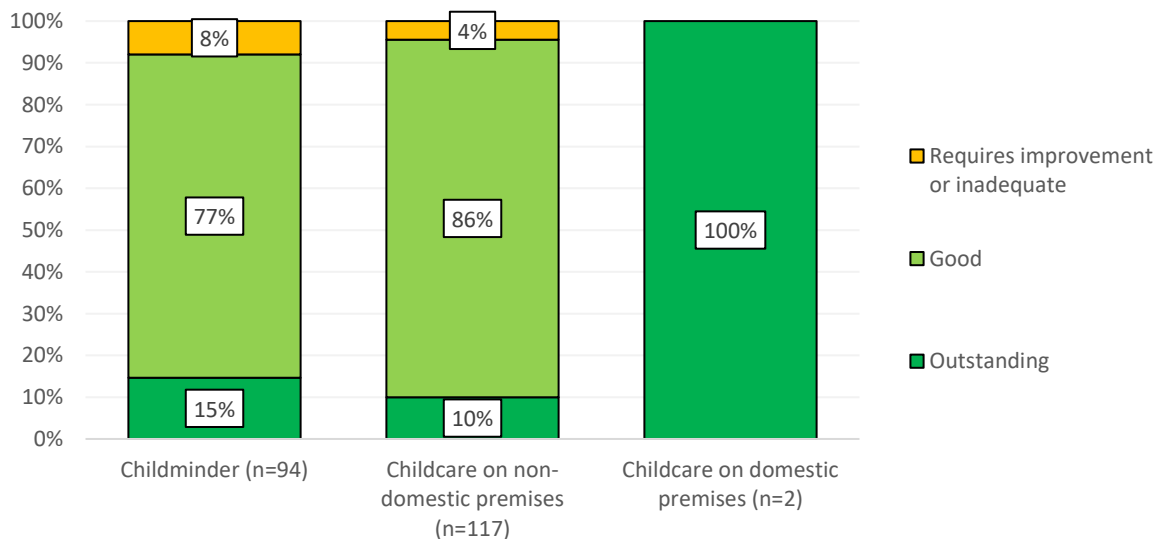


*Table 43: Ofsted ratings for childcare providers in the London Borough of Harrow, 2019-2023*



Source: [Ofsted - Childcare providers and inspections as at 31 August 2023](#); [2022](#); [2021](#); [2020](#); [2019](#)

*Table 44: Ofsted ratings for childcare providers in the London Borough of Harrow, by provider type*

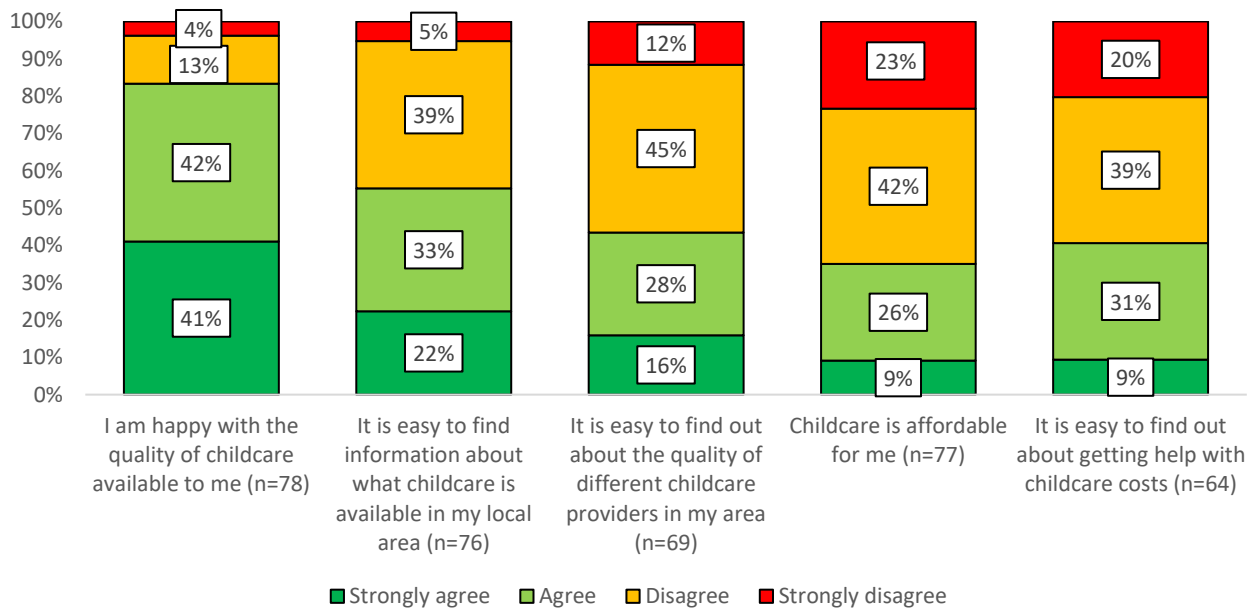


Source: [Ofsted - Childcare providers and inspections as at 31 August 2023](#)

As Table 45 (below) shows, most parents are happy about the quality of childcare available in the London Borough of Harrow, with 83 percent saying that they agree or strongly agree that they are happy with the quality of childcare in the London Borough of Harrow. Only 4 percent of parents said that they strongly disagree with this statement.

Table 45 (below) shows that parents can find it difficult to find out about varying aspects of childcare provision in the borough. While more than half (55 percent) agree or strongly agree that it is easy to find information about what childcare is available in their local area, only 44 percent agree or strongly agree that it is easy to find out about the quality of providers, and only 40 percent agree or strongly agree that it is easy to find out about getting help with childcare costs.

Table 45: Parent's views on childcare



Source: Parent survey

### **3 What are the risks to sufficiency in the London Borough of Harrow, and what can be done to mitigate these risks and improve sufficiency?**

The London Borough of Harrow has good geographical sufficiency and providers have reasonable stability and are of good quality. However, while the number of registered childcare places has remained relatively steady over the past 5 years, the number of providers has declined, which could limit capacity to meet potential surges in demand.

This is of particular concern given the upcoming expansions to the free early education entitlements. These expansions represent both a significant opportunity and a significant risk for childcare sufficiency in the London Borough of Harrow. While providing more free childcare hours will help make early education more affordable for many families, there are concerns that demand could outpace the available supply of childcare spaces over the next two years. This concern is slightly mitigated by the finding that many providers across the London Borough of Harrow report having vacancies for the funded childcare entitlements, but there is still a possibility that a surge in demand prompted by the expansions to funded childcare could outstrip these vacancies.

Another area that provides an opportunity for improvement is with awareness among parents about the various childcare subsidies and entitlements for which they may qualify, as well as their ability to access clear, consistent information about childcare options. The take up rates for the offer for disadvantaged two year olds has been low relative to other entitlements, signalling the need to improve awareness about the childcare entitlements, especially in underserved neighbourhoods and among parents of children with SEND. This section highlights the need to improve information accessibility by enhancing the borough's website and information resources for families, and outlines potential solutions to make it easier for parents to find and understand the childcare information they need.

Extended hours care is also an unmet need for many families, and so supporting providers to offer flexible scheduling aligned with work demands could significantly improve childcare sufficiency for working families. The vacancy rates for wraparound care for school aged children are low,. There has also been a reduction in the number of childminders and nurseries, leading to a lack of options for affordable and flexible care for working parents.

As childcare costs in the London Borough of Harrow are higher than the regional and national average, affordability remains a major barrier, with cost cited as the top reason parents don't use more childcare. This is especially heightened for parents of children with SEND, who want to use more childcare but are less likely to be able to afford it or be able to access a place that meets the needs of their child.

By proactively addressing these challenges around supply/demand and information accessibility, the London Borough of Harrow can work towards successfully implementing the expanded free entitlements while ensuring families have the resources to take full advantage of this support.

### **3.1 Risk 1 – Lack of access to clear and accurate information for parents**

Parents said that they struggle to access good quality information about the childcare and financial help available to them. Most parents were relying on internet searches and word of mouth to find out about childcare in the London Borough of Harrow, with the parent survey finding that only 4 in 10 parents used the London Borough of Harrow website as a source of information. This was corroborated by the focus groups, in which parents stated that they do not routinely use the London Borough of Harrow website to find out about childcare. Parents that said that they had used the website said that they have sometimes found the information unreliable or not up-to-date, and had needed to call providers to confirm the veracity of the information on the website. The inability to access accurate, up to date information can be a significant barrier to parents finding childcare that suits their needs, and to accessing help with childcare costs.

#### **3.1.1 How can the London Borough of Harrow ensure access to clear and accurate information for parents?**

Given the above, one change that could increase awareness and use of the financial support available to support affordability would be to publicise and improve the utility of the childcare section of the London Borough of Harrow website. A redesign and general update of the childcare section of the London Borough of Harrow website may be needed. There are four main recommendations to improve the website, based on parents' feedback:

- Promote the London Borough of Harrow's childcare webpage as a source of information about childcare in the local area for parents
- Perform a regular general quality check on the available information, making sure that everything is up to date, consistent, and clearly explained.
  - The London Borough of Harrow is currently planning to update its Local Offer for SEND and early years webpages in September
  - We suggest that the London Borough of Harrow invites parents to review the new webpages, and that it performs regular checks for general quality of the information on the new webpages
- Provide parents with a searchable database of childcare providers in the London Borough of Harrow, including number of places, SEND provision, Ofsted rating, prices etc.
  - Ensure that parents with child(ren) with SEND can see at a glance what types of SEND settings are equipped and trained to provide adequate care for.
- Provide parents with an easy-to-use entitlement calculator that enables them to quickly and easily see what help they could get with the costs of childcare, and how they can access this help.
  - There is an entitlement calculator at <https://www.gov.uk/childcare-calculator>, but this could be coupled with a resource to show parents where to access the entitlements in their local area

### **3.2 Risk 2: Affordability and lack of awareness of financial support**

The provider survey revealed that childcare in the London Borough of Harrow is more expensive than both the averages for Outer London and England as a whole, and this does not look like it will

change, with 39 percent of providers reporting that they have increased prices in the last six months, and the same proportion intending to do so in the next six months.

This clearly translates to parents struggling to afford childcare in the area. When parents who do not use childcare were asked why they did not do so, half (50 percent) said that this is because 'It's too expensive/I can't afford it'. In another question, parents were asked how much they agree with the statement 'Childcare is affordable for me', and more than half (56 percent) of parents said that they disagree or strongly disagree, compared with just 30 percent saying they agree or strongly agree. One parent in the focus groups expressed their disbelief that anybody could afford to work full-time with the current cost of childcare.

One factor that could be exacerbating the affordability issue for parents is lack of awareness of the financial support available to them. Coram Family and Childcare's parent survey highlighted that there is considerable variation in awareness levels of parents about their eligibility for financial support for childcare. As shown in Section 2.9, awareness of help with costs varies greatly between entitlements. For example, while 52 percent of parents are aware of Tax Free Childcare and 58 percent are aware of the 15 hours offer for 3 and 4 year olds, only 16 percent are aware of Tax Credits for childcare, or of Universal Credit for childcare. Generally, parents of school-age children are more likely than parents of pre-school children to be aware of the entitlements for which both groups are eligible. Of particular cause for concern is the finding that parents of children with SEND are far less likely to be aware of the 2 year old entitlement for disadvantaged children, even though children with an ECHP or who receive DLA are eligible for the offer. It should be noted, however, that according to DfE data, no children in London Borough of Harrow who are currently eligible for the entitlement are eligible on the grounds of high level SEND needs.

### **3.2.1 How can the London Borough of Harrow help parents with affordability of childcare?**

Helping parents with affordability is a difficult issue for any local authority, given that they have limited power to affect the prices that providers can charge. One thing that could help is increasing parental awareness of the financial support that is available to them. Aside from ensuring that all information on the London Borough of Harrow website is accurate and up-to-date, as covered in the previous section, the council could help parents by:

- Sending emails and/or text messages to parents encouraging them to check their eligibility for all entitlements.
  - This could be targeted to certain parents if information is held e.g. parents of children with SEND, especially to raise awareness of the 2 year old entitlement for disadvantaged children.
- Flyers and leaflets could be printed detailing each entitlement and who might be eligible for them. These flyers could be distributed to providers, schools, the Family Information Service (FIS), play schemes, SEND parent groups and any other schemes or settings that may be frequented by parents and children. These should be simple, easy to understand and translated into community languages.
- Social media should be utilised to encourage parents to check their eligibility for help with childcare, and to signpost them towards relevant information on the London Borough of Harrow website.
- Postal campaigns should also be considered.

- Ensure that all family-facing professionals – such as health visitors, midwives, and Early Support workers – are well informed of the entitlements, provided with the flyers and leaflets recommended above, and encouraged and empowered to tell parents about the entitlements they could be accessing in their conversations with them.

### **3.3 Risk 3: Lack of extended hours care**

The parent survey highlighted that around 1 in 6 parents in the London Borough of Harrow want to use childcare outside of 9-5 hours, but are not currently doing so. The significant gaps between current usage and desired usage of extended hours care highlight the unmet demand among parents in the London Borough of Harrow. The largest discrepancy is for childcare services after 6:30 pm on weekdays, where there is a 12 percentage point difference between parents currently using these services (4%) and those who would like to use them (15%).

The upcoming expansion of funded childcare for eligible working parents may further increase the demand for extended hours childcare. As more working parents become eligible for funded childcare, the need for care during non-traditional hours is likely to rise. Despite this potential increase in demand, over a quarter (28 percent) of schools responding to our survey said that they were either not confident or not sure that they will still provide wraparound care in September, which, coupled with already low vacancy rates for wraparound care, is cause for concern.

In addition, low response rates to the school survey, as well as the difficulty faced in recruiting the target of six school headteachers to interview (only three interviews were arranged) might suggest that there is a relative lack of interest or engagement with wraparound care as an issue, or that schools are simply too busy to give much time and thought to this programme. While these are merely inferences, it is important to mention in the context of changes to wraparound policy and the fact that 1 in 6 parents in the London Borough of Harrow would like to use more wraparound care.

Based on the data, there is a clear need for extended hours childcare services in the London Borough of Harrow. Addressing this unmet demand by increasing the availability and accessibility of extended hours childcare services could be crucial in supporting working families and promoting work-life balance in the area.

#### **3.3.1 How can the London Borough of Harrow help providers to offer extended hours care?**

Consider a provider toolkit to support making changes such as:

- A business planning template, which would take providers through the steps needed to develop a full strategy for delivering extended hours care.
- Financial modelling and guidance, which could include pre-made spreadsheets and calculators to help providers undertake financial planning, calculate staff ratios etc.
- Guidance for providers on how to deliver the early education entitlements.
- Help with assessing parental demand, for example providing questionnaire templates.
- Help with marketing for providers, for example template flyers.

Transport was another barrier to offering extended hours care highlighted in a provider interview. Where schools are unable to provide wraparound care in-house, they have the option of linking with an external provider. However, this is not practical without the means for children to get to a different setting without their parents taking them, which eliminates the main benefit of wraparound care for parents. Therefore, this school suggested that reinstating Harrow Transport would be an important step towards greater wraparound coverage, especially in their particular case.

### **3.4 Risk 4: Recruitment and retention of the childcare workforce**

Recruitment and retention issues within the childcare workforce is a national issue; a recent survey by Coram Family and Childcare<sup>21</sup> found that 75 percent of local authorities in England see staffing issues as a major barrier to childcare expansion.

#### **3.4.1 Run recruitment events and provide training opportunities to the workforce**

As with all councils, the London Borough of Harrow could help to alleviate these issues slightly with some simple steps, including:

- Work with local careers organisations and providers on campaigns to attract people into the childcare industry, such as information stalls at careers fairs, promotions with recruitment agencies and other job finding services, and promotion of the £1,000 bonus for new childcare workers.<sup>22</sup>
- Run specific campaigns targeting recruitment of childminders.
- Work closely with providers and staff to continually assess the best way to support providers and the childcare workforce, for example running a survey to understand current training gaps and needs.
- Provide more training opportunities for existing workers, and do so in a way that allows providers to free up staff to attend and facilitates attendance for childminders. This could include facilitating staff-sharing arrangements between providers, helping providers cover training with agency staff, or running training sessions outside of typical provider opening hours. In addition, training could be provided for managers to support staff in their demanding roles.
- Provide training for staff specifically on how to recognise, support, and speak to and about children with SEND, in order to combat some of the issues with knowledge gaps and inclusivity raised by parents in the focus groups (see Section 2.8)
- Support providers with information and toolkits on how to make their setting inclusive and accessible for children with SEND.

### **3.5 Expansion of free early education entitlements**

The upcoming expansions to the free early education entitlements are potentially the most significant risk to supply meeting demand for all local authorities across the nation. While

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<sup>21</sup> <https://www.familyandchildcaretrust.org/councils-concerned-about-shortages-places-ahead-next-phase-childcare-expansion>

<sup>22</sup> <https://educationhub.blog.gov.uk/2024/02/02/recruit-early-years-workers-trial-bonus/>

providers in the London Borough of Harrow are generally planning to offer the entitlements to some degree, there may still be a gap between potential demand and potential supply. For example, only one third of providers (35 percent) say that they have the capacity to provide spaces to more children than are currently attending their setting for the September 2024 offer (15 hours of care for all children from the age of 9 months with eligible working parents) to more children, with this figure improving only marginally to 36 percent for the September 2025 expansion (30 hours of care for all children from the age of 9 months with working parents).

As mentioned in previous sections of the report, there are good reasons to believe that the upcoming expansion could lead to much higher demand in places; many parents in the London Borough of Harrow want to use more childcare, and cost is the biggest factor in them not being able to do so. The new entitlements should drastically reduce costs for many families (according to the last census, there are a total of **3,034 children** aged one in the London Borough of Harrow, many of whom could stand to receive the new entitlements for children aged 9 months and above. This considerably outstrips the number of vacancies found in the provider survey, and although not all of these children will be eligible or want to take up their place, it nevertheless represents a considerable risk.

In addition, the provider survey revealed some doubt as to how soon providers might be able to offer places for the expansion. While 35 percent of providers said that they would be able to offer additional places for the September 2024 expansion, and a further 35 percent said that they would be offering expansion places to all eligible children currently attending their setting (see Table 23), only 11 percent of providers said that they would be increasing the number of early education places they offer in the next six months (see Table 10). This suggests that while most providers are planning to offer the new entitlements, they do not feel ready to do so immediately, which could represent a major barrier to parents being able to take up the entitlements for which they are eligible.

Finally, the expansion could represent a risk to the number of places for the disadvantaged two year old entitlement. This entitlement already has the lowest vacancy rate and the lowest proportion of providers planning to increase places in the next six months, as well as the lowest take up-rate among parents.

### **3.5.1 How can the London Borough of Harrow help providers to manage the expansion to funded early education entitlements?**

There are a number of actions that the London Borough of Harrow can take to help mitigate these risks, including:

- Consult providers as to what they feel are the barriers preventing them from immediately offering places for the September 2024 expansion to the free early education entitlement, and what the London Borough of Harrow could do to assist with removing these barriers and generally supporting providers in offering expansion places.
- Establish a governance and implementation team to assist with the roll out of the two upcoming expansions.
- Review the support and resources currently available to providers to assist them with delivering the new entitlements and alter resources where applicable.



- Continually review the rollout of the April 2024 expansion and seek feedback from providers and parents to expand the knowledge base for dealing with September 2024 and September 2025 expansions.
- A specific strategy to encourage the London Borough of Harrow residents into the childcare workforce, and to retain existing workers:
  - This could include awareness raising through social media, careers fairs, and webinars.
  - The provision of training and networking opportunities for the existing childcare workforce, developed in partnership with providers to ensure that staff can access training without impacting their personal life, or the operation of the provider for which they work.
- A review should be undertaken as to why providers are not providing places for the disadvantaged two-year-old entitlement, as well as why take-up rates are low.
  - This should be coupled with re-doubled efforts to encourage awareness of this entitlement among eligible parents, and support to enable parents to apply and access the places they are entitled to.

### **3.6 Risk 6: Setting sustainability**

Although 62 percent of providers who responded to our survey said that they were ‘confident’ or ‘very confident’ in still being in operation in six months’ time, this still leaves 10 percent of providers answering ‘not at all confident’ or ‘not confident’, on top of 17 percent saying ‘neither confident or not confident’ (see Table 13)

In addition, the number of providers in the London Borough of Harrow has been steadily declining over the past 5 years, from 257 providers in 2019 to 213 providers in 2023 (see Table 2). Although this has not translated to a similar fall in the number of places, this concentration of a higher number of places in a smaller number of settings comes with its own risks. Should one of the larger providers have to close, or change how they operate, this could have serious consequences for the number of places available to parents, as well as to their ability to access childcare in a setting that is in a useful location for them.

Finally, a smaller number of providers means less competition, which could be a contributory factor to the high cost of childcare and consequent affordability issues for parents that was a recurring theme throughout the parent survey and focus groups.

#### **3.6.1 What can the London Borough of Harrow do to help the sustainability of providers?**

In light of the finding that one in ten providers are not confident in still operating in six months’ time, it is suggested that the London Borough of Harrow carries out further research with providers to identify what are the largest issues for the providers in imminent danger of ceasing operation, and what can be done to support them in staying open. Identifying and addressing these risks may also have the additional benefit of encouraging new providers to the market.

### **3.7 Risk 7: Ability to meet the needs of children with SEND**

Results from the parent survey reveal that parents of this group of children are more likely to be using almost all types of childcare and were most likely to say they wanted to use more, but also have least awareness of entitlements, and are the most likely to find childcare unaffordable.

In addition, one-third of parents of SEND children who are not currently using childcare say that this is because they could not find provision to meet their child's additional needs. Parent focus groups revealed variability in the quality of SEND care. While some parents praised their child(ren)'s settings for their recognition of, and support for, children with SEND, others said that their childcare setting simply did not know how to deal with their child's behavioural issues. One parent expressed that they had been subjected to inappropriate and offensive language regarding their child from a member of staff.

#### **3.7.1 What are the London Borough of Harrow already doing to help parents of children with SEND, and to help providers meet the needs of children with SEND?**

The London Borough of Harrow already has a number of policies and programmes in place to help parents of children with SEND, and to help providers meet the needs of children with SEND.

Currently, the London Borough of Harrow:

- Has a SEND team that offer SEND surgeries for providers, and provides six-part SEN training for all settings
- Maintain a SEND register of all children with SEND in early years settings, to whom they offer support around identify needs of the children.
  - Is undergoing an information-gathering process regarding next steps in supporting SEND, and keep a running record on the number of children with SEND
- Offer SEN Inclusion Funding (SENIF) for children with emerging needs.
- Offer termly SENCO forums to support SENCO within early years settings, with SENCO training offered on a termly basis to all early years settings.
- The Early Years team offers a comprehensive training package for continued professional development for early years staff, as well as offering regular forums and annual conferences.
- Supports an Early Years Learning Partnership (EYLP), comprised of representatives from across the early years sector to provide training, mentoring and shared learning around quality provision within the group. This includes coffee mornings, a monthly newsletter, meetings once per term, networking groups, and a yearly conference.
- Employs speech and language therapists, education psychologists, and children's sensory therapists, and runs Portage (a home-based teaching program for children aged five and under who are not in school or pre-school and are experiencing delayed development)

#### **3.7.2 What can the London Borough of Harrow do to help parents of children with SEND, and to help providers meet the needs of children with SEND?**

- Continue to foster strong relationships with parents and caregivers of children with SEND, involving them in decision-making processes such as early years and wraparound care-specific steering groups and panels.

- Appoint dedicated SEND coordinators within childcare settings that do not already have them to oversee the implementation of personalised support plans and to act as liaisons between parents, staff, and external agencies.
- Enhance communication efforts to ensure parents of children with SEND are fully aware of their childcare entitlements. This can be achieved through targeted outreach, and easy-to-access online resources that explain the various support options available, including funding and specialised services.
- Encourage regular workshops and seminars on inclusive practices, ensuring that all staff members within new and existing provision are equipped with the skills and knowledge to support children with SEND effectively.

## 4 Conclusion

The Childcare Sufficiency Assessment (CSA) for the London Borough of Harrow indicates that while there is generally sufficient provision to meet current demand, significant challenges remain, especially in the context of upcoming government expansions to early years and wraparound childcare entitlements.

The report emphasises the relatively stable number of childcare places despite a decline in the number of providers over the past five years. This stability suggests that existing providers have increased their capacity to accommodate demand. However, this concentration of places in fewer providers raises concerns about the potential impact of any future closures or changes in operating practices on quality.

Vacancy rates across different types of childcare indicate variability in demand. While there are sufficient vacancies in some areas, wraparound and holiday childcare show particularly high vacancy rates, suggesting a possible oversupply or a misalignment with parental needs. Providers' willingness to increase the number of funded childcare places is a positive sign, especially with the upcoming government expansions aimed at supporting working parents.

Affordability remains a significant barrier for many parents in Harrow, as reflected in the parent survey. The cost of childcare in Harrow is notably higher than both national and regional averages, which limits access for many families. This is compounded by the fact that a significant number of providers have increased their prices in the last six months, with similar increases planned for the near future.

Parents of children with SEND face additional challenges in accessing suitable childcare. While some parents report positive experiences with knowledgeable and supportive providers, others struggle with affordability and finding providers who can meet their children's specific needs. This highlights the need for targeted support and training for childcare staff to better accommodate children with SEND.

The CSA also identifies gaps in parental awareness of available support for childcare, particularly among parents of children with SEND. Improving access to information and resources for parents is essential to ensure that all families can benefit from the available childcare entitlements.

While the London Borough of Harrow generally meets the current demand for childcare, significant challenges related to affordability, accessibility for children with SEND, and the upcoming expansions in government-funded childcare need to be addressed. Proactive measures to support providers, improve information dissemination, and ensure the sustainability of childcare services will be critical in meeting the evolving needs of families in the London Borough of Harrow.

## **Annex 1 – Methodology**

The methodology used to undertake this Childcare Sufficiency Assessment are set out below. Coram Family and Childcare undertook each element and wrote the report which had input from the London Borough of Harrow.

### **Desktop review**

A desktop review of key figures and statistics about the London Borough of Harrow's population and childcare market was carried out using data from sources such as the census, ONS, Ofsted, and Coram's Childcare Survey.

### **Parent and provider surveys**

Coram Family and Childcare ran three surveys in the London Borough of Harrow in April and May 2024. Separate surveys were sent to parents, early years providers, and schools providing wraparound care. The survey of providers received responses from 75 providers. The survey of parents received responses from 137 parents, 30 of whom reported that they have at least one child with SEND requirements. The survey of schools providing wraparound care received 34 responses.

Price calculations were weighted by the number of places per provider. This was done to ensure that, for example, providers with a low number of places but a very high price did not disproportionately affect the overall figures.

### **Parent focus groups**

We delivered three focus groups in May and June 2024, with a total of eight parents attending online. Parents had completed the London Borough of Harrow parent survey and put themselves forward to participate in one of the focus groups. The three focus groups were divided up depending on the ages or needs of children:

- a) Parents who had at least one pre-school aged child
- b) Parents who had at least one child with Special Educational Needs and Disability (SEND)
- c) Parents who had at least one school aged child

Whilst the focus groups were divided up as stated there was some crossover in views across all three areas. In addition, parents with school aged children also touched on their experience of early years provision and had views on the increased financial support for childcare. A number of the parents also had more than one child so spoke about their wider experience of childcare provision in Harrow including how it had changed over a number of years. All the parents except one, were working full or part-time and the parent who was currently not working was actively seeking work. All of the parents were mothers.

Data was gathered using a semi-structured topic guide to allow us to find out about parents' views and experiences of local childcare. The focus groups allowed parents to discuss current provision

as well as the government's plans to expand wraparound childcare provision and increased the free childcare offer to parents with pre-school aged children. In terms of wraparound childcare parents were specifically asked about whether their use of the provision had changed post-COVID. Feedback from the focus groups was analysed thematically to draw out key issues and ideas for areas of improvement.

## **Interviews with headteachers of schools providing wraparound care**

We initially aimed to interview six head-teachers of schools providing wraparound care. However, we found recruitment very difficult, and after exploring a number of avenues, could only recruit three head-teachers to talk to us. Of these three head-teachers, two work at schools who provide wraparound care, and one who works at a school that does not. Schools were recruited through emails, phone calls, and information given at a headteachers' meeting in the London Borough of Harrow. The interviews were conducted via video call, and transcribed. Data was gathered using a semi-structured topic guide to allow us to find out about headteachers' views and experiences of delivering wraparound childcare in the area, or of the barriers to doing so.