



# Enfield Borough Council

## Childcare Sufficiency Assessment 2025

**Private & Confidential**

April 2026



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## Executive Summary

Premier Advisory Group (PAG) was commissioned to deliver a Childcare Sufficiency Assessment (CSA) for Enfield Borough Council throughout 2025, to provide the council with an update to the previous CSA, delivered by PAG in 2024. This report intends to provide a comprehensive overview of Early Years childcare sufficiency in Enfield.

In conjunction of this report, PAG have also produced a SEND-focused CSA. Although this report addresses core criteria with regard to SEND, the full SEND CSA report delves into sufficiency in the SEND, EY sector specifically.

### Overall Sufficiency in our Area

Enfield's childcare market continues to successfully deliver provision; however, the 2025 consultation findings indicate an increasing pressure on overall sufficiency. The key issues identified through this include an affordability gap for families and growing financial sustainability challenge for providers, with rising operating costs. SEND sufficiency remains a concern, as demand is rising but providers report constrained capacity due to staffing, space and funding barriers. The market also presents gaps in provision for atypical hours, wraparound and holiday childcare, alongside persistent confusion among parents about access to childcare and funded entitlements.

### Recommendations

PAG's analysis of consultation findings and key data informed a set of specific recommendations, to be considered by Enfield. The recommendations for the 2025 CSA are as follows:

- Implementation of the parent engagement action plan detailed in **Appendix 3**
- Design and implement an affordability and sustainability response plan
- Ward-level monitoring of SEND provision and waiting list to improve all types of sufficiency
- Improve information accessibility through the production of a parent-facing resource to clarify current confusion relating to sector-specific jargon and take up entitlement
- Deliver targeted outreach in line with the above to improve take-up
- Develop and implement an up-to-date Early Years workforce development plan with a focus on SEND capacity and skills expansion.

## Introduction

### About Childcare Sufficiency Assessments

Our council is required by law to 'report annually to elected council members on how they are meeting their duty to secure sufficient childcare and make this report available and accessible to parents'. Enfield Borough Council have prepared this report in order to meet this duty.

Having sufficient childcare means that families are able to find childcare that meets their child's learning needs and enables parents to make a real choice about work and training. This applies to all children from birth to age 14, and to children with disabilities. Sufficiency is assessed for different groups, rather than for all children in the local authority.

In this report, we have made an assessment of sufficiency using data about the need for childcare and the amount of childcare available, and feedback from local parents about how easy or difficult it has been for them to find suitable childcare. We use information about childcare sufficiency to plan our work supporting the local childcare economy.

### Enfield's Approach to Childcare Sufficiency Assessment

Enfield regularly commission CSAs to ensure that there is sufficient, accessible and high-quality childcare provision to meet the needs of local families. These assessments provide a detailed understanding of current and projected demand, the capacity and quality of existing provision, and any emerging gaps or pressures within the market. They also inform Enfield's strategic planning, partnership working and targeted interventions, particularly in relation to inclusion and the needs of children with SEND.

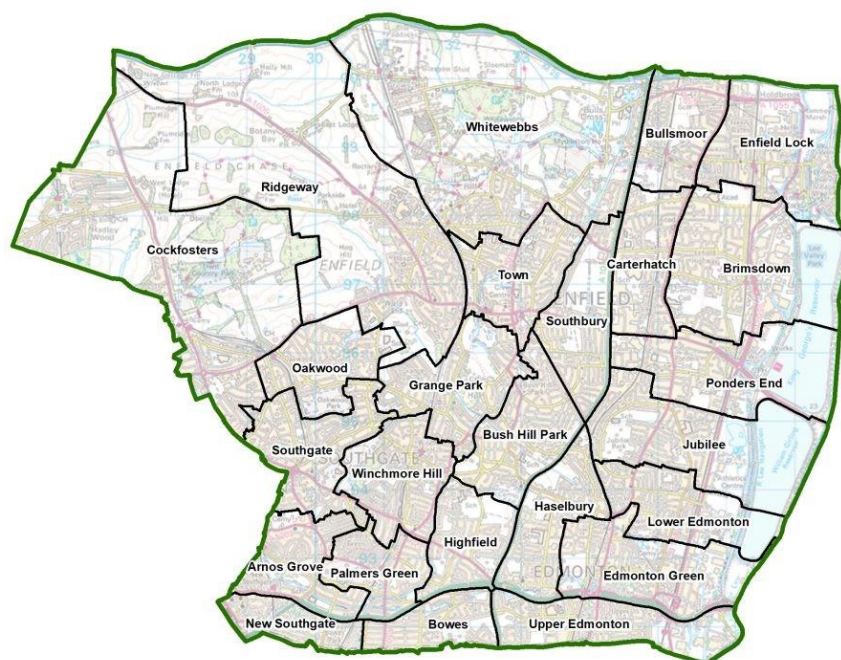
The approach to CSA delivery in Enfield ensures continuous improvement and understanding of developing trends within the region. Specific recommendations have been made, keeping in mind the findings from previous CSAs. This ensures that the recommendations made by PAG are attainable, ambitious and reflect progress within Enfield.

## 1. Methodology and Overview

The assessment draws on a combination of national, regional, and local datasets to provide a high-level overview of childcare demand, supply, quality, and affordability in the London Borough of Enfield. Use of a mixed-methods approach ensures that both quantitative and qualitative evidence inform our analysis, capturing the experiences of families and providers alongside statistical trends. These sources provide a comprehensive picture of the childcare landscape in Enfield and highlight areas of strength, challenge and opportunity for development.

### 1.1 Demographic Research

These areas, shown below, have been broadly defined by considering town and community council ward boundaries.



GLA Custom Age Population Projections (2024–2028)<sup>1</sup> has formed the primary dataset for estimating current and future populations of children aged 0–4 and 5–18. These estimates ensure consistency with regional planning frameworks. Supplementary analysis from the Enfield Borough Profile (2024)<sup>2</sup>

<sup>1</sup> GLA Population Estimates as per London template instructions (<https://data.london.gov.uk/dataset/gla-population-projections-custom-age-tables>)

<sup>2</sup> “Ward Profile: Town 2024”, Enfield Council, [https://www.enfield.gov.uk/data/assets/pdf\\_file/0025/60919/Town-ward-profile-2024-Your-council.pdf](https://www.enfield.gov.uk/data/assets/pdf_file/0025/60919/Town-ward-profile-2024-Your-council.pdf)

and Office for National Statistics (ONS) Census and mid-year estimates has been used to contextualise demographic trends and highlight historical population shifts. This includes ward-level breakdowns and projections to 2031. When assessing population and the concentration of the population of children by ward, an analysis has also been included of Enfield's GP registration data. This has been used to supplement and support the data available through public population data such as that produced by ONS.

## 1.2 Consultation

Consultation forms a core element of Enfield's CSA evidence base, providing insight into lived experiences that cannot be captured through quantitative data alone. Engagement was carried out with both parents and carers and childcare providers to understand the perspectives of key stakeholders on availability, affordability, accessibility and quality of local childcare.

### 1.2.1 Parents

Feedback from parents and carers was gathered through an online survey and structured focus groups were offered but not delivered due to low parental engagement. The consultation explored experiences of finding and using childcare, perceived sufficiency of places, barriers to access and views on affordability and quality.

Key findings:

- The survey reflects insights from a diverse range of households across EN3 and N9 postcodes, encompassing various family structures and children spanning the 2-12 age range.
- There is a predominant reliance on informal childcare (grandparents) over formal provision, with current formal usage limited to day nursery (full or part-time).
- Respondents reported various spending, including none (33.3%), £201-£300 (33.3%), and £1,000+ (33.3%).
- Parents identified quality of care, affordability, proximity to work and/or home, and flexible hours as the most critical factors when choosing a provider, expressing a clear intent to access formal childcare (i.e., holiday play schemes, nursery classes in state schools) within the next two years.

- Access to formal childcare is hindered by financial constraints, irregular work patterns, and specific visa-related requirements (such as Skilled Worker Visa conditions) that complicate eligibility for support.
- None of the respondents are currently using the 30-hour or 15-hour funded entitlements for 3- and 4-year-olds.
- Engagement with the 15 and 30-hour funded offers remains low, primarily due to children not being in the correct age bracket or a lack of clarity regarding eligibility and the registration process.
- Households with children with Special Educational Needs and Disabilities (SEND), including Autism and speech needs, face challenges such as age-related service thresholds and general uncertainty about available support entitlements.
- 100% respondents feel that information on the Council website regarding funded childcare could be made significantly clearer.
- Parents reported confusion over overlapping terms such as 'nursery', 'daycare', and 'preschool', requesting more straightforward guidance on which services apply to their child's specific age and circumstances.

### 1.2.2 Providers

Providers were engaged through a survey and a series 1:1 interviews, enabling a detailed understanding of sufficiency from a delivery perspective. Providers shared their views on demand, capacity, staffing, inclusion, funding and operational challenges.

Key findings from the provider survey:

- A significant proportion of settings are operating at or near full capacity, with approximately 40% reporting no current vacancies and waiting lists increasing slightly year-on-year.
- The majority of providers (77.27%) plan to continue operating over the next five years, though sustainability concerns around funding rates and staffing costs pose a risk to long-term sufficiency.
- Most providers (86.67%) offer places for children with SEND, though capacity is limited, with the majority able to accommodate only one to three children per session. A third of

providers have had to turn away children with SEND in the past 12 months, primarily due to space and resource constraints.

- No providers felt that current funding fully meets the needs of children with SEND, citing insufficient rates, staffing cost pressures, and delays in accessing SENIF funding.
- Only 36.36% of providers feel they have sufficient staff with SEND experience, with confidence notably lower for sensory impairments and profound disabilities.
- The three most commonly cited borough-wide barriers were difficulty recruiting qualified staff, inadequate funding, and inability to provide 1-1 support, each identified by 77.78% of providers.

Key findings from the provider interviews:

- Demand for childcare places varied considerably across settings, with increased competition from school nurseries and DfE funding changes contributing to reduced occupancy in some settings, whilst others remained at or near full capacity.
- Speech and language delay and behaviour indicative of ASD were the most commonly observed SEND needs, consistent with survey findings.
- Funded entitlement take-up among children with SEND was generally positive, though capacity constraints limited the number of funded children per setting. Challenges were more commonly experienced by parents than providers, particularly around awareness of available support.
- Current funding levels were widely seen as insufficient, with providers citing staffing costs, bureaucratic processes, and inconsistent payment timelines as key concerns.
- Whilst most providers had embedded SEND awareness into induction processes, access to specialist training remained limited by time and cost constraints.
- Experiences of LA support were broadly positive, particularly regarding Early Years advisors, though providers called for more observational SEND visits and greater focus on Early Years within broader LA strategy.

### 1.3 Additional Research

To supplement the demographic and consultation evidence, additional research was undertaken to provide a well-rounded understanding of childcare sufficiency in Enfield. This has involved:

- Review of Ofsted inspection outcomes and provider quality data

- Analysis of DfE official statistics for take-up rates for funded entitlements (2-year-old, universal 15 hours, extended 30 hours)
- Benchmarking against regional and national trends in affordability
- Review of local policy documents, including Enfield’s Early Years Strategy
- Consideration of wider contextual factors.

This approach has ensured that the findings presented within this report are grounded in robust data, lived experiences of Enfield’s families and childcare providers and any additional sources which contribute to these findings.

## 2. Demand for Childcare

### 2.1 Population of Early Years Children

According to Greater London Authority (GLA) population projections<sup>3</sup>, Enfield’s Early Years population (ages 0–4) is expected to remain broadly stable over the medium term, following a period of gradual decline. Over the past five years, the number of children in this age group has fallen from around 22,200 in 2021 to approximately 20,400 in 2026, reflecting wider demographic trends across London.

Projections indicate that this downward trajectory is now easing, with the Early Years population expected to stabilise through the late 2020s and show a modest increase by 2031 (not included in the table below but predicted increase to 20,600 0–4-year-olds). While this may reduce immediate pressure on place-based sufficiency, it also has implications for the sustainability of Early Years provision, particularly for providers operating close to capacity thresholds or heavily reliant on funded places.

Table 2.1 – Population of children aged 0–4 in Enfield, 2026–2030

Year	Male	Female	Persons
2026	9,900	10,500	20,400
2027	9,900	10,500	20,300
2028	9,800	10,500	20,300
2029	9,900	10,500	20,400
2030	9,900	10,500	20,400

According to the Greater London Authority (GLA) population projections, Enfield’s youngest cohort (ages 0–1) is expected to remain highly stable across the medium term. The total population of children aged 0–1 is projected to sit at around 8,200 each year, indicating a broadly flat trend in the number of babies and very young children entering the Early Years system.

This stability suggests that demand pressures at the earliest entry points (e.g., baby rooms in nurseries, childminder places, and other provision catering for under-twos) are likely to be predictable rather than escalating over the late 2020s. Although this reduces the likelihood of sudden sufficiency shocks, it also implies that any changes in local capacity pressures will be driven less by population

<sup>3</sup> GLA Population Estimates as per London template instructions (<https://data.london.gov.uk/dataset/gla-population-projections-custom-age-tables>)

growth and more by other factors, such as parental preferences, affordability, workforce constraints, patterns of take-up, and shifts in the provider market.

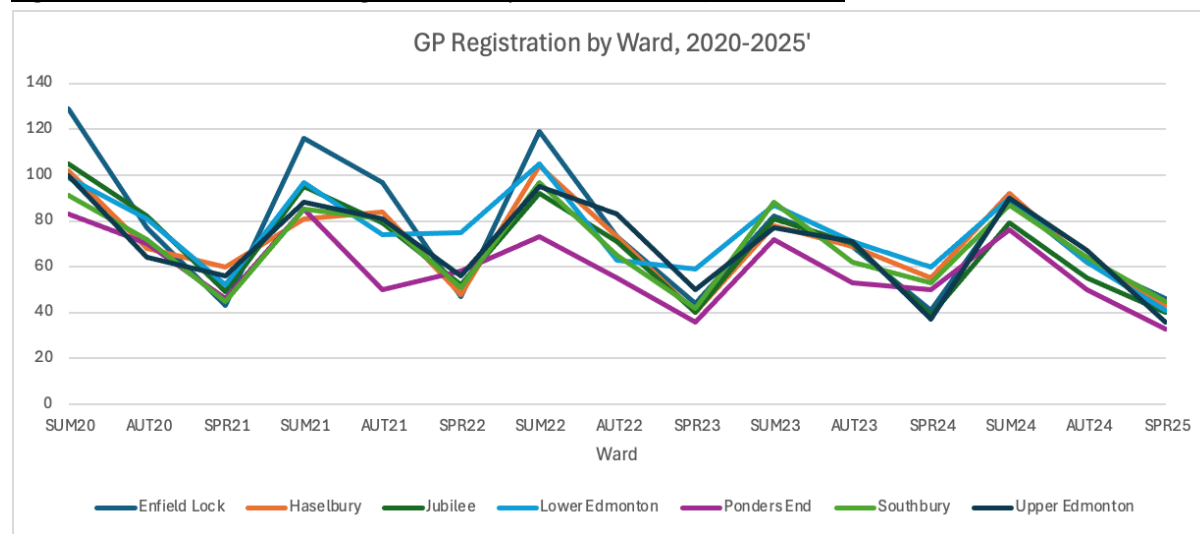
To supplement GLA population projections, General Practitioner (GP) registration data from May 2025 was analysed to provide a current view of the distribution of children aged 0-4 across Enfield. As GP registration is typically completed shortly after birth or relocation, this provides a strong proxy for the resident child population at ward level.

**Table 2.2 – Highest concentration of children aged 0-4 by ward (GP registrations, May 2025)**

Age	0 years-old	1 years-old	2 years-old	3 years-old	4 years-old
Enfield Lock	199	200	262	236	287
Haselbury	222	186	233	209	256
Jubilee	193	188	229	233	248
Lower Edmonton	213	217	258	227	238
Ponders End	180	166	181	199	230
Southbury	192	188	233	192	216
Upper Edmonton	197	211	233	206	241

Enfield’s areas where the highest concentrations of young children each have over 1,000 registered children ages 0-4. These areas represent the most significant sources of demand for childcare provision within the borough. The clustering of high populations of children in these wards suggests that demand is geographically concentrated rather than evenly distributed, supporting the need for targeted childcare sufficiency planning at the sub-borough level. Enfield’s high-demand areas also align with locations identified for housing growth and increased population pressure, further strengthening the case for prioritised provision in these wards.

Figure 2.1 – Number of GP registrations by selected ward (2020-2025)



Enfield’s GP registration is consistent with GLA’s population projections. Analysis of GP registration data shows steady decline in the number of registrations between summer of 2020 to spring of 2025. While all wards show some degree of decline over the period, the pattern is not uniform throughout the 5-year period, with noticeable fluctuations between terms, particularly across summer and spring cohorts. High-demand wards such as Enfield Lock and Upper Edmonton remain consistently elevated despite this downward trend, suggesting that while overall population growth has slowed, demand for Early Years provision remains concentrated and resilient in specific areas of the Enfield borough.

Table 2.3 – Population of children aged 0–1 in Enfield, 2026–2030

Year	Male	Female	Persons
2026	4,000	4,200	8,200
2027	4,000	4,200	8,200
2028	4,000	4,200	8,200
2029	4,000	4,200	8,200
2030	4,000	4,300	8,200

Enfield’s population of children aged 2 is expected to remain stable over the medium term. The total number of two-year-olds is projected to be around 4,100 each year from 2026 to 2030, with no change across the period. The male population is projected to remain constant at 2,000 annually, while the female population is also steady at 2,100 each year. This produces a consistent overall cohort size and suggests limited demographic-driven change in demand for provision specifically serving two-year-olds.

This stability implies that pressures on two-year-old place sufficiency, including take-up of funded early education for eligible two-year-olds, are likely to be broadly predictable. As with the wider Early Years picture, any localised shifts in demand or sustainability are therefore more likely to be shaped by factors such as eligibility rates, parental take-up, provider capacity and staffing, and changes in the local childcare market rather than changes in the size of the cohort itself.

**Table 2.4 – Population of children aged 2 in Enfield, 2026–2030**

Year	Male	Female	Persons
2026	2,000	2,100	4,100
2027	2,000	2,100	4,100
2028	2,000	2,100	4,100
2029	2,000	2,100	4,100
2030	2,000	2,100	4,100

Enfield’s population of children aged 3–4 is expected to show a slight decline and then stabilise over the medium term. The total number of children in this age group is projected to fall from around 8,200 in 2026 to approximately 8,100 in 2027, with the cohort then remaining steady at 8,100 each year from 2027 to 2030.

This small reduction is driven by a marginal decrease in the male population, from 4,000 in 2026 to 3,900 from 2027 onwards, while the female population remains stable at 4,200 throughout the period. Overall, the change is modest, but it confirms a broadly flat outlook for the pre-school cohort across the late 2020s.

In practice, this suggests that demand for universal early education places for 3–4-year-olds is unlikely to increase through this period and may ease slightly compared to 2026 levels. Although this may reduce immediate pressure on sufficiency in some areas, it also reinforces the importance of monitoring provider sustainability, particularly for settings reliant on funded entitlement places where even small cohort changes can affect occupancy levels, financial viability, and the balance of provision across the borough.

**Table 2.5 – Population of children aged 3–4 in Enfield, 2026–2030**

Year	Male	Female	Persons
2026	4,000	4,200	8,200
2027	3,900	4,200	8,100
2028	3,900	4,200	8,100

2029	3,900	4,200	8,100
2030	3,900	4,200	8,100

## 2.2 Population of School Age Children

Enfield’s school-age population (ages 5–18) is expected to decline steadily over the medium term. The total number of children in this age group is projected to fall from around 62,600 in 2026 to approximately 60,200 by 2030, representing a reduction of about 2,400 pupils over the five-year period.

This decline is reflected across both sexes. The male population is projected to decrease from 30,300 in 2026 to 29,000 by 2030, while the female population falls from 32,400 to 31,200 over the same period. The downward trend is gradual but consistent year-on-year, indicating a sustained easing in overall demand across the statutory school-age cohort.

In practical terms, this trend has implications for school place planning and the financial sustainability of provision. A declining pupil population is likely to increase the risk of surplus places in some areas and may create pressure on school budgets where funding is closely tied to pupil numbers. This reinforces the importance of monitoring local variation beneath the borough-wide headline, as changes in housing development, migration patterns, and parental preferences can still lead to uneven demand between neighbourhoods and phases, even within an overall declining population.

Table 2.6 – Population of children aged 5–18 in Enfield, 2026–2030

Year	Male	Female	Persons
2026	30,300	32,400	62,600
2027	29,900	32,100	62,000
2028	29,600	31,800	61,500
2029	29,300	31,600	60,900
2030	29,000	31,200	60,200

The primary-age population (ages 5–11) is expected to decline steadily over the medium term. The total number of children in this age group is projected to fall from around 30,600 in 2026 to approximately 28,700 by 2030, a reduction of about 1,900 children over the five-year period.

This decrease is seen across both sexes. The male population is projected to drop from 14,700 in 2026 to 13,800 by 2030, while the female population falls from 15,800 to 14,900 over the same period. The

reduction is gradual but consistent year-on-year, suggesting a sustained easing in cohort size as smaller year groups move through the primary phase.

This trajectory has clear implications for primary place planning and school sustainability. A continuing decline in the primary cohort is likely to increase surplus places in some parts of the borough and may intensify financial pressures for schools where funding is closely linked to pupil numbers. It also reinforces the need to track variation at local level, as demand may not fall evenly across Enfield – shifts in housing, migration, and parental preference can still create pockets of pressure alongside areas of under-occupancy.

**Table 2.7 – Population of children aged 5–11 in Enfield, 2026–2030**

Year	Male	Female	Persons
2026	14,700	15,800	30,600
2027	14,500	15,600	30,200
2028	14,300	15,400	29,700
2029	14,100	15,100	29,200
2030	13,800	14,900	28,700

Enfield’s population of children aged 12–14 is expected to remain broadly stable over the medium term, with only minor year-to-year fluctuation. The total number in this age group is projected to be around 13,300 in 2026, dip slightly to 13,200 in 2027, and then return to 13,300 in 2028 before rising modestly to 13,400 in 2029 and 2030.

The pattern is driven by small movements in both the male and female cohorts. The male population is projected to decrease from 6,400 in 2026 to 6,300 in 2027, then increase to 6,500 by 2029 and remain there in 2030. The female population follows a similar, limited range: 6,900 in 2026, 6,800 in 2027, back to 6,900 in 2028 and 2029, and a small increase to 7,000 in 2030.

Overall, this suggests relatively steady demand for places across early secondary years (Key Stage 3), with no major demographic-driven pressure expected in the late 2020s. However, the slight uplift from 2028 onwards indicates that any emerging pressure points are more likely to be localised, shaped by the distribution of cohorts across the borough, school popularity and admissions patterns, rather than significant growth in the overall size of the age group.

**Table 2.8 – Population of children aged 12–14 in Enfield, 2026–2030**

Year	Male	Female	Persons
2026	6,400	6,900	13,300

2027	6,300	6,800	13,200
2028	6,400	6,900	13,300
2029	6,500	6,900	13,400
2030	6,500	7,000	13,400

Enfield’s population of older teenagers (ages 15–18) is expected to decline gradually over the medium term. The total number of children in this age group is projected to fall from around 18,800 in 2026 to approximately 18,100 by 2030, a reduction of about 700 over the five-year period.

This downward trend is reflected across both sexes. The male population is projected to decrease from 9,100 in 2026 to 8,700 by 2030, while the female population falls from 9,700 to 9,400 over the same period. The pattern is steady year-on-year, indicating a sustained easing in the size of this cohort through the late 2020s.

In practical terms, this suggests that demographic pressure on places for upper secondary (Key Stage 4) and post-16 provision is unlikely to increase over this period and may reduce slightly. However, demand for 16–18 places will also be shaped by participation and retention trends, the mix of academic and vocational pathways, travel-to-learn patterns, and the attractiveness of local sixth forms and FE options. As a result, even with a modestly shrinking cohort, some settings may still experience pressure while others may face viability challenges linked to recruitment levels and funding.

Table 2.9 – Population of children aged 15–18 in Enfield, 2026–2030

Year	Male	Female	Persons
2026	9,100	9,700	18,800
2027	9,100	9,600	18,700
2028	9,000	9,600	18,500
2029	8,800	9,500	18,300
2030	8,700	9,400	18,100

## 2.3 Number of Children with SEND

### 2.3.1 EHCPs

Department for Education (DfE) SEN2 Education, Health and Care Plan (EHCP) data<sup>4</sup> shows that Enfield had 484 children aged 0–5 with an Education, Health and Care Plan (EHCP) as of January 2025 (academic year 2024/25), up from 430 as at January 2024 (2023/24).

The January 2025 total for the 0-5 age group comprises 5 children aged under 3, 50 aged 3, 162 aged 4 and 267 aged 5, indicating that demand associated with the highest levels of SEND increases sharply as children approach and enter statutory school age. The same dataset suggests that 17 of Enfield’s 0–5 cohort with EHCPs were recorded in non-maintained Early Years provision in January 2025 (2 under 3, 12 aged 3 and 3 aged 4, and none aged 5), with the highest non-maintained Early Years shares among younger children (40% of the under-3 cohort and 24% of three-year-olds), reinforcing the need for sufficient inclusive places and SEND-capable support in private, voluntary and independent Early Years settings.

Table 2.10 – Number of EHCPs at January each year, 0-5 age group

	2023/24	2024/25
Under 3	7	5
Age 3	51	50
Age 4	161	162
Age 5	211	267

Table 2.11 - % Change in Number of EHCPs from 2023/24 to 2024/25, 0-5 age group

	Enfield	London Regional	England National
Under 3	-28.57%	-19.51%	+10.81%
Age 3	-1.96%	-15.55%	-5.99%
Age 4	+0.62%	+2.63%	+4.88%
Age 5	+26.54%	+20.19%	+24.22%

### 2.3.2 SEN Support

SEN support captures children whose special educational needs are identified and being met through additional or different support, but who do not have an EHCP. DfE school census data<sup>5</sup> shows that, in Enfield, 207 children in the Early Years cohort were recorded as receiving SEN support in January 2025 (2024/25), equivalent to 3.2% of children in state-funded Early Years settings (up slightly from 206

<sup>4</sup> “Education, Health and Care Plans, Reporting Year 2025”, Department for Education, last modified 12 January, 2026, <https://explore-education-statistics.service.gov.uk/find-statistics/education-health-and-care-plans/2025>

<sup>5</sup> “Special educational needs in England”, Department for Education, last modified 2 October 2025, <https://explore-education-statistics.service.gov.uk/find-statistics/special-educational-needs-in-england/2024-25>

children, 3.1%, in January 2024). This rate is higher than the England average (2.4%) and slightly below the London average (3.5%).

In reception, 441 children were recorded as receiving SEN support in January 2025, representing 6.7% of reception pupils (up from 408 children, 6.2%, in January 2024); this is above both England (5.2%) and London (6.0%). As SEN support is recorded through the school census, it does not capture all children in private, voluntary and independent (PVI) childcare settings, but it provides a useful indicator of broader SEND-related demand beyond EHC plans—particularly the need for inclusive practice, targeted support and smooth transitions between childcare and school as children approach statutory school age.

Table 2.12 – SEN Support

Year	Phase	Enfield count	Enfield %	London % Regional	England% National
2023/24	Early Years	206	3.1	3.7	2.5
2024/25	Early Years	207	3.5	3.5	2.4
2023/24	Reception	408	6.2	6.0	5.3
2024/25	Reception	441	6.7	6.0	5.2

## 2.4 Characteristics of Children in Enfield

Enfield’s child population is shaped by a highly diverse resident community. Enfield Council reports that, in the 2021 Census, 40% of residents were born outside the UK, and the borough’s ethnic mix includes substantial White British (31.3%), Other White (20.8%), Black/Black British/Caribbean/African (18.3%), Asian/Asian British (11.5%), Mixed (5.9%) and Other ethnic groups (12.1%)<sup>6</sup>. For the childcare market, this increases the importance of culturally responsive provision (for example, inclusive practice around food, celebrations and family engagement) and of understanding how community networks influence take-up and preferences for different types of childcare.

Enfield is highly multilingual. The Council reports that 73.6% of residents aged three and over speak English as their main or only language, with Turkish (5.7%), Romanian (1.7%) and Bulgarian (1.7%) among the most widely spoken main languages after English; the Council also notes that over 90 languages are spoken as a main or only language. The 2021 Census headline report for Enfield provides additional detail on language, including that 13% of households contain no members with English as a main language. These characteristics affect both market management and delivery:

<sup>6</sup>“Annual Equalities Report 2024/25”, citing Census 2021, Enfield Council, accessed 10th January, Annual Equalities Report 2024 to 2025

families may require clear, accessible information about entitlements, fees and admissions, and providers need capacity to support children with English as an additional language (including strong early communication practice and effective partnership with parents).

Religion is a relevant factor for some families' childcare choices and expectations. Enfield Council reports that, at the time of the 2021 Census, Christianity was the most common religion in the borough (46.4%), followed by "no religion" (19.8%) and Muslim (18.6%). The Enfield Census headline report similarly notes that Christians remain the largest religious group (46%) and that the number of Muslims rose to 19% of the total, while 20% reported "no religion". For providers, this reinforces the importance of inclusive approaches that can accommodate faith-related needs where relevant (for example, dietary requirements or observance), even where provision is not explicitly faith-based.

Socio-economic need is an important driver of affordability pressures and patterns of take-up. Enfield Council reports that in 2023/24, 18% of children under 16 were living in relative low-income families, and that 30.5% of pupils were eligible for Free School Meals (up from 29.1% in 2022/23). The Council also reports that Enfield is the 74th most deprived local authority in England overall (out of 317) and the 9th most deprived London borough, referencing the Indices of Multiple Deprivation. These indicators are relevant to managing the childcare market because they increase the need to ensure sufficient funded places (including for disadvantaged families), to monitor where affordability may suppress demand, and to support families to navigate eligibility and application processes.

Working patterns affect demand for different session types (full day, part-time, flexible hours, and wraparound). Although Census data is not specific to parents only, it provides context on labour market conditions that shape childcare demand: the Enfield 2021 Census headline report states that 60.7% of residents aged 16+ were economically active in March 2021, and 55.9% were in employment (with 4.7% unemployed)<sup>7</sup>. The same report notes variation across the borough, with some areas having higher proportions of economically inactive people who are carers, experiencing long-term illness or students. For childcare sufficiency, this supports planning for a mixed market offer: stable part-time places alongside provision that can support working parents (including longer days and predictable patterns), and targeted engagement where families are more likely to be out of work or have caring responsibilities.

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<sup>7</sup>"2021 Census: The Enfield Picture", Enfield Council, accessed 10th January 2026, 2021 Census - Headline data

## 2.5 Changes to the Population of Children in Enfield

Enfield’s Draft Local Plan housing trajectory<sup>8</sup> indicates a marked increase in housing delivery over the plan period, which is likely to increase the number of children living in the borough, and therefore the demand for childcare.

Over the next five years (2025/26–2029/30), the trajectory projects around 5,618 net additional homes in total. Based on identified sites, the largest concentrations of housing delivery in 2025/26–2029/30 are expected in Upper Edmonton (1,357 homes), Ridgeway (656), Carterhatch (384), Edmonton Green (312) and Southgate (256), suggesting these areas are most likely to see the strongest housing-led increases in the local population and childcare demand. Key developments contributing to this include Meridian Water (Willoughby Lane/Meridian Way) (709 homes), the Former Chase Farm Hospital site (369), Edmonton Green Shopping Centre (280), the Hoe/Eastfield/Cherry/Bouvier estates (240), and Southgate Office Village (216).

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<sup>8</sup> “Housing trajectory and 5 year housing land supply excel file”, Enfield Council, October 15 2025, <https://www.enfield.gov.uk/services/planning/new-enfield-local-plan#stage-3-hearing-statements>

### 3. Supply of Childcare

#### 3.1 Number of Early Years Providers and Places

As of 2025, there are 289 registered Early Years providers operating across the London Borough of Enfield, offering a diverse mix of provision types to meet the needs of local families. In total, these providers offer approximately 6,859 childcare places across the borough, contributing to a broad and varied childcare market that supports parental choice and accessibility.

Two datasets inform Enfield’s Early Years provider landscape: one drawn from local authority records<sup>9</sup> and one from Ofsted’s national statistics<sup>10</sup>, as recommended in the London CSA template.

Local authority records indicate that, as of January 2026, Enfield settings include 50-day nurseries, 140 childminders, 46 pre-school playgroups, 6 nursery units within independent schools, 21 school-based nursery classes, 22 after-school and breakfast clubs, and 4 holiday schemes.

This dataset captures a broader range of locally used provision types, including school-based and wraparound childcare, which are not always separately identified in national datasets.

**Table 3.1 – Total childcare supply in Enfield, January 2026 (local authority records)**

Childcare Type	Number of settings
Day nursery	50
Childminders	140
Pre-school playgroup	46
Nursery units of independent schools	6
School nursery	21
Holiday playschemes	4
After school and breakfast clubs	22
<b>Total</b>	<b>289</b>

Nationally comparable data is provided by Ofsted, which publishes annual statistics on registered childcare providers and places, alongside inspection outcomes and sector movement. As of 31 August 2025, Ofsted recorded 639 childcare providers in Enfield. Of these, 285 providers were registered on the Early Years Register (EYR), offering 6,859 registered Early Years places, with a further 354

<sup>9</sup> London Borough of Enfield, Early Years Portal: Childcare Provider Directory, accessed 25th January 2026, <https://earlyyearsportal.enfield.gov.uk/Synergy/Live/SynergyWeb/Enquiries/Search.aspx?searchID=55>

<sup>10</sup> Ofsted. Childcare Providers and Inspections as of 31 August 2025. (2025) <https://www.gov.uk/government/statistics/childcare-providers-and-inspections-as-at-31-august-2025>

providers registered outside the EYR. This dataset reflects the regulatory status of settings and is used as the primary source for London-wide and national benchmarking.

**Table 3.2 – Registered childcare providers and places in Enfield, August 2025 (Ofsted data)**

	As of 31st August 2025,
Total childcare providers	639
Early Years Register (EYR) providers	285
Registered Early Years places	6859
Non-EYR providers	354

Compared with the Ofsted data from the previous year<sup>11</sup>, the childcare market shows a modest contraction. Between August 2024 and August 2025, the total number of registered providers fell by 34, while the number of EYR providers decreased by 14. Over the same period, registered Early Years places reduced by 115, reflecting a combination of provider exits and reductions in registered capacity.

**Table 3.3 – Change in childcare providers and places in Enfield, 2024–2025 (Ofsted data)**

	As of 31st August 2024,	As of 31st August 2025,	Net change
Total childcare providers	673	639	-34
Early Years Register (EYR) providers	299	285	-14
Registered Early Years places	6974	6859	-115
Non-EYR providers	374	354	-20

While the two datasets differ in scope and classification, they present a consistent picture of a diverse but slightly contracting childcare market. Childminders and school-based provision continue to account for a significant proportion of overall supply. Used together, local authority and Ofsted data provide a robust basis for assessing childcare sufficiency and informing strategic planning, while recognising the different purposes each dataset serves.

### 3.1.1 Early Years Register (EYR)

Within the Early Years Register, provider numbers declined from 293 to 285, a net reduction of 8 providers between March and August 2025. This change was the result of 5 new joiners and 13

<sup>11</sup> Ofsted, Childcare Providers and Inspections as at 31 August 2024 (2024), <https://www.gov.uk/government/statistics/childcare-providers-and-inspections-as-at-31-august-2024>

leavers, indicating ongoing churn within the regulated Early Years market. Registered Early Years places also decreased, falling from 6,976 to 6,859, a net loss of 117 places.

The reduction in EYR places was driven primarily by changes within childcare on non-domestic premises, where a net loss of 80 places was recorded. Smaller net reductions were also observed among childminders, with a net loss of 37 places, and childcare on domestic premises, where provider numbers and places remained negligible and unchanged. No change was recorded for home childcares on the Early Years Register during this period.

### 3.1.2 Provision not on the Early Years Register

Provision not on the Early Years Register showed limited overall movement. The number of non-EYR providers reduced slightly, contributing to the overall net decline in provider numbers, but without any material impact on Early Years place capacity. As in previous years, changes in this part of the market largely reflect normal provider turnover rather than shifts in demand or regulatory compliance.

### 3.1.3 Summary

Taken together, the data indicates that between March and August 2025, Enfield's childcare sector remained broadly stable, with incremental reductions in provider numbers and registered places rather than structural change. The scale of joiners and leavers observed during the period is consistent with normal market churn and does not, in itself, suggest immediate risks to childcare sufficiency. However, the continued net loss of Early Years places—particularly within group-based provision—reinforces the importance of ongoing monitoring of market sustainability, especially in the context of wider demographic change and falling demand among younger age cohorts.

### Addendum: Movement in the Childcare Sector March 31<sup>st</sup>, 2025 –August 31<sup>st</sup>, 2025 (Appendix 2)

Between March and August 2025, Enfield's childcare sector experienced a modest level of churn, with small net reductions in both provider numbers and registered Early Years places. Overall, the pattern of movement indicates a largely stable but gradually contracting market, rather than sudden or disruptive change.

Across all registers, the total number of registered childcare providers decreased from 652 to 639, representing a net reduction of 13 providers over the period. Over the same timeframe, the number

of registered Early Years places fell by 117 places, from 6,976 to 6,859. This net change reflects normal sector turnover, with 19 joiners and 32 leavers recorded across all types of provision.

### 3.2 Vacancies

Understanding the level of available childcare places across the borough is essential to assessing overall sufficiency. Vacancy data provides an indication of the current balance between supply and demand, as well as the flexibility of the local childcare market. For this assessment, vacancy data has been drawn from consultation with providers, offering a snapshot of availability across different provider types and age groups.

A vacancy in this context is defined as a place that could realistically be used by a child, taking account of staffing ratios, operating hours, and sessional patterns. Part-time or occasional sessions (e.g. one afternoon per week) were excluded from this count.

A total of 15 providers responded to questions to current capacity and vacancies. This represents a small proportion of the total registered Early Years settings in Enfield; therefore, these findings should be viewed as an illustrative snapshot rather than a fully representative borough-wide view. Of these:

- **60% (9 providers)** reported that they currently have vacancies, with available places in these settings ranging from 1 to 30, with notable outlier reporting 120 vacancies.
- **40% (6 providers)** reported that they are currently full and have no available spaces.
- **Comparative Insight**  
Whilst over half of the respondents reported vacancies, qualitative data suggests these are not evenly distributed or always accessible. Some settings reported vacancies for the first time due to increased competition from school nurseries and recent funding changes. There is a clear age-related disparity; although over 90% of providers cater to 2-4-year-olds, only 27.27% offer provision for children aged 5 and over, implying that vacancies are heavily concentrated in the early years segment rather than in the much-needed wraparound care for older children. The existence of physical space does not always equate to 'functional' capacity for all families. Despite reported vacancies, 33.33% of providers turned away children with SEND in the last year, citing staffing ratios (88.89%) and the inability to provide the required 1-1 support as challenging hurdles.

These findings suggest a childcare market where capacity is under pressure in high-demand segments. The contrast between reported vacancies in some settings and the prevalence of long-term waiting lists, with some running until December 2026, highlights a mismatch between available physical spaces and the specific needs (age, timing and SEND support) of Enfield families.

### 3.3 Atypical Hours

Atypical hours provision refers to childcare offered outside standard operating times (typically 8am-6pm on weekdays), including early mornings, evenings, weekends, or overnight care.

Consultation findings and Family Information Service records indicate that a minority of providers offer care during atypical hours, with such flexibility primarily concentrated among childminders. Group-based settings, including day nurseries and preschools, generally operate within standard hours due to staffing ratios, funding limitations, and regulatory constraints.

The 2025 consultation reveals that whilst true atypical flexibility (weekends/overnight) is non-existent in the sample, a negligible number of providers offer slight extensions to standard hours.

- **Survey Discrepancy:** In the specific survey question asking for an outline of atypical capacity (Q9), no providers provided a response. However, data from other sections of the consultation, such as fee structure and interviews, indicate that a very small number of settings offer marginal extensions, with at least one provider operating from 7.30 am to 6.30 pm to accommodate parents arriving just before 8 am and leaving slightly after 6 pm.
- **Absence of Weekend/Overnight Care:** Despite these marginal weekday extensions, no providers reported offering weekend, late evening, or overnight sessions. This confirms that provision remains firmly anchored to the standard working week.
- **Parental Barrier:** 50% of parent respondents identified the lack of provision aligning with irregular work patterns as a barrier, contributing to the 66.67% reliance on informal care from family and friends.

The reluctance to expand into true atypical hours is driven by significant operational hurdles:

- **Sustainability Pressures:** 100% of providers reported that current funding rates do not fully meet their costs, making the higher staffing costs associated with atypical hours financially unviable.

- **Impact on Workforce Participation:** The lack of formal flexibility creates an employment barrier. One respondent explicitly noted that their partner could “work more hours” if suitable, funded childcare were available during non-standard times.

Although a few providers offer marginal extensions to the 8 am-6 pm window, the borough-wide supply of true atypical care remains severely limited and difficult to assess fully due to low response rates. To address this, further engagement strategies has been outlined in **Section 9.3** to better map the demand for non-standard childcare.

## 4. Funded Early Education

### 4.1 Introduction to Funded Early Education

Funded early education refers to the statutory childcare entitlements funded by central government and delivered through local authorities, which provide a set number of free childcare hours for eligible young children. In Enfield, funded early education is delivered through a mixed market of approved Early Years providers, including childminders, day care, playgroups, pre-school, nursery (school or private) and wraparound provision (breakfast and afterschool clubs).

This funding is available through the following streams:

- 15 hours per week for eligible working parents of children aged 9 months to 2 years, as part of the national phased expansion of funded early education
- 15 hours per week for eligible 2-year-olds, including children from lower-income households and some children with additional needs
- 15 hours per week for all 3- and 4-year-olds (the universal entitlement)
- 30 hours per week for eligible working parents of 3- and 4-year-olds (the extended entitlement)

These entitlements are typically available for 38 weeks per year, though some providers offer them on a stretched basis across more weeks. While the funded hours must be provided free at the point of delivery, providers may charge for additional hours or optional services, such as meals or extended sessions. This section assesses the availability, take-up and accessibility of funded early education in Enfield, as well as whether current provision meets the needs of local families.

### 4.2 Proportion of 2-Year-Old Children Entitled to Funded Early Education

Table 4.1 – Proportion of 2-year-olds eligible for funded early education in Enfield (2024–2025)

	Year	Eligible amount of 2-year-olds	Total amount of 2-year-olds	Percentage eligible
2-year-olds	2025	1355	4100	33.0%
	2024	1417	4200	33.7%

In 2025, 1,355 children in Enfield were eligible for early education entitlements among 2-year-olds relative to the approximately 4,100 children present in the borough. Enfield saw a reduction in the number of 2-year-olds eligible for targeted funded early education entitlements from the previous

year, decreasing by 0.7%. This reduction also factors in the decrease in total population of early youth and 2-year-olds, accounting for Enfield’s reduction in 2-year-olds by approximately 100 children (2.4%).

Table 4.2 – Comparison of 2-year-old funded entitlement participation by selected wards (disadvantaged vs working families, FTE)

Ward	2-year-old Disadvantaged (FTE)	2-year-old Working (FTE)	Difference
Enfield Lock	54	30	-24
Haselbury	58	28	-30
Jubilee	95	48	-47
Southgate	34	80	+46
Highfield	8	20	+12

Examining ward-specific data, participation among eligible 2-year-olds through working family entitlement exceeds that of those accessing the disadvantaged offer. Unlike the universal entitlement for 3- and 4-year-olds assessed below, eligibility for 2-year-olds is targeted primarily at lower-income households and vulnerable groups. Thus, the distribution of eligible children is likely to reflect the underlying socio-economic patterns across the borough.

While overall participation varies by ward in line with population distribution, the balance between disadvantaged and working family participation differs across the borough. In higher-demand areas such as Jubilee, Haselbury and Enfield Lock, participation among disadvantaged 2-year-olds exceeds that of working families, indicating a greater concentration of low-income households. In contrast, wards such as Southgate and Highfield show higher participation among working families, reflecting different local demographic profiles. This variation suggests that patterns of engagement with funded early education are shaped by underlying socio-economic differences, rather than a uniform level of access across all areas.

These statistics represent the number of 2-year-old children eligible on the basis of income, not because of disability or being looked after. However, this decline in eligibility is consistent with the reduction among other age groups as well, as Enfield has experienced both decreases in population among youth and take-up rates for funded early education. This decline highlights the concern of Enfield’s youth demographics and should be monitored to ensure that sufficient childcare provision continues to meet the needs of eligible families as demand patterns change.

### 4.3 Take Up of Funded Early Education

Take-up of funded early education entitlements in Enfield have experienced slight declines but remains strong overall, particularly for the universal 3- and 4-year-old offer. As of 2025 census, 82.5% of eligible 3- and 4-year-olds were registered for their 15-hour entitlement, compared to 86.6% in 2024. Although participation remains high, this represents a relative decline year-on-year and will require continued monitoring to ensure eligible families are not facing emerging barriers to access.

Take-up of 2-year-old entitlements for families receiving additional support remains lower than for universal offers. In 2025, 64% of eligible 2-year-olds were registered for funded provision, compared to 67.5% in 2024. Although over 850 eligible children are accessing their entitlement, approximately one-third of eligible children are not participating. This gap highlights the importance of having sustained outreach, eligibility checking support, and partnership working with health and community services.

Analysis by ward of residence reveals higher levels of participation in wards such as Southbury, Enfield Lock and Jubilee, indicating that demand for childcare is geographically concentrated rather than evenly distributed. When considered alongside provider-based data, patterns suggest that children may access provision outside of their home wards, with 9.0% of total take-up occurring with children as attending provision in Enfield while residing outside of the borough.

In summary, Enfield demonstrates reasonable engagement with funded early education entitlements, particularly among 4-year-olds. However, the year-on-year decline across all cohorts indicates that take-up cannot be assumed to remain stable. Continuous monitoring of participation and targeted engagement with eligible 2-year-olds remains important toward ensuring that all children benefit from early education provisions.

#### **4.4 3- and 4-Year-Old Funded Entitlement Applications**

Take-up of the universal funded entitlement among 3- and 4-year-olds remains substantially higher than for 2-year-olds but also shows a modest year-on-year decline across all geographies.

In Enfield, overall registration for the universal entitlement decreased from 86.6% in 2024 to 82.5% in 2025. This mirrors a reduction across London, where take-up fell from 87.2% to 85.7%, and a smaller decline nationally, from 93.6% to 93.1%.

When disaggregated by age, registration among 3-year-olds in Enfield fell from 80.4% in 2024 to 76.4% in 2025, remaining below both the London average (82.2%) and the national average (90.6%) in 2025. Among 4-year-olds, take-up in Enfield remained high but declined from 92.9% to 88.8% year on year. This level of participation is broadly comparable with London (89.5% in 2025), though lower than the national rate (95.6%).

**Table 4.3 – Universal entitlement (3 and 4-year-olds)**

	Geography	2024	2025	Percentage point change
3-year-olds	Enfield	80.4%	76.4%	-4.0
	London	83.4%	82.2%	-1.2
	England	91.3%	90.6%	-0.7
4-year-olds	Enfield	92.9%	88.8%	-4.1
	London	90.9%	89.5%	-1.4
	England	95.9%	95.6%	-0.3

When analysing ward-level participation in the 3- and 4-year-old universal and extended entitlements, a disproportionate share of children accessing provision is concentrated in a small number of areas. Southgate, Jubilee and Whitewebbs account for approximately 7.2%, 7.0% and 7.0% of total participation respectively, representing the highest levels of use across the borough. In contrast, wards such as Grange Park and Highfield contribute significantly smaller shares, at around 2.2% and 1.8% respectively. This distribution broadly reflects underlying population patterns across the borough, understanding that child populations are not evenly distributed across all wards.

Overall, these figures indicate that the majority of eligible children in Enfield continue to be registered for funded early education, but that take-up across both targeted and universal entitlements has reduced slightly between 2024 and 2025. As a snapshot assessment, this provides a baseline for future monitoring rather than a full exploration of causality.

#### **4.5 Providers Offering Funded Early Education Places**

A broad provider base across the private, voluntary and independent (PVI) sector, and state-funded schools finance Enfield’s early education delivery. Universal 15-hour entitlements remained stable from 2024 to 2025, there were 168 PVI providers and 70 state-funded schools that delivered provision for 3- and 4-year-olds.

**Table 4.4 – Number of Providers Delivering Funded Early Education Entitlements**

		Private, Voluntary and Independent (PVI) Providers		State-Funded Schools	
	Population	2024	2025	2024	2025
Universal	Total	164	168	70	70
	3-year-olds	160	161	47	49
	4-year-olds	125	128	70	70
Working Parents	3-year-olds	146	142	31	33
	4-year-olds	100	102	30	35
Families Receiving Additional Support	2-year-olds	120	112	13	15

Delivery of the extended 30-hour entitlement for working parents remains concentrated within the PVI sector. In 2025, 142 PVI providers delivered extended provision for 3-year-olds and 102 for 4-year-olds, compared to the 33 and 35 state-funded schools respectively. This pattern represents the significant role of the PVI market in offering flexible provision that supports working families.

For the targeted 2-year-old entitlement for families receiving additional support, 112 PVI provides and 15 state-funded schools delivered funded places in 2025. Overall, the provider landscape demonstrates strong engagement across entitlement groups, with the PVI sectors playing the most significant role in delivery while schools continue to contribute to universal provision.

#### 4.6 Comparing Take Up of Funded Early Education Over Time

From 2022 to 2025, take-up rates analyses indicate a sustained, steady decline in participation in the universal 3- to 4-year-old entitlement. Overall, take-up rates for universal entitlement fell by roughly 9% over a 4-year period, suggesting that while participation rates remain comparatively high, engagement with universal entitlement has weakened over time.

Table 4.5 – Take-up of Funded Early Education Entitlements in Enfield

	Population	2022	2023	2024	2025
Universal	Total	91.2%	90.0%	86.6%	82.5%
	3-year-olds	86.9%	83.4%	80.4%	76.4%
	4-year-olds	95.2%	96.5%	92.9%	88.8%
Families Receiving Additional Support	2-year-olds	58.8%	61.5%	67.5%	64.0%

Assessing universal entitlement by age, decline is reflected in both cohorts. Take-up among 3- and 4-year-olds fell by 10.5% and 5.2% respectively over a 4-year period, potentially reflecting changing patterns for entry into early education or broader demographic and labour market influences.

In contrast, take-up of the targeted 2-year-old entitlement for families receiving additional support has shown an overall improvement across the 4-year period. Participation from 2022-25 has increased by 5.2%, indicating improved engagement among disadvantaged families.

#### 4.7 Comparisons to Other Local Authorities

When comparing to Enfield’s take-up of entitlement to neighbouring boroughs, London, and England as a whole, 3- and 4-year-old entitlement is slightly below both the London and national averages. However, this take-up is relatively similar to neighbouring boroughs, signalling geographic discrepancies in rates of entitlement use.

Table 4.6 – Percentage of Eligible Children Registered for Funded Early Education in Enfield and Comparator Authorities (2025)

	Population	Enfield	Barnet	Waltham Forest	London	England
Universal	Total	82.5%	84.6%	84.3%	85.7%	93.1%
	3-year-olds	84.1%	84.1%	80.6%	82.2%	90.6%
	4-year-olds	88.8%	85.2%	88.2%	89.5%	95.6%
Families Receiving Additional Support	2-year-olds	64.0%	51.4%	53.4%	61.1%	65.2%

When looking within 3- and 4-year-old age groups, Enfield 3-year-old take-up is slightly lower than both London and England. Their 4-year-old participation remains comparatively strong (88.8%), however still slightly below the national average.

In contrast, take-up among targeted families with 2-year-old entitlement compares more favourably. Enfield (64.0%) performs above the London average (61.1%) and significantly above neighbouring boroughs such as Barnet (51.4%) and Waltham Forest (53.4%). This suggests that within the London area, Enfield has relatively strong engagement among disadvantaged families compared to local peers.

Overall, Enfield’s universal entitlement take-up is modestly below London’s and England’s regional and national averages respectively, however it’s performance on the disadvantaged 2-year-old offer is comparatively strong.

## 5. Prices

### 5.1 Prices of Early Years Childcare

This section reports the prices charged by Early Years provision in Enfield, based on the provider survey. Whilst 21 providers responded to the pricing question (Q4), one response from a primary school was excluded from this specific Early Years analysis as it pertained to school-age wraparound care. Consequently, this analysis is based on a sample of 20 providers.

It should be noted that this sample of 20 providers is small relative to the total childcare market in the borough; however, the Local Authority considers this sample to be broadly typical of the core Early Years market in Enfield. This is because the sample represents the borough’s primary provision types: childminders (59.09%), full-day care settings (36.36%), and pre-schools (13.64%).

Providers were asked to state how much they charge per hour or per session (Q4). Since the responses varied in formats – hourly rates, daily rates, session rates, and day rates without specified hours – all figures were converted to a standardised hourly equivalent before calculating the mean. When conversion was necessary, the following assumptions were applied:

- Daily rates without a specific duration were divided by 10 hours (the standard full childcare day).
- Session fees without stated duration were divided by 3 hours (a typical morning or afternoon session).
- Where a range was provided (e.g., £8 - £10), the midpoint was used. Where fees were specified separately by age group, the arithmetic mean of those fees was used.

Note: Converted figures are *marked* with an asterisk (\*) in Table 5.1 below. The mean should be read alongside the range, as several outliers, particularly £15/hr childminder rate, pull the average upward.

Table 5.1 – Provider Hourly Rate Data (Q4, 2025 Survey)

#	Original Response	Standardised Hourly Rate	Note
1	£123 full day (7:30–18:30)	£11.18*	11 hours duration
2	£15 per hour	£15.00	Outlier (Highest)
3	£80 per day	£8.00*	10-hour assumption
4	£123 (assumed daily)	£12.30*	10-hour assumption
5	£9 per hour	£9.00	
6	£8 per hour	£8.00	Modal Rate

7	£80 per day / £50 half day	£8.00*	10-hour assumption
8	£9 per hour	£9.00	
9	£8.00 per hour	£8.00	Modal Rate
10	£8 per hour	£8.00	Modal Rate
11	£80 per day, 8-6	£8.00*	10 hours duration
12	£6.50	£6.50	
13	£8.00 per hour	£8.00	Modal Rate
14	£7–£10 per hour	£8.50*	Midpoint used
15	£8/hr (3 yrs+) / £9/hr (2 yrs)	£8.50*	Mean of age rates
16	£8–£10	£9.00*	Midpoint used
17	£12 per hour	£12.00	
18	£104 full day	£10.40*	10-hour assumption
19	£8.50 per hour	£8.50	
20	£6/hr (rising to £7/hr from January)	£6.00	Lowest

\* Denotes figures where assumptions were applied during conversion (see Methodology above).

## 5.2 Findings

### 5.2.1 Current Pricing and Market Trends

The following table and analysis summarise the pricing data derived from the survey.

Table 5.2 – Key Pricing Metrics (Early Years)

Metric	Value
Number of responses	20 (Early Years specific)
Mean hourly rate (arithmetic average)	£9.02 per hour
Minimum hourly rate observed	£6.00 per hour
Maximum hourly rate observed	£15.00 per hour
Most common rate	£8.00 per hour (7 providers)
Median hourly rate	£8.50 per hour

The mean hourly rate for Early Years childcare in Enfield, based on the provider survey, is £9.02. The most common price point is £8.00 per hour, primarily driven by the childminder sector. Prices show significant variance, ranging from £6.00 to a maximum of £15.00 per hour, with the highest rates (£12.00–£15.00) exclusively associated with private childminders. Full-day care settings generally reported daily rates that equate to an hourly cost between £8.00 and £11.18 when standardised.

### 5.2.2 Financial Sustainability and Funding Disparities

Qualitative feedback reveals that these market prices are under intense pressure. Notably, one provider at the lowest current price point (£6.00) has already scheduled a rate increase to £7.00 from January to keep pace with rising operational costs.

Further, 54.55% of providers reported that current government funding does not meet the needs of children in their care. Specific concerns include:

- **Funding Gaps:** Several providers noted that the 3-4-year-old funding rate is insufficient, with one describing it as a “half rate” compared to the 9-month-old entitlement, despite higher resource requirements.
- **Operational Strain:** Due to the gap between the government rate (£6.26 in one case) and their standard hourly charge, one provider indicated they would no longer offer funded places for 3-4-year-olds.
- **Mitigation Strategies:** To remain sustainable, some settings have begun asking for voluntary contributions towards consumables or are staggering intakes of funded 3-4-year-olds to avoid financial deficit.

### 5.3 Prices of School Age Childcare

The provider survey collected pricing data from all provider types. However, school-age childcare provision was sparsely represented: only one primary school (classified under ‘Other’) responded, accounting for 4.55% of total respondents, and no dedicated holiday playscheme providers participated.

Due to the extremely limited number of school-age providers in this sample, it is not possible to calculate a statistically meaningful mean price for the borough. Unlike the Early Years sample, the Local Authority does not consider this specific school-age sample to be typical of the wider provider market in Enfield. These figures are provided for transparency only and should not be used as representative benchmarks.

#### 5.3.1 After-School and Before-School Clubs (Daily Rate)

One primary school provided data for this category, reporting a charge of £25.00 per afternoon session. No other specific daily rates for dedicated wraparound clubs were captured in this survey. The Local Authority intends to address this significant data gap by conducting targeted engagement with school-based and private wraparound providers in future assessments.

### 5.3.2 Holiday Clubs and Playschemes (Weekly Rate)

No holiday playscheme providers responded to the survey. Consequently, no weekly rate data is available for this category at this time. To provide more comprehensive picture for parents, the Local Authority will look to supplement this with data from the Family Information Service (FIS) and Ofsted registration records.

### 5.3.3 Childminders Providing Wraparound Care (Hourly Rate)

Of the 22 survey respondents, six providers (27.27%) indicated that they offer childcare for children aged 5 and over through wraparound and extended care (Q2). For these childminders, the mean price is consistent with the broader childminder market trends reported in **Section 5.1** (mean of £9.02 per hour), with individual fees ranging from £6.00 to £15.00 per hour. Given the dual function of these providers, serving both Early Years and school-age children, their rates are integrated into the primary analysis in **Section 5.1**.

### 5.3.4 Meals, Snacks, and Consumables

The survey results indicate that standard pricing may not always cover the full cost of meals and snacks. Qualitative feedback from providers highlighted that rising operational costs are making the inclusion of these items difficult. Notably, some providers have reported asking for voluntary contributions towards consumables, which typically include snacks and meals, to remain financially sustainable. Parents should therefore clarify with individual providers whether these costs are included in the quoted or hourly rates.

## **5.4 Comparing Childcare Prices Over Time**

Data from previous Enfield CSA reports enables a three-point longitudinal comparison spanning 2022 to 2025. The table below draws on fee range data collected in the 2022 and 2024 CSA reports, and the 2025 hourly rate data calculated from the provider survey (see **Section 5.1**). Where 2022 and 2024 data were reported as most frequent values and ranges rather than arithmetic means, these are represented on that basis for consistency with the original source.

Table 5.3 – Childcare Prices in Enfield: 2022, 2024, and 2025 Comparison

*Per Hour (0-4 Early Years Providers)*

Metric	2022 CSA	2024 CSA	2025 CSA	Change 2022-2025
Lowest recorded	£5.00	£3.50	£6.00	↑ £1.00

Highest recorded	£12.00	£9.50	£15.00	↑ £3.00
Most frequent / mean	£7.00	£7.50 – £8.00	£9.02 (mean)	↑ £2.00

*Per Session (0-4 Early Years Providers)*

Metric	2022 CSA	2024 CSA	2025 CSA	Change 2022-2025
Lowest recorded	£12.00	£35.00	N/A*	—
Highest recorded	£20.00	£52.00	N/A*	—
Most frequent	£15.00	£35.00	N/A*	↑ £20.00

*Per Day (0-4 Early Years Providers)*

Metric	2022 CSA	2024 CSA	2025 CSA	Change 2022-2025
Lowest recorded	£21.00	£65.00	N/A*	—
Highest recorded	£99.50	£75.00	N/A*	—
Most frequent	£60.00	£65.00	N/A*	↑ £5.00

The 2025 CSA survey standardised all responses to hourly equivalents. Session and day rate were converted rather than reported separately; direct comparison is therefore not available.

#### 5.4.1 Analysis

Hourly rates for Early Years childcare in Enfield have risen consistently across all three reporting periods. The most frequently cited hourly rate increased from £7.00 in 2022 to £7.50-£8.00 in 2024, and the 2025 provider survey mean stands at £9.02, representing an overall increase of approximately £2.00 per hour since 2022. This trajectory is consistent with cost-of-living pressures and rising staff wage bills faced by providers across the sector.

The 2024 report noted that the highest recorded hourly rate had not increased as dramatically as mid-range rates, suggesting that mid-range providers were adjusting fees more significantly, possibly to remain competitive or to absorb rising operational costs. By 2025, however, the highest recorded rate has risen to £15.00 per hour, indicating that premium providers have also increased their charges, widening the overall range considerably.

Session fees showed the most significant increase between 2022 and 2024, rising from a most frequent rate of £15.00 to £35.00. It potentially reflects a shift in how settings structure and price sessional care, or an increase in the number of hours included per session. Day rates increased more modestly, from £60.00 to £65.00 at the most frequent level. Direct comparison for session and day rates is not available for 2025 as the survey standardised responses to hourly equivalents.

It is worth noting that providers surveyed in 2025 consistently raised concerns that government-funded entitlement rates do not keep pace with their actual hourly charges (Q30). Several noted that the funded rate leaves them operating at a loss, with one provider stating they would no longer offer 3-4-year-old funded places as a result. These price trends should be read alongside the funded entitlement rate set by the DfE when assessing market sustainability.

Table 5.4 – Tracking Framework for Future CSAs

Metric	2022	2024	2025 (this report)	2026 (to be collected)	2027 (to be collected)
Mean hourly rate	£7.00	£7.80-£8.18	£9.02	—	—
Hourly range	£5-£12	£3.50-£9.50	£6-£15	—	—
Most freq. session	£15.00	£35.00	N/A	—	—
Most freq. day rate	£60.00	£65.00	N/A	—	—

## 6. Quality of Childcare in Enfield

### 6.1 Ofsted Inspection Grades

Ofsted inspection outcomes provide an important indicator of the quality of Early Years provision available locally and form a key component of the assessment of childcare sufficiency. Inspection judgements reflect providers' most recent full inspection under the Early Years Register and offer insight into the standards experienced by children accessing formal Early Years provision.

As of 31 August 2025, Ofsted<sup>12</sup> reported that Enfield had 285 Early Years Register (EYR) providers, of which 213 had received a full inspection and judgement at their most recent inspection. Among inspected providers, the overall quality of Early Years provision in the borough remains high.

98% of inspected providers were judged to be Good or Outstanding, with 86% receiving a Good judgement and 12% rated Outstanding. A small proportion of providers (2%) were judged as Requires Improvement, and no inspected providers were judged Inadequate.

Table 6.1 – Ofsted inspection outcomes for Early Years Register providers in Enfield, as of 31 August 2025

Inspection judgement	Number of providers	Percentage of inspected providers
Outstanding	26	12%
Good	183	86%
Requires improvement	4	2%
Inadequate	0	0%

This quality profile indicates that the vast majority of Early Years provision accessed by children in Enfield meets or exceeds Ofsted's expected standards. While not all registered providers have yet received a full inspection, the available evidence suggests a strong and stable quality baseline across the inspected sector.

Table 6.2 – Early Years Register providers in Enfield: inspection outcomes by provider type, 2024 and 2025

	EYR Providers (total)	Grade 1	Grade 2	Grade 3	Grade 4	Total number inspected
		Outstanding	Good	Requires Improvement	Inadequate	

<sup>12</sup> "Childcare providers and inspections as at 31 August 2025", Ofsted, November 19 2025, <https://www.gov.uk/government/statistics/childcare-providers-and-inspections-as-at-31-august-2025>

Childminders in 2024	163	9	110	2	2	123
Early Years settings in 2024	136	13	78	3	1	95
<b>2024 Total</b>	<b>299</b>	<b>22</b>	<b>188</b>	<b>5</b>	<b>3</b>	<b>218</b>
Childminders in 2025	151	10	102	3	0	115
Early Years settings in 2025	134	16	81	1	0	213
<b>2025 Total</b>	<b>285</b>	<b>26</b>	<b>183</b>	<b>4</b>	<b>0</b>	<b>213</b>

Compared to 2024, the overall number of inspected providers declined slightly in 2025 (from 218 to 213), with a small decrease in both Outstanding and Good ratings. While the overall proportion of providers judged Good or Outstanding remained high in both years, there was a small shift in the distribution of inspection grades. The number of Outstanding judgements increased marginally (from 22 to 26), while the number of providers judged Good reduced slightly (from 188 to 183).

Among childminders, the number of inspected providers fell from 123 in 2024 to 115 in 2025. Despite this reduction in inspection volume, inspection outcomes remained strong, with the vast majority of childminders continuing to be judged Good or Outstanding.

## 6.2 Comparing Inspection Grades Over Time

Over the past year, Enfield’s childcare market has remained stable in both the number of providers and the overall quality profile. Between August 2024 and August 2025, the number of Early Years Register providers decreased from 299 to 285 along with the number of available childcare places (6,974 to 6,859).

Table 6.3 – Overall effectiveness of active Early Years registered providers at Enfield’s most recent inspection

		Number of Providers					Percentage of Inspected Providers			
	EYR Provider s	Total Number Inspected	Outstandin g	Good	Requires Improvement	Inadequat e	Outstandin g	Good	Requires Improvement	Inadequat e
2024	299	218	22	188	5	3	10	86	2	1

2025	285	213	26	183	4	0	12	86	2	0
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Despite this small fluctuation, quality standards have been maintained or improved. The proportion of Good and Outstanding settings remains in line with, or slightly above, the London average. In 2025, a very small minority have been judged as Requires Improvement (4) and none have been judged Inadequate, a small improvement in standards from 2024. The proportion of inspected providers judged Good or Outstanding increased from 96.3% in 2024 to 98.1% in 2025, representing a 1.8% improvement.

These outcomes reflect strong local quality assurance arrangements, ongoing provider engagement through Enfield’s Early Years Quality and Inclusion Team, and the continued commitment of settings to professional development, safeguarding, and inclusive practice.

## 7. Parents Views of Sufficiency of Childcare in Enfield

As part of Enfield’s CSA, PAG sought the views of parents and carers to understand their experiences of accessing childcare in Enfield. This consultation aimed to capture a diverse range of perspectives from families using, seeking, or unable to access childcare, including those with children with SEND. Feedback was collected through an online survey and through a series of focus groups. These sessions were set up to explore topics and themes from the survey in more detail.

### 7.1 Parent Consultation: Survey

A total of three parents and carers completed the survey, representing families with children aged between 2 and 12 years old across Enfield. The respondent cohort reflects the diverse demographic makeup of Enfield, including Asian (Pakistani, Other) and mixed other, with a mix of Buddhist, Muslim, and non-religious households. Currently, there is a heavy reliance on informal childcare (66.67%) provided by family and friends, with formal usage limited to day nursery (full or part-time).

Emerging themes from the survey included:

- **Availability:** A barrier to identifying available care is the confusing terminology used by providers and the Council. Parents reported difficulty distinguishing between terms such as ‘nursery’, ‘daycare’, and ‘pre-school’, particularly when children are already in a school reception class. All respondents feel that the Enfield Council website must be made clearer to help families navigate funding applications and registration processes. Further, there is a noted lack of provision that aligns with irregular work patterns (50.00%), leaving parents who do not work standard hours struggling to find suitable placements.
- **Affordability:** Whilst reported annual expenditure varies, ranging from no spend (33.33%) to over £1,000 per year (33.33%), affordability is a universal concern. All respondents cited formal care as being “too expensive”. This financial pressure has a direct impact on parental employment; one respondent explicitly noted that their husband could work more hours if the family were able to access funded childcare places.
- **Accessibility and inclusion:** Systemic hurdles were reported regarding visa-related eligibility. Families on a Skilled Worker Visa noted that the requirement for both parents to be in employment to qualify for funding creates a barrier when one parent needs to stay home due to the high cost of care. For children with SEND, including those with

Autism and speech and language needs, accessibility is further limited by age thresholds (e.g., a child being 12 years old) and uncertainty regarding exactly what support they are eligible for.

- **Quality and satisfaction:** ‘Good quality’ (100.00%) was identified as the top priority by all respondents when selecting a provider. Some parents expressed hesitation in moving toward formal services due to doubts about the quality of provision or a preference for leaving their children with known individuals, such as family members, rather than strangers.
- **Flexibility and wraparound care:** There is a clear demand for more wraparound and holiday provision, with parents expressing an intent to use Ofsted-registered After School Clubs and Holiday Play Schemes within the next two years. Most families require core weekday hours (8 am – 6 pm), but the lack of ad hoc availability remains a challenge for balancing employment.

These findings will help to highlight areas where childcare provision is meeting family needs and where further development, or investment may be required.

## 7.2 Parent Consultation: Focus Groups

In addition to the parent survey, we planned to run a programme of parent focus groups to gather richer qualitative insight and explore the lived experiences behind the survey findings. Resources and materials were prepared in advance, including a discussion guide covering key themes such as access and choice, SEND inclusion, information and awareness, and views on future provision.

However, despite efforts to recruit participants, take-up was low and it was not possible to convene focus groups within the consultation timeframe. This limits the extent to which qualitative perspectives could be used to triangulate and add depth to the survey data. A mitigation strategy to address this gap, including options to strengthen engagement and collect qualitative insight through alternative channels, is set out through **Section 10** (Recommendations) as well as through **Appendix 3** (Parent Engagement Action Plan).

## 7.3 Other Local Intelligence

We have also reviewed a small set of local intelligence sources that capture parent voice in the public domain, including local news coverage, community discussions and parent-facing forums. This provides additional context alongside the survey findings, helping to triangulate emerging themes (for

example, affordability, availability, flexibility and inclusion) and surface any locality-specific concerns that may not be fully reflected in the survey responses. These sources are included for contextual reference:

- Local community and hyperlocal news coverage and commentary (e.g. Enfield Dispatch<sup>13</sup>, Enfield Chronicle, and Palmers Green Community), which can provide insight into issues affecting families and service availability across different parts of the borough.
- Enfield Council engagement and consultation platforms (including Let’s Talk Enfield<sup>14</sup> and the Council’s consultations “Have your say” pages), which provide established mechanisms for reaching residents and gathering structured feedback.
- Local family information and signposting services, including Informed Families<sup>15</sup> and associated childcare guidance, to identify common enquiry themes and strengthen routes for direct parent engagement.
- Family Hubs<sup>16</sup> / Start for Life and the Early Help Directory (Directory 4 All), which provide trusted touchpoints for engaging parents in person and digitally, including families less likely to respond to surveys.
- Existing parent forums and panels (including Enfield Parent and Carer Panels<sup>17</sup>) to support follow-up qualitative insight gathering through established co-design and feedback structures.
- SEND-specific engagement routes, including Our Voice<sup>18</sup> (the borough’s SEND parent carer forum) and Enfield SENDIASS, to ensure the views of families of children with SEND are captured through appropriate, accessible channels.

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<sup>13</sup>“Enfield Dispatch”, Enfield Dispatch, accessed 20<sup>th</sup> January 2026, <https://enfielddispatch.co.uk>

<sup>14</sup>“Let’s Talk Enfield”, Enfield Council, accessed 20<sup>th</sup> January 2026, <https://letstalk.enfield.gov.uk> [www.com](http://www.com)

<sup>15</sup> “Informed Families”, Enfield’s Family Information Service, accessed 20<sup>th</sup> January 2026, <https://www.enfield.gov.uk/childcare-information-service/informed-families>

<sup>16</sup>“Family Hubs”, Enfield Council, accessed 15<sup>th</sup> January 2026, <https://www.enfield.gov.uk/services/children-and-education/family-hubs>

<sup>17</sup> “Parents-Carers Panels”, Enfield Parenting Directory, accessed 15<sup>th</sup> January 2026 <https://enfieldparentingdirectory.co.uk/parents-carers-panels>

<sup>18</sup> “Our Voice Enfield”, Our Voice Enfield, accessed 20<sup>th</sup> January 2026, <https://www.ourvoicenfield.org.uk>

- Enfield’s Local Offer information<sup>19</sup> (Early Years SEND childcare guidance) to ensure qualitative follow-up reflects the practical choices and pathways available to families with additional needs.

These sources will be used both to strengthen the evidence base (through triangulation of issues being raised locally) and to inform a refreshed engagement approach, including targeted recruitment through trusted networks and settings.

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<sup>19</sup>“Finding and Funding Early Education and Childcare SEND”, Enfield Council, accessed 20<sup>th</sup> January 2026, <https://www.enfield.gov.uk/services/children-and-education/local-offer/early-years-0-to-5/finding-and-funding-early-education-and-childcare-send>

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## 8. Providers Views of Sufficiency of Childcare in Enfield

Through the consultation period, PAG engaged with childcare providers to gather their perspectives on childcare sufficiency in Enfield. This engagement aimed to understand provider experiences of current demand, capacity, workforce pressures, inclusion, and funding sustainability. Feedback was collected through an online survey and a series of 1:1 interviews, offering both quantitative insight and qualitative depth. Providers were encouraged to share open and honest reflections to help shape a realistic understanding of the local childcare market and to inform future planning.

### 8.1 Provider Consultation: Survey

A total of 22 providers completed the survey, representing a range of settings across the sector, including:

- Childminder (59.09%)
- Full day care setting (36.36%)
- Pre-school (13.64%)
- Other (4.55%)

The respondent who chose “other” specified “primary school” in additional comment. Responses were received from providers operating across Enfield, ensuring coverage across the borough.

Key themes emerging from the survey included:

- **Demand:** The majority of providers are operating at or near full capacity, with approximately 40% reporting no current vacancies. Waiting lists have increased slightly, with 47.62% of providers currently reporting a waiting list compared to 42.86% over the past 12 months. Demand for SEND places remains consistent, with 76.92% of providers having received at least one enquiry from families of children with SEND.
- **Affordability and funding:** Funding emerged as a significant concern across the sector. No respondents felt that the current level of funding fully meets the needs of children with SEND in their care, with providers citing insufficient rates, staffing cost pressures, and delays in accessing SENIF funding as key challenges.
- **Workforce:** Only 36.36% of providers felt they have sufficient staff with SEND experience to meet current need. Whilst autism and communication-focused training is well-

represented, confidence among staff is notably lower for sensory impairments and profound disabilities, suggesting a need for targeted workforce development.

- **Inclusion:** The majority of providers (86.67%) currently offer places for children with SEND. However, capacity remains limited, with most settings able to accommodate only one to three children with SEND per session. Staffing ratios, funding limitations, and access to specialist support were identified as the primary barriers to more inclusive provision.
- **Sufficiency:** Whilst 72.27% of providers plan to continue operating over the next five years, sustainability concerns were raised around funding rates and staffing costs. One provider indicated they would no longer offer funded places as the rate does not cover their hourly charge, highlighting potential risks to the sufficiency of provision across the borough.

This feedback provides a valuable indication of how providers view the balance between supply and demand, and the factors influencing their ability to meet local needs.

#### 8.1.1 Current Provider Landscape

The majority of respondents offer provision for the youngest children, with 77.27% providing early education and childcare places for children aged 0-2, and 90.91% accommodating 2-year-olds. The same proportion (90.91%) also provide places for children aged 3-4. However, provision for older children is considerably more limited, with only 27.27% of respondents offering early education and childcare for children aged 5 and over (wraparound or extended care).

The majority of providers (72.73%) operate their settings all year round, with only 27.27% offering term-time provision only. Whilst most settings align with standard hours, fee disclosure data reveals a level of 'hidden flexibility'. Although no providers formally outlined atypical capacity in the specific survey question (Q9), individual responses to fee structures (Q4) confirms that some settings already operate from 7.30 am to 6.30 pm.

Providers were asked to indicate their charges per hour or session. Of the 22 respondents, 21 provided a response with one excluded due to insufficient information. Hourly rates ranged from £6 to £15, with £8 per hour being the most commonly cited rate. Daily rates ranged from £80 to £123. Some providers apply age-differentiated pricing, with higher rates for younger children.

Over the past 12 months, 57.14% of respondents reported that their setting did not have a waiting list, whilst 42.86% indicated that they did. This has shifted slightly, with 47.62% of respondents currently reporting a waiting list, compared to 52.38% who do not.

Of the 12 providers who reported having a waiting list, responses varied considerably in both format and length. In terms of time, waiting periods ranged from as little as two weeks to over a year, with one provider noting their list runs until December 2026. Where providers indicated the number of children or families waiting, figures ranged from one child to approximately 45 people. One provider noted receiving 2-3 new enquiries for care each week, with no available spaces until 2026. The variation in responses suggests that demand pressure differs significantly across settings in the borough.

The majority of respondents (77.27%) indicated that they plan to continue providing childcare over the next five years, with 22.73% indicating that they do not.

Providers were also asked about their current capacity. Of the 22 respondents, 15 provided responses to both questions. The number of registered children varied considerably, ranging from 0 to 99, with an average of approximately 22 and a median of 15, suggesting that whilst most responding settings are small to medium in size, some larger settings are also represented. In terms of current vacancies, approximately 40% of respondents reported having no available spaces, indicating that a significant proportion of settings are operating at full capacity. Among those with vacancies, the number of available places ranged from 1 to 30, with an average of approximately 24.

### 8.1.2 Inclusion and SEND Provision

Providers were asked about their current offer for children with Special Educational Needs and Disabilities (SEND). When asked whether they currently offer places for children with SEND, 86.67% of respondents indicated that they do, either regularly (66.67%) or occasionally (20.00%). Of those who responded 'No', 6.67% noted they are open to doing so in the future, whilst a further 6.67% indicated they are not currently able to offer SEND places.

Of the 14 respondents who provided a response, the number of children with SEND currently enrolled ranged from 0 to 13. Five respondents reported having no children with SEND currently enrolled, whilst the remaining nine settings reported between one and 13 children. The average number of enrolled children with SEND was approximately two, with a median of 1.5. One provider noted that

their setting currently supports 13 children with SEND out of a total of 46 enrolled, representing a high proportion.

However, the number of children accessing funded entitlement was considerably lower. The majority of respondents (71.40%) reported that none of their enrolled children with SEND are currently accessing funded entitlement, with figures ranging from one to three among those who did. Two providers indicated that access had not yet been established, one citing a pending local authority decision, and another awaiting confirmation of funding, suggesting that the number of children accessing entitlement may increase once these processes are resolved.

Providers were asked to describe the processes their settings currently deploy to support children with SEND or complex medical needs and their families.

Of the nine providers who responded, three key themes emerged:

- Individual support plans and observations – the most commonly referenced approach, with several providers also using specialist communication tools such as Makaton to support children’s needs
- Staff training and specialist expertise – providers highlighted the importance of accessing dedicated SEND teams, council-provided training, and local resources such as Enfield SEND services and the local offer.
- Partnership working – close collaboration with parents, SENCOs, and external professionals such as speech and language therapists and health visitors was widely referenced.

One provider indicated that they are currently awaiting further guidance before establishing formal processes.

Regarding the tracking and evaluation of progress for children with SEND, three approaches were equally and most commonly used among the nine respondents, each cited by 77.78% of providers: Individual Support Plans, regular key person reviews, and progress monitoring using the EYFS framework. External reviews were referenced by 33.33% of respondents, whilst Early Support Development Journals were used by 22.22%. One respondent indicated that this question was not currently applicable to their setting as they do not have any children with SEND enrolled.

Provider perceptions of the progress made by children with SEND in their settings were broadly positive. Of the nine respondents, the majority reported that children typically make good progress (44.44%), whilst 22.22% indicated excellent progress and 33.33% reported some progress. No respondents reported limited progress or indicated that progress was difficult to measure, suggesting that providers feel their settings are having a meaningful impact on the development of children with SEND.

When asked whether they offer enhanced or tailored settling-in processes for children with SEND, 72.72% of respondents indicated that they do, either always (36.36%) or when required (36.36%). No respondents reported that they do not offer this, with the remaining 27.27% indicating that whilst they do not currently do so, they would be open to it.

Providers further shared what enhanced settling-in looks like in their settings for children with SEND. Of the nine providers who responded, three key themes emerged:

- Individualised and flexible approach – settling-in processes are tailored to the specific needs of each child and family, with timetables and session lengths adapted accordingly
- Extended settling sessions – several providers offer additional or longer settling visits as standard, with one noting a minimum of ten sessions, extendable where needed.
- Additional resources, parent involvement, and external liaison – stay-and-play sessions, visual aids, additional staff support, and collaboration with external professionals were all highlighted to ensure smooth transitions.

Respondents were also asked to identify the types of SEND needs present in their settings. Among the 10 providers who responded, Speech, Language and Communication Needs (SLCN) was the most commonly reported need, cited by 60.00% of respondents, followed by Autistic Spectrum Diagnosis (ASD) at 50.00%. Moderate needs were identified by 30.00% of respondents, whilst complex needs, hearing impairment, physical disability, and other needs were each reported by 20.00%. Severe needs, Social, Emotional and Mental Health Difficulties (SEMH), and visual impairments were each cited by 10.00% of respondents.

Providers were asked to estimate their capacity for children with SEND both per session and per term. Responses were broadly consistent across these questions. Excluding one large setting which reported a capacity of 86, the majority of providers estimated they could accommodate between one and three children with SEND per session, with an average of approximately two. Per-term estimates followed

a similar pattern, with most settings reporting a capacity of between one and five. One provider noted that their capacity is dependent on the nature of the child's needs, reflecting the individualised approach that SEND provision often requires.

When asked whether they had to turn away any children with SEND in the past 12 months, 33.33% of respondents reported 'Yes'. Of the five providers who gave reasons, the most commonly cited factor was a lack of physical space or capacity, with three providers indicating that their settings were already full. The remaining two responses pointed to resource-related challenges, including an inability to meet complex needs within the current environment, and a lack of resources for children with severe ASD. One provider also highlighted a positive practice of referring families to alternative settings with SEN professionals, suggesting some providers are actively seeking solutions despite their own limitations.

Providers were asked how frequently they receive enquiries from parents and carers seeking childcare for a child with SEND. Of the 13 respondents, the majority (76.92%) reported having received at least one such enquiry, with the most common frequency being at least once a year (30.77%). A further 15.38% reported receiving enquiries at least once a month, and 15.38% at least once a term, indicating that for some providers, demand from families of children with SEND is a regular occurrence. However, 23.08% of respondents indicated that they had not yet received any such enquiries.

These findings suggest a consistent level of demand for SEND places across the borough, further explored in the following section.

### 8.1.3 Funding for SEND Provision

Providers were asked whether they offer funded early education entitlements to children with SEND. Of the 15 respondents, 80.00% indicated that they offer all three forms of funded entitlement: 2-year-old funding (including SEND eligibility), 3-4-year-old universal hours, and 3-4-year-old extended hours (30 hours). 13.33% of respondents indicated that they do not currently offer funded entitlements. Of the two respondents who selected 'Other', one noted that they offer the working parents grant for children aged 9 to 36 months, whilst the other indicated that they would no longer be offering 3-4-year-old funded places, citing that the current funding rate does not meet their hourly charge. This latter response highlights a potential sustainability concern for funded SEND provision in the borough.

Providers were asked whether they had a preference for any particular funded entitlement. Of the 13 respondents, 46.15% indicated no preference. Among those who did express a preference, the 15-hour funded entitlement for 2-year-olds was the most favoured, cited by 30.77% of respondents, followed by the 30-hour entitlement for 3- or 4-year-olds (15.38%), and the 15-hour entitlement for 3-4-year-olds (7.69%).

When asked whether the current level of funding meets the needs of children with SEND in their care, no respondents indicated that it does. 54.55% reported that the funding does not meet needs, whilst the remaining 45.45% felt it only partially does. Providers were asked to explain their responses, and three key points emerged.

- Insufficient funding to cover staffing costs – the most commonly referenced concern, with multiple providers noting that the funding does not cover the cost of additional staff required to support children with complex needs, and that SENIF funding is limited.
- Delays in accessing funding – providers highlighted difficulties accessing SENIF funding in a timely manner, with decisions taking too long due to infrequent review meetings.
- Low funding rates and unmet needs – several providers noted that the 3-4-year-old funding rate is too low, and that children with SEND require additional support with transitions and specialist resources that the current funding does not cover.

Regarding the process for requesting EHCPs or top-up funding, only 50.00% of respondents found it clear, with 40.00% rating it as somewhat clear and 10.00% as very clear. 30.00% found the process confusing, whilst 20% indicated they were not familiar with it. Of the six providers who elaborated, the most commonly cited concerns were delayed response times, difficulties accessing SENIF funding and a lack of clarity in the system. However, two providers reported more positive experiences, noting that their teams are well-informed and that area SENCO support is available when needed.

Providers also shared their perspectives on the key barriers faced by parents of children with SEND in accessing funded entitlements. Of the 10 respondents, three key factors emerged:

- Lack of awareness and knowledge – several providers noted that parents are often unaware of the funding available to them or how to access relevant services, suggesting a need for improved information and outreach.
- Complex and lengthy funding processes – providers highlighted that the funding process is not straightforward and can be prolonged, making it difficult for families to navigate.

- Limited availability of suitable places – respondents noted that settings are often stretched in terms of staff and resources, with insufficient places available to meet the needs of children with higher or more complex needs, including limited hours such as term-time only provision.

When asked to identify the key challenges their settings face in offering funded entitlement, three key patterns emerged:

- Insufficient funding rates – the most frequently cited challenge, with multiple providers noting that the funding does not cover the true cost of delivery, particularly for children with complex needs. Several highlighted that they are unable to ask parents for top-up contributions, leaving some settings financially unsustainable.
- Low uptake among eligible families – some providers noted that not all eligible children take up their entitlement, attributed in part to the area in which they operate and limited parental awareness.
- Staffing and administrative challenges – providers referenced difficulties in recruiting and retaining staff within current funding levels, managing SEND ratios, and navigating administrative processes such as portal set-up and payment schedules.

#### 8.1.4 Workforce Capacity and Training

Providers were asked to rate their staff team’s confidence in supporting children with a range of SEND needs. Staff confidence was highest for Moderate Learning Difficulties (weighted average 1.60), Speech, Language and Communication Needs (1.67), and Autism Spectrum Disorder (1.87). Confidence was lowest for Vision Impairment and Hearing Impairment (both 2.73) and Profound and Multiple Learning Disabilities (2.60).

Providers also shared the SEND-specific training their staff had completed in the past two years. Of the 12 respondents, autism-related training was the most commonly referenced, including programmes such as autism awareness, Making Sense of Autism, and ETIPPS. Communication-focused training was also frequently mentioned, including British Sign Language (BSL), Visual Communication, Early Talk Boost, and Verbo training. A number of providers referenced formal qualifications and specialist programmes such as Level 3 SENCO and Positive Behaviour Support (PBS), whilst general SEND training accessed through Enfield Council, online platforms, and webinars was also noted.

Regarding induction, the majority of providers (80.00%) reported that SEND awareness is included in their induction process for new staff, either as part of core introductory training (60.00%) or informally through shadowing (20.00%). A further 10.00% indicated plans to incorporate this, with only 10.00% reporting no current provision.

When asked whether they have sufficient staff with SEND experience to meet current need, only 36.36% of respondents indicated that they do. The majority felt this was only partially the case (45.45%), whilst 18.18% reported that they do not have sufficient experienced staff. These findings reinforce the need for continued investment in SEND-specific workforce development across the borough.

Providers rated their experience of support from a range of LA teams and services. The Early Years SEND/Inclusion Team received the highest rating (weighted average 3.27), with Area SENCO support also rated positively (2.91). The Portage or Home Visiting Service had the lowest weighted average (1.64), though 63.64% had not used this service. A high proportion of respondents had also not engaged with the Educational Psychology Service, EHCP assessment process, and SENDIASS/Parent support services (all 45.45%). In terms of delays, opinions were evenly divided, with half of respondents (50.00%) reporting that they have experienced delays in obtaining support or services for children with SEND. Overall, only 18.18% felt well-supported to offer inclusive, high-quality provision for children with SEND, with the majority (72.73%) feeling only partially supported and 9.09% not feeling supported at all.

Looking ahead, providers shared what further training or support their settings would benefit from. Of the seven respondents, three key areas were identified:

- External professional support – providers expressed a desire for greater involvement from outside agencies, including regular visits from SEND specialists, speech and language therapists, and educational psychologists.
- Specialist training – training in complex needs, autism, and behaviour management was highlighted as a priority.
- Regular knowledge updates – several providers noted the importance of ongoing training to keep staff knowledge current.

#### 8.1.5 Barriers to SEND Provision

Providers shared their views on the biggest barriers to SEND provision across the borough. Of the nine respondents, three barriers were equally and most commonly identified, each cited by 77.78% of providers: difficulty recruiting suitably qualified staff, inadequate funding, and an inability to provide 1-1 support. Lack of support and advice from statutory organisations was also highlighted by 44.44% of respondents, whilst lack of specialist equipment (22.22%) and difficulties with the identification process (11.11%) were also noted. No respondents selected 'None', indicating that all providers perceive meaningful barriers to SEND provision in the borough.

Providers were asked to identify the biggest barriers that parents and families of children with SEND face when accessing childcare. Of the 13 respondents, three key themes emerged:

- Lack of resources and staffing – the most frequently cited barrier, including insufficient staff training, a shortage of personnel with specialist knowledge of SEND, and limited external support for settings.
- Funding challenges – providers noted insufficient financial support from local authorities, delays in accessing funding, and criteria that can change mid-year.
- Limited availability of suitable places – few settings are equipped to adequately meet the individual needs of children with SEND, with waiting times also identified as an additional barrier.

When asked whether they felt other factors had contributed to the rise in demand for SEND childcare, three factors were equally and most commonly cited among the 11 respondents, each by 45.45% of providers: funded entitlement not starting soon enough, changes in parenting, and a lack of awareness among parents regarding the support available to them. Parents working more was identified by 36.36% of respondents, whilst lack of parental support and unwillingness from parents to access available support were each cited by 27.27%. These findings suggest that alongside structural and resource-related barriers, broader social and systemic factors are also perceived to be contributing to the increased demand for SEND provision.

Providers were asked whether they had experienced any issues with getting children's SEND identified. Of 13 respondents, nearly half (46.15%) indicated that the process takes too long, whilst no respondents found the process confusing. 23.08% felt the process was satisfactory, and a further 23.08% were unsure. Only 7.69% reported that the process was quick and easy. These findings

highlight that delays in the SEND identification processes are a significant concern among providers, which may in turn affect families' ability to access appropriate and timely childcare support.

Providers also identified the barriers they personally face in offering high-quality SEND provision. Staffing ratios emerged as the most significant barrier, cited by 88.89% of respondents, followed by funding and resource limitations (77.78%) and space or physical environment constraints (55.56%). Access to specialists was highlighted by 44.44% of respondents, whilst family engagement (33.33%) and training gaps (22.22%) were also noted.

Despite these barriers, there is clear openness to collaborative approaches. When asked about partnerships with other providers or schools to support children with SEND, 22.22% of respondents indicated that they already engage in such partnerships, with a further 33.33% stating they would be open to doing so. 22.22% indicated they would not consider partnerships, whilst the remaining 22.22% were unsure.

Providers were asked to rate their ability to provide suitable childcare for children with SEND on a scale of 0 to 10. Responses varied considerably in format, and were converted to a comparable scale, the average score was approximately 5 out of 10, suggesting that providers perceive their current ability to be at a moderate level.

#### 8.1.6 Sector-Wide Concerns

Providers shared their views on the biggest issues facing the childcare sector in Enfield. Of the nine respondents, funding and staffing emerged as the most prominent concerns, with multiple providers citing insufficient funding rates, high staff wages, rising running costs, and difficulties recruiting and retaining experienced staff. Two providers also noted challenges around low demand and parental engagement, with one observing an oversupply of provision relative to the number of children in their area.

In closing, providers were invited to share any additional thoughts on how the Local Authority could better support SEND provision in Early Years settings. Responses highlighted a need for more specialist provision to support children with higher needs, earlier identification and support processes, and greater backing for staff within settings. One provider noted that many mainstream settings are not suitable environments for children with high needs and called for a significant expansion of specialist provision across the borough.

## 8.2 Provider Consultation: Interviews

In addition to the provider survey, semi-structured interviews were conducted with four providers in October 2025. Participants represented a range of setting types, including private day nurseries and childminders, with provision spanning from six weeks up to 12 years of age. Whilst the majority of providers operate within the standard 8 am to 6 pm window, interviews revealed that some settings already offer marginal extensions to these hours. In terms of SEND capacity, most providers were able to support a small number of children with SEND, though several noted limitations around complex or high-level needs due to staffing and accessibility constraints. Interviews were designed to explore key themes in greater depth, including demand for SEND provision, funded entitlement places, staff capability, and working with the LA. This is intended to complement and contextualise the quantitative data gathered through the survey.

Emergent insights from the interviews included:

### 8.2.1 Capacity & Demand for SEND Provision:

- The most commonly observed types of SEND within providers' current cohorts included speech and language delay and behaviour indicative of ASD, broadly aligning with survey findings.
- Confidence in meeting SEND needs varied, ranging from those who felt well-supported through council and head office visits, to those relying on Level 3 assistants due to a lack of funding and external support.
- Demand for childcare places varied across settings, with some providers reporting spaces for the first time due to increased competition from school nurseries and DfE funding changes, whilst others were at or near full capacity.
- Most providers had experienced turning away or declining to accept children with SEND at some point, with reasons including capacity constraints, inability to meet complex needs without parental agreement, age limitations, and insufficient 1:1 support within the setting.
- Factors that made it easier included strong SENCO support, early access to information and assessments, and good relationships with the Enfield Early Years SEND team. Barriers included difficulties securing parental agreement, insufficient settling-in time, lack of guaranteed 1:1 support despite EHCP entitlement, limited physical space, and the challenges of managing a wide range of needs within a single setting.

### 8.2.2 Funded Entitlement Places:

- Most providers offered funded places to children with SEND where capacity allowed, though one provider noted a case where funded hours could not be offered due to the severity of the child's needs and safeguarding concerns for staff and other children, with the child subsequently transitioning to a specialist school.
- Take-up of funded places among children with SEND was generally positive where capacity allowed, with providers noting that parents often sought funded hours for respite purposes. However, the number of funded children per setting remained low, typically between one and four, due to capacity constraints.
- Regarding funded entitlement, providers noted that the challenges were more commonly experienced by parents than by settings themselves, particularly around a lack of awareness of available support and how to access it.
- Providers identified several improvements that would make the funding system work better, including reduced repetitive paperwork, more consistent and timely payment processes, greater flexibility around funding cut-off dates, and increased funding levels to enable settings to adequately staff and support children with additional needs.

### 8.2.3 Training and Staff Capability:

- SEND-related training completed in the past year included autism awareness, behaviour management, EHCP processes, and safeguarding. Whilst providers expressed a willingness to engage with further training, access was commonly hindered by time constraints, cost, and the practical challenges of attending sessions outside of working hours.
- Where referenced, SEND awareness was embedded into the induction process through a combination of policy reviews, on-the-job training, and direct discussion with SEND or quality leads about inclusive practice and what to expect when supporting children with additional needs.
- Providers highlighted autism and speech and language training as priority areas for further development, with one noting a significant improvement in confidence following recent increases in training provision.
- One provider noted that personal experience of navigating SEND support had reinforced the importance of further training.

### 8.2.4 Working with the Local Authority and Other Services

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- Experiences of local SEND services were mixed. Some providers praised the responsiveness of the Enfield SEND team, noting quick response times and proactive engagement, whilst others felt that visits could be more thorough, with greater emphasis on direct observation of the child rather than reliance on provider accounts.
- Suggestions for improving collaboration with LA teams included more thorough and child-centred reporting to support timely EHCP processes, clearer communication of children’s individual needs, and more consistent financial processes such as earlier payment timelines to reduce uncertainty for providers. Some providers expressed satisfaction with current LA support, mentioning accessible communication and practical assistance with processes such as Ofsted registration.

#### 8.2.5 Inclusion, Quality, and Broader Practice

- Where referenced, settling-in approaches for children with SEND included following EHCP recommendations, conducting access and inclusion walks, gathering information from parents and relevant professionals, and offering extended settling-in periods. One provider offered a minimum of ten settling-in sessions prior to a child joining, alongside meetings with both the SEND officer and key person.
- Effective settling-in practices centred on extended, flexible sessions, close parental involvement, and a gradual approach to building relationships with key staff, with one provider noting that increasing to ten settling sessions had resulted in a noticeably calmer environment.
- Progress for children with SEND was tracked through a range of approaches, including IEP and short-term plans, development maps, Early Years journals, and tools such as Verbo. Regular reviews with parents, SMART targets, and six-weekly check-ins were also highlighted as key practices.
  - Additional staffing, funding, and continued access to training were identified as the key factors that would support providers in delivering higher quality, more inclusive provision.

#### 8.2.6 Wider Early Years Landscape

- The most commonly cited borough-wide barrier was a lack of funding, which providers felt underpinned many other challenges including staffing shortages, limited resources, and

restricted capacity to expand. Additional barriers included the volume of need, language barriers for families with English as a second language and increasing parental working hours placing greater demand on settings.

- Overall, providers expressed broadly positive views of LA support, particularly praising the accessibility and responsiveness of Early Years advisors. Key suggestions included more observational SEND visits rather than discussion-based ones, and greater focus on Early Years provision within broader LA strategy, with one provider noting that Early Years can often be overlooked.

These conversations provided nuanced perspectives on the challenges and opportunities facing the sector and helped to contextualise survey findings within day-to-day operational realities.

### 8.3 Other Local Intelligence

Local reporting of Enfield regarding childcare, population rates, access to resources, and cost of living has highlighted the growing unease and dissatisfaction of not only Enfield borough's residents, but Outer London and London as a whole. A significant concern for Enfield residents along with London residents as a whole is cost of living, where reporting has shown that families are being further priced out of areas in and surrounding London as birth rates have declined by nearly 20%. This change in population has led to sharp decreases in the number of children attending primary schools, prompting potential closures of schools and nurseries<sup>20</sup>.

Enfield has already experienced sudden nursery closures in recent years, causing significant concern to residents who utilize childcare services<sup>21</sup>. Childcare costs in Enfield have followed the broader trend observed across Outer London, where prices have increased due to rising operational costs, staffing pressures, and inflation. This could lead to higher prices for childcare services, exacerbating a problem already of concern to residents. This, coupled with the significant reduction in population growth of Enfield compared to the rest of London and England as a whole, could place additional pressure on the sustainability of Early Years providers, as declining demand and rising operational costs may make

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<sup>20</sup> Enfield Dispatch, Families 'Priced Out of London's Birth Rate Falls 20%. Accessed 5th March 2026. <https://enfielddispatch.co.uk/families-priced-out-of-london-as-birth-rate-falls-20>

<sup>21</sup> BBC. Childcare Nursery Closure Shocks Parents and Staff. Accessed 5th March 2026. <https://www.bbc.com/news/articles/c1een0p589no>

it increasingly difficult for some settings to remain financially viable<sup>22</sup>. Continued monitoring of provider stability and childcare affordability will therefore be important to ensure that sufficient provision remains available to meet the needs of families across the borough.

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<sup>22</sup> Enfield Digest. Enfield's population predicted to rise by just 4.7 people each year. Accessed 6<sup>th</sup> March 2026.  
<https://enfielddispatch.co.uk/enfields-population-predicted-to-rise-by-just-4-7-people-each-year>

## 9. Key Findings

### 9.1 Thematic Analysis: Consultation Findings

Based on the primary research conducted in 2025, including an online survey of 22 providers (childminders, full-day care settings, and pre-schools), 1:1 depth interviews with four providers, and a parent/carer survey (n=3), the following thematic analysis outlines the current state of the Enfield childcare market. Whilst the parental sample size limits statistical generalisation, findings triangulated across all three sources offer a consistent picture of the pressures and systemic barriers currently facing families and providers in Enfield.

#### 9.1.1 Financial Viability and Affordability Gap

The most prominent theme in the 2025 consultation is the severe tension between the rising costs of living and the sustainability of childcare provision.

- **Parent Economic Strain:** Affordability is a universal concern for families; 100% of parent respondents described formal childcare as “too expensive”. This cost serves as a direct barrier to employment, with parents noting that they or their partners could work more hours if affordable or funded places were more accessible. Families on Skilled Worker Visas face a compounding barrier: funding eligibility requires both parents to be employed, yet the high cost of care prevents one parent from entering the workforce initially.
- **Provider Sustainability Crisis:** Providers reported that government funding is failing to keep up with rising operational costs, a pressure that has intensified alongside consistent year-on-year increases in hourly rates (see **Section 9.2**). 54.55% of providers explicitly stated that current funding does not meet the needs of children, whilst the remaining 45.45% felt it only partially met those needs. A significant friction point is the 3-4-year-old funding rate, with one provider describing it as a “half rate” (£6.26/hour) compared to the 9-month-old entitlement despite 3-4-year-olds requiring significant resources and opportunities. Consequently, some providers are staggering intakes of older children or withdrawing from the funded offer entirely to remain solvent.

#### 9.1.2 SEND Inclusion and Capacity Challenges

The 2025 findings reveal a substantial gap between the demand for SEND provision and the sector's ability to deliver high-quality, inclusive care.

- **Sufficiency and Supply:** Demand for SEND places is consistent and significant, with 76.92% of providers having received at least one enquiry from families of children with SEND in the last year. Although 86.67% settings offer SEND places, their capacity is limited; most can only accommodate one to three children with SEND per session. In the last 12 months, 33.33% of providers had to turn away a child with SEND, primarily due to a lack of physical space or full occupancy.
- **Systemic Barriers:** The primary obstacles to SEND inclusion identified by providers are staffing ratios (88.89%), funding/resource limitations (77.78%), and space or physical environment constraints (55.56%). Providers frequently cited the inability to provide 1-1 support as a major barrier, with 77.78% of respondents identifying this as a significant hurdle to offering more inclusive places. Furthermore, only 18.18% of providers feel fully supported by the Local Authority to offer inclusive care, citing delays in identification and funding (SENIF) as critical issues.

### 9.1.3 Information Accessibility and Systemic Confusion

A recurring theme from 2025 is the difficulty parents face when navigating the “confusing terminology” used by both the Council and childcare settings.

- **Conflicting Terminology:** Parents reported difficulty distinguishing between terms such as ‘nursery’, ‘daycare’, and ‘pre-school’, particularly when children transition into school reception classes.
- **Website and Awareness:** There is a unanimous call for the Enfield Council website to be made clearer regarding funding applications and registration processes. Currently, parents feel unsure about their eligibility for different funded offers, which contributes to a reliance on informal care (66.67%) provided by family and friends. Provider survey findings reinforce this picture, with multiple providers noting that families are often unaware of the funding available to them or how to access relevant services – a gap that affects both take-up of funded entitlement and timely access to SEND support.

### 9.1.4 Operational Pressures and Workforce Stability

Providers are operating under notable operational strain, with demand often exceeding their capacity.

- **Occupancy and Waiting Lists:** Approximately 40% of providers reported having no current vacancies. Waiting lists are a growing challenge, with some settings reporting lists that run until December 2026. Looking ahead, 22.73% of providers indicated that they do not plan to continue operating within the next five years, representing a potential further reduction in available places if this trend is realised across the wider market.
- **Workforce Expertise:** Only 36.36% of providers believe they have sufficient staff with the necessary SEND expertise to meet current needs. Staff confidence is lowest for sensory impairments and Profound and Multiple Learning Disabilities, areas where training provision remains limited. Recruitment remains a major issue, with settings struggling to find and retain qualified staff within the constraints of current funding levels and rising wage costs.
- **Atypical Hours:** There is a notable lack of provision for parents with non-standard work patterns. 50% of parents reported a lack of provision aligning with irregular work hours, whilst none of the providers interviewed in 2025 offered weekend or evening sessions. Only 27.27% of providers serve children aged 5 and above, leaving a significant gap in wraparound and holiday care that is not currently being met through formal routes.

Taken together, these four themes suggest that, whilst the childcare market is generally functioning smoothly in terms of mainstream service provision, structural pressures are gradually increasing. The key changes observed since the previous CSA and the measures recommended are set out in the following section.

## 9.2 Key Changes from Previous CSA

A longitudinal comparison of data from the 2022 and 2024 CSA against the 2025 consultation findings reveals several significant shifts in the Enfield childcare market.

### 9.2.1 Escalated Costs of Provision

The most striking trend is the consistent and accelerating rise in childcare fees, reflecting the ongoing affordability challenges for Enfield families.

- **Hourly Rates:** The mean hourly rate rose from £6.40 in 2021 to £7.80 in 2023, as reported in the 2024 CSA. By 2025, this has climbed further to £9.02 across the Early Years sector, an increase of approximately 41% over four years.

- **Sessional Costs:** The most frequent cost per session increased by £20.00 between 2022 and 2024 (from £15.00 to £35.00), suggesting a structural shift in how providers are pricing their offer to absorb rising operational overheads.

### 9.2.2 Increased Demand Pressure and Waiting Lists

Despite a decline in the overall 0-4-year-old population in Enfield (which fell by 8.1% between 2013 and 2024), pressure on available places has intensified.

- **Waiting List Growth:** The proportion of providers reporting a waiting list has grown from 37.04% in 2024 to 47.62% in 2025.
- **Wait Times:** Whilst 2024 lists averaged six children, 2025 data show extreme outliers with waiting lists now extending as far as December 2026 for some settings, driven by high demand in certain high-density wards (as identified in previous assessments).

### 9.2.3 Sustained Provider Engagement for 2-Year-Old Provision

Whilst borough-wide take-up rates for 2025 are not yet finalised, provider engagement remains a positive area of the market.

- **High Service Availability:** In 2025, 90.91% of surveyed providers reported offering places for 2-year-olds, indicating strong supply-side participation for this age group.
- **Provider Preference:** Among providers who expressed a preference for specific funding streams, the 15-hour entitlement for 2-year-olds was the most favoured (30.77%), suggesting continued stability in this segment of the market.

### 9.2.4 Rising SEND Complexity and Supply Constraints

The challenge of providing inclusive care for children with SEND has become markedly more acute since the previous assessment.

- **Post-Pandemic Demand:** 66.67% of providers in 2025 reported an increase in the number of children presenting with SEND since the COVID-19 pandemic.
- **Provision Barriers:** The inability to provide 1-1 support remains the primary barrier to SEND inclusion, cited by 75% of providers in 2024 and rising to 88.89% in 2025. A third of providers (33.33%) reported turning away a child with SEND in the last 12 months, a significant indicator of failing sufficiency for this group.

### 9.2.5 Long-Term Market Fragility

Provider confidence in long-term sustainability has weakened since the previous assessment.

- **Market Contraction:** The 2024 CSA noted a contraction in the provider market, with 11 fewer registered providers compared to the previous year.
- **Potential Exit Trend:** This trend shows no sign of reversing: 22.73% of providers in 2025 indicated that they do not plan to be operating within the next five years, citing insufficient funding rates and rising wage costs as the primary deterrents.

Taken together, these shifts point to a market under increasing strain, one where rising costs, growing demand, and workforce pressures are outpacing the current policy and funding response. The recommendations set out in the following section seek to address these challenges directly.

## 10. Recommendations

### 1. Parental Engagement

Implement the Parent Engagement Action Plan in **Appendix 3** to mitigate the limited responses from parents to both CSA surveys, focus groups and any other engagement methods.

### 2. Affordability and accessibility

Design and implement an affordability and provider sustainability response plan, with closer monitoring of fees and communication on schemes which exist to support access and sustainability.

### 3. SEND sufficiency

Enfield should continue to monitor the areas of the ward which are under the highest-pressure to deliver SEND provision and identify training opportunities to support existing or new providers to explicitly meet these needs to build capacity.

### 4. Access to information

Enfield Council should seek to develop a parent-facing resource which breaks down sector-specific jargon and importantly funded entitlement to minimise confusion and ensure confident take-up.

### 5. Take up of funded entitlements

Through targeted outreach, Enfield Council should clearly circulate the information required for parents to access funded entitlement. Evidenced by both take up data and parent consultation, the confusion here could explain why Enfield sees lower rates of take up than the national average.

### 6. Recruitment and retention

Given the challenges associated with recruitment and retention in Enfield, it is recommended that the council develop an updated Early Years workforce development plan, with a focus on the integration of SEND training to meet demand in this area and support existing SEND providers.

### 7. Market stabilisation

It is recommended that to improve market stability, monitoring of available childcare is ward-focused, given the differing population projections across Enfield. Monitoring more closely will support the council's ambition to empower communities by ensuring that families will be more likely to access the support they need within their local area.

	Identified Gap or Risk	Evidence	Recommendation for Enfield Council
1	Limited parental engagement presents a risk when attempting to draw conclusions in certain areas of Enfield, with difficulties accessing key insight across qualitative themes.	Through the limited responses to the parental survey, as well as the lack of engagement for the proposed focus groups.	Adopt the Parent Engagement Action Plan outlined in Appendix 3. This action plan details specific activities which should be undertaken to improve uptake in parental surveys and engagement tools through future CSAs and beyond. These should be adopted for Enfield's next CSA cycle and be delivered through the phases outlined in the supporting appendix.
2	Affordability is suppressing access to childcare, whilst providers are also reporting that funding does not always cover delivery and operational costs. This presents a risk of a potentially worsening affordability gap.	This was demonstrated through consultation findings for both parents and carers and providers, with affordability flagged as a universal concern to all parents who did engage with the consultation.	Enfield Early Years team may wish to design and implement an affordability and provider sustainability response plan, this should include closer monitoring of fees by type and age band, as well as clear communication of any and all existing support schemes which can be accessed by parents or providers.
3	SEND sufficiency is a structural gap with demand continuing to rise, whilst capacity	Data demonstrates a continued increase of EHCPs for children, as well as providers confirming they currently have SEND specific	In line with the SEND CSA, Enfield Council should review SEND-specific findings and internally work toward mapping SEND

	remains limited due to staff capacity, training or recruitment challenges.	challenges which result in barriers to delivering additional places or resources.	sufficiency. This work should build upon that which has been carried out through the 2025 CSA reports in order to continually monitor the high-pressure wards in Enfield, which SEND needs are arising most frequently and identify training opportunities which will support providers to meet these needs explicitly to expand capacity. Providers raised through consultation that mainstream settings were not suitable for children with severe SEND, therefore Enfield may wish to consider how best to maximise what existing SEND focused settings can deliver.
4	Limited access to information is creating a barrier to accessing provision for parents and carers, particularly regarding the funded childcare they are eligible for and sector-specific terminology.	Demonstrated through the parental survey – it should be noted that the responses from parents were limited and therefore this may not be an accurate representation of all parent and carer experiences.	Enfield Council should develop a parent-facing web-resource, detailing a plain-English childcare guide by child age. This should be designed to breakdown each type of provision, how best to access this, and most critically a simple funded-entitlement criteria checker. This will allow parents to feel

			confident in the childcare they are eligible to access through funded entitlements with the intention of improving take-up.
5	Enfield has seen a reduction in take-up of funded early education – with take-up falling for both the universal offer for 3- and 4-year-olds, as well as that for eligible 2-year-olds.	Through section 4, data exploring take-up of funded entitlements demonstrates a decrease in families accessing their funded entitlements. The limited consultation responses from parents also echo a sentiment of confusion and frustration in how to access these entitlements.	Enfield Council may wish to deliver targeted outreach to parents to ensure clear communication. this should be supported by a clearly produced guide to accessing childcare. Targeted outreach could include a focus on the wards identified as having the highest concentration of demand. Communication should also be distributed with trusted organisations which parents may regularly access, such as health partners, Family Hubs and libraries.
6	Providers have identified difficulties recruiting and retaining staff, weakening SEND confidence where specific experience or training may be required.	In line with Enfield’s Early Help strategy, the consultation revealed a recognition of the need to equip the workforce with the required skills, knowledge, training and guidance to improve capacity. The	In response to this recruitment and retention risk, Enfield Council should design an Early Years workforce development plan, with a SEND-focus for training opportunities. Where possible, Enfield may wish to work closely

		consultation revealed that 36.36% of providers do not feel they have enough SEND-experienced staff.	with providers accessing training to identify how this can best be delivered with regard to the challenges associated with training around delivery of provision.
7	Enfield continues to see market instability, given the context of falling places, potential for existing providers to withdraw from the sector and the differing population changes anticipated across wards in the authority.	Year-on-year has indicated a decrease in number of providers in Enfield through movement in the sector data, supported further through consultation with providers, with almost a quarter (22.73%) of those surveyed indicating they did not plan to continue providing childcare over the next five years.	It is recommended that Enfield shift to a ward-level market monitoring model to take into account the differing projections by ward. This will also support the council maintaining the most accurate picture of where there is an over-concentration of providers with regard to demand, and vice versa. This monitoring should take into consideration the waiting lists, vacancies and population projections by ward.

## Appendices

### Appendix 1: 2025/26 Pupil Projections<sup>23</sup>

#### 0-4 Population Projection by Ward

Area Code	Ward	2025			2026		
		Males	Females	Total	Males	Females	Total
E05000193	Bowes	450	450	900	450	400	850
E05000194	Bush Hill Park	450	400	850	450	400	850
E05000195	Chase	450	400	850	400	400	800
E05000196	Cockfosters	2500	450	950	500	450	950
E05000197	Edmonton Green	900	850	1,800	900	850	1,750
E05000198	Enfield Highway	650	600	1,300	650	600	1,250
E05000199	Enfield Lock	750	700	1,450	750	700	1,400
E05000200	Grange	450	400	850	400	400	800
E05000201	Haselbury	700	650	1,350	700	650	1,350
E05000202	Highlands	450	400	850	450	400	850
E05000203	Jubilee	550	500	1,050	550	500	1,000
E05000204	Lower Edmonton	800	750	1,550	800	750	1,550
E05000205	Palmers Green	600	550	1,100	550	550	1,100
E05000206	Ponders End	750	700	1,450	750	700	1,400
E05000207	Southbury	600	550	1,150	600	550	1,150
E05000208	Southgate	450	450	900	450	400	850
E05000209	Southgate Green	550	500	1,050	550	500	1,000
E05000210	Town	500	450	950	450	450	900
E05000211	Turkey Street	600	550	1,150	550	550	1,100
E05000212	Upper Edmonton	1,350	1,300	2,650	1,450	1,350	2,800
E05000213	Winchmore Hill	400	350	750	400	350	750

#### 5-11 Population Projection by Ward

Area Code	Ward	2025			2026		
		Males	Females	Total	Males	Females	Total
E05000193	Bowes	550	500	1,050	550	500	1,050
E05000194	Bush Hill Park	650	600	1,200	600	600	1,200
E05000195	Chase	700	650	1,300	650	600	1,300
E05000196	Cockfosters	700	650	1,350	700	650	1,350
E05000197	Edmonton Green	1,200	1,100	2,300	1,200	1,100	2,300
E05000198	Enfield Highway	950	900	1,850	950	900	1,800
E05000199	Enfield Lock	1,050	1,000	2,050	1,050	1,000	2,050
E05000200	Grange	600	550	1,150	600	550	1,150

<sup>23</sup> Greater London Authority (GLA), "GLA Population Projections – Custom Age Tables," London Datastore, accessed March 31, 2026, <https://data.london.gov.uk/dataset/gla-population-projections-custom-age-tables-2o8ng/>.

E05000201	Haselbury	1,050	1,000	2,000	1,050	1,000	2,000
E05000202	Highlands	650	600	1,250	650	600	1,250
E05000203	Jubilee	700	650	1,350	700	650	1,350
E05000204	Lower Edmonton	1,050	1,000	2,050	1,050	1,000	2,050
E05000205	Palmers Green	750	700	1,400	700	650	1,400
E05000206	Ponders End	1,100	1,000	2,100	1,050	1,000	2,100
E05000207	Southbury	900	850	1,750	900	850	1,750
E05000208	Southgate	750	700	1,450	750	700	1,400
E05000209	Southgate Green	750	700	1,450	750	700	1,450
E05000210	Town	700	650	1,400	700	650	1,350
E05000211	Turkey Street	850	800	1,700	850	800	1,700
E05000212	Upper Edmonton	1,650	1,600	3,250	1,800	1,700	3,500
E05000213	Winchmore Hill	600	550	1,150	550	550	1,100

**Appendix 2: Movement in the Childcare Sector March 2025 to 31 August 2025<sup>24</sup>**

	Childminder		Childcare on non-domestic premises		Childcare on domestic premises		Home child carer		All provision	
	Providers	EYR places	Providers	EYR places	Providers	EYR places	Providers	EYR places	Providers	EYR places
All registers										
Position as of 31 <sup>st</sup> March 2025	172	985	179	5,991	0	0	301	-	652	6,976
Joiners	0	19	6	202	0	0	13	-	19	202
Leavers	7	42	10	248	0	0	15	-	32	291
Change in places numbers	-	5	-	-33	-	0	-	-	-	-28
Net overall change	-17	-37	-4	-80	0	0	-2	-	-13	-117
Position as of 31 <sup>st</sup> August 2025	165	948	175	5,911	0	0	299	-	639	6,859
<b>Provision on Early Years Register</b>										
Position as of 31 <sup>st</sup> March 2025	157	985	179	5,991	0	0	-	-	293	6,976
Joiners	0	0	6	202	0	0	-	-	5	202
Leavers	6	42	10	249	0	0	-	-	13	291
Change in places numbers	-	5	-	-33	-	0	-	-	-	-28

<sup>24</sup> Office for Standards in Education, Children’s Services and Skills (Ofsted), “Main findings: Childcare providers and inspections as at 31 August 2025,” GOV.UK, November 19, 2025, <https://www.gov.uk/government/statistics/childcare-providers-and-inspections-as-at-31-august-2025/main-findings-childcare-providers-and-inspections-as-at-31-august-2025>.



Net overall change	-6	-37	-4	-80	0	0	-	-	-8	-117
Position as of 31st August 2025	151	948	175	5,911	0	0	-	-	285	6,859
<b>Provision not on Early Years Register</b>										
Position as of 31 <sup>st</sup> March 2025	15	-	43	-	0	-	301	-	359	-
Joiners	0	-	1	-	0	-	13	-	14	-
Leavers	1	-	3	-	0	-	15	-	19	-
Net overall change	-1	-	-2	-	0	-	-2	-	-5	-
Position as of 31st August 2025	14	-	41	-	0	-	299	-	354	-

### Appendix 3: Parent Engagement Action Plan

This annex sets out a structured action plan to strengthen parental engagement in CSA consultations for Enfield. Its purpose is to improve the representativeness, quality and practical value of parental evidence, particularly where standard consultation methods have generated limited response rates in previous years.

The need for a strengthened approach is clear. While Enfield’s overall population of children aged 0–4 is projected to decline modestly over the medium term, this borough-wide trend masks sustained localised demand, detailed throughout the 2025 CSA. Certain areas continue to experience higher concentrations of young children and greater levels of. At the same time, these areas are less likely to be fully represented through digital-only or survey-led consultation models.

Limited participation presents a material risk to the CSA evidence base. Whilst quantitative data can show patterns in supply, vacancies and take-up for analysis of sufficiency, it cannot explain why some families may not access provision, why funded places remain under-used and which barriers matter most in practice.

#### 10.1.1 Context and rationale

Recent consultation activity suggests that reduced engagement regarding childcare sufficiency may reflect three overlapping challenges. These have been identified based on the methodology used for Enfield’s 2025 CSA, as well as best practice assumptions around engagement in parental consultation.

- Digital-first methods risk excluding families affected by language barriers, digital exclusion, limited time, or lower trust in formal consultation processes. This is particularly relevant in areas with higher deprivation and among communities that rely more heavily on informal and community-based support networks.
- Families of children with SEND often interact intensively with statutory systems and may be less willing or able to engage with broader strategic consultation unless it is clearly relevant to their immediate concerns. In these cases, standard surveys are unlikely to generate sufficiently rich or representative evidence.
- Some parents may feel that previous engagement has not led to visible change. Where feedback loops are weak, participation may decline because residents doubt the value of contributing, rather than because they are disengaged from the underlying issues.

### 10.1.2 Strategic approach

Activity moving forward must actively acknowledge parental pressures, explain clearly what the CSA can and cannot influence and creates opportunities for families to shape how evidence is gathered. Three pillars have been identified below for improving engagement.

#### ***Pillar 1: Engage through trusted intermediaries***

The Council should expand its use of trusted intermediary organisations as engagement partners. This includes voluntary and community sector groups, SEND-focused organisations, hardship and advice services, Family Hubs and neighbourhood-based community networks already working with local families.

This approach will be particularly important for engaging communities that may be less likely to respond to Council-led surveys directly, including Somali, Turkish, Kurdish and other communities with strong informal support structures. Rather than relying on passive dissemination of online surveys, the Council should embed childcare engagement within settings and services that families already use and trust.

#### ***Pillar 2: Develop a distinct approach for SEND families***

Families of children with SEND require a tailored engagement model. Standard survey methods are unlikely to be sufficient on their own, given the intensity of need, complexity of services and existing pressure on parental capacity.

Engagement activity for this group should prioritise smaller-scale qualitative methods, including facilitated listening sessions, focus groups in familiar venues, and conversations delivered through existing parent networks. These sessions should be framed as open discussion rather than formal consultation and should seek to surface practical barriers around access, suitability, confidence in provision and unmet need.

#### ***Pillar 3: Strengthen the Parent Champions model***

Enfield's Parent Champions model should be repositioned to support beyond information-sharing to deliver structured intelligence gathering. Future recruitment should be informed by gaps in CSA engagement and targeted towards groups and areas that are currently underrepresented, including

fathers, parents in high-demand wards, and communities reflecting the borough's linguistic and cultural diversity.

Parent Champions could be supported to offer verbal survey completion and encourage participation among parents who may face literacy, time or digital barriers. This approach is likely to be particularly effective in Family Hubs, at school gates and in community settings where parents are already present.

### 10.1.3 Delivery actions

To support these strategic pillars, the Council should adopt the following practical measures, serving as specific recommendations to improve parental engagement.

#### ***Improve incentives and reduce participation barriers***

Engagement activity should include proportionate incentives that recognise parents' time and encourage participation. For survey activity, this may include a low-cost prize draw or voucher incentive. For focus groups and SEND-specific engagement, time-based vouchers should be considered, alongside practical enablers such as refreshments, child-friendly venues and, where possible, crèche provision.

#### ***Demonstrate impact more clearly***

Future engagement should be accompanied by a visible 'You Said, We Did' approach. This could include a public-facing summary showing where previous parental feedback has informed service improvements, communication changes or future priorities. CSA engagement materials should explicitly link past feedback, resulting actions and the purpose of the current consultation.

#### ***Use a multi-channel approach***

The Council's website should remain the main repository for survey links and information, but engagement should be supported through social media, messaging platforms, Family Hubs, schools, community venues and partner organisations. These mediums are ideal for circulating simple, visual and shareable engagement materials, in turn increasing reach moving forward.

### 10.1.4 Implementation

A phased delivery model is recommended to implement the parental engagement specific recommendations.

***Phase 1: Preparation (Months 1–2)***

- Undertake a short ‘You Said, We Did’ review of recent engagement
- Publish a summary of visible changes for review by parental groups and forums

***Phase 2: Active engagement (Months 3–4)***

- Launch the next CSA parent survey with a stronger explanation of purpose, confidentiality and likely use of findings.
- Deploy Parent Champions and organisation supporting the CSA to gather responses in community settings
- Run a small programme of qualitative sessions, including SEND listening events and neighbourhood-based discussions

***Phase 3: Feedback and closure (Month 5)***

- Publish an initial summary of findings promptly after survey closure.
- Ensure the final CSA includes a clear account of what parents said, where evidence gaps remain and what actions the Council will take in response.

**10.1.5 Intended outcome**

This action plan is intended to improve both the reach and credibility of parental engagement in future CSAs. By strengthening peer-led engagement, Enfield will be better placed to capture the experiences of families who are least well represented in standard consultation. The above recommendations will ensure the collection and analysis of parental feedback is improved through enhanced methods of communication and ongoing engagement with parent groups.