

# The London Borough of Tower Hamlets Childcare Sufficiency Assessment 2022 - 2025

“Ensuring every child gets the best start in life, with opportunity to flourish”



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## Foreword

A very warm welcome to The London Borough of Tower Hamlet's Early Education and Childcare Services' Childcare Sufficiency Assessment. We have a vibrant mixed economy of providers across the whole of Tower Hamlets, unified by our shared vision: an exciting, vibrant, increasingly diverse and thriving provision of good and outstanding quality which:

- achieves excellent outcomes for our children.
- is sufficient, affordable, and accessible to families.
- contributes to the early identification of children's needs.
- ensures children receive the right help at the right time.

The child is at the heart of our childcare offer. International research and policy recognise that:

*“The period from pregnancy to age three is the most critical when the brain grows faster than at any other time; 80% of a baby's brain is formed by this age. This is a window of opportunity to lay a foundation of health and wellbeing whose benefits last a lifetime – and carry into the next generation.”*

Nurturing care for early childhood development, World Health Organisation 2018.

Under the Department for Education's 'Early Education and Childcare Statutory Guidance' local authorities should report annually to elected

Mayor and council members on how the duty to secure sufficient high-quality childcare is being met and make this report available and accessible to parents and carers as well as prospective educational providers looking to expand or join Tower Hamlets as a provider.

This report provides relevant data, analyses, and recommendations for our sector, and highlights our areas of strength as well as proposing future actions to ensure children receive the best possible support.

Achieving this is particularly critical for children from disadvantaged backgrounds. Our 2-year-old entitlement offer has had a significant impact in improving the wellbeing of children, reducing inequalities, and improving outcomes. The Early Education and Childcare offer also produces a positive impact on the local economy and can support economic regeneration, as well as boosting employment.

Our Early Education and Childcare sector has also seen recent increases in the need to provide for children with additional needs and/or SEN (Special Education Needs) designations, which we will refer to as Inclusive Support. This report contains valuable quantitative and qualitative insight into how providers are approaching both inclusive and wraparound care, and how further collaboration can continue to improve existing provision.

## Executive Summary and Recommendations

The London Borough of Tower Hamlets' Early Education and Childcare Service undertook a Childcare Sufficiency Assessment commencing April 2022 to March 2023, with support from Premier Advisory Group. This assessment included desk-based research on demographics, primary research consultation, focus groups, interviews, and surveys with families, employers, stakeholders, and Early Education and Childcare providers.

The Tower Hamlets 2023-2025 CSA (Childcare Sufficiency Assessment) assessment covers provisions for:

- Children aged 2, 3 and 4 taking up early education places, including extended entitlement (30 hours).
- Children from low-income families.
- Children with special educational needs and disabilities (SEND).
- Children with families who work irregular hours.
- School-age children (wraparound care).
- Children needing holiday care.

This Childcare Sufficiency Assessment report reflects the specific context for childcare provision in the borough as aligned to individual wards. Overviews of each ward can be found in the appendices. The report is divided into three key parts:

- Early Education and Childcare.
- Inclusion, including children with SEND, EHCPs (Education, Health, and Care Plans), and additional needs.
- Extended Services, including 'wraparound' and out-of-hours childcare.

Sufficiency is assessed in relation to these three groups individually, as well as for Tower Hamlets as a whole. Qualitative data such as feedback on the nature and/or quality of the provision is also considered, to give a more nuanced and comprehensive view of childcare in the borough.

Presented overleaf are the key findings from the analysis. Predictions regarding the need for specific places are based on the number of eligible children and the relevant number of places in any given ward and across the borough. As there is an identified borough-wide need to increase the uptake of places generally, qualitative statements on need should be considered alongside current rates of uptake as presented in the snapshot study. Where uptake is low, the actual need for increased places should be prioritised after increasing uptake.

## Key Findings

1. All primary and secondary data included within this report was collected in Summer 2022, and therefore this CSA represents a snapshot of the sufficiency within Tower Hamlets at that time.
2. There is need across the borough to increase uptake of both extended entitlement places (30 hours) and funded places for eligible 2-year-olds (EL2). This increased uptake can be achieved through improved marketing from existing providers, as well as broader market stimulation and community interaction.
3. The need for additional Early Education and Childcare places (including 30 hours, EL2, and universal entitlement) should be considered after increasing uptake, and on a ward-by-ward basis as informed by the ward profiles.
4. There is need to improve access to available information regarding vacancies and types of provision so that families can make informed decisions.
5. Considering population projections, housing developments, and current capacity, frequent review is needed to ensure continued capacity.
6. Based on the snapshot summer 2022 data, 85% of 3 and 4-year-old children occupy relevant places, and 50% of eligible 2-year-old children occupy relevant places.
7. Community and stakeholder engagement indicates rising concern regarding services for children with SEN designations, EHCPs, and/or additional needs. Data shows a small but steady increase in children with EHCPs and those receiving SEN-support. Concerns include:
  - a. Children arriving at provisions with unidentified additional needs.
  - b. Lack of accessible information and specialist resources and/or treatment.
  - c. Families and employers reported discontent with the current costs of Early Education and Childcare.
  - d. Stakeholders reported a lack of affordable quality SEND provisions.
8. Wards show high variation in the number of reported childcare vacancies, with Bow West reporting 0 vacancies and Limehouse reporting 150 vacancies. However, this information is based on provider responses to our survey, and the uptake of the survey was not significant enough to provide a thorough analysis.
9. Over half the responding providers stated that they have at least one child on a waiting list.

## Key Recommendations

1. The council should analyse whether their existing sufficiency will be considered adequate by 2029 due to continuing plans to develop new dwellings and housing within Tower Hamlets.
2. The council should consider ways to increase engagement from Early Education and Childcare providers for future studies, such as incentives and/or in-person visits, particularly for areas such as Bow East, St Dunstan's and Whitechapel.
3. The council should consider how it can improve support to Early Education and Childcare settings which provide care for children with SEN designations and/or additional needs. This may include:
  - a. Developing knowledge and skills to support children still awaiting diagnosis.
  - b. Improving access and quality of information for families, potentially including knowledge-sharing sessions, service-contact roadmaps, and signposting for what vacancies are available where.
  - c. A comprehensive SEND study to generate ward-specific data.
4. The council should consider how it can work with providers to advertise their places, as well as information regarding entitlements on offer to increase uptake in the borough. This would aid in reducing both waiting lists and vacancies.
5. The council should continue to work collaboratively with the DfE (Department for Education) to ensure the continued successful provision of Early Education and Childcare, with special regard to the upcoming budget release.
  - a. Further to the above, the council should work with providers to promote both recruitment and retention within the sector, with special regard to inclusive support.
6. Considering the upcoming budget release, the council should continue to work collaboratively with the DfE to ensure that the extended childcare initiative is implemented efficiently and effectively across the borough.



## Introduction

As per The Childcare Act 2006, local authorities have the duty to ensure sufficient childcare, as far as is reasonably practicable, for families in employment and families who are studying or undertaking vocational training. Children covered by The Childcare Act are aged 0-14, or 0-25 for children with disabilities.

Section 11 of this act requires all local authorities to undertake a CSA. Sufficiency is defined in the act as 'sufficient to meet the requirements of families in the local authority's area who require childcare to enable them to take up, or remain in, work, or to undertake education or training which could reasonably be expected to assist them in obtaining work.'

The Childcare Act 2016 also requires local authorities to secure funded childcare for qualifying children of working families, following the introduction of the 30 hours extended entitlement. According to the act, eligible working families are entitled to 30 hours of funded childcare for 38 weeks of the year.

## Key Terminology

Where appropriate, for the purpose of analysis, the following provision will be referred to as 'childcare providers' unless otherwise stated:

PVI (Private, Voluntary, and Independent) (Private, Voluntary, and Independent) (Private, Voluntary and Community, and Independent Sectors)

- Childminders
- Pre-schools
- Day Nurseries
- Independent school-based nurseries

School-based:

- School-based nurseries (academies and local authority-maintained primary schools)
- Maintained Nursery Schools
- Specialist Provision (SEND)

## About Tower Hamlets

The London Borough of Tower Hamlets is a vibrant and diverse inner London borough and is home to over 200,000 people living within eight square miles at the heart of London's East End. 49% of residents are from black and minority ethnic (BME) communities, and there are sizable Bangladeshi, Somali, Caribbean, Chinese, Vietnamese, Indian, and Pakistani Communities. Tower Hamlet's local areas are among both the most and least deprived in London according to the 2019 Indices of Multiple Deprivation. A variety of languages are spoken at-home in the borough, including English, Bengali, Somali, Arabic, and Turkish.

## Children in Tower Hamlets

The following section presents an overview of the current and forecasted demographics for children in Tower Hamlets. Population data is considered alongside socio-economic factors to provide the foundation for measuring childcare sufficiency.

Datasets include:

- Current populations aged 0-4 years and future projections.
- Birth-rates within the borough.
- Incidence and distribution of families eligible to take up FE for childcare.
- Average household incomes.
- Incidence of children with SEND, EHCP, and/or additional needs.
- Current and planned housing developments.

The key, total demographic information and forecasts relevant to children in Tower Hamlets include:

- The population of 0-4-year-olds has increased by 2% from 2011 to 2021. This population is predicted to decline by 2028.
- Tower Hamlets is experiencing negative net-immigration.
- 25.7% of the population is classed as economically inactive.
- The borough aims to develop 38,156 (rounded) new homes between 2019 and 2029.
- 11.6% of children receive SEN support at school. 5.4% of children have an Educational Health Care Plan (EHCP). These figures are broken down by age and designation in section 3 of this assessment.

## Summary of Provision

We have a vibrant mixed economy of Early Education and Childcare provision across Tower Hamlets that includes childminders, private and voluntary organisations, day nurseries and pre-schools, schools, maintained nursery schools and independent schools that deliver funded and non-funded provision in a variety of approaches and flexibility.

## Vision

Our vision is to give every child the best start in life by building resilient communities, raising aspirations, and working in partnership to deliver high-quality, inclusive services that are accessible, tailored to local needs and make a difference to children, young people and their families by:

- Improving the quality of Early Education and Childcare across the borough to lay the foundations for lifelong learning, raise attainment for all children and close the gap in learning and development between children experiencing multiple challenges and their peers.

- Strengthening opportunities for integrated working with key partners in Health, Social Care and the Voluntary and Community Sectors to make sure that Early Years services are easy to access, inclusive and make sense for families.
- Promoting engagement with the whole Early Education and Childcare sector to develop a quality improvement strategy that recognises the experience and expertise of practitioners with a trajectory of excellence in their settings.
- Securing sufficient, sustainable and inclusive Early Education and Childcare provision across the sector through prudent management and information sharing with key partners.

## Existing Provision

The following table shows the number of providers across Tower Hamlets.

Table 1 Providers by Ward and Mini Cluster

Ward	Schools with nursery classes	Nursery Schools	Full Childcare Providers	Playgroups/ Sessional Providers	Independent schools	Registered Childminders
<b>North West Mini Cluster</b>						
Weavers	4	1	2	1	0	3
St Peter's	6	0	4	2	0	7
Bethnal Green	4	1	2	1	1	13
Spitalfields & Banglatown	5	0	4	4	0	1
<b>North West Sub-Total</b>	<b>19</b>	<b>2</b>	<b>12</b>	<b>8</b>	<b>1</b>	<b>24</b>
<b>South West Mini Cluster</b>						
Whitechapel	5	0	1	2	2	2
St Katharine's & Wapping	2	0	3	0	1	1
Shadwell	3	0	2	1	0	6
Stepney Green	2	1	3	1	0	1
St Dunstan's	4	1	1	0	0	5
<b>South West Sub-Total</b>	<b>16</b>	<b>2</b>	<b>10</b>	<b>4</b>	<b>3</b>	<b>15</b>
<b>North East Mini Cluster</b>						
Bow East	1	0	3	2	0	11
Bow West	3	0	1	0	0	7
Mile End	5	0	3	4	0	7
Bromley North	2	1	1	0	0	2
Bromley South	2	0	0	1	0	4
<b>North East Sub-Total</b>	<b>13</b>	<b>1</b>	<b>8</b>	<b>7</b>	<b>0</b>	<b>31</b>
<b>South East Mini Cluster</b>						
Lansbury	6	0	0	3	0	6
Poplar	1	0	4	1	0	1
Limehouse	1	0	1	1	0	2
Canary Wharf	2	0	6	0	1	4
Blackwall & Cubitt Town	1	0	7	1	0	8
Island Gardens	3	0	1	0	0	3
<b>South East Sub-Total</b>	<b>14</b>	<b>0</b>	<b>19</b>	<b>6</b>	<b>1</b>	<b>24</b>
<b>BOROUGH TOTAL (All Mini-Clusters)</b>	<b>62</b>	<b>5</b>	<b>49</b>	<b>25</b>	<b>5</b>	<b>94</b>

Early education and Childcare provision in Tower Hamlets is of a high standard. 97% of settings are rated Good or Outstanding by Ofsted. Newly established settings have yet to be inspected.

## Methodology

The fieldwork and research which informed the 2022 Tower Hamlets Childcare Sufficiency Assessment was conducted during the period of April to November 2022. This report provides a snapshot of childcare in Tower Hamlets as of Summer 2022. Multiple types of research and analysis were undertaken throughout the Childcare Sufficiency Assessment, detailed below.

### Identification of key demographic and socio-economic issues

Structured desk-based research was conducted to identify key demographic and socio-economic factors which will have a discernible influence on the sufficiency and suitability of existing and future provision of Early Education and Childcare settings and free early education entitlements throughout Tower Hamlets. This research focused on:

- Population projections, by ward or geographical area, as required.
- Birth rates.
- Incidence of children with SEND (Special Educational Needs and Disabilities) and complex medical needs.
- Incidence of new, forthcoming housing developments/yields which may impact future sufficiency, including sufficiency for the 30 hours childcare offer.
- Incidence of specific ethnicities and faiths.
- Incidence of (baseline) working families, full-time employment and the localised labour market.

All data, where possible, was broken down by ward or Middle Super Output Area to provide identification of supply and demand at a local level. A range of sources were used to conduct research, including the Office for National Statistics, the Department for Education, Department for Work and Pensions.

### Provider reporting

Premier Advisory Group carried out a detailed analysis of the live supply data held by Tower Hamlets to determine precise figures for the availability of childcare places in the area. Additionally, by combining data from childcare settings and our demographics research we identified potential pinch points in the system, both in terms of wards that have limited supply/demand and areas that have particularly high levels of children with SEND.

### Online Family Survey

This Childcare Sufficiency Assessment also considered the demand for childcare by analysing the needs of families, identified through an online survey. Responses were analysed, detailing trends in terms of accessibility, affordability, and flexibility of childcare for families across the county.

### **Online survey with Children**

Premier Advisory Group created a child-friendly online survey for school students. The survey asked children about after-school provision, with a specific focus on access, availability and whether their preferred options were available.

### **Online survey with Stakeholders and Employers**

Premier Advisory Group and Tower Hamlets consulted with a range of stakeholders, including persons with interest in childcare and their representatives, local employers and persons representing them and employer organisations and neighbouring local authorities, to gather their views on the local economy, barriers to childcare that may affect the workforce and emerging trends across the past few years. A range of employers across various industries were consulted to provide the most representative sample possible within the timeframe.

### **Final Analysis and Recommendations**

Upon completion of the consultation phase, a summary of our findings was produced regarding the sufficiency of places across the local authority. Various techniques were applied to derive an accurate report on current gaps in childcare sufficiency throughout the authority by mapping supply to demand. We subsequently analysed, by specific/appropriate age groups, the range and diversity of early childhood education and care provision available in the borough. Based on this analysis, further strategic recommendations have been provided for Tower Hamlets to address gaps in supply or demand and the potential impact of COVID-19, which the authority will be able to use to build an action plan for the purpose of addressing the identified gaps and challenges.

## Demographics and the Childcare Market

This section presents an analysis of demographic and socio-economic factors which may affect current and future demand for childcare places. The aim of this study is to present and interpret the relevant data in an accessible and productive format so that childcare planners within the borough can make informed decisions regarding the expanding, maintaining, or re-distributing of places and resources.

### Current and future population of Children and Young People (CYP) in Tower Hamlets

The following data is based on the results of the 2021 Census, covering rounded population and household estimates for England and Wales. It should be noted that the COVID-19 pandemic may have affected the Census data collection.

The figures on children should first be understood against the backdrop of broader demographic movements. Between 2011 and 2021, the population of Tower Hamlets grew by 22.1%, approximately 56,200 people, making it the local authority with the largest increase in England during this period. Neighbouring authorities such as City of London, Newham, Southwark, and Hackney have also seen population increases over the last decade.

The number of children aged 0 - 15 has increased by 5% across England during the last decade. However, the number of 0 – 4-year-olds has decreased by 7%. In Tower Hamlets specifically, there has been an overall increase of 14.1% in children aged 0 – 15, and the population of 0 – 4-year-olds has increased by 2% in the last decade. These preliminary figures indicate a likely rise in demand for childcare in Tower Hamlets and show that the local context differentiates itself from the national trend concerning 0-4-year-olds.

### Children aged 0 – 4 years in Tower Hamlets

The following data is based on information from the Office of National Statistics. Graph 1 shows the following groups of children distributed across the wards in Tower Hamlets:

- Under 2 years old
- 2 years old
- 3 – 4 years old



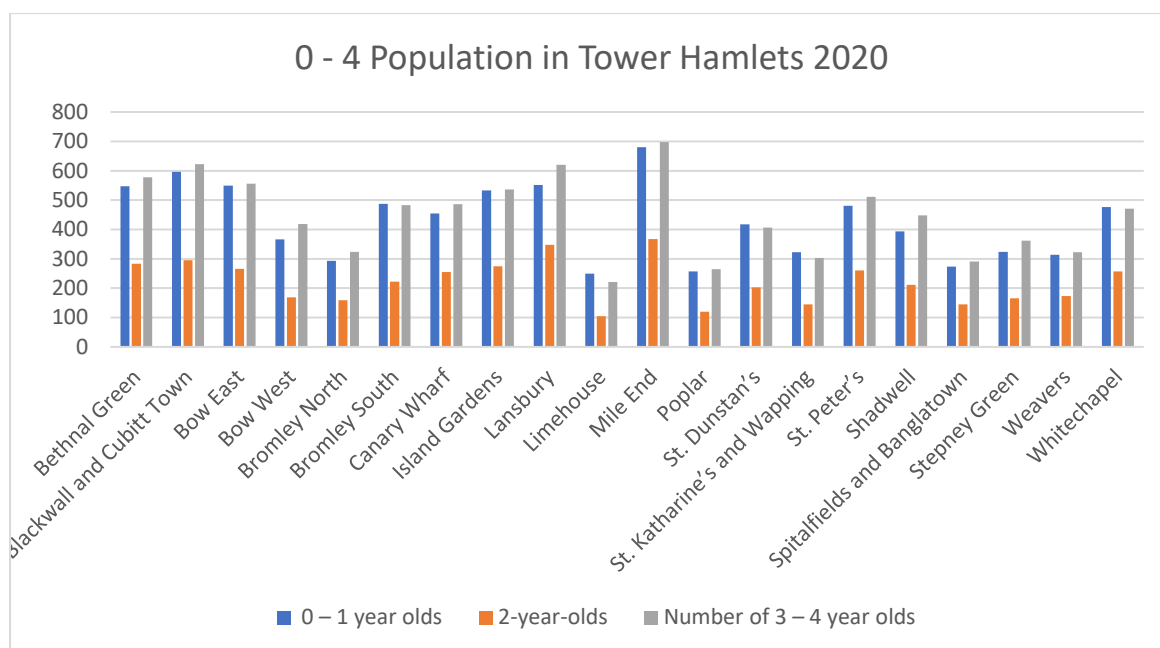


Figure 1 0-4 Population in Tower Hamlets 2020

The data presented in Figure 1 suggests that demand for childcare places is likely to be highest in Mile End, with high needs relative to the borough anticipated also in Bethnal Green, Bow East, Blackwell and Cubitt Town, and Lansbury.

3-4-year-olds are the largest group, with a combined total of 8,924 children. 0-1-year-olds total to 8,563, and 2-year-olds total to 4,423. As the demand for places is often correlative with population numbers, provision for 3-4-year-olds will experience the highest demand and will therefore require close monitoring in terms of sufficiency.

While areas such as Limehouse and Poplar have relatively low numbers of 0-4-year-olds, future demand for places should also be considered alongside ongoing developments in housing and migration.

## Children and Young People aged 5-14 years in Tower Hamlets

The following data is based on information from the Office of National Statistics. Figure 2 shows the following groups of children and young people distributed across the wards in Tower Hamlets:

- 5 – 7 years old
- 8 – 11 years old
- 12 – 14 years old

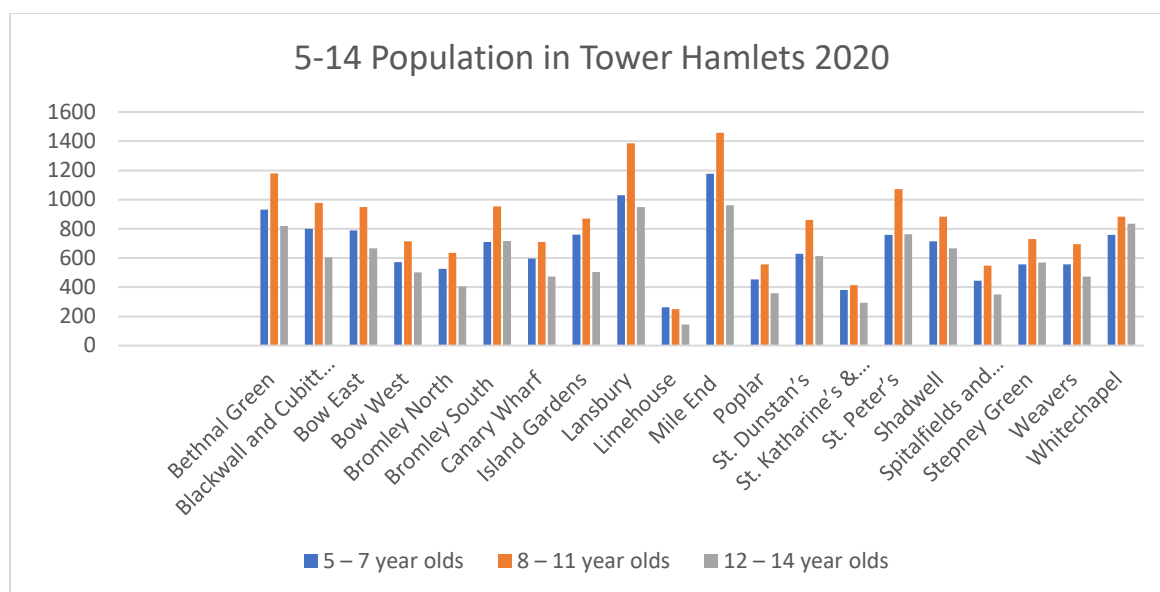


Figure 2 5-14 Population in Tower Hamlets 2020

Considering the data above, the need for childcare for 5+ year-olds across Tower Hamlets is most critical for 8 – 11-year-olds and is geographically centred on Mile End, Bethnal Green, and Lansbury. Planners should consider Mile End, Bethnal Green, and Lansbury as priority areas when considering childcare sufficiency in the immediate future, based on demographics.

The following graphs represent data from the Office of National Statistics (ONS) on population forecasts in Tower Hamlets. These figures should be interpreted against a broader predicted increase in CYP aged 0 - 18 from 80,175 to 83,140. The purpose of this data is to model predicted increases or decreases across relevant age groups to inform future planning of childcare provision.

Figure 3 Number of children forecasted to be resident in Tower Hamlets by 2025 and 2028

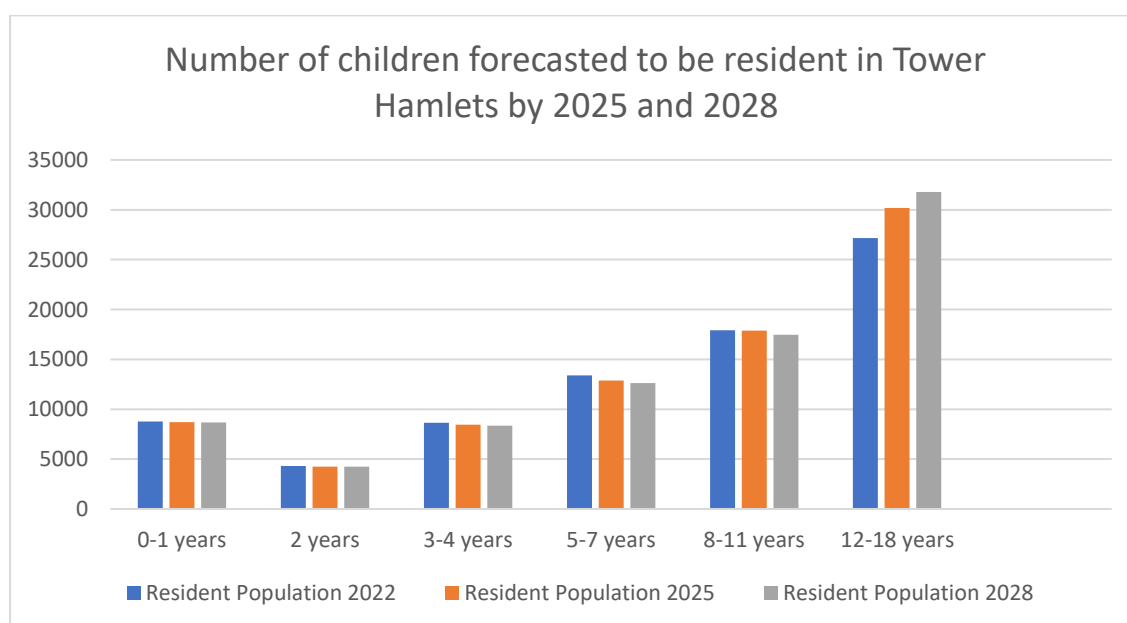


Figure 4 Changes in numbers of children forecasted to be resident in Tower Hamlets by 2025 and 2028

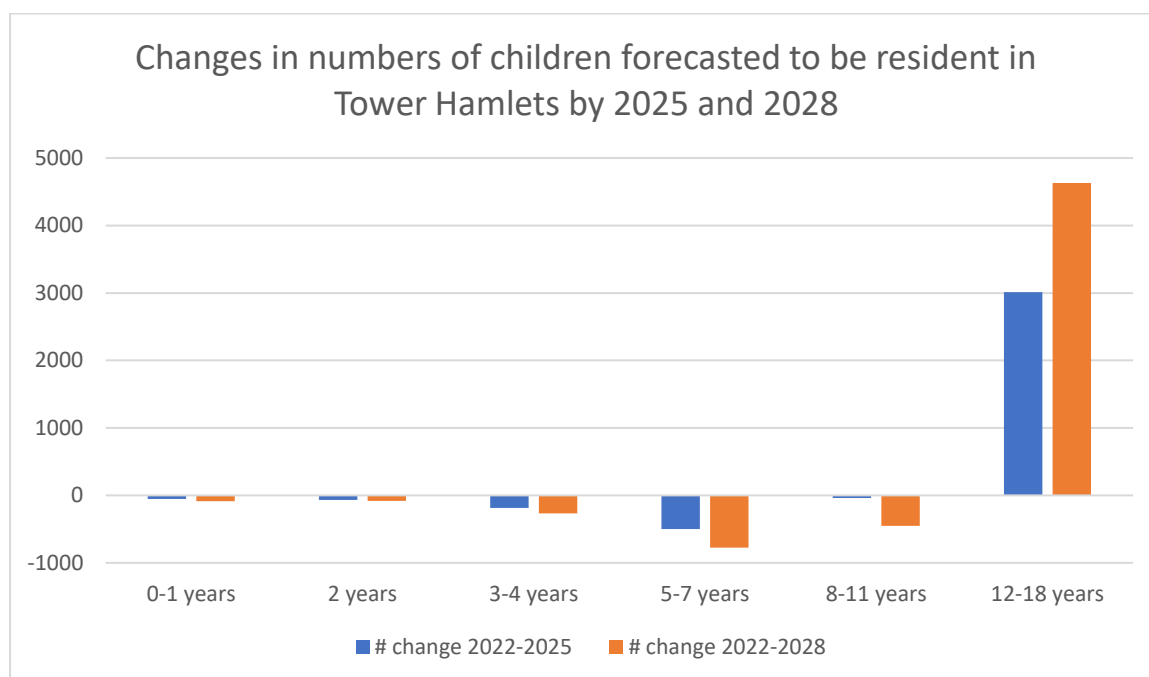
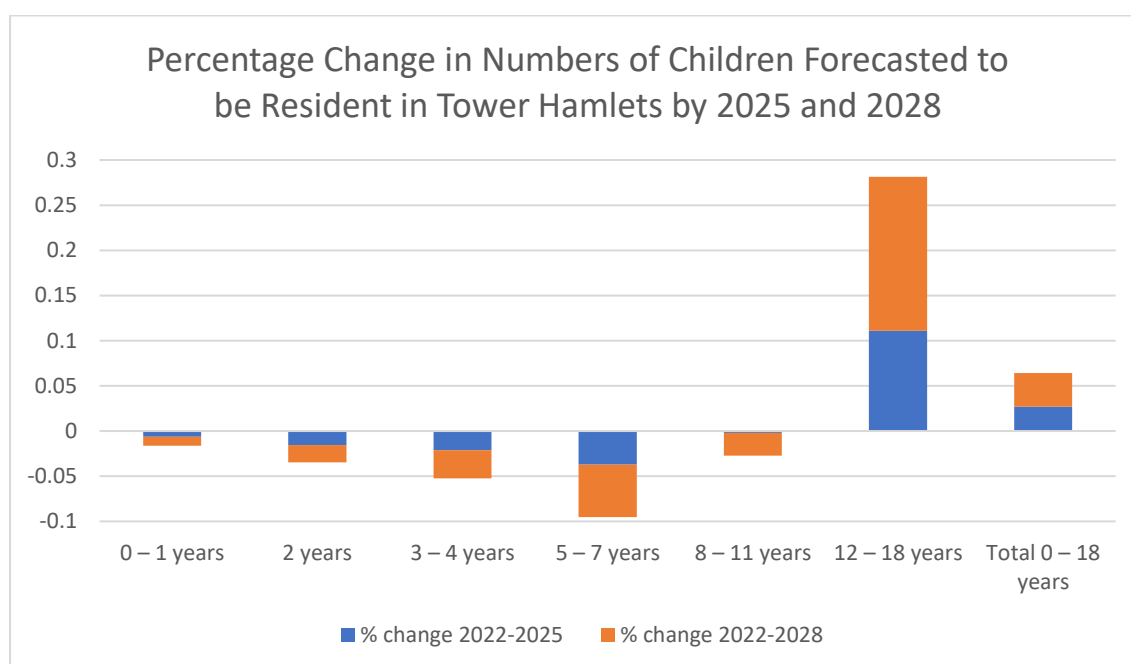


Figure 5 Percentage Change in Numbers of Children Forecasted to be Resident in Tower Hamlets by 2025 and 2028



The only age group expected to see an overall increase in population is the 12 – 19 years age group, expected to grow by 3,011 by 2025 and 4,629 by 2028. Other age groups are predicted to decrease between 2022 and 2028, with the largest percentage

decrease expected in children aged 5 – 7 years old. 8-11-year-olds are expected to have the largest actual decrease from 2022-2028, declining by 1,825.

These population projections suggest that Tower Hamlets can expect an increase in demand for extended services in the 12 – 18 age group within the next 5 to 10 years. This may be accompanied by a decrease in demand for places for other age groups, particularly those between 0 and 5.

## Birth Rates

The following information is taken from the Office of National Statistics via Nomis.

*Table 2 Live Births by Year*

Date	Live Births
2019	4,307
2020	4,291
2021	4,381

It should be noted that ONS reports a long-term trend of decreasing live births before the COVID-19 pandemic and that during the pandemic it fell to the lowest levels since 2003. Since 2021, birth rates across the UK have begun to slowly increase.

## Migration

The table below tracks international and internal migration in Tower Hamlets between 2013 and 2020, based on data from the ONS.

*Table 3 Migration in Tower Hamlets*

Year	2013 – 2014	2014 – 2015	2015 – 2016	2016 – 2017	2017 – 2018	2018 – 2019	2019 – 2020
<b>International Migration</b>							
<b>Inflow</b>	13,117	12,905	11,847	11,434	13,476	12,568	13,655
<b>Outflow</b>	4,789	4,368	5,217	5,905	5,054	7,604	6,775
<b>Net migration churn</b>	8,328	8,537	6,630	5,528	8,422	4,964	6,880
<b>Internal Migration</b>							
<b>Inflow</b>	23,142	22,524	22,198	25,786	26,929	29,575	26,042
<b>Outflow</b>	24,017	25,322	25,228	27,794	29,052	31,378	28,836
<b>Net migration churn</b>	875	2,798	3,031	2,008	2,123	1,803	-2,794

Planners should stay abreast of developments, however, as recent geopolitical developments such as the war in Ukraine have, and may continue to, cause sudden and sharp movements of people and families across Europe and the United Kingdom.

## Housing growth in Tower Hamlets

Under the current London Plan 2021, Tower Hamlets has a total target of 34,730 dwellings by 2029, meaning the council must aim for 3,473 new homes per annum to meet the policy requirements. Information provided by the council shows a working housing development trajectory, last reviewed in 2020. This trajectory outlines the plans for each ward, demonstrating that by 2029, Tower Hamlets plans to have built a total of 38,155.8 new dwellings. This exceeds the London Plan target for Tower Hamlets of 34,730 new dwellings from 2019-2029 and will create opportunities for families to move into Tower Hamlets and create ongoing phases of increased demand for free early education entitlement/childcare places – including 30 hours childcare offer places.

Table 4 Housing Developments by Ward

Ward	No. of Dwellings 2019 - 2029
Bethnal Green	859
Blackwall & Cubitt Town	11,258.8
Bow East	88
Bow West	32
Bromley North	343
Bromley South	689
Canary Wharf	9,567
Island Gardens	238
Lansbury	3,753
Limehouse	71
Mile End	1,075
Poplar	1,926
Shadwell	484
Spitalfields & Banglatown	556
St. Dunstan's	269.8
St. Katharine's & Wapping	2,069.9
St. Peter's	1,189
Stepney Green	176.2
Weavers	942
Whitechapel	2,569.1
<b>Total</b>	<b>38,155.8</b>

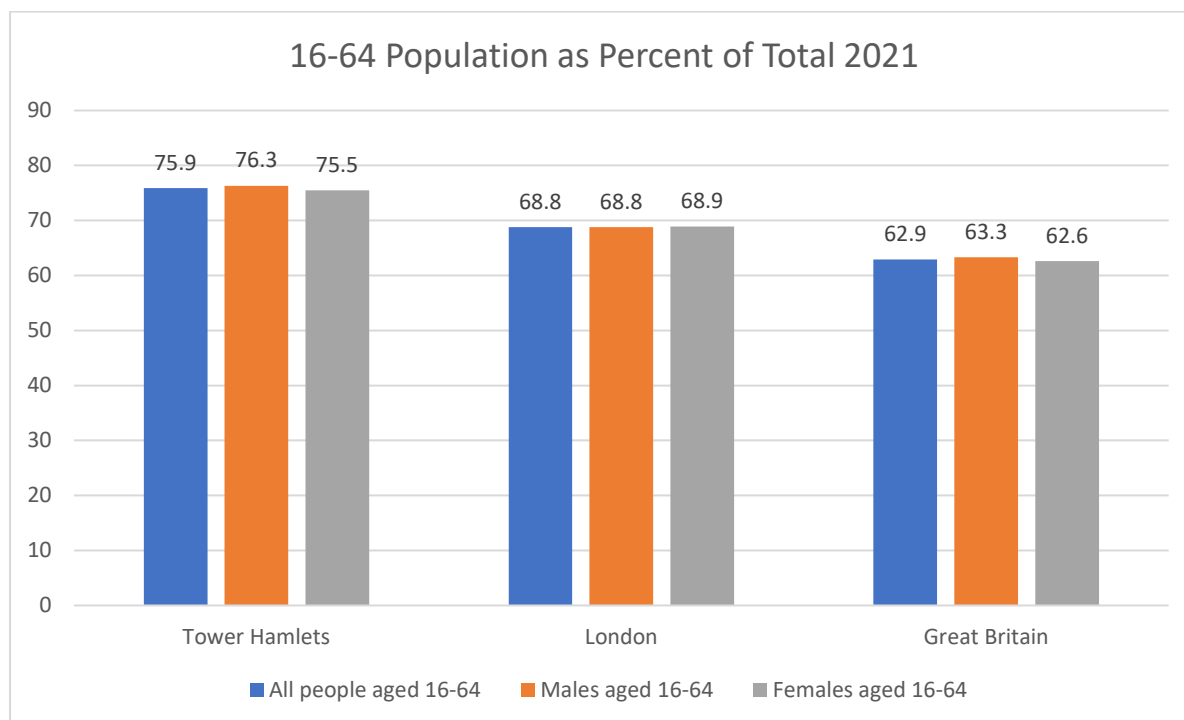
This information indicates that the population projections may need to be adjusted depending on the type of individual/family attracted by the housing developments. Considering the current capacity and need, the results of these housing developments should be monitored closely.

## Local labour market in Tower Hamlets

The following data from the ONS is used to offer a broad view of the local labour market, including statistics regarding out-of-work benefits, working households, employment and unemployment (full and part-time). This information will be used to contextualise children living in Absolute Low-Income Families, and children living in Absolute Low-Income Families, broken down by working and non-working families.

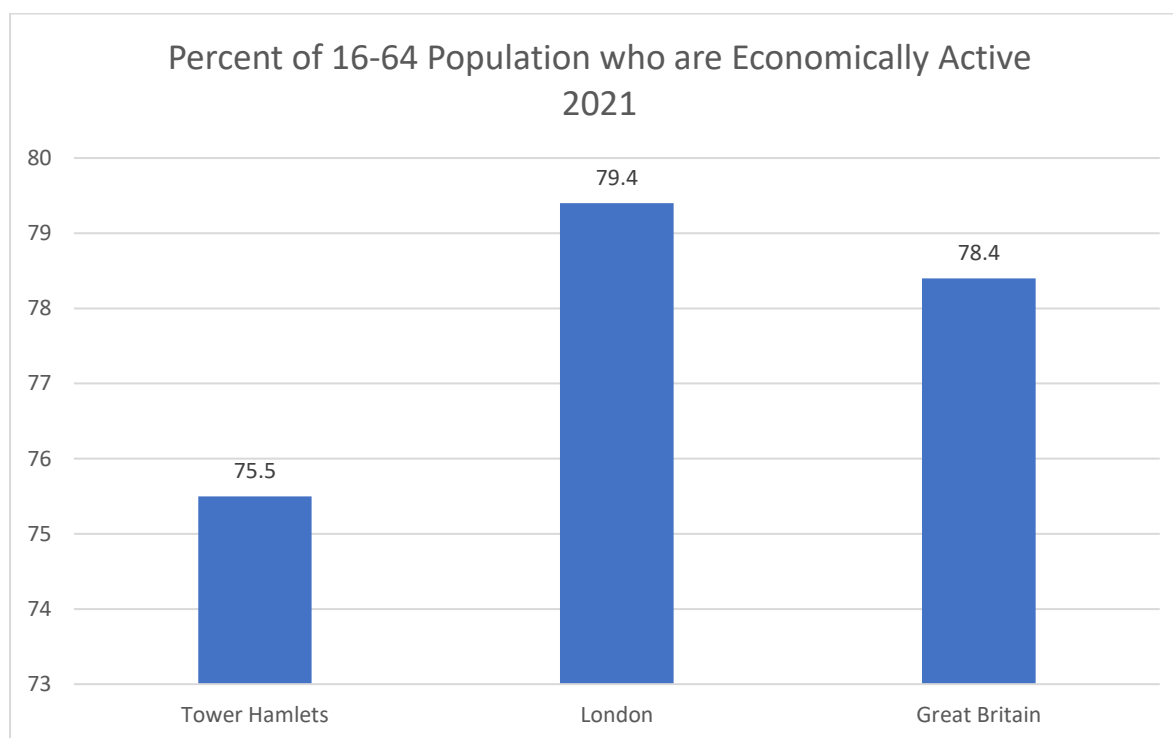
### Population aged 16-64 in Tower Hamlets 2021

Figure 6 Working-age population as a percent of total population



The graph above shows the working-age population of Tower Hamlets, London, and the United Kingdom as a percent of the total population. The graph shows that Tower Hamlets (75.9%) has a slightly higher proportion of working-age people compared to London (68.8%) and the United Kingdom (62.9%).

Figure 7 Economically active working-age population



This shows the percentage of the working-age population who are economically active – either currently employed, or unemployed but available to work. These figures are further broken down in the table below:

Table 5 Economic Activity in Tower Hamlets

	Tower Hamlets (Level)	Tower Hamlets (%)	London (%)	Great Britain (%)
<b>Economically active</b>	183,100	75.5	79.4	78.4
<b>In employment</b>	176,400	72.8	75.8	75.5
<b>Employees</b>	150,600	62.3	64.2	66
<b>Self-employed</b>	25,000	10.1	11.3	9.2
<b>Unemployed (model-based)</b>	8,500	4.6	4.5	3.7

Note that the percentages for ‘in employment’ to ‘self-employed’ are based on the total population aged 16-64, and ‘unemployed’ is based on the total economically active population. These figures indicate that Tower Hamlets has a lower rate of economic activity and employment compared to London and Great Britain. This can indicate a lower demand for childcare places from working families when compared to city and national averages.

### Out-of-work Benefits and Low-Income Families

Further data shows the number and percentage of people claiming out-of-work benefits. Compared to London and the United Kingdom, Tower Hamlets has a relatively high percentage of out-of-work benefits claimants, with 5.1%.

Table 6 Claimants in Tower Hamlets and London

Claimants	Tower Hamlets (Level)	Tower Hamlets (%)	London (%)	United Kingdom (%)
Aged 16 To 17	5	0.1	0.1	0.2
Aged 18 To 24	1,985	5.5	5.4	4.6
Aged 25 To 49	7,415	4.6	4.7	4.1
Aged 50+	2,935	7.7	4.9	2.8
<b>Total</b>	<b>12,340</b>	<b>5.1</b>	<b>4.7</b>	<b>3.6</b>

This data should be considered alongside information on Workless Households and low-income families. In 2021, 21.1% of children in Tower Hamlets were living in low-income families. The full breakdown of this figure is in the table below:

Table 7 Children in low-income families in Tower Hamlets

Year		2018/19	2019/20	2020/21 (p)
Age of Child (years and bands)	0-4	4,011	4,155	3,597
	5-10	5,520	5,674	5,214
	11-15	5,498	5,714	5,300
	16-19	4,292	4,539	4,331
	Unknown or missing	-	-	-
	Total	19,317	20,077	18,439
Year		2018/19	2019/20	2020/21 (p)
Gender of Child	Male	9,727	10,001	9,227
	Female	9,591	10,074	9,209
	Total	19,317	20,077	18,439

In 2021, 50.2% of children in Tower Hamlets were living in working households. This proportion is smaller than that of London (55.4%) and Great Britain (61.0%).

## Key Insights

Viewed together, the data presented in this section offer the following insights:

- 24.5% of the working-age population in Tower Hamlets are economically inactive, due to a variety of factors including being in education, looking after family members, illness, discouragement, and retirement. The exact data on this breakdown is currently unavailable, due to small sample sizes.
- The number of children in absolute low-income families has been steadily rising. However, data may be affected by the COVID-19 pandemic, and drawing accurate projections from available data is difficult.
- The data above should be considered alongside qualitative reports, as provided in the key summaries of this report. The relationship between childcare sufficiency and the labour market, while informative, cannot be used in isolation to provide recommendations.



## Inclusion – SEND, EHCP, Additional Needs

### Incidence of children with SEND

The following section is an analysis of Early Education and Childcare for children with additional needs, SEN designations, and/or an Education, Health and Care Plan (EHCP). Nationally, the number of children and young people with SEND, EHCPs, or additional needs continues to rise across all forms of childcare and education. There has been a national increase in the number of children with an EHCP of 50% since 2016, and the percentage of children receiving SEN support has risen to 12.6%.

All LAs (local authorities) are required to establish SEN inclusion funds for 3- and 4-year-olds who are taking up any number of hours of free entitlement. This can be extended to include 2-year-olds who are also accessing the free entitlement and in Tower Hamlets this funding has been extended to include eligible 2-year-olds. The funding is used to support access and inclusion for children with significant emerging needs accessing private, voluntary and community, and independent (PVI) Early Education and Childcare provision. Providers submit Inclusion Funding applications for individual children when they have adequate evidence that the child has significant emerging needs requiring Inclusion Funding. This is monitored on a termly basis to establish whether further funding is required for the subsequent term.

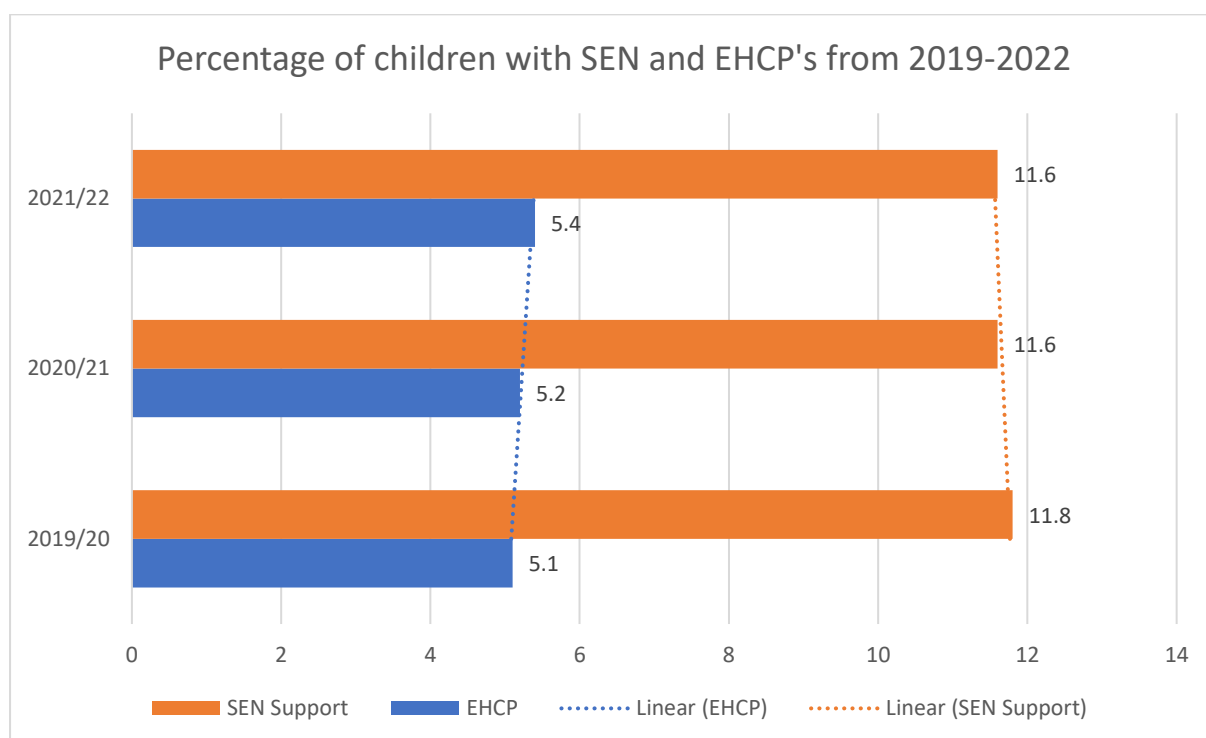
The data below provides termly data on the number of children attending a PVI Early Education and Childcare provision in receipt of inclusion funding:

*Table 8 Inclusion Funding by Term and Year*

Term and Year	Number of Children
Autumn 2021	52
Spring 2022	52
<b>Summer 2022</b>	<b>95</b>
Autumn 2022	61
Spring 2023	84

As of 2022, Tower Hamlets has a total of 5.4% of school children in receipt of an EHCP, higher than the national average. The borough also has 11.6% of children receiving some kind of SEN support at school, and this is lower than the national statistic of 12.6%. The graph below shows that the rate of children receiving SEN support is decreasing, while the rate of children with EHCPs is increasing.

Figure 8 Percentage of children with SEN and EHCPs in Tower Hamlets



These initial statistics indicate that the number of children requiring additional support in Early Education and Childcare is increasing; a conclusion which is supported by data from both provider and family engagement. The nature and distribution of the additional needs are analysed below.

## SEN Designation by Age-Group

The following graphs show the breakdown of SEN designation by age-bracket in Tower Hamlets, based on data from 2021 and 2022.

### Children aged 0 – 5 in Tower Hamlets

Speech, Language, and Communication Needs is the most prevalent SEN designation in children aged 0-5 years old in Tower Hamlets. Other common designations are Autistic Spectrum Disorder, Moderate Learning Difficulty, and Social, Emotional and Mental Health. This is shown in the following graphs:

Figure 9 Number of children aged 2 and under by SEN Provision and type of need: 2021/22

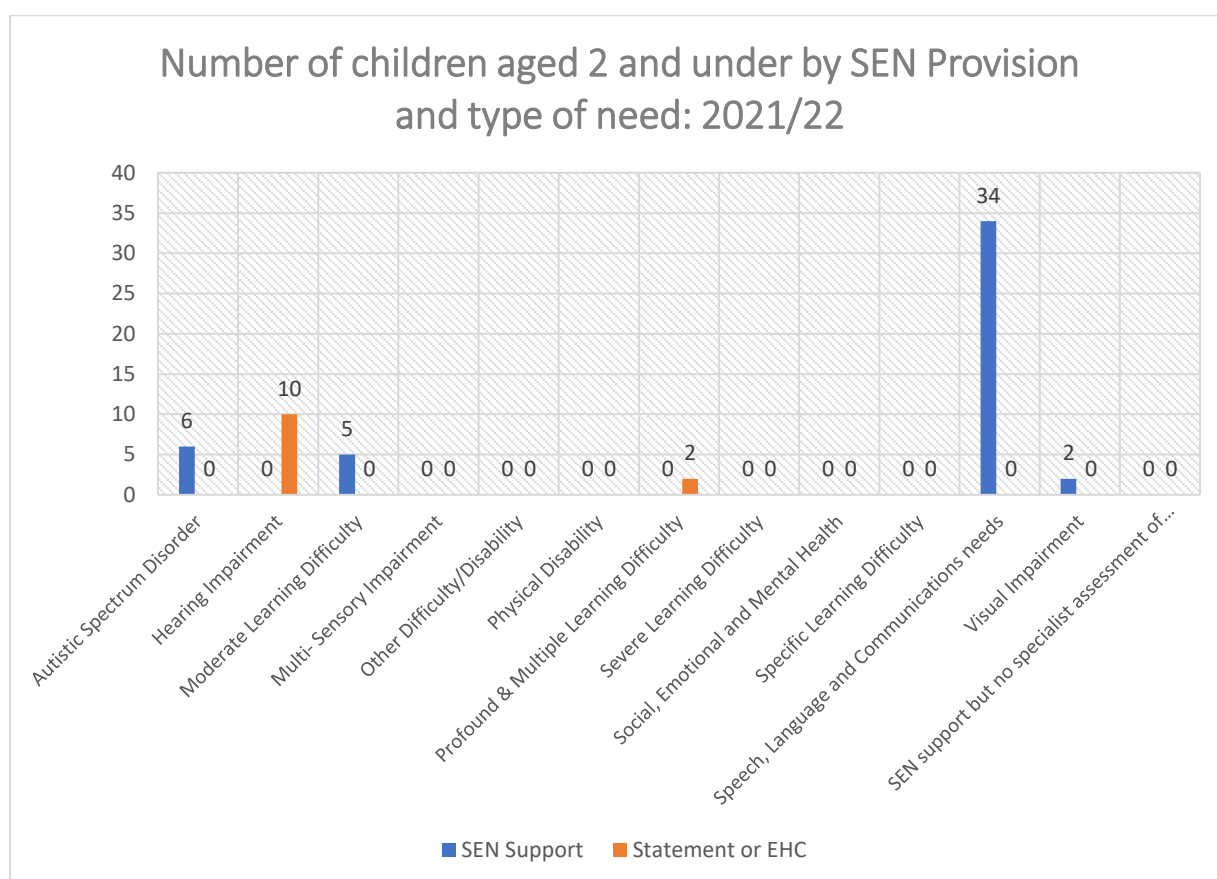


Figure 10 Number of children aged 3-4 by SEN Support and type of provision,

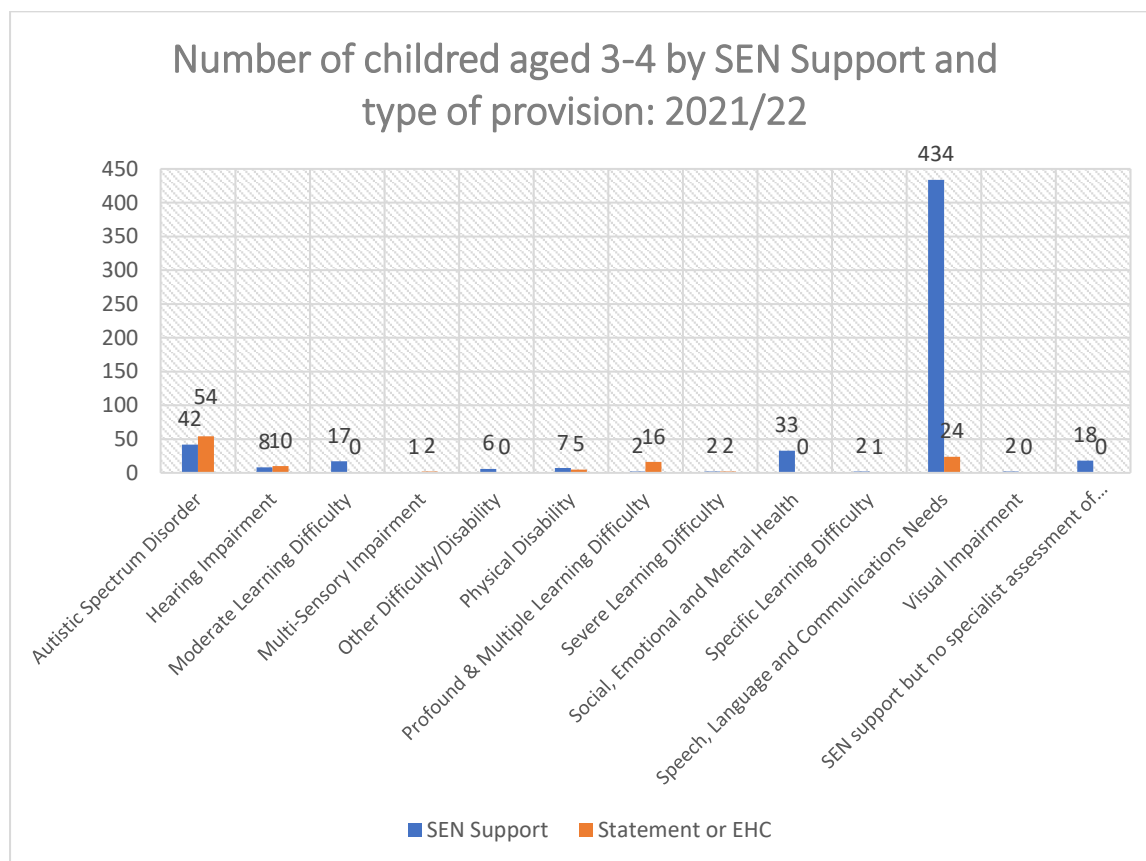
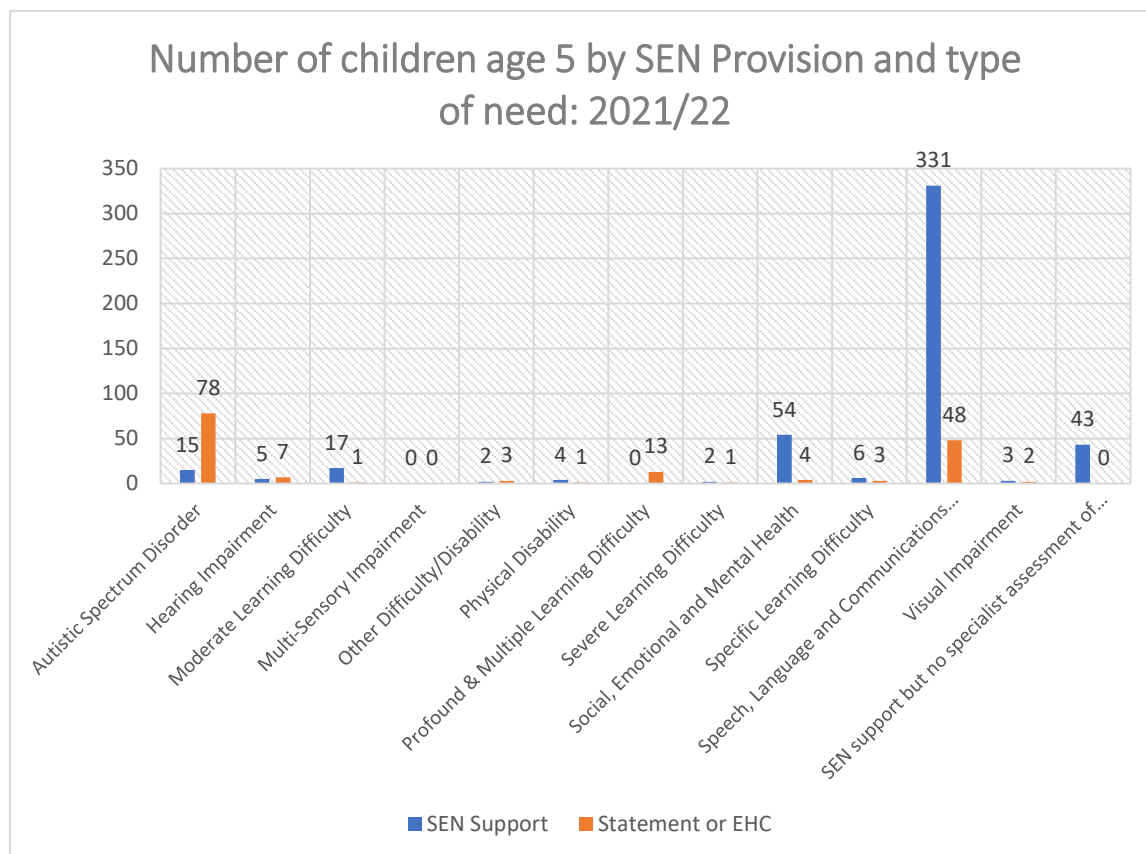


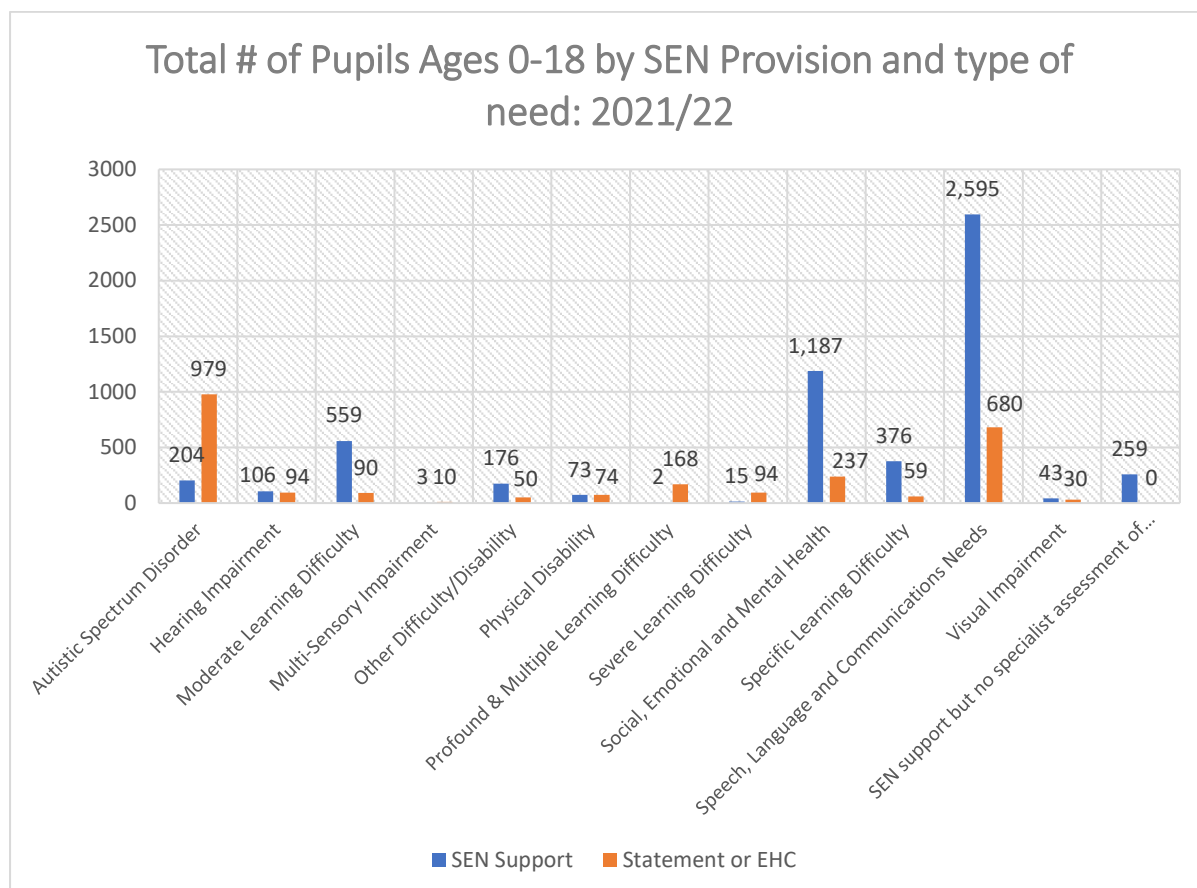
Figure 11 Number of children aged 5 by SEN Provision and type of need.



### Children aged 0-18 by SEN Provision

The following table shows the full breakdown of children ages 0-18 in Tower Hamlets by SEN designation, distinguishing between those in receipt of an EHCP and those receiving SEN Support.

Figure 12 Total # of Children Ages 0-18 by SEN Provision and type of need: 2021/22



The frequency of designations for the 0-5-years bracket and the 0-18-years bracket are roughly proportionate, though it is clear that children and young people above the age of 5 show a broader range of designation.

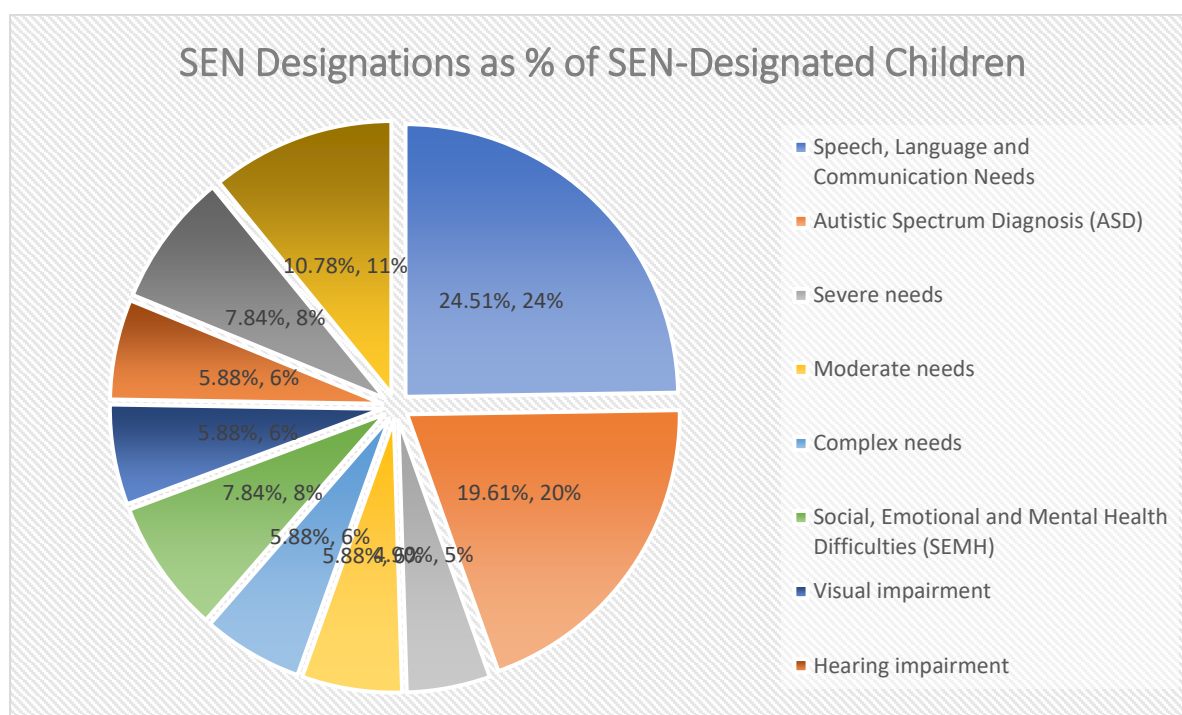
### Children and Young People ages 18 – 25 by SEN Provision

The most common SEN designation by EHCP in 18-25-year-olds is ASD (Autistic Spectrum Disorder), followed by Profound & Multiple Learning Difficulty, then Severe Learning Difficulty. Speech, Language and Communication Needs (SLCN) is also prevalent, though more so through SEN support than an EHCP. These figures may indicate that additional needs regarding learning difficulty tend to be diagnosed beyond Early Education and Childcare and that SLCN is more visible within the context of Early Education and Childcare.

### Childcare Providers and Inclusion

Responding Early Education and Childcare providers were asked how many children with SEND (in receipt of SEN support, SENIF (Special Educational Needs Inclusion Fund) funding or with an EHCP) they currently have on-roll. Although data taken from provider responses provide a small snapshot of current provision, it is important to note that it may not fully represent the needs of providers across the borough due to the low response rate of the survey.

Figure 13 SEN Designations as % of SEN-Designated Children



Speech, Language and Communication Needs is the most common SEN designation at 24.51%, followed by Autistic Spectrum Diagnosis (ASD) at 19.61%, with other designations occupying a range of 4.9% (Severe Needs) to 10.78% (Other). This data is somewhat reflected in the second graph, where respondents were asked which designation, they consider to be the most common among children in their care. Speech, Language and Communication Needs and ASD form the clear majority, though disproportionately so when considered against the previous graph. This indicates that respondents are generally accurate in assessing the prevalence of specific SEN designations and that Speech, Language and Communication Needs and ASD are potentially more visible than other designations as a whole. Regarding their capability to cater for children with SEND, the most common responses for the actual number of children were two or three children at any one time, both with 5.13% of responses. However, it is noteworthy that over 53% of respondents stated it depends on various factors.

Figure 14 Most Common SEN Designation according to Respondents

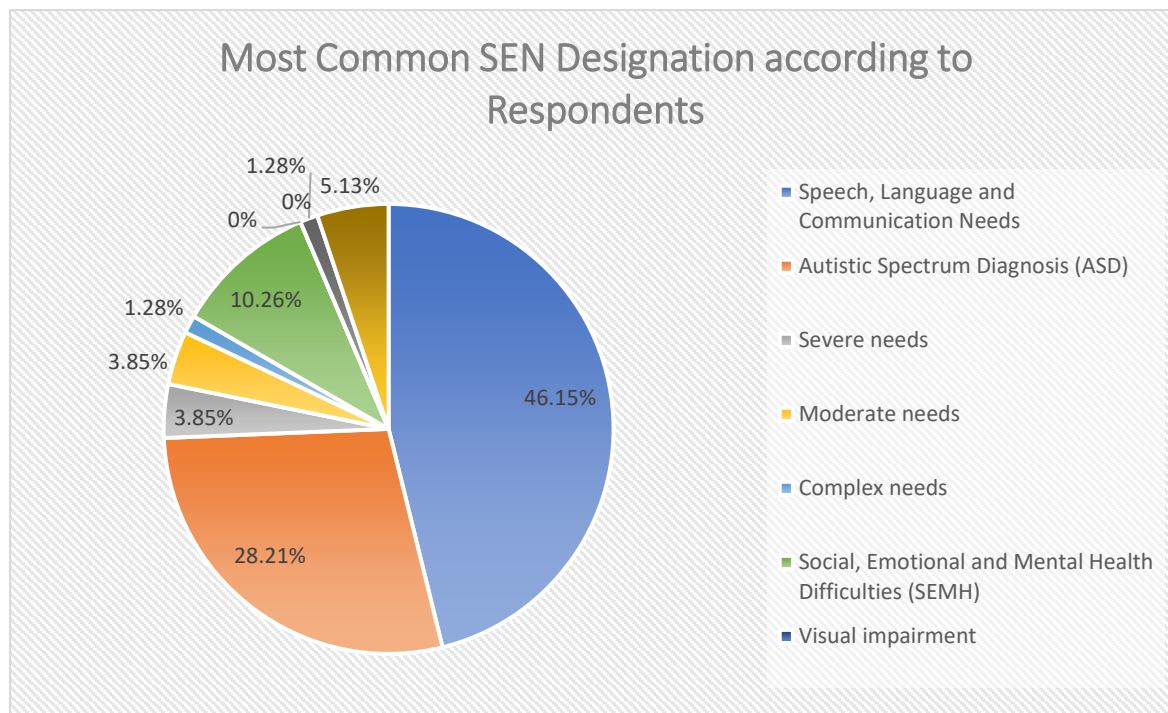
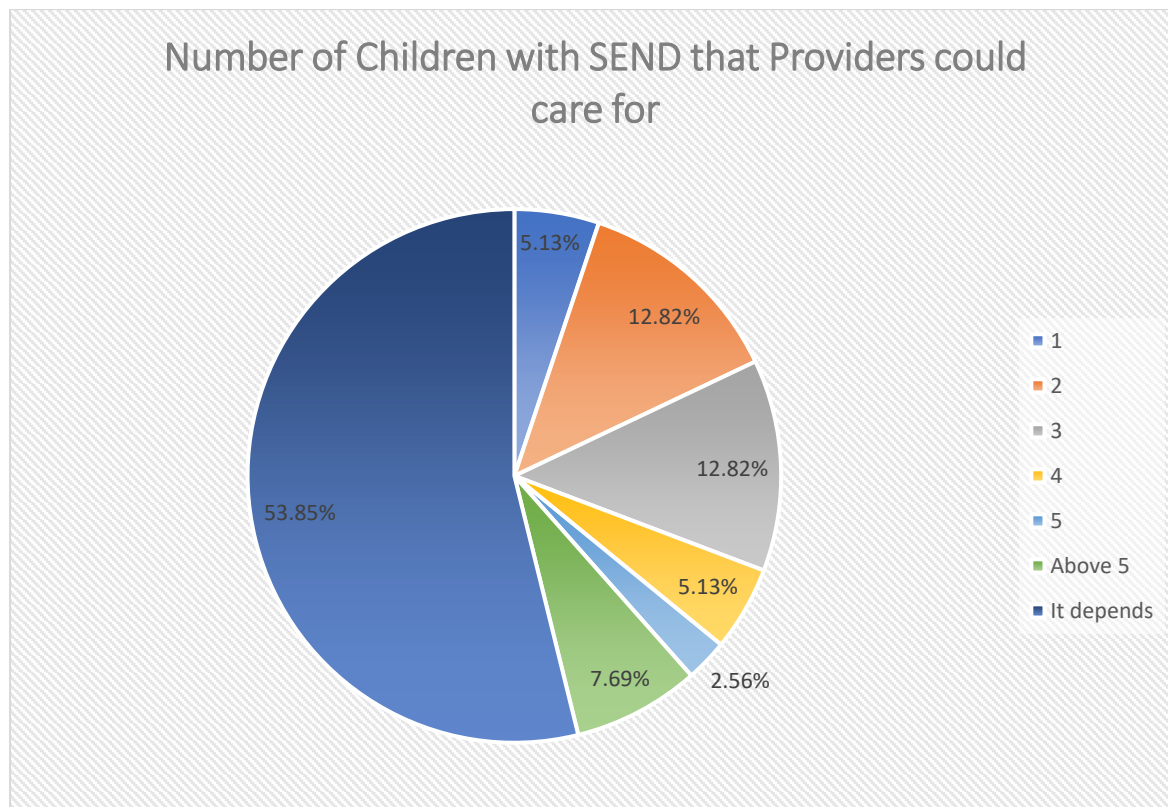


Figure 15 Number of Children with SEND that Providers could care for.



This information is complicated by the frequency with which children arrive without having their needs previously identified, according to respondents.

*Table 9 Frequency of Children arriving without identified needs*

Frequency	Percentage of Responses
Children usually arrive without having their needs identified	40%
At least once a month	14%
At least once a term	18%
At least once every 6 months	4%
At least once a year	12%
Less than once a year	8%
It has not happened yet	4%

When asked how often they are asked by families to care for a child with SEND, 40% of responding childcare providers stated that children usually arrive without having their needs identified 14% responded at least once a month whilst the other 18% responded at least once a term. When asked about the qualitative frequency, 50% responded that children arrive without having their needs previously identified ‘most of the time.’

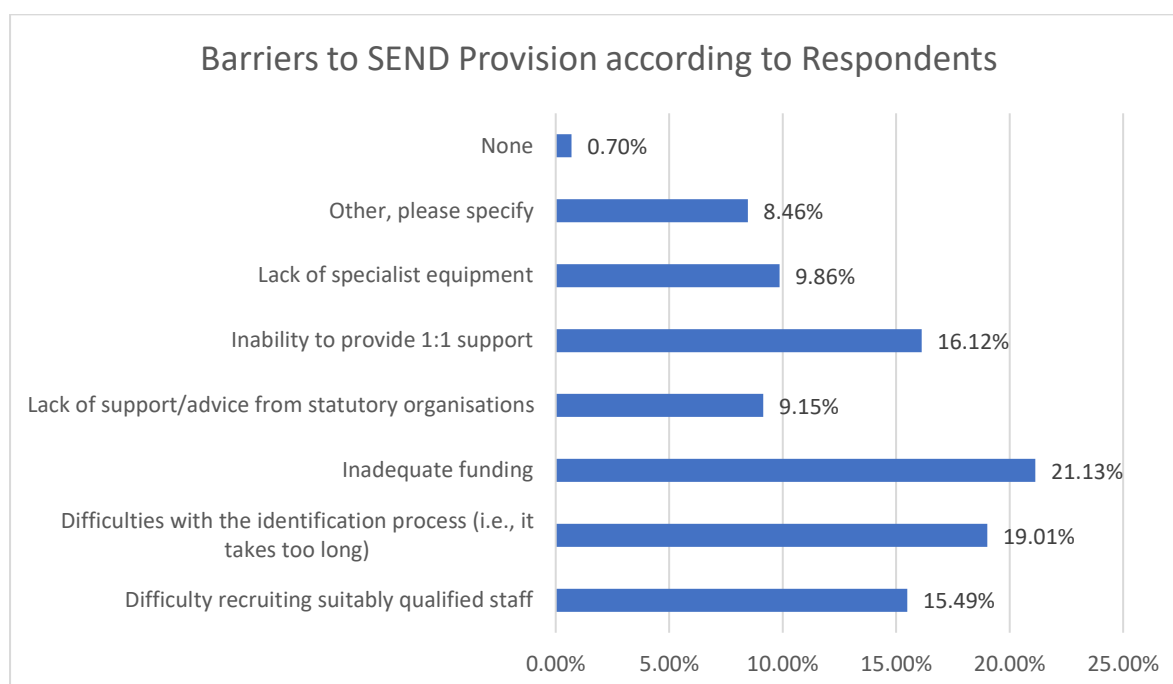
These findings indicate that providers would benefit from increased support regarding identifying and supporting additional needs within their care. This is also reflected in the results of the family survey.

### **Barriers to SEND Provision**

All respondents were asked to specify the largest barriers in terms of SEND provision across the Borough. The responses varied considerably, but the two most common responses were inadequate funding and difficulties with the time taken for assessments from specialist services to be undertaken following referral by providers.



Figure 16 Barriers to SEND provision according to respondents



One of the main points addressed by providers who had chosen ‘other’ when asked to expand was the lack of information and not enough signposting, leading to confusion from families. This is evidenced in the following quotes from respondents:

*‘...the misconception that a nursery is the only person liable to support the child, when we do not have enough support to provide these 1:1 support system that they expect. Or that we are not qualified speech therapist, or paediatric doctors!’*

*‘When children enter the nursery a lot of parents do not know their children have SEND. They need a lot of support to understand their child's needs and what support is available to them. The SENCO (Special Educational Needs Coordinators) has to go through the process with individual parents.’*

Providers also noted a lack of funding, and long waiting lists which end up impacting the children’s development, before the appropriate support is put in place:

*‘Other nurseries don’t take children with SEND because they do not have enough money or resources. Lower children ratio for child with SEND is needed’*

*‘Money funded entitlements not enough to cater for children with SEND. E.g., 2-year-olds, 15 hours just isn't enough, so parents do not bother. Sometimes can be more disruptive to have children in for such*

*short stints of time in the day, by the time they're settled, it is time for them to go. Training of staff, some of these might go amiss, because they haven't been trained to recognise'.*

The responses above give qualitative weight to the responses outlined in the graph on barriers to SEND. These barriers reflect both the local and the national context of current SEND provision in Early Education and Childcare.

## Family Focus Groups and Inclusion

Focus groups composed of families of children with additional needs were conducted via zoom or in person at community/family centres. Of the 4 focus groups that were organised, each had different amounts of families attending, in total, we spoke to around 12 parents from varying backgrounds.

### Key points

Key points raised in the focus groups include:

- Health visitors and childcare provision staff can give clear advice and help with support.
- Language barriers exist for face-to-face communication with staff or professionals.
- Families found the lack of provision during COVID-19 to have a negative impact on their lives and their child(ren)'s development.
- Families reported experiencing significant backlogs and delays for places in childcare provisions.
- New digital forums and websites created to bring families together are beneficial in sharing information and advice.

Regarding accessibility and the quality of care, the following points were raised:

- Families reported limited space and a 'first come, first serve' method of booking to be difficult to navigate when attempting to establish routine support.
- One focus group had many families not using formal childcare. The reasons provided included:
  - No availability
  - Transport issues
  - Lack of weekend and holiday support
  - Affordability
  - Appropriate resources
- Lack of appropriate equipment for certain children with SEND, particularly for children in wheelchairs.
- Insufficient staff to support children's needs and one-to-one care.

Regarding improvements they would like to see, responses included:

- More support during the diagnosis process.
- More training for general staff regarding SEN.
- Increasing the number of settings that can take on SEND children and doing more to ensure affordability or flexibility.
- More effective communication from the council advertising existing provisions with available spaces.
- More funding for transport services.

Extended comments from the focus groups include:

*‘Every child should have an equal opportunity to attend where possible, everyone should have this.’*

*‘The lack of support in general for parents of, and children with severe needs compared to more commonly known needs like Autism is a great difference’*

Responses from the focus groups were generally more positive than the family survey, and the concerns were more specific. Planners should take into consideration the points above when strategizing solutions to commonly identified problems, such as clarity of information regarding provision, places, and support, as well as material changes such as additional equipment.

## Stakeholder Survey and Inclusion

For families of children with SEND, most stakeholders noted a lack of clarity in terms of advice and support available, as well as suitable provision over the holiday, as barriers to SEND provision.

Table 10 Barriers to SEN provision according to stakeholders

Type of Barriers	Percentage of Responses	Number of Responses
Lack of quality childcare provision	28.57%	2
Lack of different types of childcare provision e.g., childminder/day nurseries	57.14%	4
Lack of supply of childcare overall	42.86%	3
Lack of affordable childcare	57.14%	4
Lack of flexible childcare e.g., flexible opening times	42.86%	3
Childcare not located in areas which are accessible to families within their local area	57.14%	4
Lack of suitable provision over the holidays	71.43%	5
Lack of clarity in terms of advice and support available	85.71%	6
None of the above	0.00%	0
Others – please give details	28.57%	2

## Key Summaries: Inclusion in Tower Hamlets

- Uptake in the provider surveys was low, and the resulting analysis should not be considered wholly representative.
- The most frequent SEN designations for children are Autistic Spectrum Diagnosis and Speech, Language and Communication Needs.
- Providers have expressed concern regarding children coming to their provisions without previously identified needs, and their capacity to offer quality support.
- Families have expressed concern about the availability of provision for their children with additional needs, including places, information about places, and other information regarding available support.
- Across the various surveys, accessibility and information about accessibility were highlighted as common concerns.
- The key barriers to effective SEN provision identified by respondents include affordability, availability, and accessibility.

## Key Recommendations: Inclusion in Tower Hamlets

- Planners should be aware of the barriers to effective SEN provision in Early Years Services and look to establish improved processes for identification and support.
- Productive channels of communication should be opened and/or improved between providers, families, and the council to facilitate sharing current places and availability, information pertaining to available services and support, information regarding SEN designations and how to support children and families in the home, as well as creating productive feedback loops to ensure future sustainability.
- The council should consider a comprehensive review of SEN provision in Early Education and Childcare to inform future planning.



## Early Education and Childcare

### Introduction

This section covers the current sufficiency of Early Education and Childcare in Tower Hamlets as a holistic provision. Key information regarding Early Education and Childcare includes:

- Some children are entitled to free childcare, funded by the government. These entitlements are for 38 weeks per year.
- All children aged 3 and 4 are entitled to 15 hours per week until they start reception class in school.
- Children aged 3 and 4 where both parents are working, or from lone parent families where that parent is working, are entitled to 30 hours per week until they start reception class in school.
- Children aged 2 whose families receive certain benefits (including low-income families in receipt of in-work benefits), or those who meet additional non-economic criteria, are entitled to 15 hours per week. Nationally, about 40% of 2-year-olds are entitled to this offer, but the proportion varies by area.

The current estimated national percentage of eligible 2-year-olds registered for early education entitlement is 72%. England has seen an increase of 10% in eligible registered children since 2021. The current national percentage for 3–4-year-olds registered for universal entitlements is 92%. England has seen an overall decrease of 1% since 2020, although is up by 2% from 90% in 2021. The take-up rates for 3 and 4-year-olds are calculated based on population estimates derived from mid-year estimates and projections produced by the Office for National Statistics.

### Tower Hamlets eligibility and take up 2022

Tower Hamlets Borough Council assesses the take up of places on a termly basis throughout the year for the 'Childcare Sufficiency Assessment: Free Early Education Entitlements and Childcare Take-up' (or CSA FEEE (Free Early Education Entitlement) & Care Take-up) report. To align with the consultation period in the surveys, the following data is taken from the Summer Term 2022. Data from this report has been used to supplement information derived from the School Census and Early Years Census 2022, to provide an overview of the sufficiency of free entitlements in Tower Hamlets.

Full information on the distribution of provisions across the borough can be found in the introduction.

### Take up of tax-free childcare option

In England, a reported 401,000 families took advantage of the tax-free childcare option, for approximately 478,000 children as of September 2022.

The annual number of families with used tax-free childcare accounts over the last three years in Tower Hamlets is taken from the ONS.

Table 11 Number of Families and Children accessing tax-free childcare 2019-2022

Year	Number of Families	Number of Children
2019-20	740	880
2020-21	755	905
2021-22	965	1,170

## Free Early Education Entitlements

### Universal Entitlement for 3- & 4-year-olds

The following graph shows the population of 3- and 4-year-olds in Tower Hamlets, based on the mid-2020 population estimate and the number of occupied Universal Entitlement places during the Summer Term 2022 by ward.

Figure 17 Universal Entitlement Uptake and Demand by Ward

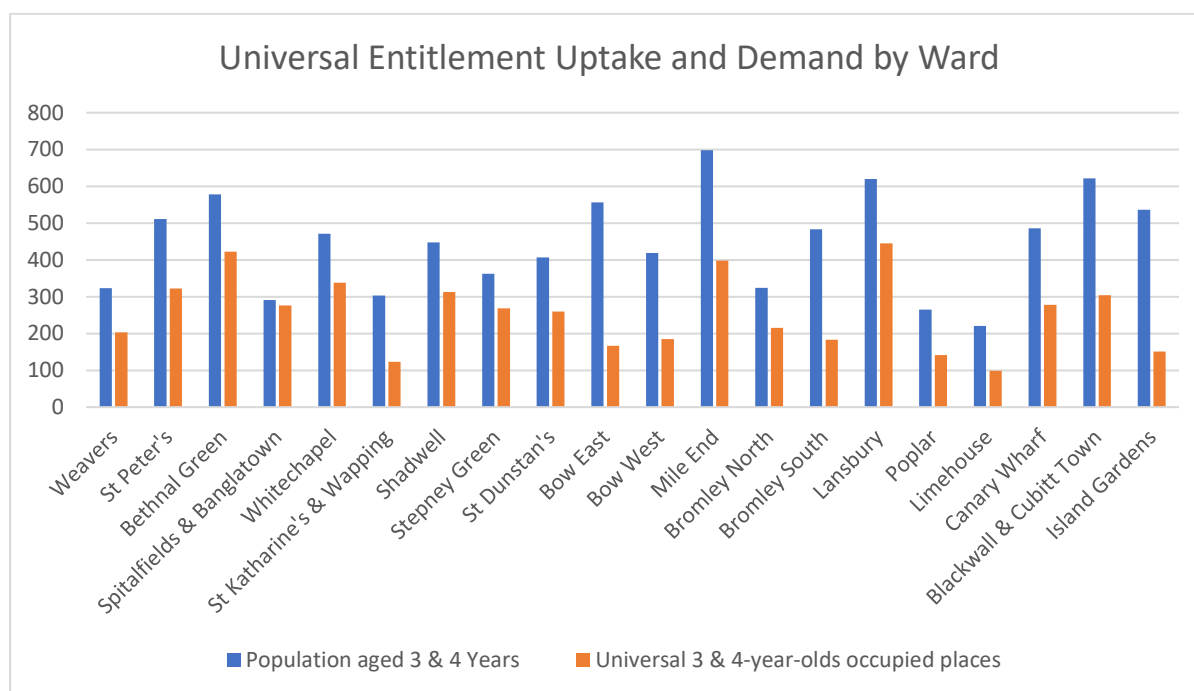
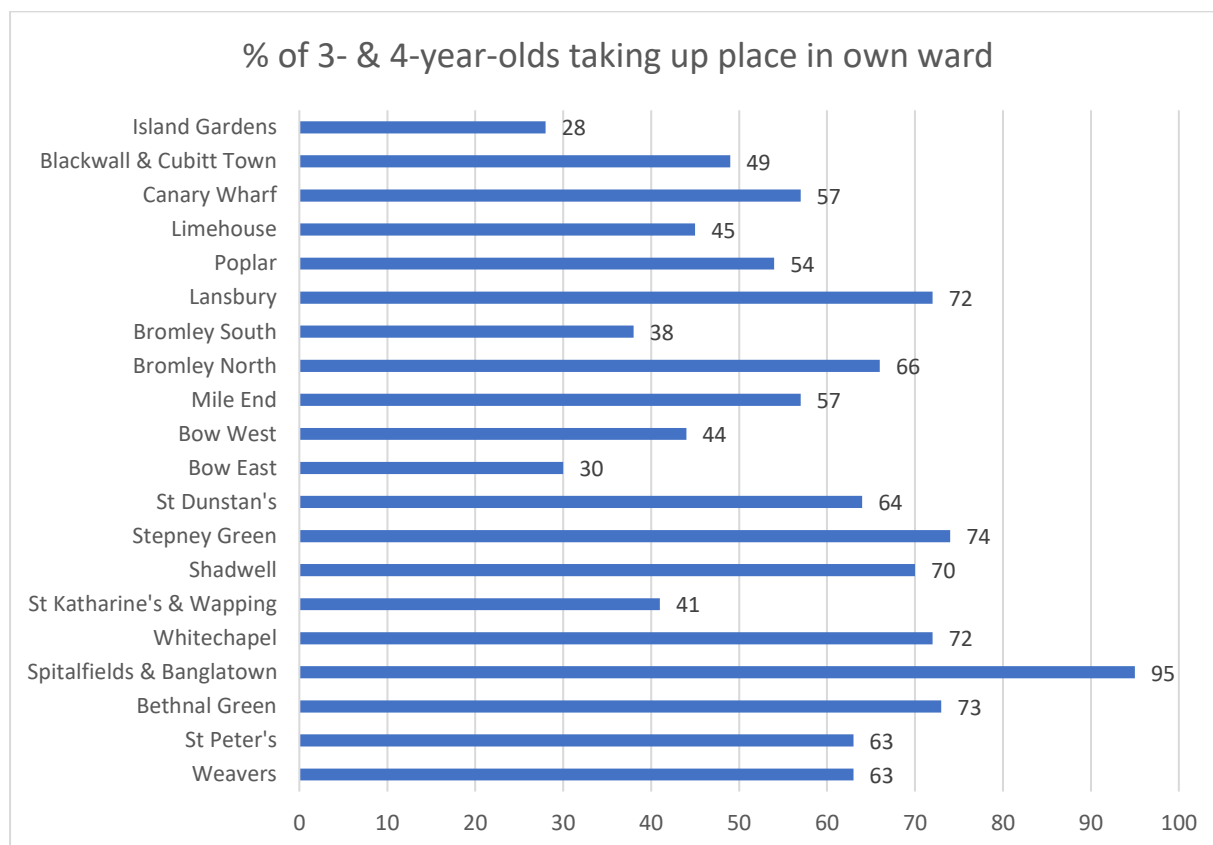


Figure 18 % of 3- & 4-year-olds taking up place in own ward



These figures show that local uptake is lowest in areas including Island Gardens, Bromley South, and Bow East. This indicates that planners should consider liaising with providers in these areas to improve accessibility and information regarding vacancies.

### 3 and 4-year-olds receiving 30-hour extended entitlement

The national number of children in receipt of the extended hours in England is 116,500. There are 8,924 children aged 3 and 4 years old in Tower Hamlets, the FEEE and Childcare Take-up report calculated that 2,200 families are eligible for the 30 extra hours entitlement, however, only 1,104 of these spaces are currently occupied:

Figure 19 Analysis of eligibility (demand) and take-up (supply) of 30-Hour Places

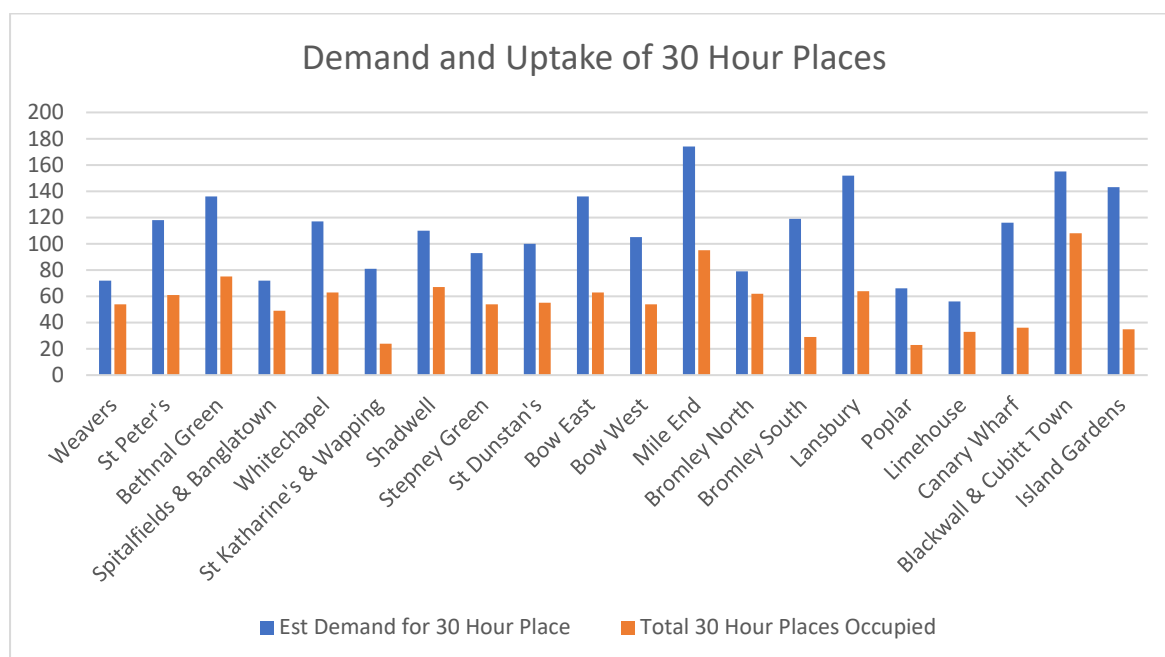
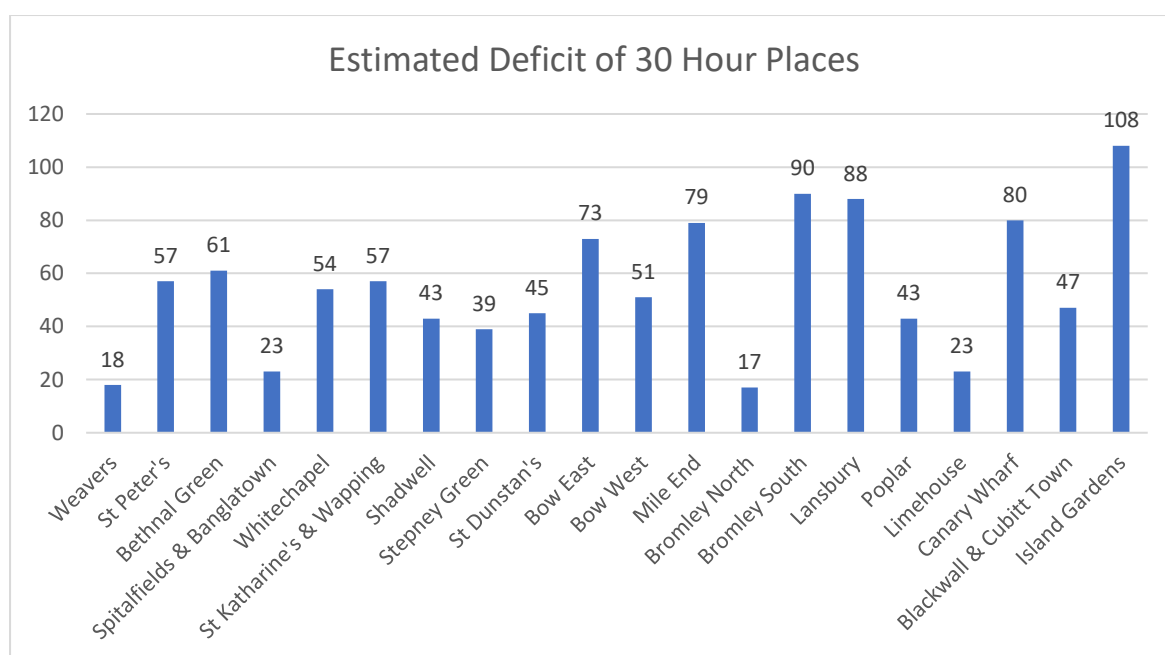


Figure 20 Estimated Deficit of 30-Hour Places



The data above demonstrates that every ward has a deficit of places based on estimated demand and currently occupied places. However, deficit is considered based on total places. This deficit can be addressed by improving uptake across the borough, as detailed in key insights and recommendations. If high uptake is achieved, Island Gardens, Bromley South, and Lansbury should be prioritised for re-assessing need for places.

### Early learning entitlement for 2-year-olds

This type of entitlement consists of 570 hours of free early education per year for 40% of the most disadvantaged 2-year-olds in the country. If taken over the 38 weeks of the school year this equates to 15 hours per week. Tower Hamlets have historically and consistently had a very low take-up of Early Learning for 2-Year-Olds (EL2) places.

Figure 21 Uptake of EL for 2-year-olds in Tower Hamlets

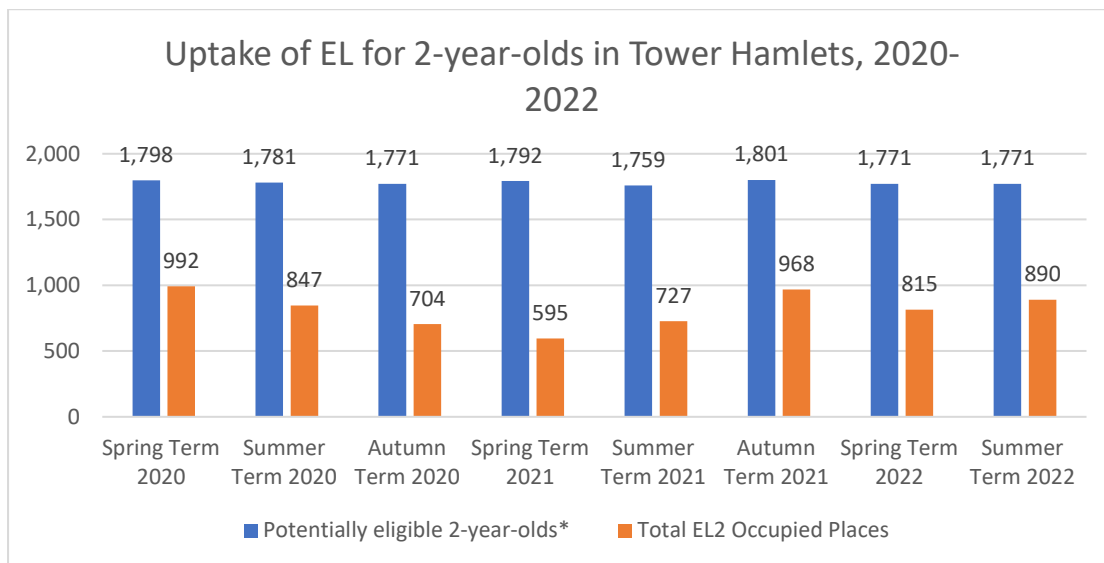
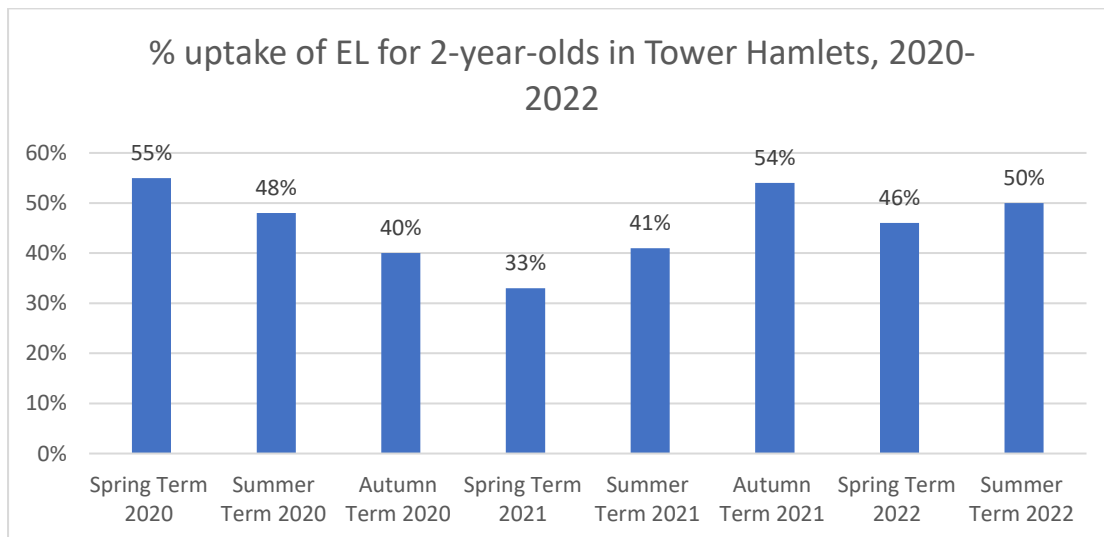


Figure 22 % Uptake of EL for 2-year-olds in Tower Hamlets



The total rate of uptake across the borough stands at 50%. This is following a significant promotion campaign and targeted outreach, which resulted in a recovery from the low of 33% in Spring Term 2021. However, the removal of these resources

again caused a dip from Autumn 2021 to Spring 2022, which has since recovered due to focussed work.

The distribution by ward is as follows:

Figure 23 Demand and Uptake of EL2 Places, Summer 2022

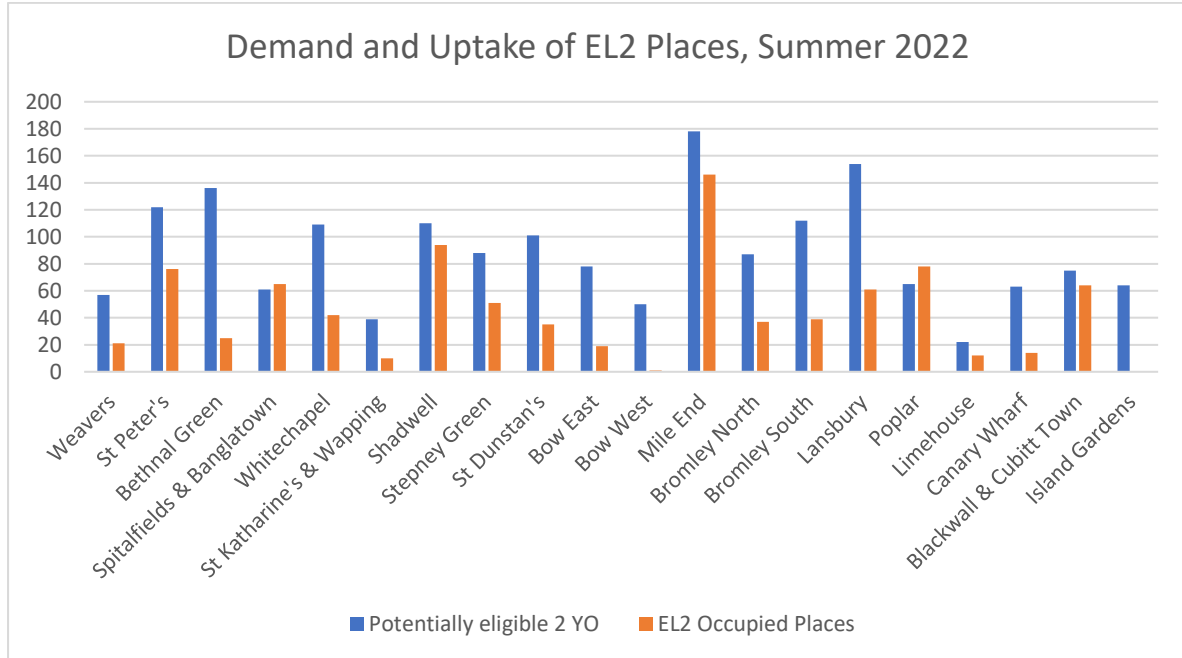
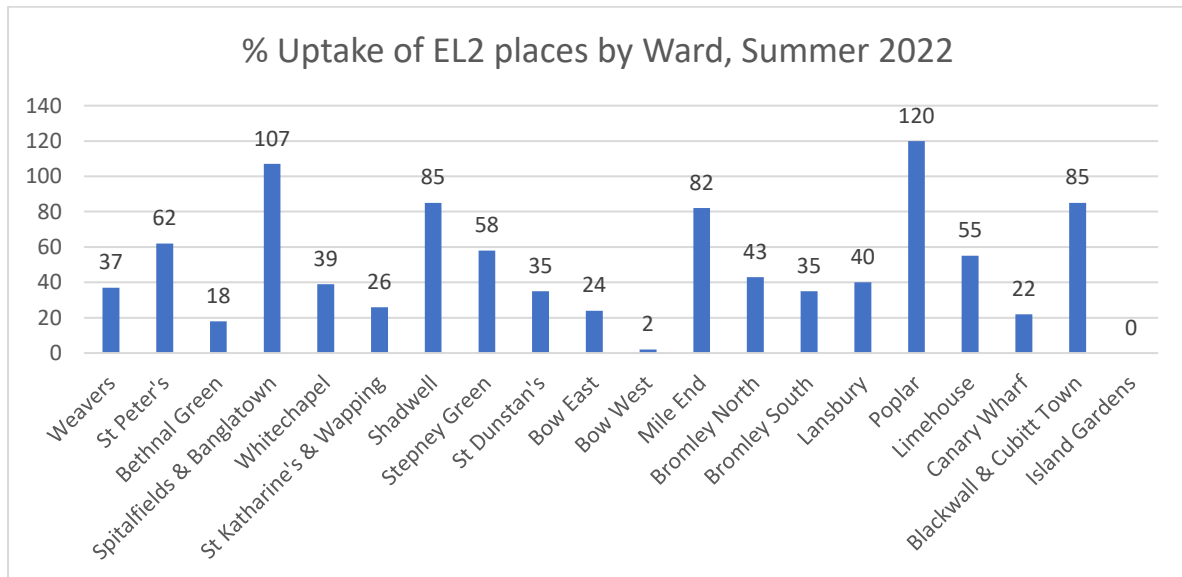


Figure 24 % Uptake of EL2 places by Ward, Summer 2022

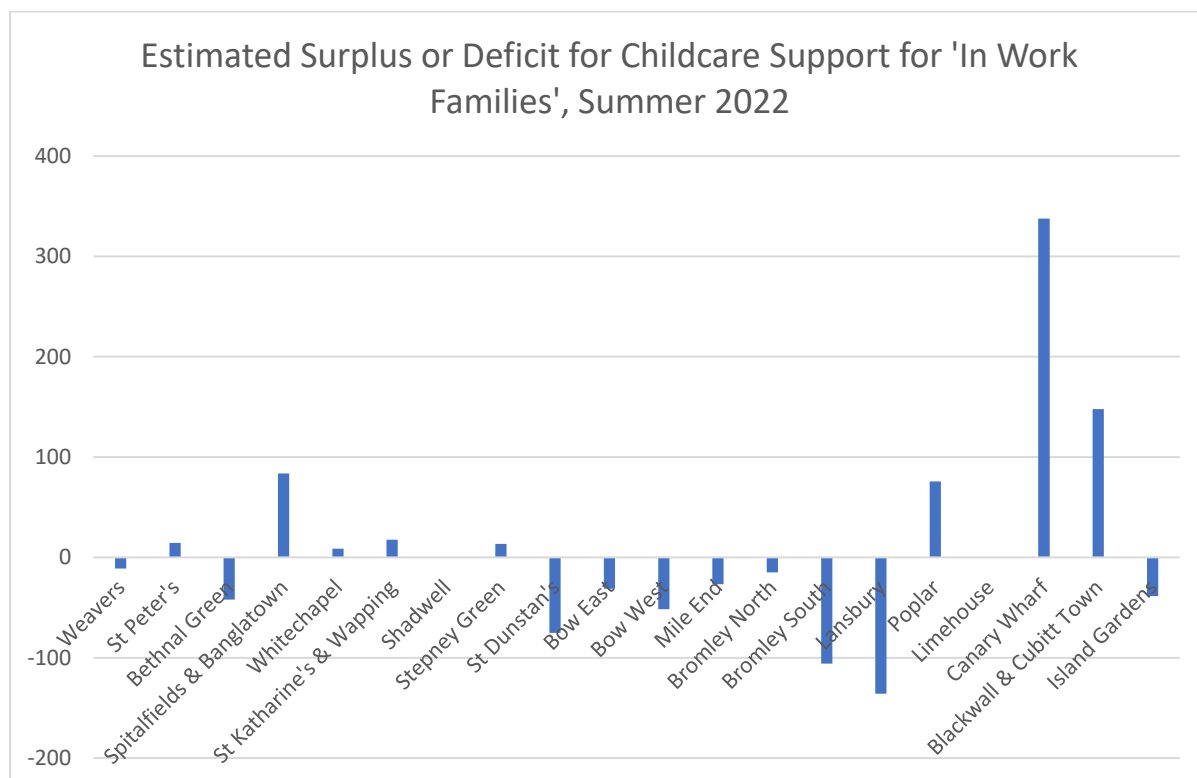


These figures demonstrate a significant need for increasing uptake in wards such as Bethnal Green, Bow West, and Canary Wharf.

### Support for Working Families

The following chart shows the estimated surpluses and deficits for each ward with respect to their capacity to support 'in-work families,' especially for those with a child aged 0-2 years. Potential capacity was generated by subtracting occupied places for each FEEE placement from the registered capacity.

Figure 25 Estimated Surplus or Deficit for Childcare Support for 'In Work Families', Summer 2022



This demonstrates that surplus and deficit depend largely on individual wards, and there are no borough-wide conclusions to be drawn. Wards such as Canary Wharf, Blackwall & Cubitt Town, and Spitalfields & Banglatown require no additional provision, whereas Lansbury, Bromley South and Bow East are in significant need of intervention.

### Waiting Lists and Vacancies

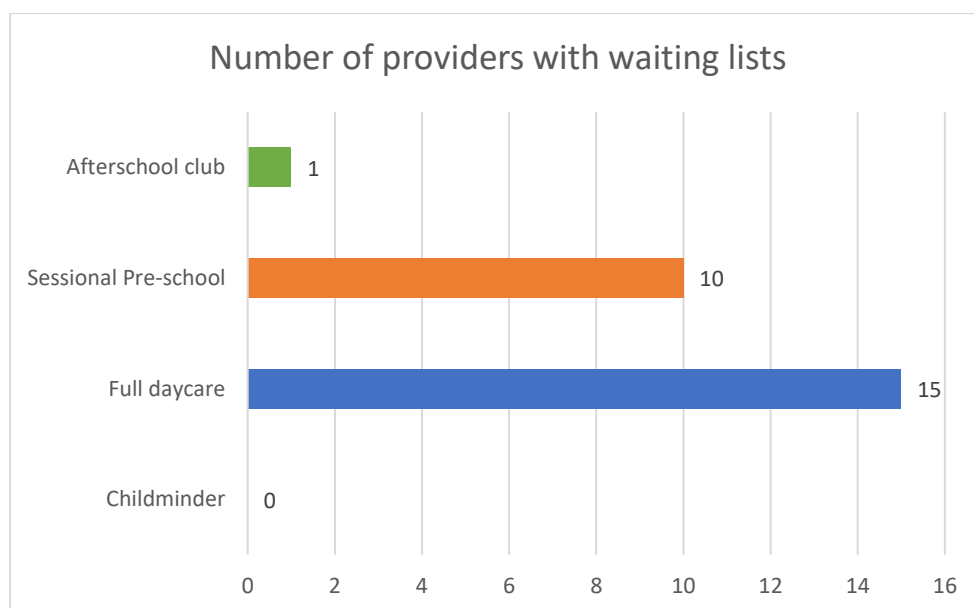
#### Waiting Lists

The following data is taken from the provider survey. Please note that this data might not completely represent the uptake of childcare throughout the borough, given the limited response rate from providers.

Just over half of providers (53.3%) stated that they have at least one child on a waiting list currently. Data indicates that there is greater demand for provision that spans a full

day, as Day Nursery providers received the most responses. Out-of-school provision appears less in demand with just 1 child on a waiting list for the responding settings.

Figure 26 Number of providers with waiting lists



When asked to elaborate on the age groups that comprise their waiting list, the most frequently cited age group was 2 years old, with 15 responses, although there was also a reported number of 14 0–1-year-olds. Providers had 10 3–4-year-olds and 6 children of 4 and above waiting for a place.

Table 11 Reported Waiting Lists

Ward	Under 2s	2 years	3-4 years	4 and above	Total
Bethnal Green	1	1	1	0	3
Blackwall and Cubitt Town	2	1	0	0	3
Bow East	2	3	3	1	9
Bow West	0	0	0	0	0
Bromley North	1	1	1	2	5
Bromley South	-	-	-	-	0
Canary Wharf	-	-	-	-	0
Island Gardens	1	1	1	1	4
Lansbury	1	1	1	1	4
Limehouse	-	-	-	-	0
Mile End	2	2	1	-	5
Poplar	-	1	-	-	1
St. Dunstan's	-	-	-	-	0

St. Katharine's and Wapping	2	-	-	-	2
St. Peter's	-	1	1	-	2
Shadwell	-	-	-	-	0
Spitalfields and Banglatown		2	1	-	3
Stepney Green	2	1	-	-	3
Weavers	-	-	-	-	0
Whitechapel	-	-	-	1	1
<b>Total</b>	<b>14</b>	<b>15</b>	<b>10</b>	<b>6</b>	<b>24</b>

The table above shows the distribution of reported waiting lists by ward and age of child waiting. Note however that there is a large gap in the available information due to lack of response. Due to the lack of information, further research and outreach is needed to establish an understanding of current waiting lists.

### Vacancies

Providers were asked if they had any vacancies and to report roughly how many more children they would currently be able to accept into their provision. 68% of responding childcare providers indicated that they have vacancies, with a total of 582 vacancies.

Table 12 Reported Vacancies

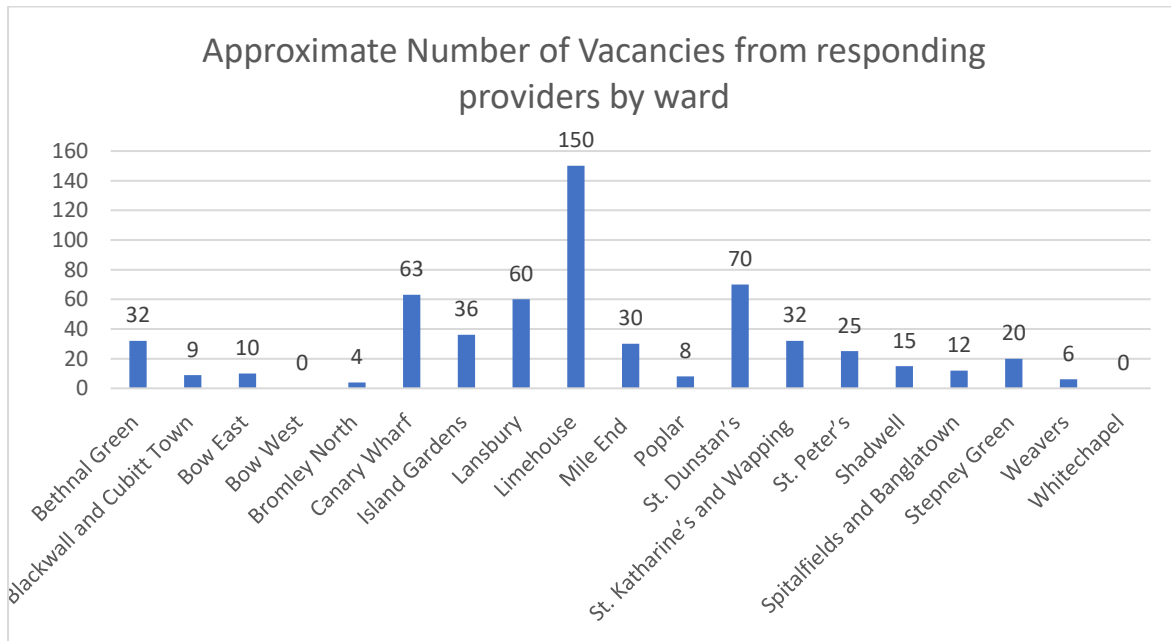
Vacancies	Percentage of Responses	Number of Responses
Childcare providers with vacancies	68%	28
Childcare providers without vacancies	32%	13

Most of the vacancies across the board were for children aged 3-4 years old, with fewer spaces available for younger children of 2 and under

Table 13 Number of responding childcare providers with vacancies, by age

	Under 1s	1-2 years	2 years	3-4 years	4 and above
Childcare providers	13	13	26	32	28

Figure 27 Approximate Number of Vacancies from responding providers by ward

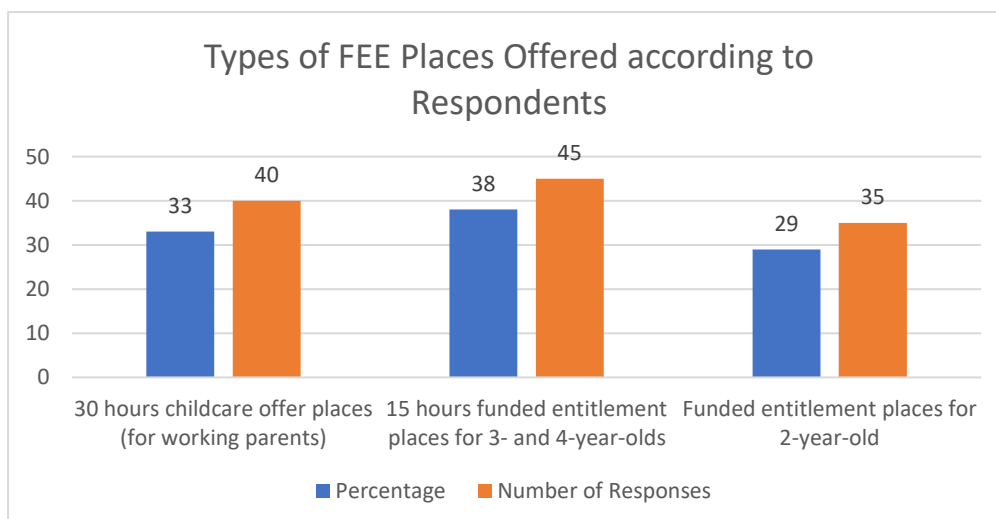


The ward with the most vacancies as reported by responding providers is Limehouse, with 150. The approximate total number of vacancies is 582. This information should be considered against the estimated demand; however, the number of responses makes drawing any further conclusions complicated.

### Provision of free early education entitlement places

All respondents were asked to state the types of free early education entitlement places that they offer. The most common type of free early education entitlement places offered by Early Education and Childcare providers was 15 hours places for 3-4-year-olds, with 37.5%. One respondent stated that they do not provide any free entitlement places.

Figure 28 Types of FEE (Free Early Education) Places Offered according to Respondents



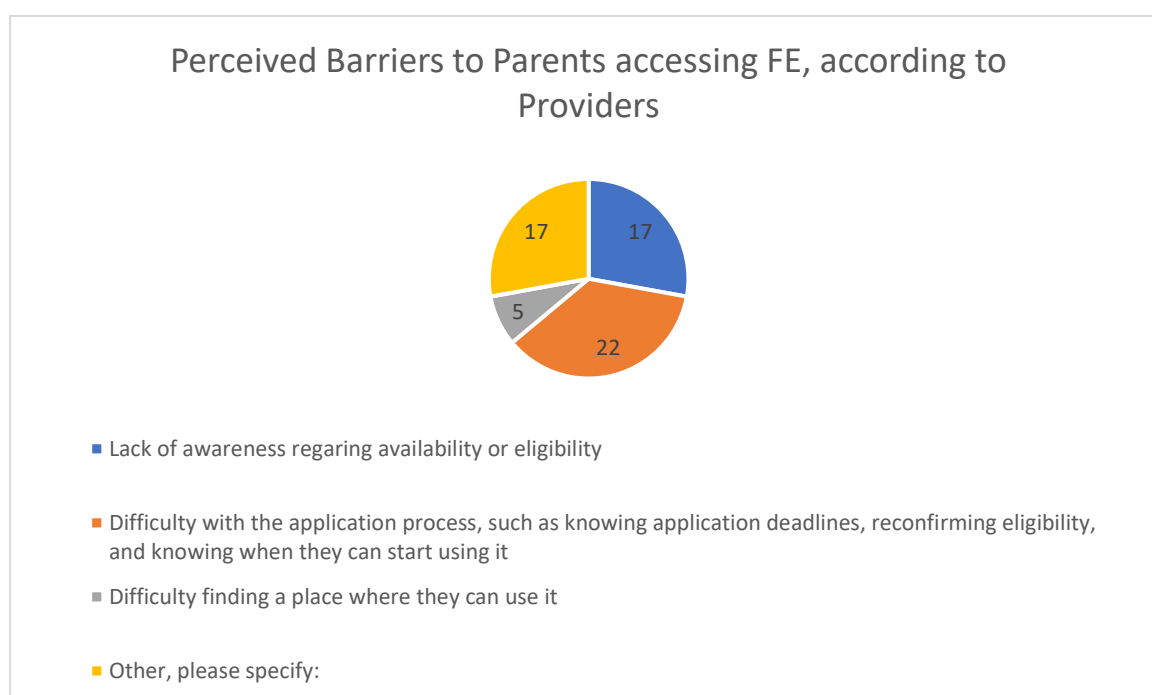
Alternative discounts or funding offered by providers included:

- 10% sibling discounts
- 20% staff discounts
- 15% university student discounts

All respondents were asked to report the type of funded entitlement places that children currently in their provision are accessing. The research found that most responding Early Education and Childcare providers currently have at least one child for different types of free early education entitlement places, as all types received more than 65% of responses. 15 hours free early education entitlement places for 3- and 4-year-olds were the most frequently reported type with 88.1%. When the participants were asked if they cap the current number of children accessing free entitlements, 73.8% of responding Early Education and Childcare providers indicated that they do not, and 26.2% do.

All respondents were inquired about types of key challenges in terms of families accessing funded entitlements.

*Figure 29 Perceived Barriers to Families accessing FE, according to Providers*



According to this data, providers should consider how they can promote awareness and information regarding funding entitlements, as well as considering streamlining processes for application.

## Perceptions on existing sufficiency of childcare

All respondents were questioned about their perceptions of the existing sufficiency of childcare. On this, opinions were considerably divided. Overall, childcare was sufficient by the majority of responders. However, childcare for children with SEND was perceived to be insufficient. This matches the conclusions drawn earlier in this report.

Table 14 Perceptions of all childcare providers on existing sufficiency of childcare

	0–5-year-olds		5 and above		Children with SEND	
	Percentage of Responses	Number of Responses	Percentage of Responses	Number of Responses	Percentage of Responses	Number of Responses
Sufficient	68%	32	75%	31	40%	19
Insufficient	32%	15	24%	10	60%	28

All respondents were asked whether their operation would continue in the next five years. 83.3% of responding childcare providers stated to continue their services in the next five years.

Table 15 Frequency of responding childcare providers state their operation would continue in the next 5 years

Option	Percentage of Responses	Number of Responses
Yes, I/my setting do plan to still be providing childcare in the next 5 years	84%	41
No, I/my setting do not plan to still be providing childcare in the next 5 years	8%%	4
Unsure	8%	4

All respondents were asked to identify specific types of support that they believe would benefit their provision. Staff training was the most frequently cited type of support by respondents, with 20.33% mentioning it. 17.89% of respondents indicated that support on recruitment and retention would be beneficial, whilst 11.38% responded advice/support with children with SEND would be beneficial.

Table 16 Extent to which responding childcare providers stated that they felt their provision would benefit from specific/targeted types of support

Type of Support	Number of Responses	Percentage of Responses
Recruitment and retention	22	17.89%
Staff training	25	20.33%
Marketing support/advice	10	8.13%
Building alterations	8	6.5%
Inspection/registration support/advice	4	3.25%
Support to network with other providers	10	8.13%
Advice/support with children with SEND	14	11.38%
Advice/support for children with complex medical needs	10	8.13%
Other (please specify)	12	9.76%
None	8	6.5%

Other answers included:

*Educational psychologists in children's centres lost*

*'TH less funding = cut back on staff. Could do with more business support, other boroughs have this additional support. Generic policy procedures.'*

When questioned if they were aware of the new Mayor's manifesto pledge to review childcare, with a look to re-introducing LA-run nurseries, only 8 providers said they were and another 21 said they were not. To expand their thoughts on the pledge and whether they think it will improve childcare in the borough, providers were invited to respond in a comment box. Most providers spoke against the idea of LA-run nurseries, feeling as if it will cause private nurseries to struggle even more and that the council needs to prioritise supporting the existing provision. Comments included:

*'We prioritise quality over quantity. Currently, we feel there are high-quality settings which are not full and do not believe creating more settings will enhance the quality of early education in Tower Hamlets.'*

*'Before we start re-introducing new LA-run nurseries, more support needs to be given to existing nurseries. Over the last 7 years we have had lots of support withdrawn which has had a negative effect on small charity/community run childcare settings. We have been providing childcare for nearly 18 years and for the last 18 months to 2 years have not been able to fill all of our spaces, this is either due to being unable to recruit good quality and experienced staff or*

*because early learning at Tower Hamlets do not get back to us when we say we have spaces for eligible 2-year-olds.'*

### Key Summaries: Early Education and Childcare

The anticipated need for different age groups by ward is shown below. The scoring of need is based on the internal scoring system used by the borough and is based on the number of places and the number of eligible children without considering uptake. Scoring is presented to align this report with internal reports and data. This scoring system is as follows:

- 0 = no identified need for increased provision
- 1 = possible need for increased provision
- 2 = identified need for increased provision
- 3 = significant need for increased provision

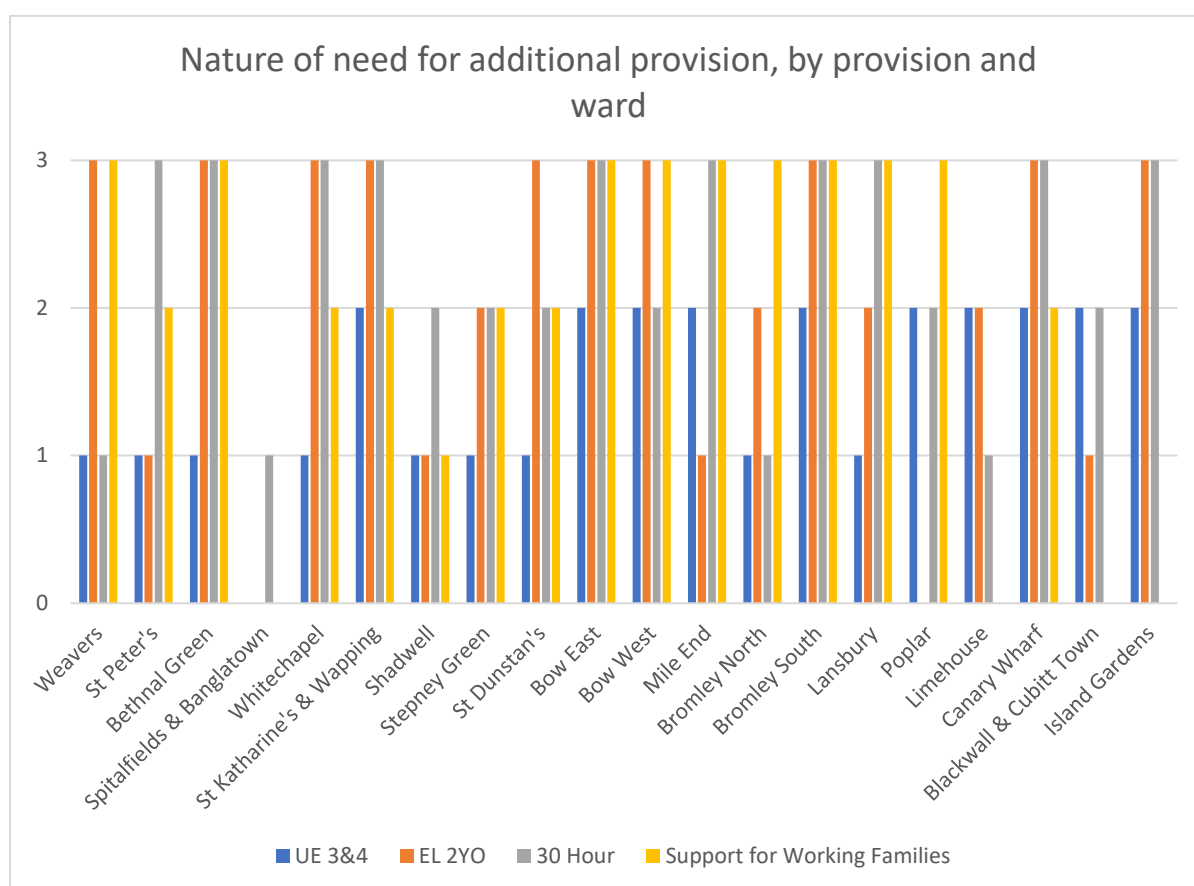


Figure 30 Nature of Need by Ward

- While the graph above, based on internal data, shows need based on internal data, need is not considered against uptake rates.
- *Actual* need across the borough is significantly lower than the place-based analysis demonstrates. If uptake were to be increased, especially in wards such as Bethnal Green, Bow West, and Canary Wharf.

- Generally, assuming 100% uptake, there is identified need for increased provision across all ages except for 3- and 4- year-olds in universal entitlement places.
- Bethnal Green and Bow East are the wards which show the most need based on place-based analysis.
- Full information on each ward's profile can be found in the appendices.

### Key Recommendations: Early Education and Childcare

- There is a general need for increased uptake of places across the borough, which can be facilitated through further co-operation between the council and providers.
- The council should work alongside partners and providers to stimulate the market, improve marketing, and support community interaction to increase uptake.
- Further support should be offered to families to facilitate comprehension of available places by provision type and age.
- Current childcare is perceived by most respondents to be sufficient.
- The overall response rate to the provider survey was low and therefore the analysis of responses around vacancies and waiting lists, as well as perceptions of sufficiency should not be taken as wholly representative.



## Extended Services

### Hours of provision

Childcare providers were asked about their operating times.

*Table 17 Frequency with which Tower Hamlets' Council's childcare providers state that they typically operate*

Type	Term-time only	All-year-round
Childminder	1	2
Day Nurseries	5	17
Sessional Pre-school	18	4
After school club	3	0

All responding childcare providers were asked to specify their typical operational period. 51.1% of all the respondents (childcare providers and childminders combined) operate term-time only basis whilst 48.9% operate all-year round. Since there were no responses from holiday playschemes, there is no data provided for the provision of care during school holidays.

Most childcare providers provide services between 8:00 and 9:00, with 8:00 being the most common start time (43.63%). 7 childcare providers responded that they start before 8:00, i.e., at 7:00 or 7:30. One childminder indicated opening after 10:00 am.

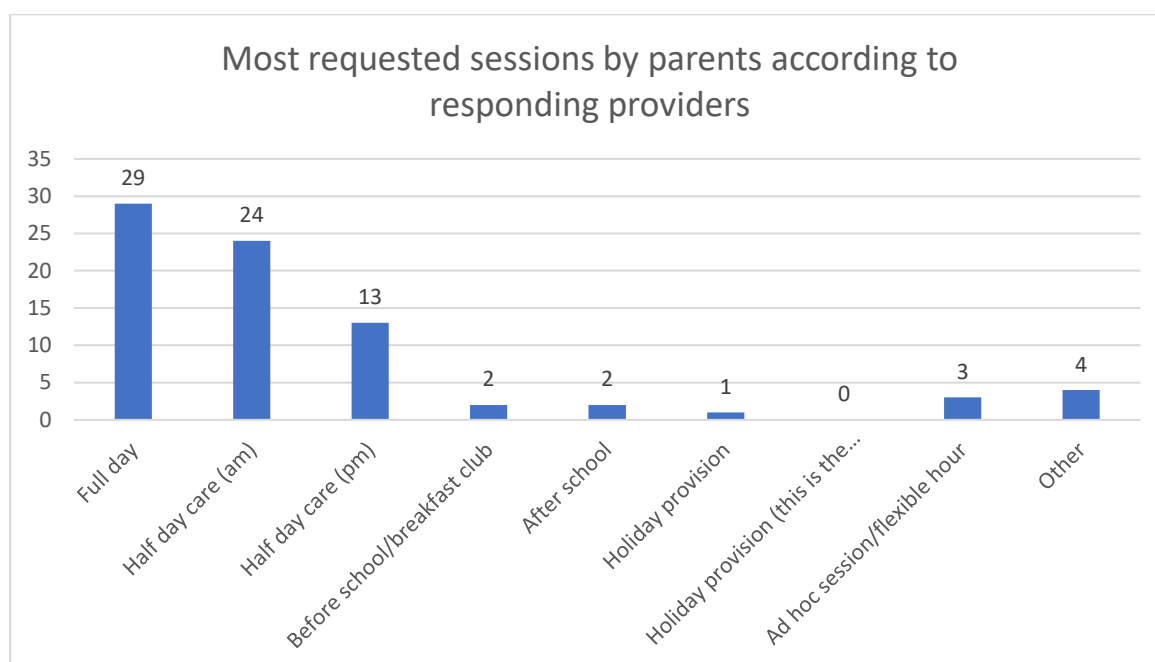
Approximately 90% of responding childcare providers close their provision before 6:00 pm, with 6:00 pm being the most common finish time (33.33%). There are 10 childcare providers finishing after 6:00 pm.

Approximately 66% of responding childcare providers do not provide wraparound care.

### Demand for provision

The most requested session by families that childcare providers experience is full day care with 35.6% responses. Half-day care (am) was the following most prevalent at 28.8%, which was more than twice as popular as half-day care (pm), the third most common.

Figure 31 Most requested sessions by families that childcare providers experience



According to the provider survey, 84.4% of providers claimed that they are either not very frequently or never get asked to provide hours outside of their normal opening times. Approximately 15.6% are reportedly asked to do so ‘quite frequently’ or ‘very frequently.’

The survey found that 26% of childcare providers operate outside of their typical operating hours based on parental demand. Interestingly, despite 100% of participants claiming they do not operate on weekends, 1 childminder and 1 day nursery reported that they will if families request it.

Table 18 Number and times of child providers operating outside of typical hours following parental demand

Time period	Number of Responses	Percentage of Responses
Before 8 am	4	10%
After 6 pm	5	10%
Overnight care	1	2%
Weekend care	2	4%
Never	38	74%

According to the data above, there does not appear to be a significant need for extended services from childcare providers. However, as mentioned throughout the report, it is essential to consider that the response rate to the provider survey was low and therefore responses may not be entirely representative of the needs of providers regarding extended services.

## Afterschool Clubs

According to the afterschool survey, a high number of schools the respondents attend offer after-school clubs. 95.92% responded with yes, while 4.08% responded with no. Most respondents (80.6%) attend an afterschool club. 19.2% do not. Three respondents skipped this question.

The respondents also gave information on how many days a week they attend the after-school club. Most respondents (25%) stated they attend three days a week. 22.2% of respondents mentioned they attend after-school clubs once a week. 19.4% stated they attend 4 days a week. 16.7% attend two days a week, and another 16.67% attend five days a week.

When asked why they attend an after-school club, 61.1% of respondents stated, "My parents are at work." 30.6% stated, "I like going to after school club" and 5.6% stated, "My friends go there."

The respondents who claimed they do not access after-school clubs were asked to explain why they do not attend, 50% stated "I go home with parents". 40% stated, "I don't want to go to after-school club".

One respondent who selected 'other' stated the following:

*'After-school clubs do not teach them anything. They are a baby-sitting facility for working parents.'*

## Quality of after-school clubs

Respondents were generally satisfied with the afterschool clubs they attend. The 34 respondents who gave an insight into what they think of after-school clubs gave positive answers. 58.82% stated "I really like after-school club" and 41.18% stated, "I like after school club." This suggests that the overall quality is good as all the attending children are satisfied with the service.

The respondents were asked to give us more information on what they think about after school club. 23 different written responses were given. Overall, the comments were positive. Responses were given regarding reasons why the children like to attend and have an insight into the types of activities that are put on in the after-school clubs. Several responses were given detailing that respondents that attend after-school clubs find it "fun." This suggests that there is enough equipment, space and resources to access. Below are some examples of the type of comments given:

*"Fun I get to hang out with my friends"*  
*'It is a great place to go with friends'*

Respondents also gave an insight into the activities they enjoy doing. The most popular activity mentioned was football, with 9 supporting responses. Other popular activities mentioned were arts and crafts, cooking and computer games.

A few respondents also commented positively on the staff. This implies that friendly and approachable members of staff are running the after-school clubs, creating a safe and enjoyable environment for the attending children. This is seen in the comments below:

*“Good teachers and new skills, fun time with friends”*

*“I like that we get to play in the playground, but it would be better if we had snacks because I get hungry. The adults are really nice in after school club”*

### Impact of COVID-19 on after school club

82.05% of respondents stated that COVID-19 has not changed their attendance. This indicates that the majority of respondents did not change the way they used after school clubs due to the COVID-19 pandemic. Overall, 39 respondents answered this question. The 17.95% who stated yes gave 9 answers as to how it has changed. A main theme across the responses was that fewer activities are now available when compared to before the pandemic and that clubs are ending earlier.

### Key Summaries: Extended Services

- There does not seem to be significant demand for extended services from childcare providers according to the research undertaken.
- Respondents are generally satisfied with the accessibility and quality of afterschool care.
- Due to the response rate and size, further research may be needed to build an accurate picture of the demand for extended services from Early Education and Childcare providers.

### Key Recommendations: Extended Services

- Planners may wish to consider liaising with afterschool providers to discover and share best practice to ensure all children benefit from improved extended services.
- Planners should consider how to boost engagement with future studies on extended services from Early Education and Childcare providers.

## Final Analysis and Summaries

The summative key takeaways are:

- All primary and secondary data included within this report was collected in Summer 2022, and therefore this CSA represents a snapshot of the sufficiency within Tower Hamlets at that time.
- Due to the response rate and size of the provider survey and afterschool club survey, further research is needed to build an accurate picture of the demand for extended services from Early Education and Childcare providers.
- The number of children in absolute low-income families has been steadily rising. However, data may be affected by the COVID-19 pandemic, and drawing accurate projections from available data is difficult.
- The most frequent SEN designations for children are Autistic Spectrum Diagnosis and Speech, Language and Communication Needs.
- Providers have expressed concern regarding children coming to their provisions without previously identified needs, and their capacity to offer quality support.
- Families have expressed concern about the availability of provision for their children with additional needs, including places, information about places, and other information regarding available support.
- Across the various surveys, accessibility and information about accessibility were highlighted as common concerns.
- The key barriers to effective SEN provision identified by respondents include affordability, availability, and accessibility.
- Generally, the report highlights a need for increased uptake of places across the borough, this should be prioritised and addressed before reconsidering the need for additional places.
- Bethnal Green and Bow East are the wards which show the most need for further engagement through uptake or places.
- There does not seem to be significant demand for extended services from childcare providers according to the research undertaken.
- Respondents are generally satisfied with the accessibility and quality of afterschool care.

The summative key recommendations are:

- Planners should be aware of the barriers to effective SEN provision in Early Education and Childcare and look to establish improved processes for identification and support.
- Productive channels of communication should be opened and/or improved between providers, families, and the council to facilitate sharing current places and availability, information pertaining to available services and support,

information regarding SEN designations and how to support children and families in the home, as well as creating productive feedback loops to ensure future sustainability.

- Planners should consider this report and current uptake when considering expanding specific provisions, due to the evident need for increased uptake of places across the borough.
- Further support should be offered to families to facilitate comprehension of available places by provision type and age.
- Current childcare is perceived by the majority to be sufficient. However, there does exist a need for additional provision which, if not remedied, may become acute if housing developments attract or contribute to large populations of families with children in Tower Hamlets in the near future.
- Planners may wish to consider liaising with afterschool providers to discover and share best practice to ensure all children benefit from improved extended services.
- Planners should consider how to boost engagement with future studies on extended services from Early Education and Childcare providers.



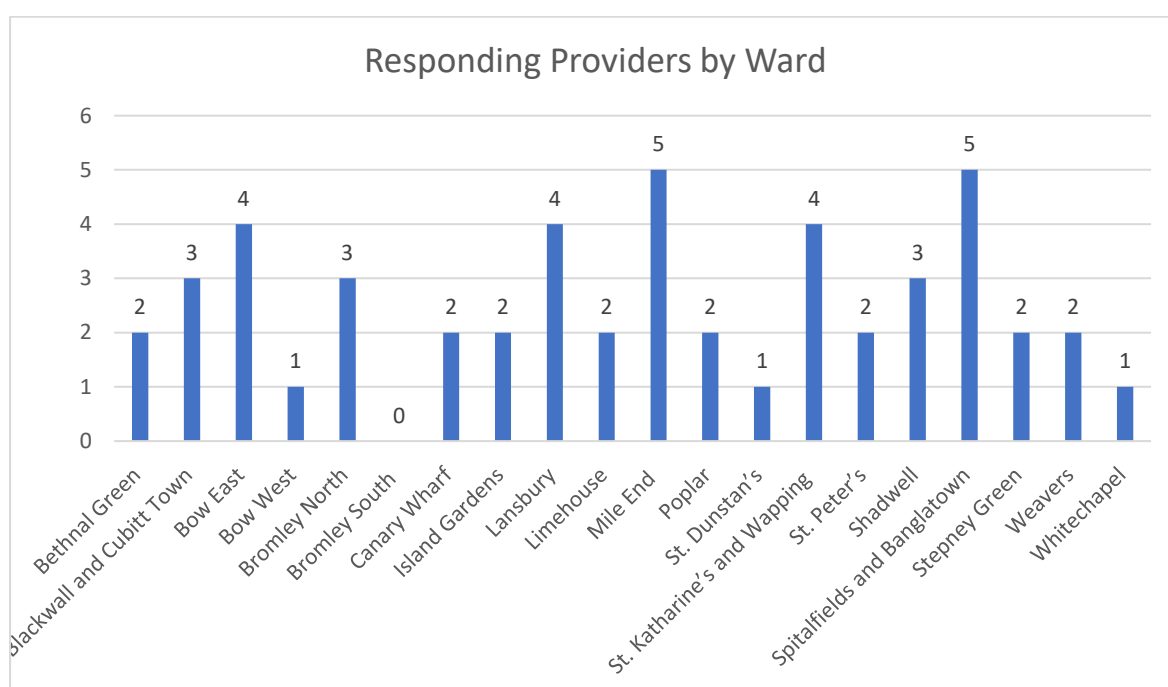
## Survey Information

The following section contains information about the various surveys undertaken for the purpose of this CSA.

## Provider Survey

Our provider survey, carried out between April and November 2022, consisted of a telephone and web survey, using a standard format of structured interview questions. 47 childcare providers and 3 childminders responded to the survey. Childcare providers included. The graph below shows the responding providers by ward.

Figure 32 Responding Providers by Ward



## Impact of COVID-19 on demand and sufficiency

Our survey queried providers on the impact of COVID-19 on their provision. Key findings include:

- 82% of respondents remained open for keyworker children.
- 55.1% of respondents felt there was increased demand for keyworker children during this time.
- 34% of respondents indicated a drop in demand for places, with 44% indicating no drop, 18% indicating a drop but the numbers have recovered, and 4% indicating other.
- Key impacts of the pandemic on children include:
  - Delays in speech and language communication
  - Delays in social developments

- 74% of respondents considered that COVID-19 impacted their financial sustainability.

### Additional Comments and Suggestions

Respondents were asked to provide any final comments or suggestions to the council. Comments included:

*‘Staff are not as experienced. - There is a big push for apprenticeship but there also needs to be time to train them. - In Tower Hamlets there are a lot of facilities available. - Communication needs to be improved so that parents know services are available. - If it was advertised better, it would reach more people.’*

*‘We have struggled with employing good early years practitioners and the support we receive from the local authority has dropped so much over the last few years which has had a negative impact on our nursery as we are a very small setting.’*

*‘Request for industry as a whole. Consider funding for nurseries to sponsor overseas candidates due to lack of high-quality practitioners in the area. Quality of professionals abroad would support a lot more.’*

### Key Summaries

Further information from the respondent survey is presented in the relevant sections. Key summaries include:

- All Early Education and Childcare, school-age and out-of-school Childcare providers in the Tower Hamlets childcare sector were asked to participate in this survey, and 50 participants responded (including childminders), making up 20.4% of the childcare sector in the borough. Therefore, these findings are not fully representative of the borough, however, they provide a snapshot of sufficiency and potential gaps in Tower Hamlets.
- Respondents flagged staff training and staff recruitment and retention as key issues that require support from the council.
- The majority of respondents were against the idea of re-introducing LA-run nurseries into Tower Hamlets, saying the funding and support should go towards pre-existing nurseries

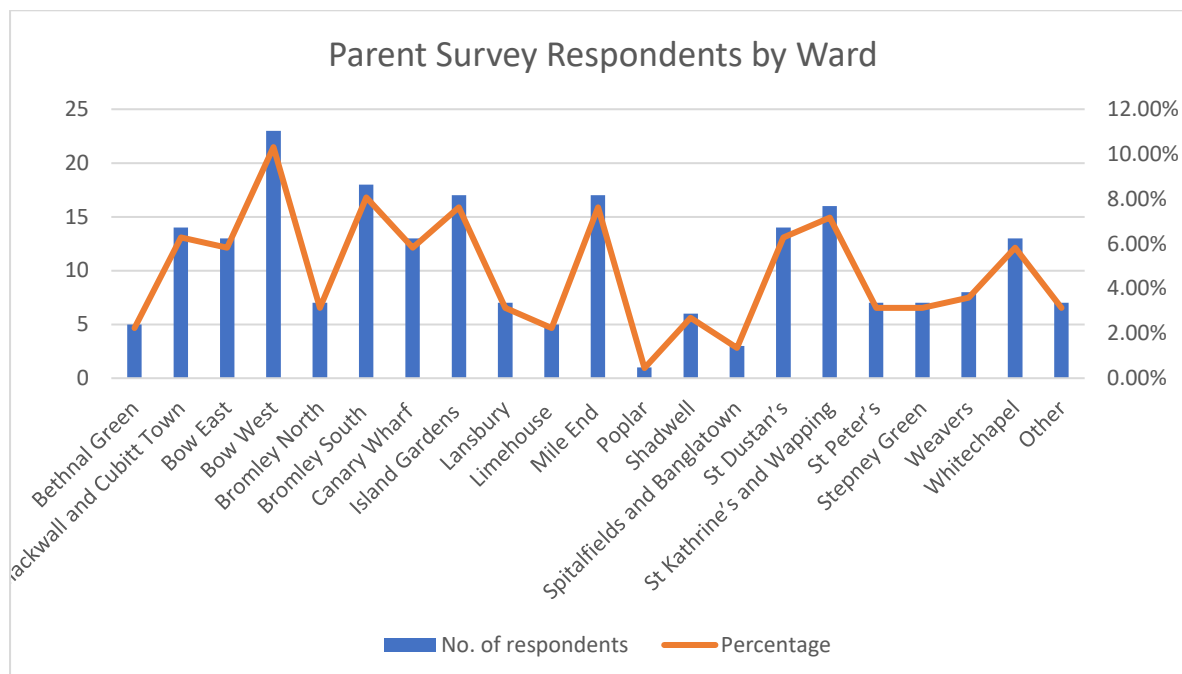
### Family Survey

Families across the borough were contacted, and 227 parents and/or carers responded to the online family survey from April – November 2022. The survey was designed for parents and/or carers of children aged between 0 and 5 years old as well as parents of children with SEND from up to 19 years old to participate.

## Geographic Distribution

A total of 223 families completing the survey filled in their postcode. The breakdown of responses by electoral ward is shown in the graph below.

Figure 33 Family Survey Respondents by Ward



## Impact of the COVID-19 pandemic on childcare usage

Our survey queried families on the impact of COVID-19 on their use of childcare. Key findings include:

- Prior to the pandemic, approximately 45% of families were using some form of formal childcare, 12% using a mix of formal or informal childcare, and 37% not using any form of childcare.
- Over 57% of families responded that COVID-19 did not affect their childcare plans, with reasons including being a key worker or any other reason.

## Current use of childcare

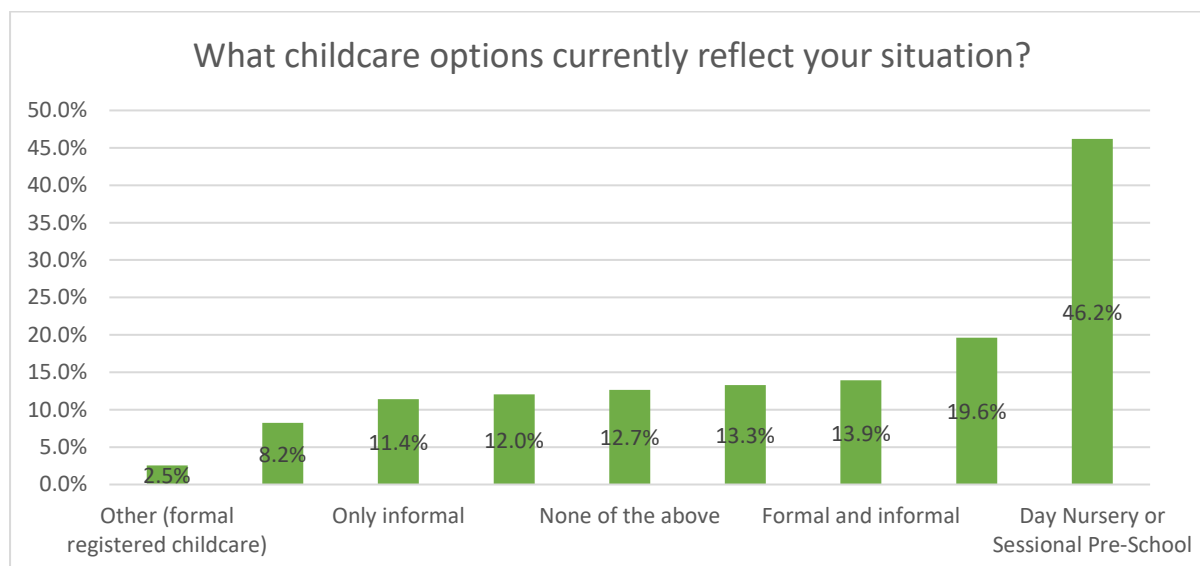
Families were asked which of the following childcare options they were using at the time of the survey. The options given were:

- Formal registered childcare only
- Formal registered and informal unregistered childcare
- Informal childcare only
- No childcare, formal or informal

For this survey, formal registered childcare refers to an Ofsted registered day nursery, pre-school, childminder, nursery school or before/ after school club. The following findings outline families' current Early Education and Childcare situation:

- The most prominent form of childcare was nursery or pre-school (46%).
- 19.62% of families were making use of holiday play schemes for their children.
- 11% of respondents were using only informal methods of childcare.

Figure 34 What childcare options currently reflect your situation?



Families who stated that they are not using any form of childcare now and will not in the following term gave the following reasons:

- 43% of respondents noted the cost of formal childcare.
- 21% of respondents noted that, as they work from home, they see no need for the service.
- 13% of respondents felt that no formal provision can cater adequately to their child(ren)'s SEND needs.
- 24% stated other, giving the following reasons:
  - No need
  - Difficult with timings
  - Parent/carer works for a school
  - Children attend school
  - Unsure

### Barriers to accessing childcare

Families were asked if they had ever experienced any barriers in accessing Early Education and Childcare in Tower Hamlets. Families were given the opportunity to choose a range of different options, highlighting that families have experienced more than one barrier. The most prominent barrier includes not being able to find space at the chosen childcare provider (46.67%), followed closely by the affordability of the childcare (40%) and lastly the timings of childcare do not suit what is required (33%).

## Satisfaction with Childcare

The following table shows respondent satisfaction with current childcare arrangements:

Table 19 Satisfaction with Childcare

Overall, how satisfied are you with your current childcare arrangements?	Percentage of responses
Very satisfied	8.3%
Satisfied	41.7%
Neither satisfied nor dissatisfied	27.8%
Dissatisfied	13.9%
Very dissatisfied	8.3%

Comments included:

*There needs to be a clear focus on having suitable childcare providers for those with SEND and a list needs to be publicised for parents & carers to understand their options*

*The last time I used the holiday childcare scheme our child was not able to access it due to his SEND and the scheme refused to provide a refund. So we had to pay for the scheme which we couldn't use and then pay for much more expensive informal one-to-one childcare. So we're penalised due to his disability.*

## Family Focus-Groups

The focus groups were conducted via Zoom or in person at community/family centres, as an additional piece of primary research to support our findings from our family survey. The research was carried out to find relevant forums, social media groups, community centres, nurseries, and family groups to contact. We either arranged meetings with them directly or asked them to promote our events. Of the 6 focus groups that were organised, each had different amounts of families attending, in total, we spoke to around 10 parents from varying backgrounds.

### Families' experiences

Overall, most of the families agreed the provisions their children attended are good quality and accessible. The majority of families detailed how they are happy with the

children's centre they use. They mentioned it is a great environment for the child, the children have great experiences while there. One mother stated it has made her want to continue using childcare in the future. Libraries also offer a story time session every day for children to attend, which was praised by the families as a useful activity.

Most families stated they either walk or travel a short distance via bus or car to reach the childcare provisions. On the other hand, other families highlighted affordability which has affected their experience, explaining that when working long shifts and if their family are not available to help split the hours it can be quite expensive.

## Barriers

After speaking with families, the main barriers are cost, hard-to-find information and a lack of holiday provisions. Most of the families explained paying between £70 and £80 a day for childcare. They stated it becomes an issue if a child must stay longer than their usual hours or days. It was also mentioned that information on childcare and free early education entitlements is on the council webpage, but it is hard to locate the information. A few families also mentioned a lack of holiday play schemes and provisions. It was mentioned by a parent that Children's Centres can be busy and a first come first serve service. Two parents also mentioned a language barrier both in person at provisions and online.

## COVID-19

There was little information given on the effect COVID-19 had on Early Education and Childcare. However, one of the parents did mention how the lack of holiday provisions came after the pandemic. Most of the families stated that over COVID-19 they did not struggle to look after their children as more time was spent at home. A few families stated a concern that during and after lockdown, not everyone would follow the rules such as wearing masks, which put them off using Early Education and Childcare during this period.

## Improvements

Recommended improvements to the existing system include:

- A dedicated Early Education and Childcare webpage or hub on the council website.
- Language support for those without English as a first language.
- Further support for kickstart holiday provisions and playschemes.

## Stakeholder Survey

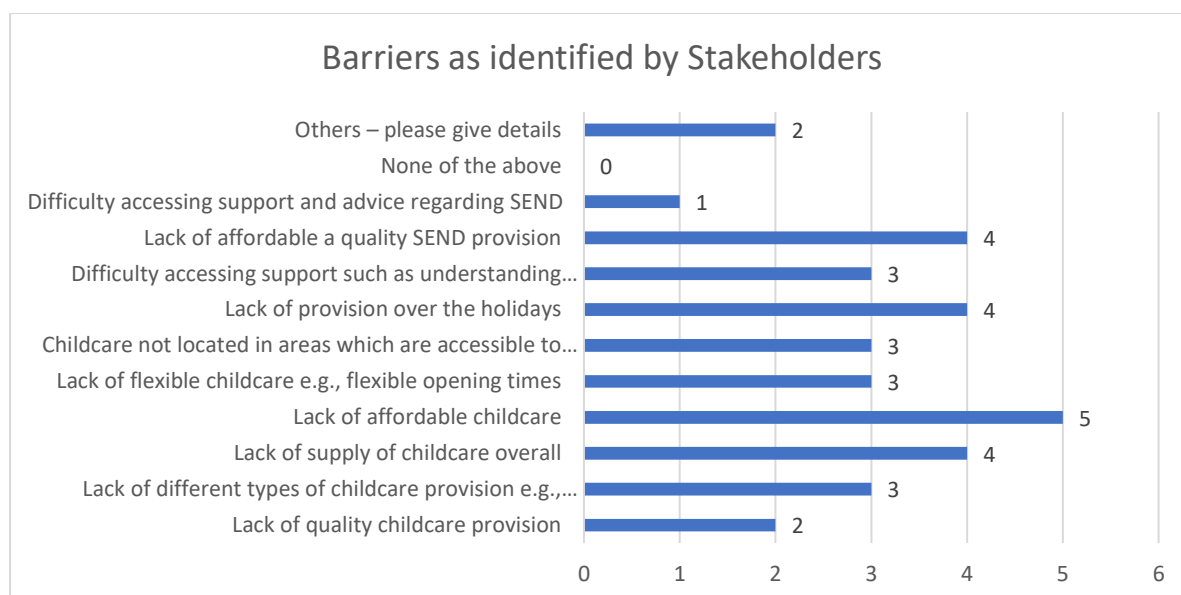
A variety of stakeholders were consulted via a short, voluntary online survey. This includes Health Visitors, Midwives, Parent and Family Support Workers, Social Workers, School staff and other professionals involved in Early Education and Childcare. In total, there were 7 respondents to the survey. There were participants from each of the following roles:

- Councillor
- Parent/Family worker
- Manager
- Child Health Nursery Nurse (School Nursing)
- Health Visitor

## Barriers and Improvements

Stakeholders were asked to identify barriers to current Early Education and Childcare provisions in Tower Hamlets. The results are shown in the graph below:

Figure 35 Barriers as identified by Stakeholders

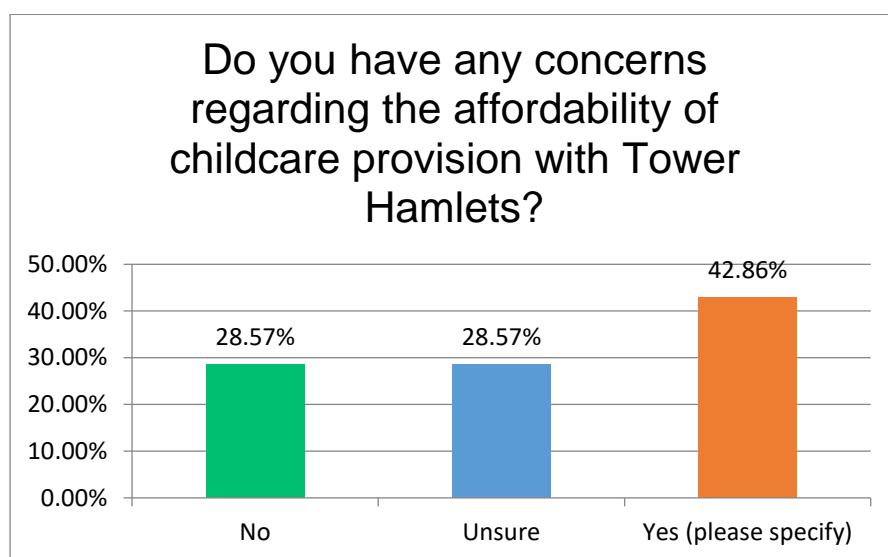


One respondent specified further:

*‘Lack of grants for early years providers, not treated same as nursery schools’*

Stakeholders were asked whether they had concerns regarding the affordability of Early Education and Childcare provision:

Figure 36 Concerns regarding Affordability



Stakeholders who responded yes (42.86%), further specified their concerns as follows:

*‘Low take up of the 2-year-old places’*

*‘The Council run day nurseries that offered working parents on low incomes an avenue for more affordable childcare closed. Private nursery provision for under 5s is increasingly unaffordable for parents on a daily basis, especially if not entitled’*

*‘For parents who are not in receipt of benefits (mid income) the prices are unaffordable.’*

## COVID-19

All stakeholders were asked whether they were aware of a reduction in Early Education and Childcare places available, as a result of the COVID-19 pandemic. The majority stated that they were unsure. Stakeholders also reported not being sure of whether they noticed a reduction in the number of families wishing to use Early Education and Childcare due to homeworking, owing to the pandemic. Regarding issues within the Early Education and Childcare sector as a result of staff furloughs, the majority of stakeholders were, again, not sure whether they were aware of this.

## Improvements

The following statements were offered by stakeholders as recommendations for improvement:

**“Ensuring every child gets the best start in life, with opportunity to flourish”**

*'Maybe look to recreate the council run childcare nursery model attached to children's centres to provide affordable childcare for local families. Maybe a similar model to Hackney as fees in the private nurseries seem to be mainly aimed at families with a relatively high income.'*

*'Government should take control of assigning funded places to make it more fair for all providers. And give grants the same as schools to ALL early years settings for affordable and sustainable childcare.'*

## Employer Survey

Employers across Tower Hamlets were consulted via a short, voluntary online survey. This survey was carried out between May – November 2022. The employers responding reported being from organisations such as the following:

- Charities
- Local help groups
- Call centres
- Pharmacies
- Youth theatres
- Advice centres
- Network centres

When asked whether employers had noticed an impact on employee attendance as a result of the availability of Early Education and Childcare over the past 4 years, over 54% of the 11 respondents answered that they had. 22.27% stated otherwise, whereas the remaining respondents said they 'don't know.'

Respondents said the ways their employees have been impacted revolve around:

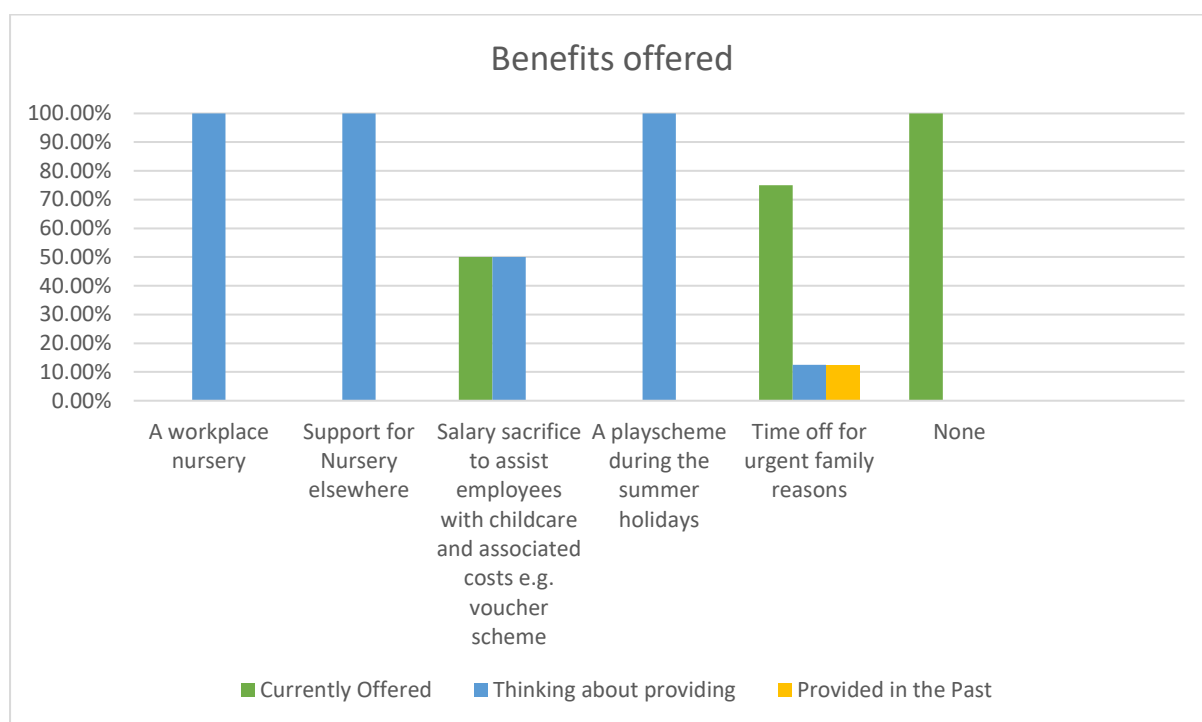
*"Costs and lack of after school / holiday activities for mother of children in primary/ secondary schools can make difficult for work availability afterschool hours or during school holidays."*

*"Flexibility required for staff taking children to and from school, staff requiring time off to assist with home schooling during pandemic, staff requiring time off for childcare in school holidays."*

These responses emphasise how the costs and availability of Early Education and Childcare influence employees and thus their employers, however, 5 out of 10 responding employers do not believe there has been an impact on recruitment or retention of employees due to Early Education and Childcare availability. 4 employers did not know whether there has, although indicated that having more Early Education and Childcare to cater for shift work, better holiday clubs and more affordable provision would help to improve recruitment and retention for their organisations.

Respondents were asked to detail the benefits they offered to their employees or the ones they were considering or have previously offered. The only two benefits that employers stated they currently offer are ‘salary sacrifices’ and ‘time off for urgent family reasons.’ Most employers seem to be considering increasing their pool of offerings to introduce all the suggested benefits below:

Figure 37 Benefits offered by respondent employers



Only 2 responding employers stated that they changed or adapted the benefits they offer since the COVID-19 pandemic. They explained:

*“Rota system for staff during pandemic to allow staff to work half week on full pay to enable them to home school children. Temporary measure in 2020 for several months.”*

*“Ability to work from home if needed”*

Employers expressed their desire to help improve Early Education and Childcare support for their employees, and expressed why it is difficult to do so, whilst others stated how the question does not apply to their employees:

*“Yes, if the government steps in to help. It’s not a woman’s issue or an employer’s issue to solve. It is something that the government should be subsidising.”*

*“At the moment, this is not an issue for us. However, this could be important to us in the future.”*

## Afterschool Survey

School children across Tower Hamlets were consulted via a short, voluntary online survey. The survey had 50 responses. Information from this survey can be found in the extended services section.

The following section outlines the socioeconomic characteristics of the children who engaged in the online survey. The subsequent sections (8.2 onwards) focus directly on children’s experience when attending after-school clubs.

*Table 20 Ages of responding children*

Year group	Percentage of responses	Number of responses
Year 1	24.49%	12
Year 2	12.24%	6
Year 3	16.33%	8
Year 4	10.12%	5
Year 5	12.24%	6
Year 6	24.49%	12

## Appendices: Ward Profiles

### Ward: Bethnal Green

Ward: Bethnal Green			
0 - 4 Population 2020	1,298	UE 3&4 Need	Possible
5 - 14 Population 2020	2,930	EL 2YO Need	Significant
No. of Dwellings 2019 - 2022	859	30 Hour Need	Significant
Universal 3 & 4-years-old occupied places	422	Support for Working Families	Significant
% of 3 & 4-year-olds taking up place in own ward	73	Responding providers	2
Demand for 30-hour places	136	Parent responders	5
Uptake of 30-hour places	75	Schools with nursery classes	4
Estimated deficit of 30-hour places	61	Nursery Schools	1
Potentially Eligible for EL2 Places	136	Full Childcare Providers	2
Uptake of EL2 Places	25	Playgroups/Sessional Providers	1
% uptake of EL2 places	18	Independent schools	1
Estimated surplus/deficit for in-work families	-42.2	Registered Childminders	13

**Ward: Bow East**

<b>Ward: Bow East</b>			
<b>0 - 4 Population 2020</b>	1,371	<b>UE 3&amp;4 Need</b>	Identified
<b>5 - 14 Population 2020</b>	2,406	<b>EL 2YO Need</b>	Significant
<b>No. of Dwellings 2019 - 2022</b>	88	<b>30 Hour Need</b>	Significant
<b>Universal 3 &amp; 4-years-old occupied places</b>	167	<b>Support for Working Families</b>	Significant
<b>% of 3 &amp; 4-year-olds taking up place in own ward</b>	30	<b>Responding providers</b>	4
<b>Demand for 30-hour places</b>	136	<b>Parent responders</b>	13
<b>Uptake of 30-hour places</b>	63	<b>Schools with nursery classes</b>	1
<b>Estimated deficit of 30-hour places</b>	73	<b>Nursery Schools</b>	0
<b>Potentially Eligible for EL2 Places</b>	78	<b>Full Childcare Providers</b>	3
<b>Uptake of EL2 Places</b>	19	<b>Playgroups/Sessional Providers</b>	2
<b>% uptake of EL2 places</b>	24	<b>Independent schools</b>	0
<b>Estimated surplus/deficit for in-work families</b>	-31.2	<b>Registered Childminders</b>	11

**Ward: Blackwall & Cubitt Town**

<b>Ward: Blackwall &amp; Cubitt Town</b>			
<b>0 - 4 Population 2020</b>	(1,513	<b>UE 3&amp;4 Need</b>	Identified
<b>5 - 14 Population 2020</b>	2,381	<b>EL 2YO Need</b>	Possible
<b>No. of Dwellings 2019 - 2022</b>	11,258.8	<b>30 Hour Need</b>	Identified
<b>Universal 3 &amp; 4-years-old occupied places</b>	304	<b>Support for Working Families</b>	None Identified
<b>% of 3 &amp; 4-year-olds taking up place in own ward</b>	49	<b>Responding providers</b>	3
<b>Demand for 30-hour places</b>	155	<b>Parent responders</b>	14
<b>Uptake of 30-hour places</b>	108	<b>Schools with nursery classes</b>	1
<b>Estimated deficit of 30-hour places</b>	47	<b>Nursery Schools</b>	0
<b>Potentially Eligible for EL2 Places</b>	75	<b>Full Childcare Providers</b>	7
<b>Uptake of EL2 Places</b>	64	<b>Playgroups/Sessional Providers</b>	1
<b>% uptake of EL2 places</b>	85	<b>Independent schools</b>	0
<b>Estimated surplus/deficit for in-work families</b>	147.8	<b>Registered Childminders</b>	8

**Ward: Bow West**

<b>Ward: Bow West</b>			
<b>0 - 4 Population 2020</b>	954	<b>UE 3&amp;4 Need</b>	Identified
<b>5 - 14 Population 2020</b>	1,788	<b>EL 2YO Need</b>	Significant
<b>No. of Dwellings 2019 - 2022</b>	32	<b>30 Hour Need</b>	Identified
<b>Universal 3 &amp; 4-years-old occupied places</b>	185	<b>Support for Working Families</b>	Significant
<b>% of 3 &amp; 4-year-olds taking up place in own ward</b>	44	<b>Responding providers</b>	1
<b>Demand for 30-hour places</b>	105	<b>Parent responders</b>	23
<b>Uptake of 30-hour places</b>	54	<b>Schools with nursery classes</b>	3
<b>Estimated deficit of 30-hour places</b>	51	<b>Nursery Schools</b>	0
<b>Potentially Eligible for EL2 Places</b>	50	<b>Full Childcare Providers</b>	1
<b>Uptake of EL2 Places</b>	1	<b>Playgroups/Sessional Providers</b>	0
<b>% uptake of EL2 places</b>	2	<b>Independent schools</b>	0
<b>Estimated surplus/deficit for in-work families</b>	-51.7	<b>Registered Childminders</b>	7

**Ward: Bromley South**

<b>Ward: Bromley South</b>			
<b>0 - 4 Population 2020</b>	(1,192	<b>UE 3&amp;4 Need</b>	Identified
<b>5 - 14 Population 2020</b>	2,379	<b>EL 2YO Need</b>	Significant
<b>No. of Dwellings 2019 - 2022</b>	689	<b>30 Hour Need</b>	Significant
<b>Universal 3 &amp; 4-years-old occupied places</b>	183	<b>Support for Working Families</b>	Significant
<b>% of 3 &amp; 4-year-olds taking up place in own ward</b>	38	<b>Responding providers</b>	0
<b>Demand for 30-hour places</b>	119	<b>Parent responders</b>	18
<b>Uptake of 30-hour places</b>	29	<b>Schools with nursery classes</b>	2
<b>Estimated deficit of 30-hour places</b>	90	<b>Nursery Schools</b>	0
<b>Potentially Eligible for EL2 Places</b>	112	<b>Full Childcare Providers</b>	0
<b>Uptake of EL2 Places</b>	39	<b>Playgroups/Sessional Providers</b>	1
<b>% uptake of EL2 places</b>	35	<b>Independent schools</b>	0
<b>Estimated surplus/deficit for in-work families</b>	-106.0	<b>Registered Childminders</b>	4

**Ward: Bromley North**

<b>Ward: Bromley North</b>			
<b>0 - 4 Population 2020</b>	776	<b>UE 3&amp;4 Need</b>	Possible
<b>5 - 14 Population 2020</b>	1,568	<b>EL 2YO Need</b>	Identified
<b>No. of Dwellings 2019 - 2022</b>	343	<b>30 Hour Need</b>	Possible
<b>Universal 3 &amp; 4-years-old occupied places</b>	215	<b>Support for Working Families</b>	Significant
<b>% of 3 &amp; 4-year-olds taking up place in own ward</b>	66	<b>Responding providers</b>	3
<b>Demand for 30-hour places</b>	79	<b>Parent responders</b>	7
<b>Uptake of 30-hour places</b>	62	<b>Schools with nursery classes</b>	2
<b>Estimated deficit of 30-hour places</b>	17	<b>Nursery Schools</b>	1
<b>Potentially Eligible for EL2 Places</b>	87	<b>Full Childcare Providers</b>	1
<b>Uptake of EL2 Places</b>	37	<b>Playgroups/Sessional Providers</b>	0
<b>% uptake of EL2 places</b>	43	<b>Independent schools</b>	0
<b>Estimated surplus/deficit for in-work families</b>	-15.1	<b>Registered Childminders</b>	2

**Ward: Canary Wharf**

<b>Ward: Canary Wharf</b>			
<b>0 - 4 Population 2020</b>	1,195	<b>UE 3&amp;4 Need</b>	Identified
<b>5 - 14 Population 2020</b>	1,779	<b>EL 2YO Need</b>	Significant
<b>No. of Dwellings 2019 - 2022</b>	9,567	<b>30 Hour Need</b>	Significant
<b>Universal 3 &amp; 4-years-old occupied places</b>	278	<b>Support for Working Families</b>	None Identified
<b>% of 3 &amp; 4-year-olds taking up place in own ward</b>	57	<b>Responding providers</b>	2
<b>Demand for 30-hour places</b>	116	<b>Parent responders</b>	13
<b>Uptake of 30-hour places</b>	36	<b>Schools with nursery classes</b>	2
<b>Estimated deficit of 30-hour places</b>	80	<b>Nursery Schools</b>	0
<b>Potentially Eligible for EL2 Places</b>	63	<b>Full Childcare Providers</b>	6
<b>Uptake of EL2 Places</b>	14	<b>Playgroups/Sessional Providers</b>	0
<b>% uptake of EL2 places</b>	22	<b>Independent schools</b>	1
<b>Estimated surplus/deficit for in-work families</b>	337.5	<b>Registered Childminders</b>	4

**Ward: Island Gardens**

<b>Ward: Island Gardens</b>			
<b>0 - 4 Population 2020</b>	1,344	<b>UE 3&amp;4 Need</b>	Identified
<b>5 - 14 Population 2020</b>	2,133	<b>EL 2YO Need</b>	Significant
<b>No. of Dwellings 2019 - 2022</b>	238	<b>30 Hour Need</b>	Significant
<b>Universal 3 &amp; 4-years-old occupied places</b>	151	<b>Support for Working Families</b>	Significant
<b>% of 3 &amp; 4-year-olds taking up place in own ward</b>	28	<b>Responding providers</b>	2
<b>Demand for 30-hour places</b>	143	<b>Parent responders</b>	17
<b>Uptake of 30-hour places</b>	35	<b>Schools with nursery classes</b>	3
<b>Estimated deficit of 30-hour places</b>	108	<b>Nursery Schools</b>	0
<b>Potentially Eligible for EL2 Places</b>	64	<b>Full Childcare Providers</b>	1
<b>Uptake of EL2 Places</b>	0	<b>Playgroups/Sessional Providers</b>	0
<b>% uptake of EL2 places</b>	0	<b>Independent schools</b>	0
<b>Estimated surplus/deficit for in-work families</b>	-38.5	<b>Registered Childminders</b>	3

**Ward: Lansbury**

<b>Ward: Lansbury</b>			
<b>0 - 4 Population 2020</b>	(1,520)	<b>UE 3&amp;4 Need</b>	Possible
<b>5 - 14 Population 2020</b>	3,344	<b>EL 2YO Need</b>	Identified
<b>No. of Dwellings 2019 - 2022</b>	3,753	<b>30 Hour Need</b>	Significant
<b>Universal 3 &amp; 4-years-old occupied places</b>	445	<b>Support for Working Families</b>	Significant
<b>% of 3 &amp; 4-year-olds taking up place in own ward</b>	72	<b>Responding providers</b>	4
<b>Demand for 30-hour places</b>	152	<b>Parent responders</b>	7
<b>Uptake of 30-hour places</b>	64	<b>Schools with nursery classes</b>	6
<b>Estimated deficit of 30-hour places</b>	88	<b>Nursery Schools</b>	0
<b>Potentially Eligible for EL2 Places</b>	154	<b>Full Childcare Providers</b>	0
<b>Uptake of EL2 Places</b>	61	<b>Playgroups/Sessional Providers</b>	3
<b>% uptake of EL2 places</b>	40	<b>Independent schools</b>	0
<b>Estimated surplus/deficit for in-work families</b>	-136.0	<b>Registered Childminders</b>	6

**Ward: Limehouse**

<b>Ward: Limehouse</b>			
<b>0 - 4 Population 2020</b>	574	<b>UE 3&amp;4 Need</b>	Identified
<b>5 - 14 Population 2020</b>	737	<b>EL 2YO Need</b>	Identified
<b>No. of Dwellings 2019 - 2022</b>	71	<b>30 Hour Need</b>	Possible
<b>Universal 3 &amp; 4-years-old occupied places</b>	99	<b>Support for Working Families</b>	Identified
<b>% of 3 &amp; 4-year-olds taking up place in own ward</b>	45	<b>Responding providers</b>	2
<b>Demand for 30-hour places</b>	56	<b>Parent responders</b>	5
<b>Uptake of 30-hour places</b>	33	<b>Schools with nursery classes</b>	1
<b>Estimated deficit of 30-hour places</b>	23	<b>Nursery Schools</b>	0
<b>Potentially Eligible for EL2 Places</b>	22	<b>Full Childcare Providers</b>	1
<b>Uptake of EL2 Places</b>	12	<b>Playgroups/Sessional Providers</b>	1
<b>% uptake of EL2 places</b>	55	<b>Independent schools</b>	0
<b>Estimated surplus/deficit for in-work families</b>	-0.7	<b>Registered Childminders</b>	2

**Ward: Mile End**

<b>Ward: Mile End</b>			
<b>0 - 4 Population 2020</b>	1,745	<b>UE 3&amp;4 Need</b>	Identified
<b>5 - 14 Population 2020</b>	3,598	<b>EL 2YO Need</b>	Possible
<b>No. of Dwellings 2019 - 2022</b>	1,075	<b>30 Hour Need</b>	Significant
<b>Universal 3 &amp; 4-years-old occupied places</b>	398	<b>Support for Working Families</b>	Significant
<b>% of 3 &amp; 4-year-olds taking up place in own ward</b>	57	<b>Responding providers</b>	5
<b>Demand for 30-hour places</b>	174	<b>Parent responders</b>	17
<b>Uptake of 30-hour places</b>	95	<b>Schools with nursery classes</b>	5
<b>Estimated deficit of 30-hour places</b>	79	<b>Nursery Schools</b>	0
<b>Potentially Eligible for EL2 Places</b>	178	<b>Full Childcare Providers</b>	3
<b>Uptake of EL2 Places</b>	146	<b>Playgroups/Sessional Providers</b>	4
<b>% uptake of EL2 places</b>	82	<b>Independent schools</b>	0
<b>Estimated surplus/deficit for in-work families</b>	-26.8	<b>Registered Childminders</b>	7

**Ward: Poplar**

<b>Ward: Poplar</b>			
<b>0 - 4 Population 2020</b>	642	<b>UE 3&amp;4 Need</b>	Identified
<b>5 - 14 Population 2020</b>	1,370	<b>EL 2YO Need</b>	None Identified
<b>No. of Dwellings 2019 - 2022</b>	1,926	<b>30 Hour Need</b>	Identified
<b>Universal 3 &amp; 4-years-old occupied places</b>	141	<b>Support for Working Families</b>	None Identified
<b>% of 3 &amp; 4-year-olds taking up place in own ward</b>	53	<b>Responding providers</b>	2
<b>Demand for 30-hour places</b>	66	<b>Parent responders</b>	1
<b>Uptake of 30-hour places</b>	23	<b>Schools with nursery classes</b>	1
<b>Estimated deficit of 30-hour places</b>	43	<b>Nursery Schools</b>	0
<b>Potentially Eligible for EL2 Places</b>	65	<b>Full Childcare Providers</b>	4
<b>Uptake of EL2 Places</b>	78	<b>Playgroups/Sessional Providers</b>	1
<b>% uptake of EL2 places</b>	120	<b>Independent schools</b>	0
<b>Estimated surplus/deficit for in-work families</b>	75.8	<b>Registered Childminders</b>	1

**Ward: Shadwell**

<b>Ward: Shadwell</b>			
<b>0 - 4 Population 2020</b>	1,052	<b>UE 3&amp;4 Need</b>	Possible
<b>5 - 14 Population 2020</b>	2,265	<b>EL 2YO Need</b>	Possible
<b>No. of Dwellings 2019 - 2022</b>	484	<b>30 Hour Need</b>	Identified
<b>Universal 3 &amp; 4-years-old occupied places</b>	313	<b>Support for Working Families</b>	Identified
<b>% of 3 &amp; 4-year-olds taking up place in own ward</b>	70	<b>Responding providers</b>	3
<b>Demand for 30-hour places</b>	110	<b>Parent responders</b>	6
<b>Uptake of 30-hour places</b>	67	<b>Schools with nursery classes</b>	3
<b>Estimated deficit of 30-hour places</b>	43	<b>Nursery Schools</b>	0
<b>Potentially Eligible for EL2 Places</b>	110	<b>Full Childcare Providers</b>	2
<b>Uptake of EL2 Places</b>	94	<b>Playgroups/Sessional Providers</b>	1
<b>% uptake of EL2 places</b>	85	<b>Independent schools</b>	0
<b>Estimated surplus/deficit for in-work families</b>	-0.5	<b>Registered Childminders</b>	6

**Ward: St Katharine's & Wapping**

<b>Ward: St Katharine's &amp; Wapping</b>			
<b>0 - 4 Population 2020</b>	707	<b>UE 3&amp;4 Need</b>	Identified
<b>5 - 14 Population 2020</b>	1,089	<b>EL 2YO Need</b>	Significant
<b>No. of Dwellings 2019 - 2022</b>	2,069.9	<b>30 Hour Need</b>	Significant
<b>Universal 3 &amp; 4-years-old occupied places</b>	123	<b>Support for Working Families</b>	Possible
<b>% of 3 &amp; 4-year-olds taking up place in own ward</b>	41	<b>Responding providers</b>	4
<b>Demand for 30-hour places</b>	81	<b>Parent responders</b>	16
<b>Uptake of 30-hour places</b>	24	<b>Schools with nursery classes</b>	2
<b>Estimated deficit of 30-hour places</b>	57	<b>Nursery Schools</b>	0
<b>Potentially Eligible for EL2 Places</b>	39	<b>Full Childcare Providers</b>	3
<b>Uptake of EL2 Places</b>	10	<b>Playgroups/Sessional Providers</b>	0
<b>% uptake of EL2 places</b>	26	<b>Independent schools</b>	1
<b>Estimated surplus/deficit for in-work families</b>	17.5	<b>Registered Childminders</b>	1

**Ward: Spitalfields & Banglatown**

<b>Ward: Spitalfields &amp; Banglatown</b>			
<b>0 - 4 Population 2020</b>	709	<b>UE 3&amp;4 Need</b>	None Identified
<b>5 - 14 Population 2020</b>	1,343	<b>EL 2YO Need</b>	None Identified
<b>No. of Dwellings 2019 - 2022</b>	556	<b>30 Hour Need</b>	Possible
<b>Universal 3 &amp; 4-years-old occupied places</b>	276	<b>Support for Working Families</b>	None Identified
<b>% of 3 &amp; 4-year-olds taking up place in own ward</b>	95	<b>Responding providers</b>	5
<b>Demand for 30-hour places</b>	72	<b>Parent responders</b>	3
<b>Uptake of 30-hour places</b>	49	<b>Schools with nursery classes</b>	5
<b>Estimated deficit of 30-hour places</b>	23	<b>Nursery Schools</b>	0
<b>Potentially Eligible for EL2 Places</b>	61	<b>Full Childcare Providers</b>	4
<b>Uptake of EL2 Places</b>	65	<b>Playgroups/Sessional Providers</b>	4
<b>% uptake of EL2 places</b>	107	<b>Independent schools</b>	0
<b>Estimated surplus/deficit for in-work families</b>	83.6	<b>Registered Childminders</b>	1

**Ward: Stepney Green**

<b>Ward: Stepney Green</b>			
<b>0 - 4 Population 2020</b>	852	<b>UE 3&amp;4 Need</b>	Possible
<b>5 - 14 Population 2020</b>	1,855	<b>EL 2YO Need</b>	Identified
<b>No. of Dwellings 2019 - 2022</b>	176.2	<b>30 Hour Need</b>	Identified
<b>Universal 3 &amp; 4-years-old occupied places</b>	268	<b>Support for Working Families</b>	Identified
<b>% of 3 &amp; 4-year-olds taking up place in own ward</b>	74	<b>Responding providers</b>	2
<b>Demand for 30-hour places</b>	93	<b>Parent responders</b>	7
<b>Uptake of 30-hour places</b>	54	<b>Schools with nursery classes</b>	2
<b>Estimated deficit of 30-hour places</b>	39	<b>Nursery Schools</b>	1
<b>Potentially Eligible for EL2 Places</b>	88	<b>Full Childcare Providers</b>	3
<b>Uptake of EL2 Places</b>	51	<b>Playgroups/Sessional Providers</b>	1
<b>% uptake of EL2 places</b>	58	<b>Independent schools</b>	0
<b>Estimated surplus/deficit for in-work families</b>	13.4	<b>Registered Childminders</b>	1

**Ward: St Dunstan's**

<b>Ward: St Dunstan's</b>			
<b>0 - 4 Population 2020</b>	1,027	<b>UE 3&amp;4 Need</b>	Possible
<b>5 - 14 Population 2020</b>	1,476	<b>EL 2YO Need</b>	Significant
<b>No. of Dwellings 2019 - 2022</b>	269.8	<b>30 Hour Need</b>	Identified
<b>Universal 3 &amp; 4-years-old occupied places</b>	260	<b>Support for Working Families</b>	Significant
<b>% of 3 &amp; 4-year-olds taking up place in own ward</b>	64	<b>Responding providers</b>	1
<b>Demand for 30-hour places</b>	100	<b>Parent responders</b>	14
<b>Uptake of 30-hour places</b>	55	<b>Schools with nursery classes</b>	4
<b>Estimated deficit of 30-hour places</b>	45	<b>Nursery Schools</b>	1
<b>Potentially Eligible for EL2 Places</b>	101	<b>Full Childcare Providers</b>	1
<b>Uptake of EL2 Places</b>	35	<b>Playgroups/Sessional Providers</b>	0
<b>% uptake of EL2 places</b>	35	<b>Independent schools</b>	0
<b>Estimated surplus/deficit for in-work families</b>	-75.4	<b>Registered Childminders</b>	5

**Ward: St Peter's**

<b>Ward: St Peter's</b>			
<b>0 - 4 Population 2020</b>	1,252	<b>UE 3&amp;4 Need</b>	Possible
<b>5 - 14 Population 2020</b>	2,591	<b>EL 2YO Need</b>	Identified
<b>No. of Dwellings 2019 - 2022</b>	1,189	<b>30 Hour Need</b>	Significant
<b>Universal 3 &amp; 4-years-old occupied places</b>	322	<b>Support for Working Families</b>	Identified
<b>% of 3 &amp; 4-year-olds taking up place in own ward</b>	63	<b>Responding providers</b>	2
<b>Demand for 30-hour places</b>	118	<b>Parent responders</b>	7
<b>Uptake of 30-hour places</b>	61	<b>Schools with nursery classes</b>	6
<b>Estimated deficit of 30-hour places</b>	57	<b>Nursery Schools</b>	0
<b>Potentially Eligible for EL2 Places</b>	122	<b>Full Childcare Providers</b>	4
<b>Uptake of EL2 Places</b>	76	<b>Playgroups/Sessional Providers</b>	2
<b>% uptake of EL2 places</b>	62	<b>Independent schools</b>	0
<b>Estimated surplus/deficit for in-work families</b>	14.5	<b>Registered Childminders</b>	7

**Ward: Weavers**

<b>Ward: Weavers</b>			
<b>0 - 4 Population 2020</b>	810	<b>UE 3&amp;4 Need</b>	Possible
<b>5 - 14 Population 2020</b>	473	<b>EL 2YO Need</b>	Significant
<b>No. of Dwellings 2019 - 2022</b>	942	<b>30 Hour Need</b>	Possible
<b>Universal 3 &amp; 4-years-old occupied places</b>	203	<b>Support for Working Families</b>	Significant
<b>% of 3 &amp; 4-year-olds taking up place in own ward</b>	63	<b>Responding providers</b>	2
<b>Demand for 30-hour places</b>	72	<b>Parent responders</b>	8
<b>Uptake of 30-hour places</b>	54	<b>Schools with nursery classes</b>	4
<b>Estimated deficit of 30-hour places</b>	18	<b>Nursery Schools</b>	1
<b>Potentially Eligible for EL2 Places</b>	57	<b>Full Childcare Providers</b>	2
<b>Uptake of EL2 Places</b>	21	<b>Playgroups/Sessional Providers</b>	1
<b>% uptake of EL2 places</b>	37	<b>Independent schools</b>	0
<b>Estimated surplus/deficit for in-work families</b>	-11.1	<b>Registered Childminders</b>	3

**Ward: Whitechapel**

<b>Ward: Whitechapel</b>			
<b>0 - 4 Population 2020</b>	1,204	<b>UE 3&amp;4 Need</b>	Possible
<b>5 - 14 Population 2020</b>	(2,477	<b>EL 2YO Need</b>	Significant
<b>No. of Dwellings 2019 - 2022</b>	2,569.1	<b>30 Hour Need</b>	Significant
<b>Universal 3 &amp; 4-years-old occupied places</b>	338	<b>Support for Working Families</b>	Identified
<b>% of 3 &amp; 4-year-olds taking up place in own ward</b>	72	<b>Responding providers</b>	1
<b>Demand for 30-hour places</b>	117	<b>Parent responders</b>	13
<b>Uptake of 30-hour places</b>	63	<b>Schools with nursery classes</b>	5
<b>Estimated deficit of 30-hour places</b>	54	<b>Nursery Schools</b>	0
<b>Potentially Eligible for EL2 Places</b>	109	<b>Full Childcare Providers</b>	1
<b>Uptake of EL2 Places</b>	42	<b>Playgroups/Sessional Providers</b>	2
<b>% uptake of EL2 places</b>	39	<b>Independent schools</b>	2
<b>Estimated surplus/deficit for in-work families</b>	8.8	<b>Registered Childminders</b>	2