Department for Education

Pulse surveys of childcare and early years providers, 2024-2025

Research report

October 2025

Government Social Research

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Introduction

Since the summer of 2020 the Department for Education (DfE) has conducted a series of Provider Pulse Surveys designed to capture evidence about the childcare and early years sector. This report outlines findings from the tenth, eleventh and twelfth waves of the research, which were carried out in November 2024, March 2025 and May 2025.

Across all survey waves, providers were asked questions on:

- Entitlements expansion
- Capacity and places
- Workforce

Other questions asked in either one or two survey waves covered:

- Funding and provider finances
- Waiting lists
- Early Years Pupil Premium (EYPP)
- Specific questions of childminders
- Payment schedules
- Space
- Wellbeing
- Early Years Foundation Stage (EYFS) statutory framework updates

Background

The Government confirmed its commitment[1] to deliver the expansion in funded childcare entitlements. This will expand the system of early years entitlements by offering up to 30 funded hours of childcare per week over 38 weeks of the year to children aged 9 months and over whose parents meet the same income eligibility criteria as applied to the existing 30 hours entitlement for 3- and 4-year-olds.

The policy is being delivered through a phased rollout, with 15 hours per week for 38 weeks a year offered to eligible 2-year-olds from April 2024 and to eligible children under 2 from September 2024. The new entitlement has been offered in full since September 2025.

Recent pulse surveys have therefore been used to assess the impact of entitlement expansion on childcare and early years providers, as well as covering workforce trends, financial positions, and responses to key policy interventions, including changes to the Early Years Foundation Stage framework.

[1] https://www.gov.uk/government/publications/early-years-places-and-workforce-need/early-years-places-and-workforce-need

Surveys

Surveys were 10–20-minute web surveys, asked of a sample of group-based providers (GBPs), school-based providers (SBPs), and childminders (CMs) in England. Fieldwork took place across:

- 19th November – 10th December 2024 (10th wave)
- 4th March – 25th March 2025 (11th wave)
- 20th May – 20th June (12th wave)

All those sampled for wave 10 and 11 had participated in the Survey of Childcare and Early Years Providers (SCEYP)[2] that took place in spring/summer 2024 and had agreed to be recontacted for future research. For the 12th wave, a new sampling approach was agreed that moved away from using the recontact sample, which allowed for a greater number of providers to be invited.

Overarchingly, the research aimed to:

- Monitor provider delivery of the early years entitlement expansion and market sufficiency
- Assess expansion appetite and barriers
- Monitor childcare and early years workforce
- Examine setting managers' wellbeing
- Analyse financial trends among providers
- Track changes in provider waiting lists
- Assess EYPP awareness and usage
- Examine childminders' use of flexibilities and payment preferences
- Investigate provider attitudes towards using 'free-flow' outdoor space

Table 1: Survey response rates

Survey	Total providers who took part	SBP response rate	GBP response rate	Childminder response rate	Overall response rate
November 2024	1,516	6%	15%	35%	20%
March 2025	1,382	5%	13%	33%	18%
May 2025	1,716	1%	8%	18%	7%

[2] Childcare and early years provider survey, Reporting year 2024 - Explore education statistics - GOV.UK

Whilst the response rates for the May wave have declined, the total number of responses overall and across provider types increased due to the higher number of providers invited compared to previous waves.

The data has been weighted to provide a stand-alone snapshot that is representative of all providers in England as well as childminders, school-based providers and group-based providers separately.

Certain questions were specific to provider types—for instance, only childminders were asked about new flexibilities, while workforce-related questions, such as vacancies and applications, were asked to school-based and group-based providers.

In some instances, comparisons have been made with previous waves of Provider Pulse Surveys and the 2024 Survey of Childcare and Early Years Providers (SCEYP). The reader is advised to interpret these with caution, due to contextual differences in survey timings and questionnaire design.

Figures based on less than 30 responses should be treated with caution and have been flagged in the chart footnotes throughout the report. Similarly, figures with less than 15 responses have been excluded. Results from school-based providers are the most excluded due to the lower response rates from this group. However, it is important to flag that where breakdowns at the provider-type level are not available due to the small number of responses, they are still included in the overall percentages for ‘all’ providers, unless stated otherwise.

In some instances, comparisons have been made across the November, March and May surveys where questions were repeated. However, these comparisons should be interpreted with caution, as no statistical significance testing has taken place.

Results may not also equal 100 per cent due to rounding or multi-code questions.

Executive summary

This report presents findings from the Department for Education's tenth to twelfth waves of Provider Pulse Surveys, conducted between November 2024 and May 2025. The surveys track the sector's response to the phased expansion of funded childcare entitlements, alongside workforce, financial, and other policy developments.

September 2024 entitlements expansion

The proportion of providers reporting that they faced challenges delivering the September 2024 expansion in funded childcare entitlements fell from 30 per cent in November 2024 to 24 per cent in May 2025. Group-based providers (34 per cent in May) were most likely to report challenges and childminders (17 per cent) the least likely. Across all three surveys the most frequently cited challenges were current funding rates not making additional places worthwhile and not having enough staff/childminder assistants.

Readiness to deliver the September 2025 entitlements

In May 2025, 58 per cent of providers expected to be able to fully meet parental demand for the 30 funded hours of funded childcare for eligible working parents of children aged 9 months and up from September 2025. Childminders (63 per cent) and school-based providers (60 per cent) were more confident than group-based providers (53 per cent). Of those unable to fully meet demand, 33 per cent of providers said they would offer all parents at least some of the hours or some parents some of the hours they want.

Capacity and Places

Expansion plans for new places for under-3s are concentrated in a small number of providers. In May 2025, 15 per cent of group-based providers and childminders already caring for under-3s expected to offer more places, whilst just 2 per cent of group-based providers and 9 per cent of childminders currently not offering places for under-3s, expected to start to offer places by September 2025. However, for those providers that are likely to expand, they anticipate significant increases: group-based providers by 10 places on average, childminders by 3.

Workforce Pressures

There has been little change in number of vacancies and applications per vacancy across surveys, with a small reduction in the number of weeks taken to fill a vacancy. An increasing proportion (50 per cent in November, 62 per cent in May) of school-based providers reported no increase nor taking actions to ensure staffing requirements meet increased demand, in contrast only a fifth of group-based providers reported the same across all three surveys. The most common actions taken by group-based providers were to have increased pay of existing staff (44 per cent in May) and increase staff working hours (37 per cent). Reflecting on new workforce flexibilities introduced in the EYFS in September 2023 and January 2024, equal proportions of providers said the changes had improved and worsened their ability to recruit; whilst slightly more said the changes had improved (11 per cent) than worsened (8 per cent) retention.

Financial Viability

There are tentative signs of provider financial positions improving over 2025. In May, 48 per cent of providers said their income covered costs (up from 46 per cent in March). In response to cost pressures, 56 per cent of providers mentioned having already or planning to increase fees in May, down from 66 per cent in March; and 57 per cent reported reducing spend on materials and equipment in May, down from 64 per cent in March.

Waiting Lists

Waiting lists have grown since the September 2024 childcare entitlements expansion, with 66 per cent of providers reporting increases in November. Group-based providers had the largest average waiting lists (14 children), compared to 10 for school-based providers and 3 for childminders. Lack of physical space and not being able to accommodate the hours / days required were the most cited reasons for having a waiting list.

Monitoring other policy changes

A range of other policy changes were introduced over the past couple of years that aimed to provide more flexibility and remove burdens for early years providers while maintaining quality and safety standards to support the entitlements expansion. Overall use of these flexibilities has varied from 40 per cent of group- and school-based providers increasing staff:child ratios for 2-year-olds and 33 per cent of childminders including kitchen space in floor space calculations; to just 4 per cent of childminders looking to spend more time working on non-domestic premises. Positively, more providers said the changes had improved their quality of care and early education (25 per cent) and capacity (20 per cent) than said they had worsened it (both 5 per cent).

In April 2025, a 45 per cent increase in the Early Years Pupil Premium (EYPP) rate (additional funding that providers can claim for the most disadvantaged children) was introduced. Use of EYPP rose from 43 per cent in November 2024 to 47 per cent in May 2025, with group-based (75 per cent) and school-based providers (85 per cent) much more likely to be claiming EYPP than childminders (18 per cent). The most commonly cited use of EYPP across all provider types was for learning materials for use at the setting. Since the increase in rates, use of EYPP has shifted towards learning resources and staff training.

Funded Entitlements Expansion

September 2024 entitlements expansion

From September 2024, eligible working parents[3] of children from the age of 9 months old became able to access 15 hours per week of funded childcare. Providers who reported that they provide childcare for children aged under 3 were asked whether they were facing any challenges that made it difficult to deliver the 15 hours of funded childcare per week.

Results remained similar across all surveys. A greater proportion of providers said they were not facing challenges delivering the September 2024 entitlements than those who said they were. Results differed across provider types: childminders were the least likely to report facing challenges, meanwhile group-based providers were the most likely.

Results from the May survey showed a decline in the proportion of providers facing challenges, with an overall decrease from 33 per cent in March to 24 per cent in May (Table 2).

Table 2: Proportion of providers facing challenges delivering the new entitlements

Survey	Nov-24	Mar-25	May-25
Group-based providers	43%	45%	34%
School-based providers[4]	37%	28%	20%
Childminders	19%	25%	17%
Overall	**30%**	**33%**	**24%**

Unweighted bases: Nov 24: GBP = 572, SBP = 29, CM = 774; Mar 25: GBP = 512, SBP = 26, CM = 742; May 25: GBP = 654, SBP = 39, CM = 840

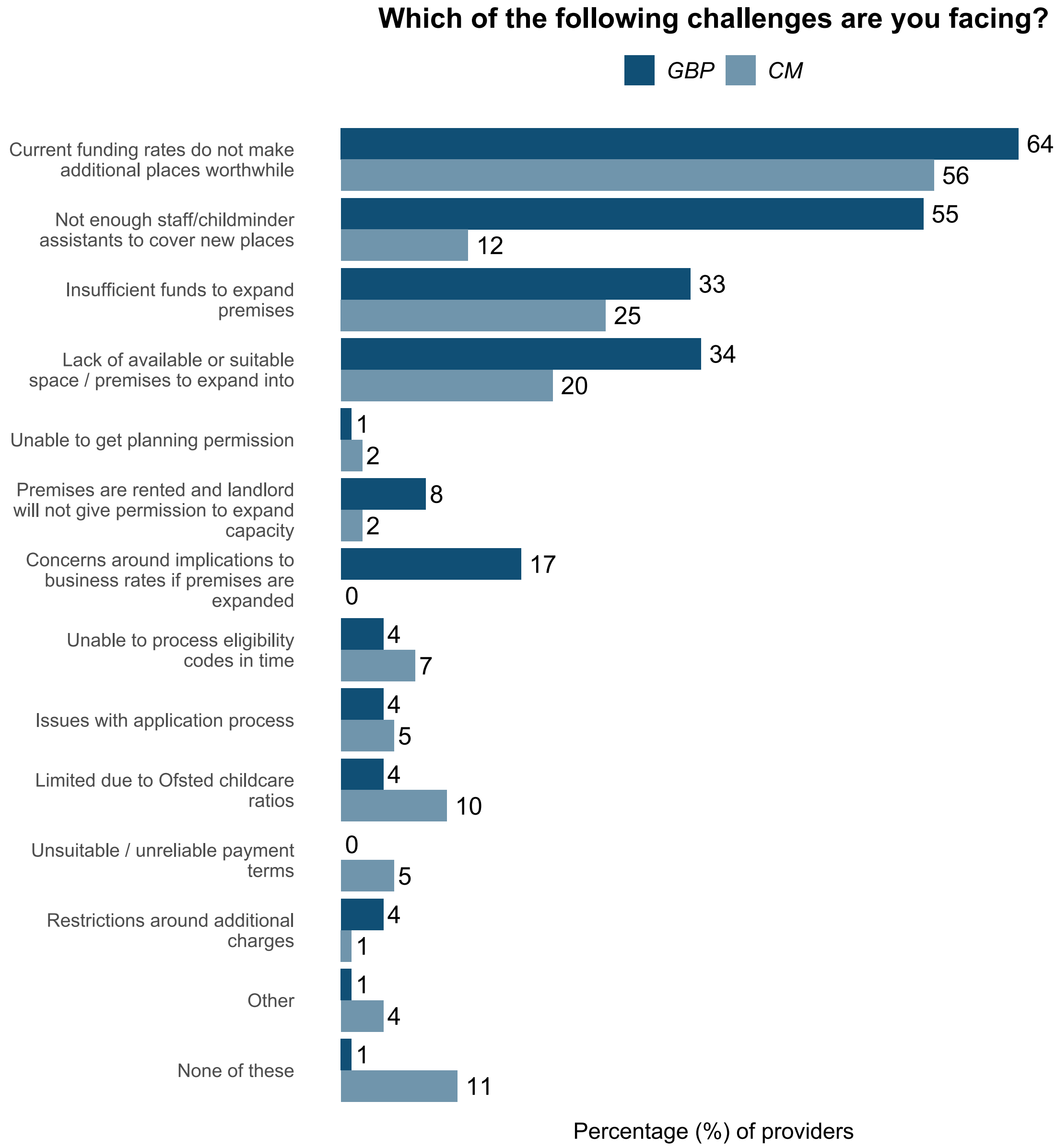
Caution: small SBP sample sizes.

Across all surveys, the two biggest challenges for providers facing challenges were having a lack of staff and insufficient funding rates.

Between December and March, there were large increases in the proportion of group-based providers (54 per cent in December, 72 per cent in March) and childminders (40 per cent in December, 68 per cent in March) reporting current funding rates as a challenge, making it the most reported challenge in March. There was a slight decrease in the proportion of group-based providers (65 per cent in December, 59 per cent in March) and childminders (25 per cent in December, 17 per cent in March) reporting a lack of staff or childminder assistants as a barrier, making it the second most cited barrier by March.

[3] Parents are eligible to access 15 hours per week of funded childcare if they, or they and their partner, earn at least £183 per week, equal to 16 hours at the National Minimum or Living Wage, but do not individually earn above £100,000 adjusted net income per year.
[4] Low response rates: interpret with care.

Figure 1: Challenges delivering the new entitlements, May 2025



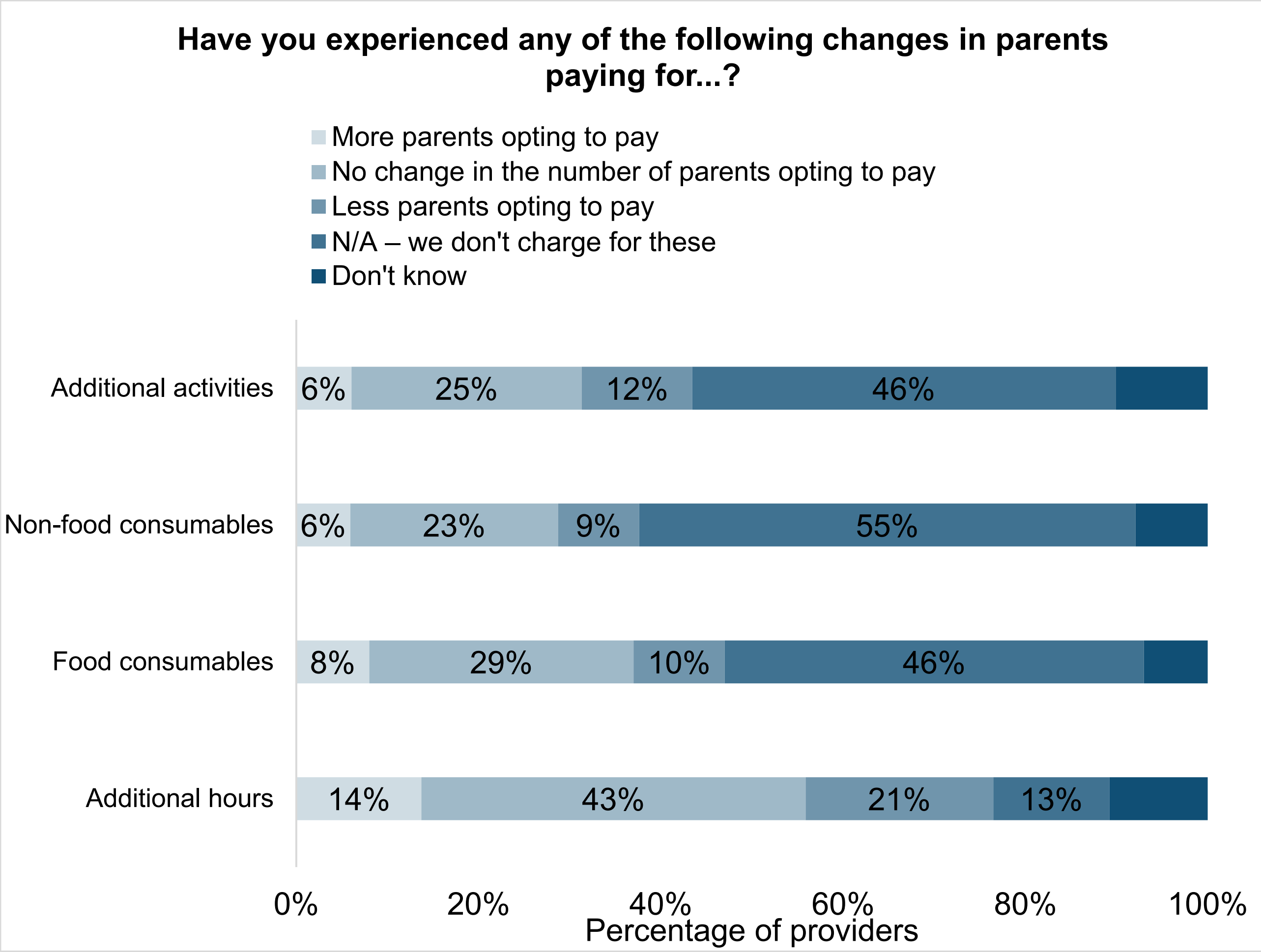
Unweighted bases: GBP = 222, CM = 150

Results from May showed a slight reduction in the proportion of providers reporting insufficient funding rates as a challenge (group-based providers 64 per cent, childminders 56 per cent), although this remained the most commonly reported challenge (Figure 1). There was also a slight decrease in the proportion of group-based providers (59 per cent in March, 55 per cent in May) and childminders (17 per cent in March, 12 per cent in May) reporting a lack of staff/childminder assistants as a barrier.

Charges for consumables

In the May survey, around half of providers reported that they did not charge for food (46 per cent), non-food consumables (55 per cent), and additional activities (46 per cent) (Figure 2). Around one tenth of providers reported less parents than before opting to pay these charges – 10 per cent of providers reporting as such for food, 9 per cent for non-food consumable and 12 per cent for additional activities. A higher share of group-based providers (27 per cent) reported less parents opting to pay for additional hours than school-based providers (14 per cent) and childminders (16 per cent).

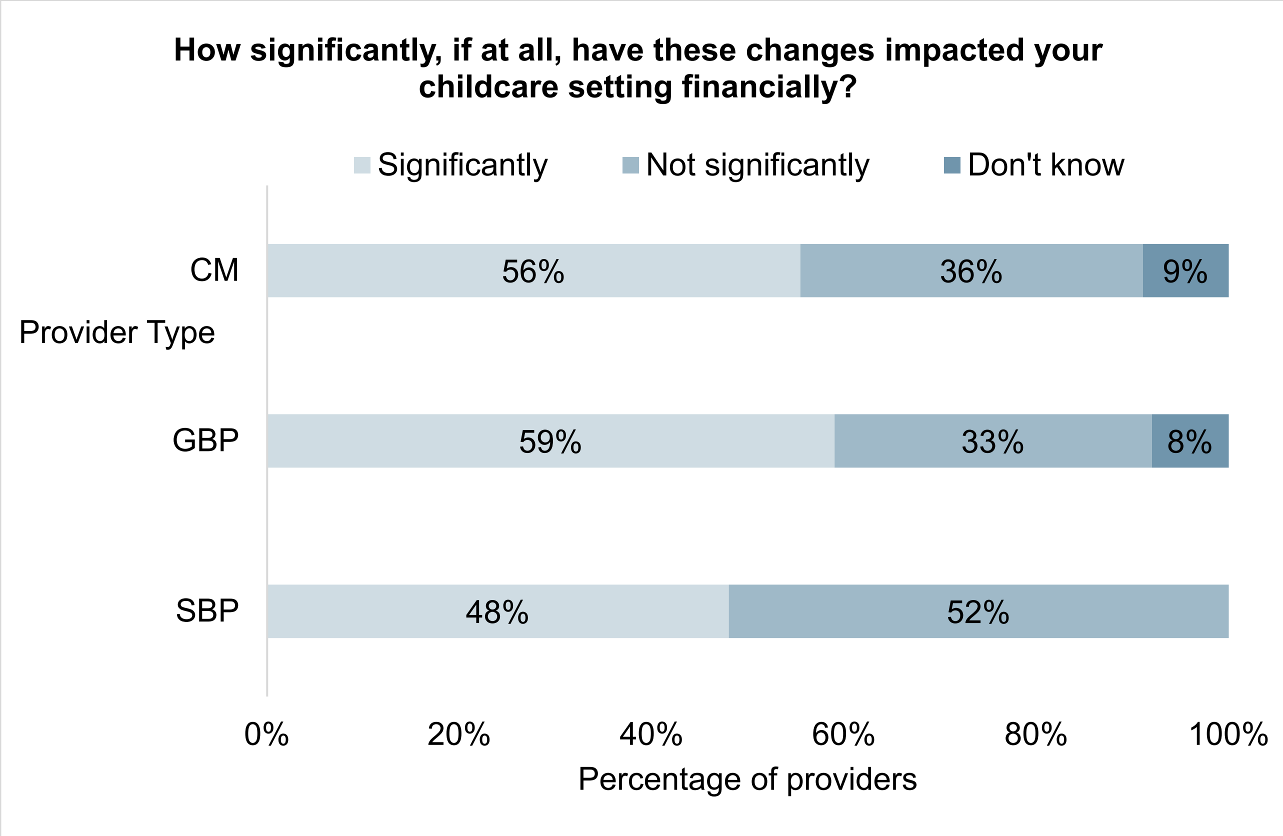
Figure 2: Experiences of changes in parents paying additional charges, May 2025



Unweighted base: 1,716

Of providers who experienced a change in (more/less) parents willing to pay these changes, over half (57 per cent) said the changes impacted their setting's finances significantly. As seen in Figure 3, group-based providers were most likely to report a significant impact (59 per cent) and school-based providers the least likely (48 per cent).

Figure 3: Impact on provider finances of changes in parents opting to pay additional charges, May 2025



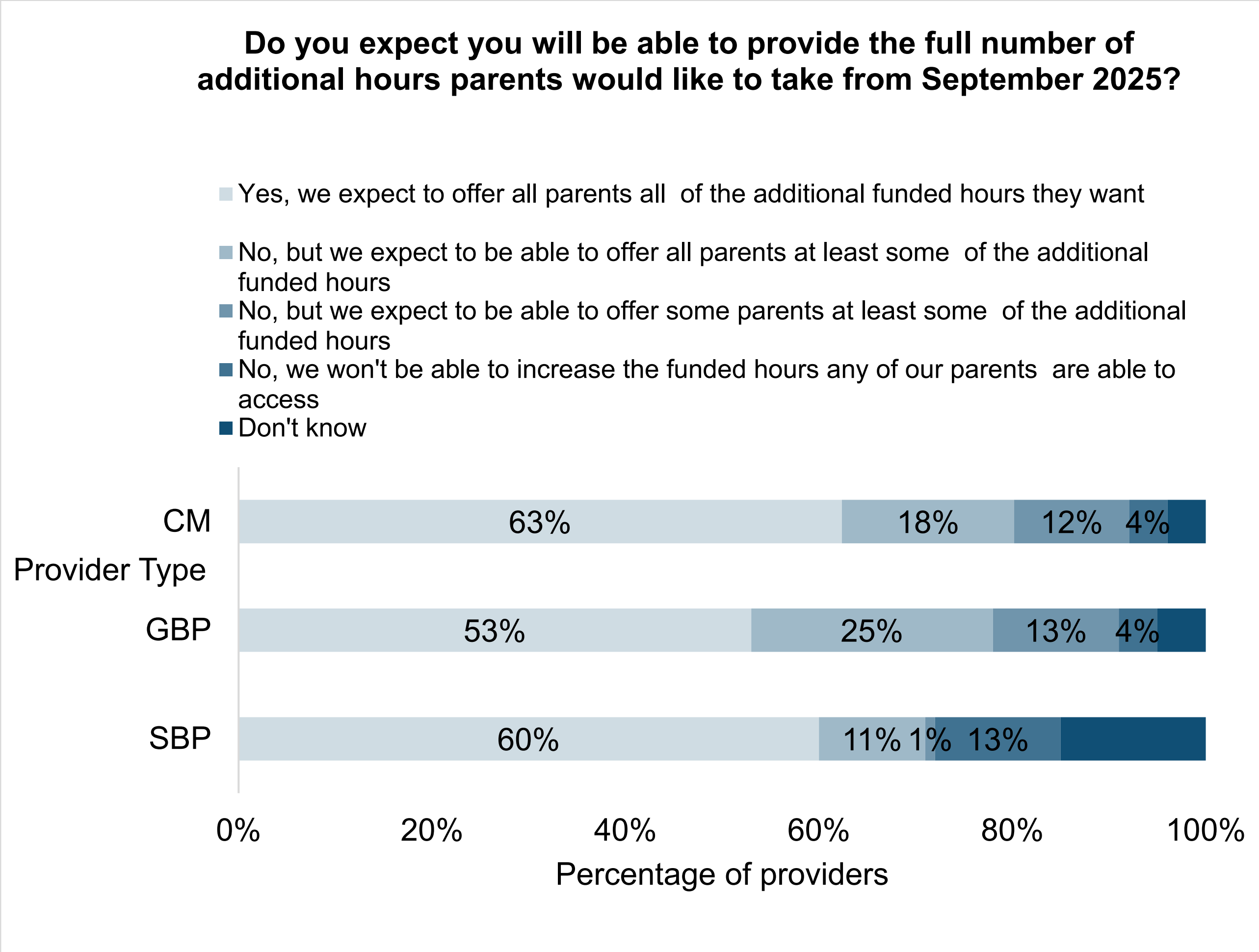
Unweighted bases: GBP = 327, SBP = 39, CM = 362

Preparations to deliver the September 2025 expansion

From September 2025, eligible working parents of children from the age of 9 months old became able to access 30 hours per week of funded childcare. Providers were asked some questions in May on how they were preparing for the expansion.

Over half (58 per cent) of providers expected to offer all parents all of the additional funded hours they would like to take from September. More school-based providers (60 per cent) and childminders (63 per cent) expected to fully deliver than group-based providers (53 per cent) (Figure 4). A fifth (21 per cent) of providers expected to offer all parents at least some of the additional funded hours they want, and an eighth (12 per cent) expected to offer some parents at least some of the additional funded hours they would like to take from September.

Figure 4: Providers ability to deliver the full number of additional hours parents would like to take from September 2025



Unweighted bases: GBP = 622, SBP = 30, CM = 813

In the run up to September 2025, 18 per cent of providers had made, or planned to make, changes to their funded entitlement offer for 9-24-month olds, and 25 per cent make changes to their 3-4 -year olds offer.

Those looking to make changes, were asked about changes in the entitlement places, hours and flexibility of access to hours for these two age groups:

- Places: there is some evidence that providers were displacing entitlement offer places for 3-4-year-olds with places for 9-24-month-olds. In particular, 24 per cent of group-based providers and 68 per cent of childminders who made or planned changes had reduced, or planned to reduce, places for 3-4-year-olds. At the same time, 33 per cent of group-based providers and 41 per cent of childminders who made or planned change, increased, or planned to increase, places for 9-24-month-olds.

- Hours: there was weaker evidence that providers were displacing entitlement offer hours for 3-4-year-olds with hours for 9-24-month-olds. 15 per cent of group-based providers and 6 per cent of childminders who made or planned changes, decreased, or planned to decrease, hours for 3-4-year-olds, compared with 16 per cent and 5 per cent decreases for 9-24-month-olds. Whilst 16 per cent of group-based providers and 28 per cent of childminders who made or planned a change, increased, or planned to increase, places for 9-24-month-olds.

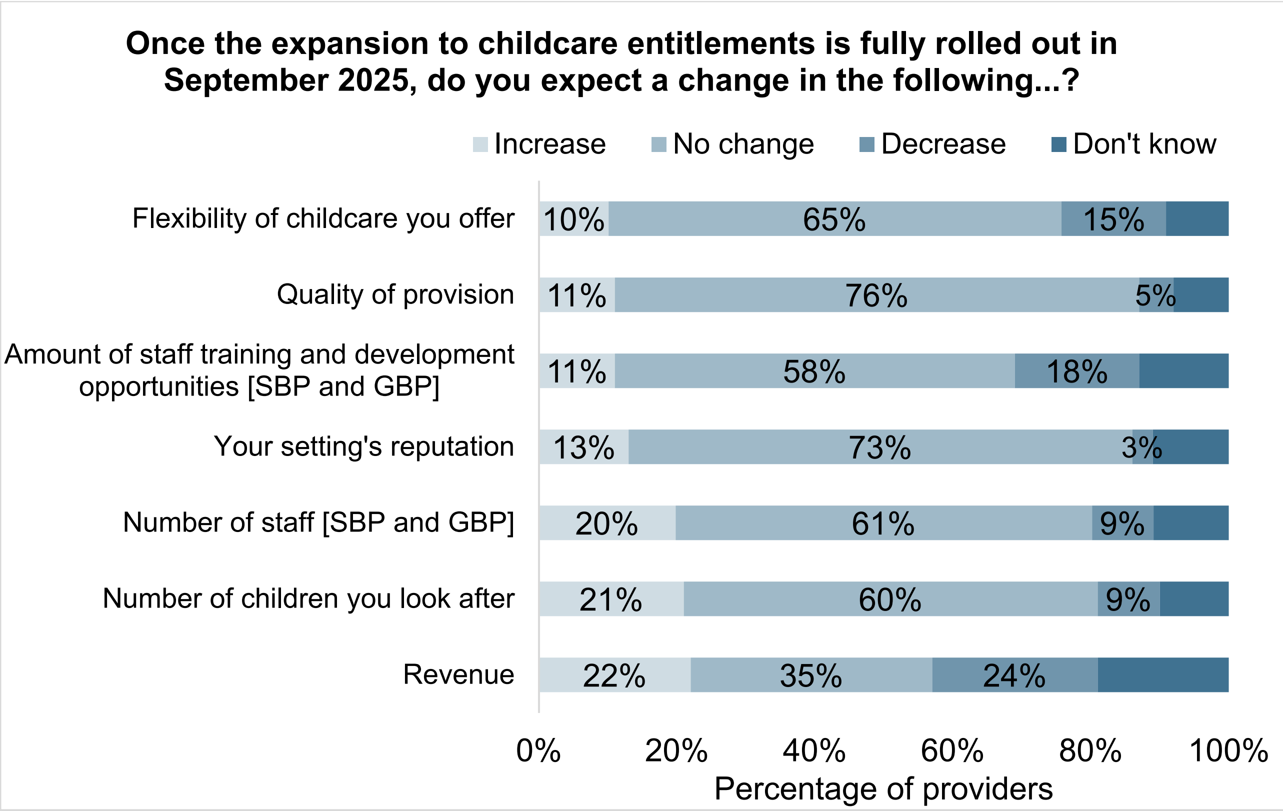
- Access to hours: providers were also more likely to make changes to the way parents can access entitlement hours for 3-4-year-olds (57 per cent of group-based providers, 64 per cent of childminders) than for 9-24-month-olds (56 per cent of GBPs, 25 per cent of childminders).

Expected impacts from the September 2025 expansion

Providers were asked in May 2025 how they expected the completion of the September 2025 entitlement rollout to impact on key characteristics of their provision.

For most measures, the majority of providers expected to see no change, for example in the number of children they look after (60 per cent), quality of provision (76 per cent), their setting's reputation (73 per cent) and flexibility of the childcare they offer (65 per cent) (Figure 5). This reflects the fact the majority of expansion in places is expected to be concentrated in a small share of providers (see following chapter).

Figure 5: Expected impacts following the full roll out of new entitlements, May 2025



Unweighted base: 1,716

Note: Number of staff and Amount of staff training were not asked to CMs.

Expectations around changes to revenue were more mixed, just over a third (35 per cent) expected no change, nearly a quarter expected an increase (22 per cent) and nearly a quarter (24 per cent) a decrease. Turning to provider types, childminders (27 per cent) were most likely to anticipate an increase, and group-based providers (30 per cent) were most likely to expect a decrease in revenue following the full rollout of the entitlements.

Capacity and places

Providers were asked a series of questions around their capacity, defined as "the maximum number of children that they / the setting can provide care for at any one time, within the physical space available".

New places for children aged under 3

The surveys sought to understand whether in light of changes to the funded childcare entitlements[5], providers were likely to offer more places or start to offer places where they currently do not, to children aged under 3 by September 2025.

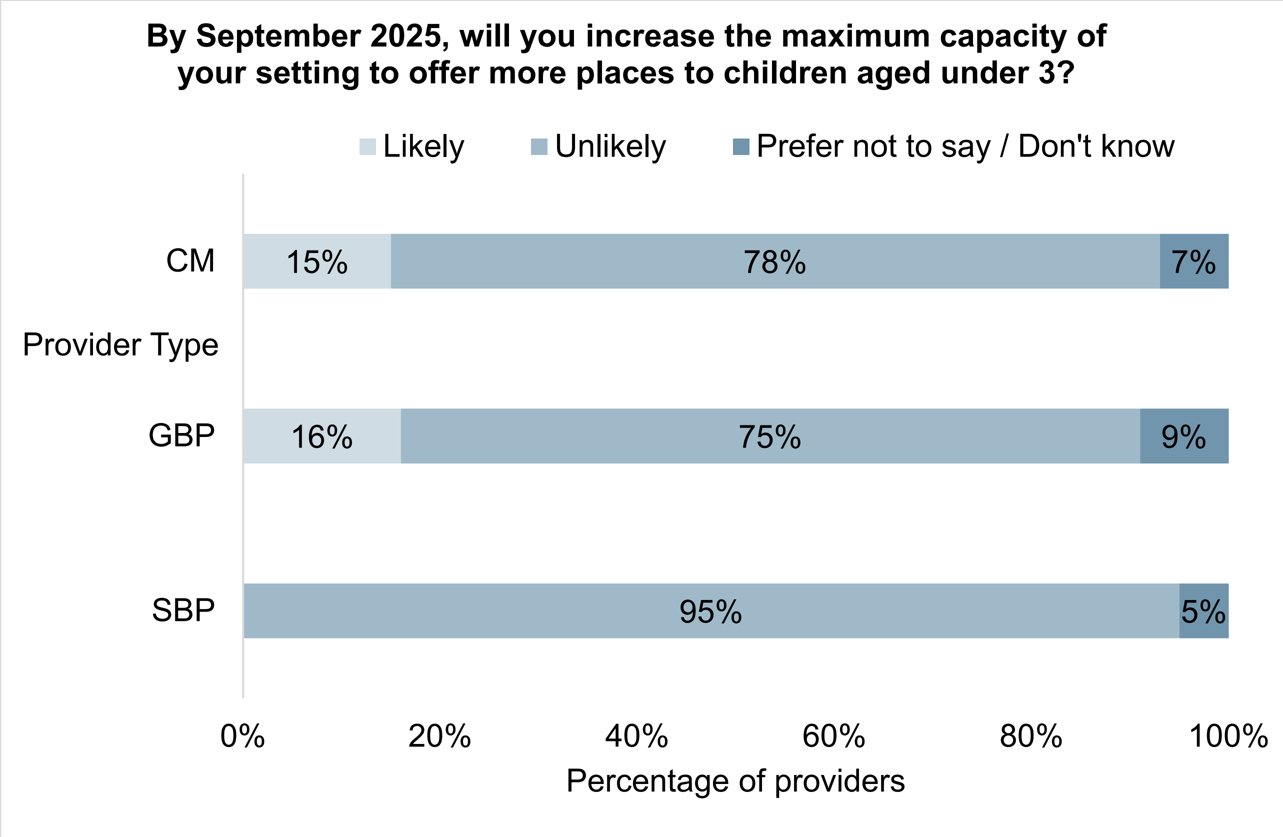
Likely to offer more places to under 3s

Overall, of providers who already care for under 3s, 17 per cent reported in November, 14 per cent in March and 15 per cent in May that they were likely to offer more places to under 3s.

In May 2025, 16 per cent of group-based providers and 15 per cent of childminders who already care for under 3s reported they were likely to offer more places for under 3s by September 2025 (Figure 6).

[5] By September 2025, all eligible working parents of children from the age of 9 months onwards would be eligible for 30 hours of funded childcare per week (for 38 weeks a year)

Figure 6: Provider intentions to offer more places for under 3s by September 2025, May 2025



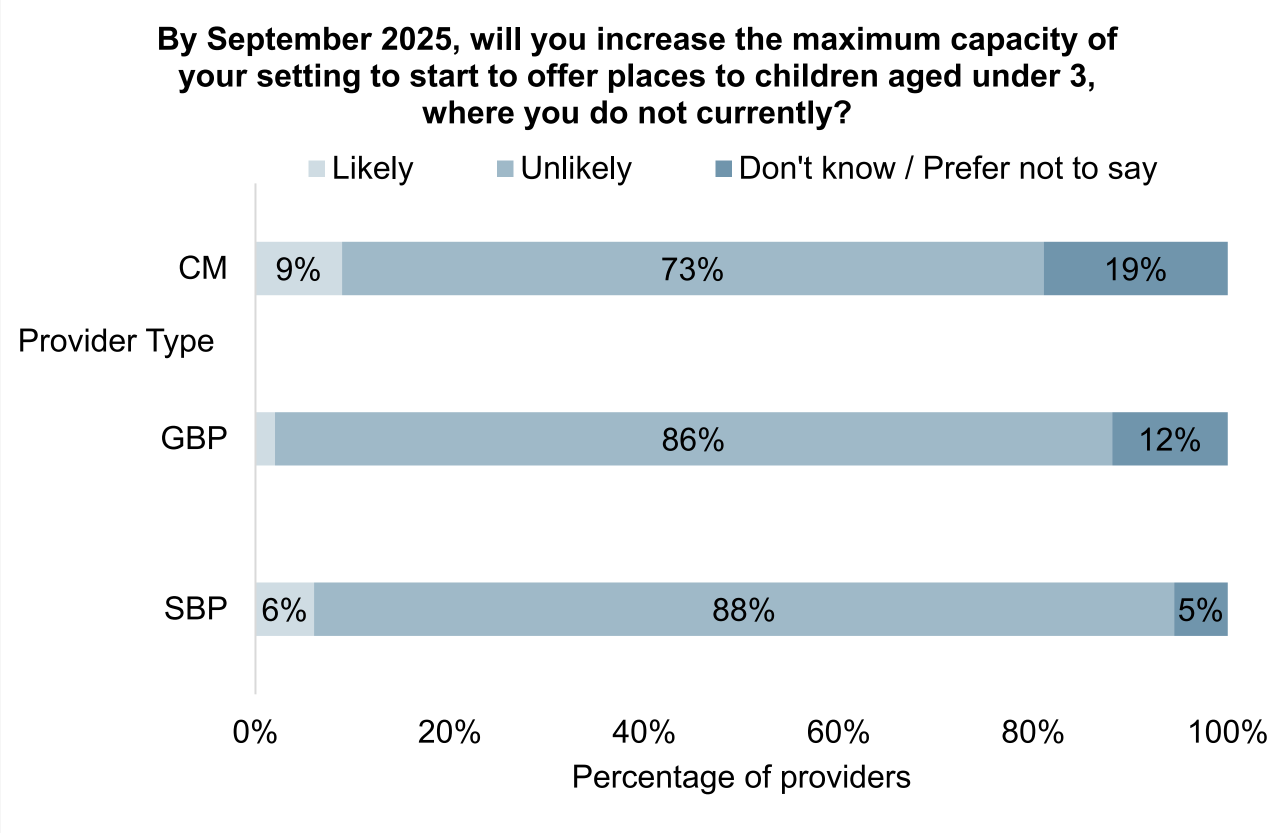
Unweighted bases: GBP n = 654, SBP n = 39, CM n = 840

Start to offer places to under 3s

Overall, of providers who do not currently offer places to under 3s, 11 per cent reported in November, 9 per cent in March and 5 per cent in May that they were likely to start to offer places to under 3s.

In May 2025, 2 per cent of group-based providers, 6 per cent of school-based providers and 9 per cent of childminders who don’t already care for under 3s reported they were likely to start to offer places for under 3s by September 2025 (Figure 7).

Figure 7: Provider intentions to start to offer places for under 3s by September 2025, May 2025



Unweighted bases: GBP n = 60, SBP n = 73, CM n = 48

Additional places

Although relatively small proportions of providers reported they are likely to increase their maximum capacity to offer more places to under 3s[6] by September 2025, those that report they are likely to grow, expect relatively large expansions.

These group-based providers reported in November they would expand by on average (mean) by 12 places, 10 places in March and 10 places in May. To put these numbers into context, the mean group-based provider responding to the 2024 Survey of Childcare and Early Years Providers had 21 registered children aged under 3[7].

For childminders who report they are likely to either offer more places or start to offer places for under 3s, they expect to expand on average (mean) by 2 places in May.

[6] Either offer more places or start to offer places.
[7] https://explore-education-statistics.service.gov.uk/find-statistics/childcare-and-early-years-provider-survey/2024

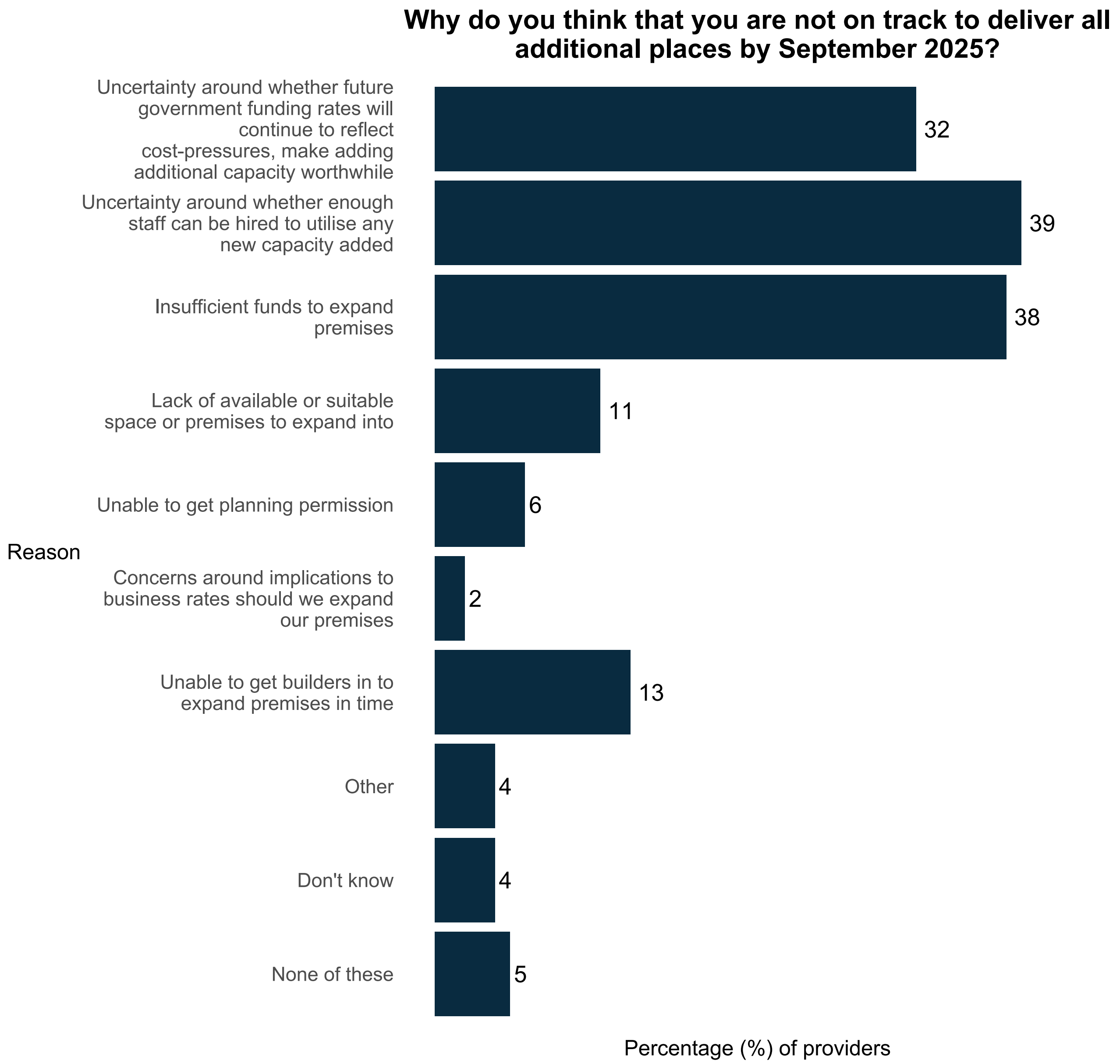
On track to expand

The majority of providers[8] likely to expand were on track to deliver these additional places by September 2025 (70 per cent of providers in November, 76 per cent of providers in March and 79 per cent of providers in May).

For the small proportion of providers who reported they were not on track[9], the most cited reason in May was uncertainty around hiring staff (39 per cent, down from 55 per cent in March) (Figure 8). The second most common reason in May was insufficient funds to expand premises (38 per cent, down from 50% in March) and the third, uncertainty around funding rates (32%, down from 59% in March).

[8] Who said they would either start to offer places or offer more places to under 3s.
[9] To deliver all additional places by September 2025

Figure 8: Reasons group-based providers and childminders are not on track to expand, May 2025



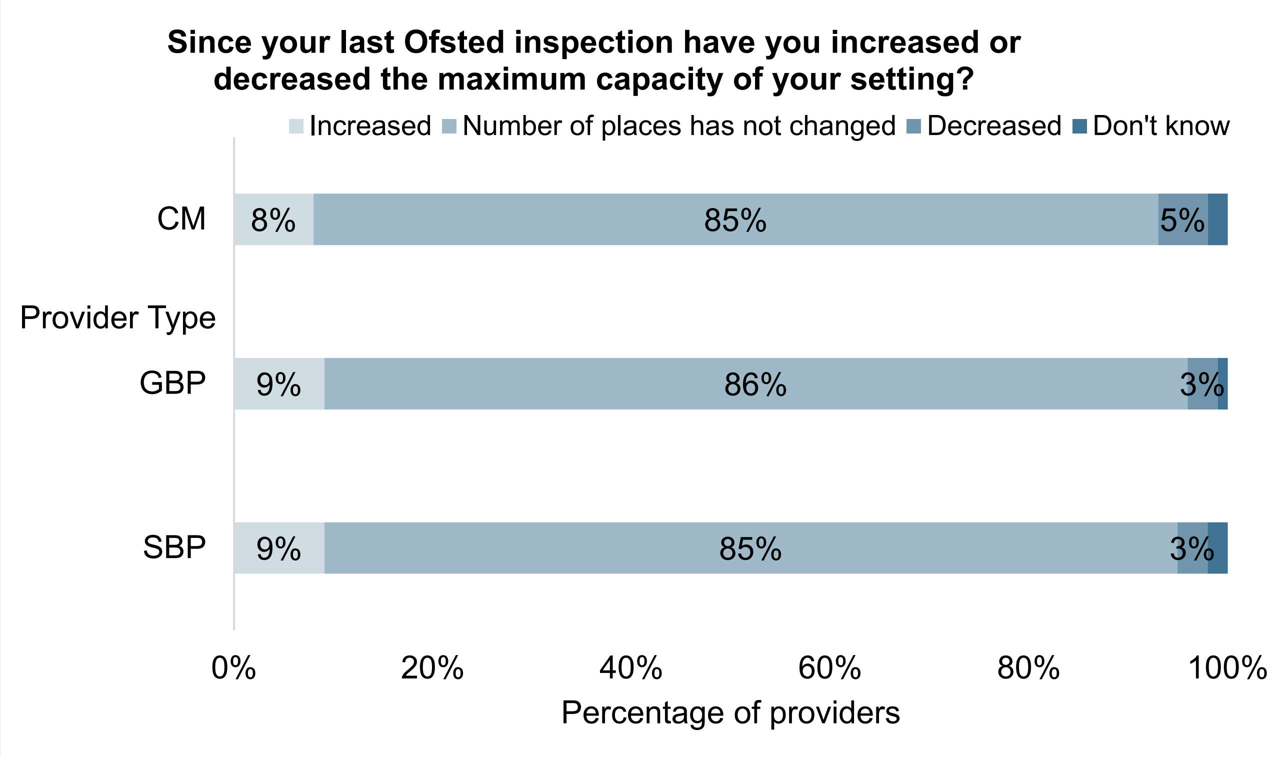
Unweighted base: n = 31

Changes since last Ofsted inspection

The majority of providers reported that their maximum capacity had not changed since their most recent Ofsted inspection (83 per cent in November; 82 per cent in March; 85 per cent in May).

In May 2024 just under a tenth of providers (9 per cent of group-based providers, 9 per-cent of school-based providers and 8 per cent of childminders) had increased their maximum capacity since their most recent Ofsted inspection (Figure 9). A smaller proportion of providers (3 per cent of group-based providers, 3 per-cent of school-based providers and 5 per cent of childminders) had decreased their maximum capacity since their most recent inspection.

Figure 9: Change in a setting's capacity since their most recent Ofsted inspection, May 2025



Unweighted bases: GBP n = 714, SBP n = 112, CM n = 890

For the small proportion of providers who have either increased or decreased their maximum capacity, approximately half notified Ofsted (52 per cent in November; 48 per cent in March, 49 per cent in May).

Providers who increased their capacity since their last Ofsted inspection

Group-based providers who expanded, reported an average capacity increase of 13 places in November, 16 places in March, and 11 places in May compared to their last Ofsted inspection. Childminders who grew, reported an average capacity increase of 3 places in November, 2 places in March, and 3 places in May compared to their last Ofsted inspection.

Providers who decreased their capacity since their last Ofsted inspection

Group-based providers who shrunk, reported an average capacity decrease of 19[10] places in November, 16[11] places in March, and 13[12] places in May compared to their last Ofsted inspection. Childminders who reduced in capacity, reported an average capacity decrease of 3 places in November and March, and 3 places in May compared to their last Ofsted inspection.

[10] Low response rates: interpret with caution.
[11] Low response rates: interpret with caution.
[12] Low response rates: interpret with caution

Funding and provider finances

Income sufficiency

There are tentative signs of provider finances improving through 2025.

In March, 46 per cent of providers surveyed said their current income covers their costs, this rose to 48 per cent in May (Table 3). Childminders were the most likely to report their income covered their costs (56 per cent in May).

Table 3: Provider financial positions

Indicator	Income covers costs	Income covers costs
Survey	March 25	May 25
Group-based providers	38%	42%
School-based providers[13]	27%	23%
Childminders	53%	56%
Overall	46%	48%

Unweighted bases: March - GBP n=544, SBP n=64, CM = n=774; May - GBP n=714, SBP n=112, CM = n=890

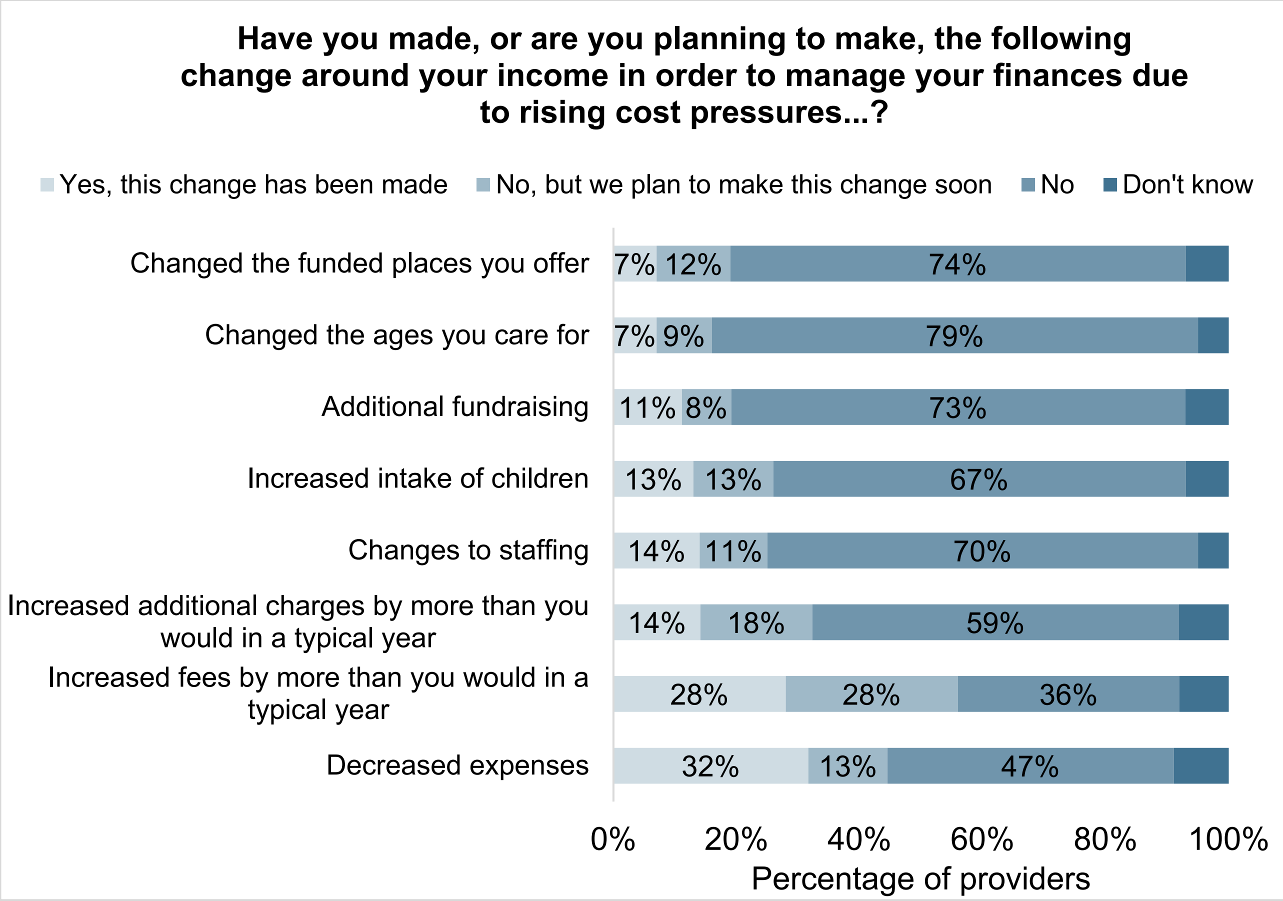
Responses to rising cost pressures

Since March, there has been a decline in the proportion of providers making changes around their income and costs as a result of cost pressures.

In May, 56 per cent of providers said they have, or plan to, increase fees by more than they would in a typical year (down from 66 per cent in March) (Figure 10) and on average they have increased/intend to increase fees by 11 per cent across all ages. 45 per cent of providers said they had, or plan to, decrease expenses, whilst 33 per cent said they have, or plan to, increase additional charges by more than they would in a typical year (a decrease from 41 per cent in March).

[13] Low response rates: interpret with care.

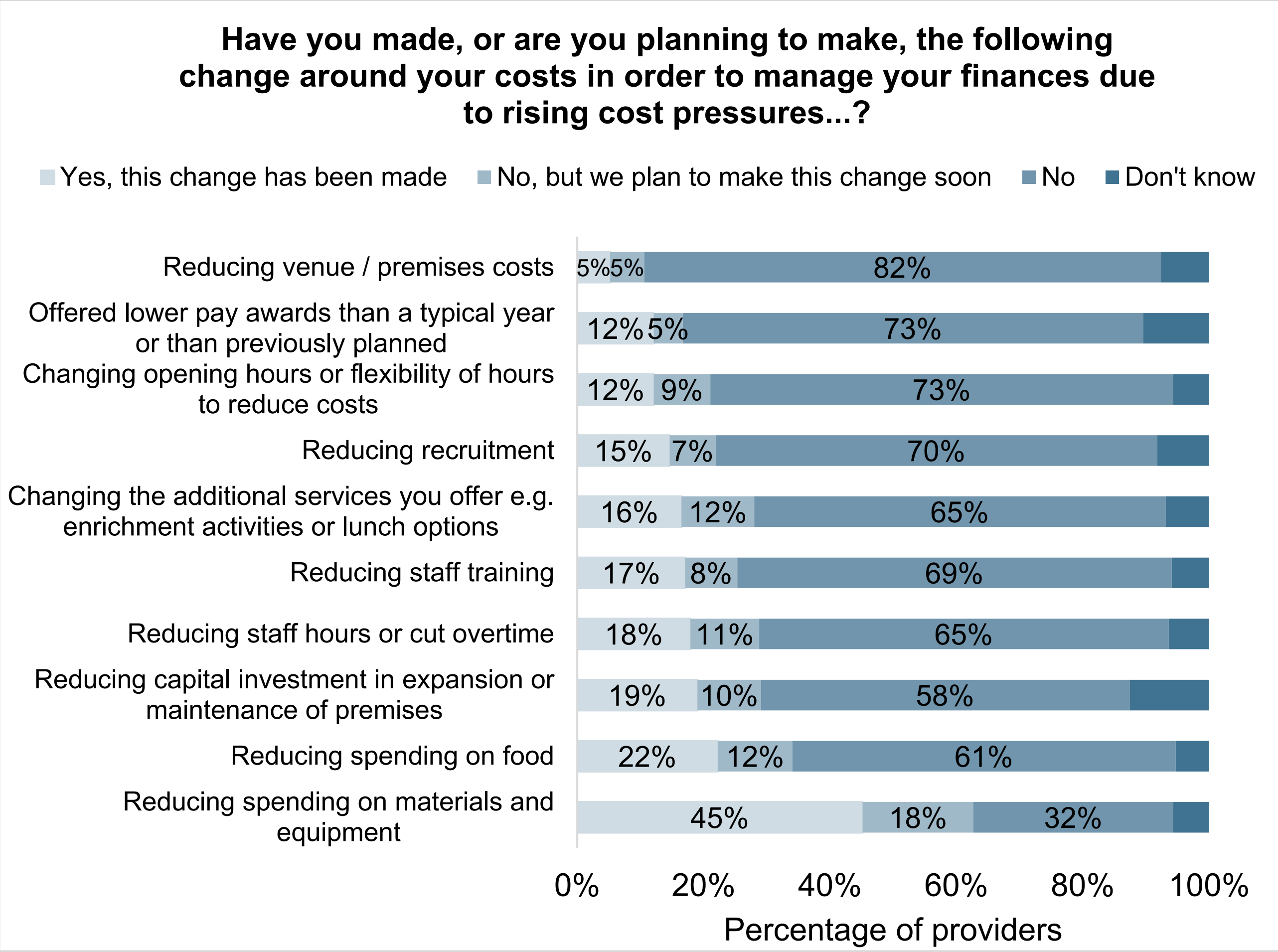
Figure 10: Changes made/planned around income in response to rising cost pressures, May 2025



Unweighted bases: GBP n = 714, SBP n = 112, CM n = 890

On the costs side, since March, there have been declines in the proportion of group-based and school-based providers that have or who plan to reduce spending on materials and equipment (63 per cent, down from 69 per cent in March) and reduce spending on food (34 per cent, down from 38 per cent in March) (Figure 11). These providers were least likely to have or plan to close business (4 per cent), close rooms in their settings (5 per cent, down from 12 per cent in March) or make staff redundant (6 per cent, down from 18 per cent).

Figure 11: Changes made/planned around costs in response to rising cost pressures, group-based and school-based providers May 2025

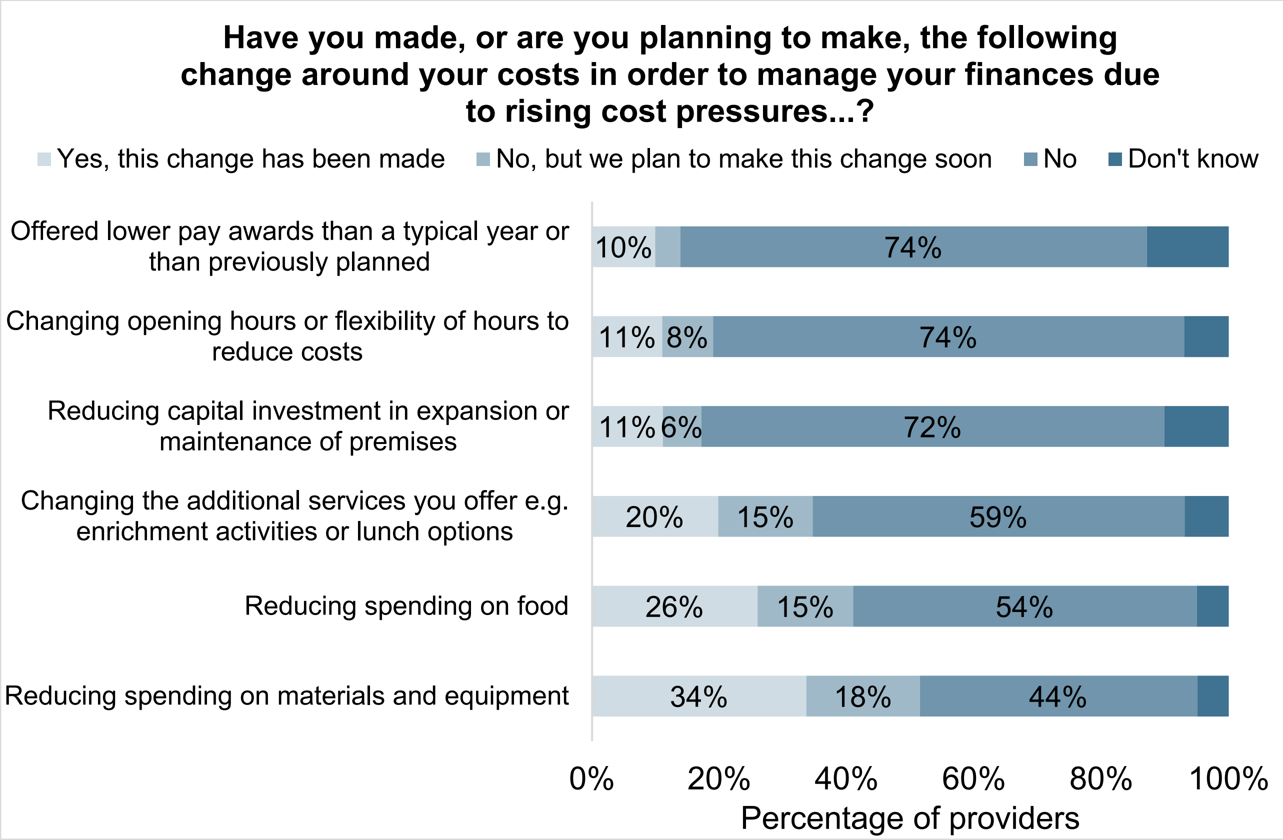


Changes made by less than 5% of GBPs/SBPs not shown above

Unweighted bases: GBP n = 714, SBP n = 112

Since March, there have also been reductions in the proportion of childminders that have or who plan to reduce spending on materials and equipment (51 per cent, down from 59 per cent in March) and reduce spending on food (41 per cent, down from 48 per cent in March) (Figure 12). Childminder were least likely to have or plan to close business (6 per cent) or reduce venue or premise costs (7 per cent).

Figure 12: Changes made/planned around costs in response to rising cost pressures, childminders, May 2025



Changes made by less than 5% of CMs not shown above
Unweighted bases: CM n = 890

Actions taken to manage finances

Asked about any other actions they have taken to manage their finances, in May 51 per cent of group-based providers (up from 45 per cent in March), 23 per cent of school-based providers (down from 31 per cent), and 54 per cent of childminders (up from 52 per cent) had not taken any further steps to manage their finances. This again suggests less pressure on provider finances in May than March 2025.

The most frequently mentioned actions taken by group-based providers were using business contingency reserves (26 per cent in May, down from 31 per cent in March); and, using business savings intended for future improvements (24 per cent in May, down from 29 per cent in March).

The most frequently mentioned action taken by school-based providers was relying on school budgets or other school funding to cover shortfalls (67 per cent in May, up from 57 per cent in March); and for childminders it was using their personal savings (31 per cent in May, compared with 32 per cent in March).

Workforce

Group-based and school-based providers answered a series of questions on their workforce. In this section, 'providers' refers only to these provider types.

Vacancies

Number of vacancies

For group-based providers, the mean number of vacancies remained 1 across all three surveys. On average there was 1 vacancy at every 3 school-based providers, down to every 10 in May (Table 4).

Table 4: Vacancies and applications, by provider type

Provider type	GBPs	GBPs	GBPs	SBPs	SBPs	SBPs
Survey date	**Nov-24**	**Mar-25**	**May-25**	**Nov-24**	**Mar-25**	**May-25**
Mean number of vacancies	1.1	1.1	1.0	0.3	0.3	0.1
Mean applications per vacancy	6	6	5	7	3	5
Mean number of weeks to fill a vacancy	13	11	11	9	8	10

Unweighted bases: Nov - GBP n=612, SBP n=86; Mar - GBP n=544, SBP n=64; May - GBP n=714, SBP n=112

Mean applications per vacancy

For group-based providers, the mean number of applications per vacancy remained steady (6 in November, 6 in March and 5 in May). For school-based providers, applications per vacancy fluctuated over time from 7 in November to 3 in March then 5 in May.

Mean number of weeks to fill a vacancy

The mean number of weeks taken to fill a vacancy fell from 13 in November to 11 in March and May for group-based providers. For school-based providers the time taken to fill a vacancy went from 9 weeks in November to 8 in March then 10 in May.

Staff:child ratios

Providers were asked about their average staff to child ratios since the introduction of the changes to the EYFS in September 2023. Results indicate that providers are typically operating under the approved maximum staff:child ratios (Table 5 and Table 6).

Table 5: Staff:child ratios for children aged 2 year olds[14]

Provider type	GBPs	SBPs
November 2024	1:4.0	1:4.1
March 2025	1:4.2	1:4.3
May 2025	1:4.2	1:4.1

Unweighted bases: Nov: GBP n=570, SBP n=28; Mar: GBP n=507, SBP n=63; May: GBP n=637, SBP n=39
Caution: small SBP sample sizes.

Table 6: Staff:child ratios for children aged 3 and 4 year olds[15]

Provider type	GBPs	SBPs
November 2024	1:6.8	1:8.4
March 2025	1:7.2	1:9.3
May 2025	1:6.9	1:8.7

Unweighted bases: Nov: GBP n=612, SBP n=86; Mar: GBP n=517, SBP n=61; May: GBP n=714, SBP n=112

Staffing issues and associated actions

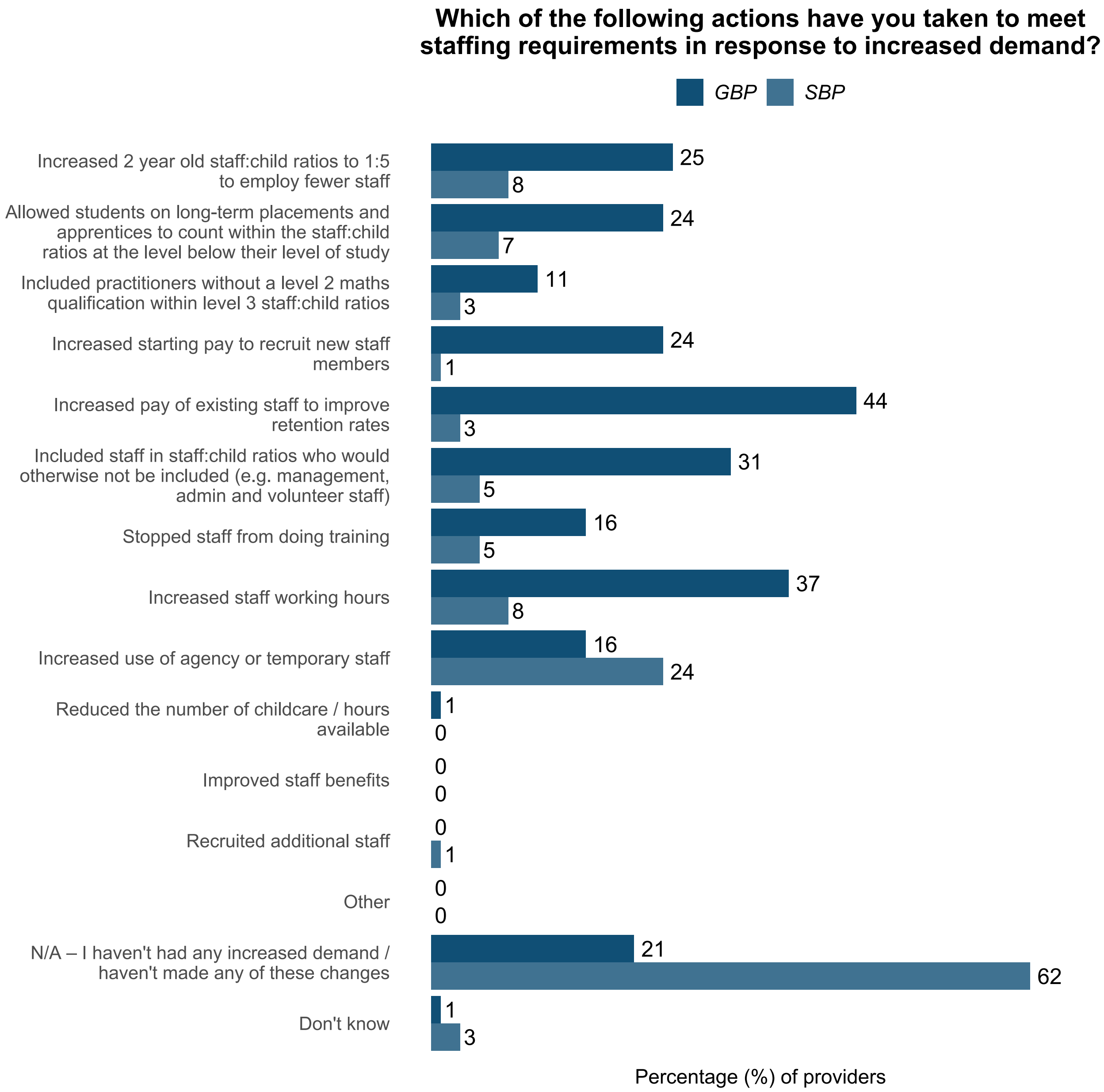
Providers were asked if they had taken any actions to meet staffing requirements in response to increased demand.

In November (50 per cent) and March (55 per cent) at least half of school-based providers reported they either hadn't experienced an increase in demand nor taken any actions in response, this rose to over three fifths (62 per cent) in May (Figure 13). In contrast, across all three surveys around a fifth (19 per cent in November, 19 per cent in March and 21 per cent in May) of group-based providers said they either hadn't experienced an increase in demand nor made any changes.

The most common action taken by group-based providers was increasing pay of existing staff (44 per cent in December, 45 per cent in March, 44 per cent in May). This was followed by including staff in staff:child ratios that would not otherwise be included (35 per cent in November, 40 per cent in March and 31 per cent in May) and, increasing staff working hours (37 per cent in November, 35 per cent in March and 37 per cent in May).

[14] Current statutory maximum staff:child ratio is 1:5.
[15] Current max staff:child ratio 1:13 with approved L6 qualified staff member working directly with children, or 1:8 if approved L6 qualified staff member is not working directly with children

Figure 13: Actions taken to meet staffing requirements in response to increased demand, May 2025



Unweighted bases: GBP n=714, SBP n=112

For those school-based providers who had experienced increased demand, the most frequently reported actions across all three surveys included allowing students on long-term placements and apprentices to count within the staff:child ratios at the level below their study (12 per cent in November, 15 per cent in March, 7 per cent in May) and increasing 2 year old staff:child ratios to 1:5 to employer fewer staff (15 per cent in November, 10 per cent in March and 8 per cent in May). Nearly a quarter (24 per cent) of school-based providers, reported using agency or temporary staff in May 2025, this wasn't given as an explicit option in early surveys.

Contact and non-contact time

In the November survey, providers were asked about the proportion of time staff spend on contact and non-contact[16] activities. Staff at school-based providers were slightly more likely to spend more time (13 per cent of time) on non-contact activities, compared to staff at group-based providers (10 per cent of time). However, the majority of time was contact time at both group-based providers (90 per cent of time) and school-based providers (87 per cent of time).

Qualified staff

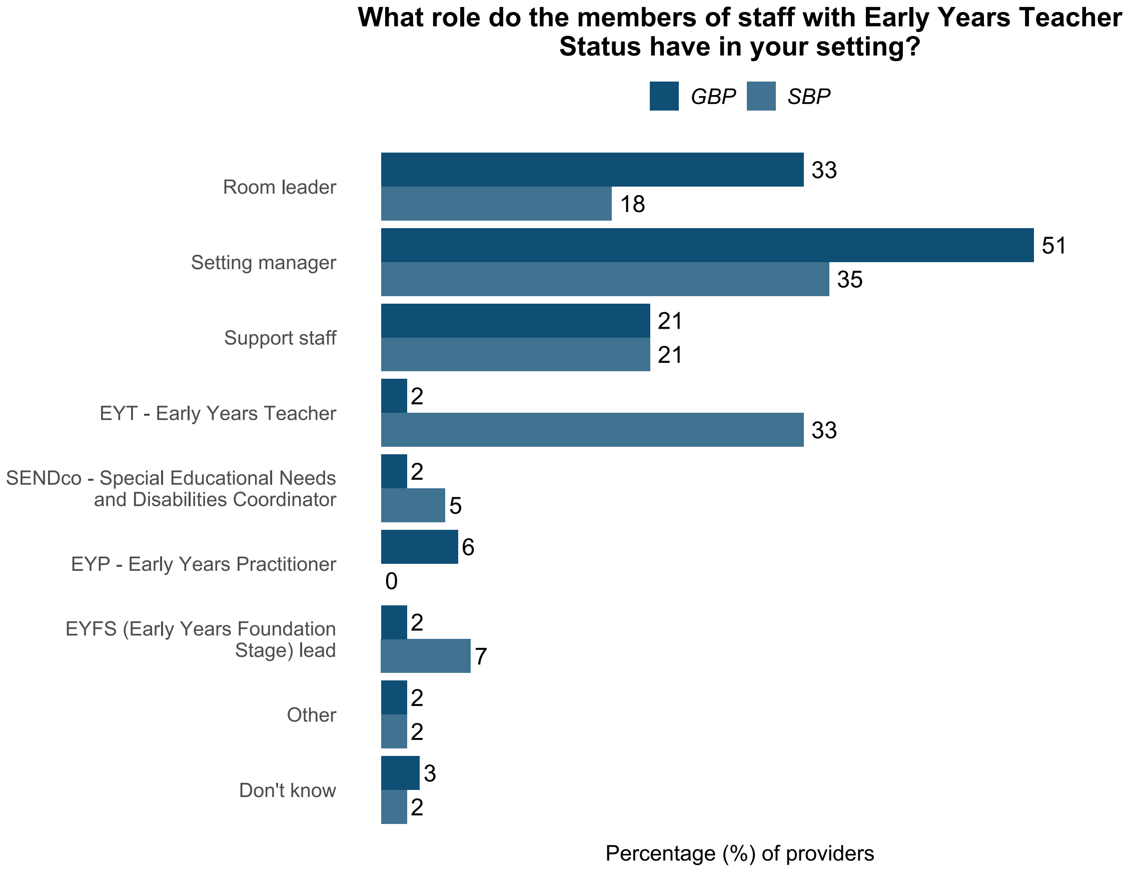
Early Years Teacher Status (EYTS)

The March and May surveys asked a series questions about staff with early years teacher status (EYTS). In May, surveyed group-based providers had on average 1 (unchanged from March) member of staff with EYTS, whilst school-based providers on average had 1 (down from 2 in March).

In May, most staff with EYTS at group-based providers worked as setting managers (51 per cent) and room leaders (33 per cent). At school-based providers most staff with EYTS worked as setting managers (35 per cent) or an Early Years Teacher (33 per cent) (Figure 14).

[16] Non contact time refers to time spent performing tasks other than childcare. This may include activities such as completing paperwork or undertaking training and management tasks.

Figure 14: Role of staff with EYTS, by provider type, May 2025



Unweighted bases: GBP n=262, SBP n=44

Nearly half (46 per cent) of school-based providers reported their full-time members of staff with EYTS earned at least £30,000 in May, with 37 per cent preferring not to say/reporting don't know (Table 7). in contrast less than a fifth (19 per cent) of group-based provider reported their full-time members of staff with EYTS earned at least £30,000.

Table 7: Annual salary of a full-time member of staff with EYTS, May 2025

Provider type / salary band	SBP	GBP
£17,999 or less	2%	12%
£18,000 - £20,999	1%	7%
£21,000 - £24,999	2%	18%
£25,000 - £29,000	12%	22%
£30,000 - £34,999	15%	12%
£35,000 or more	31%	7%
Don't know / prefer not to say	37%	22%

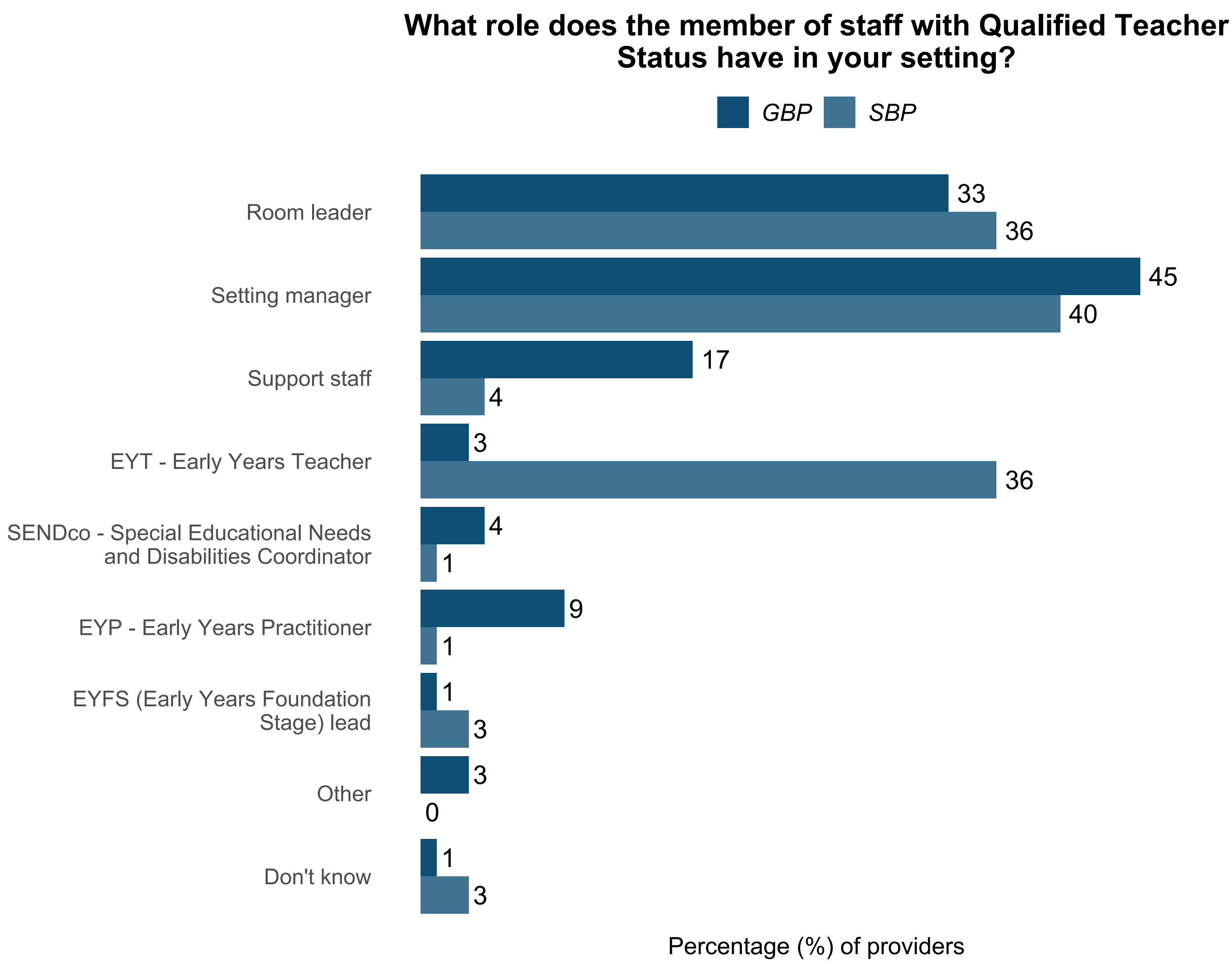
Unweighted bases: GBP n=262, SBP n=44

Qualified Teacher Status (QTS)

The May survey also asked a series questions about staff with qualified teacher status (QTS). On average, across surveyed group-based providers less than one in two had 1 member of staff with QTS and each school-based providers had 2 members of staff with QTS.

Staff with QTS at school-based providers were most likely to be setting managers (40 per cent), room leaders or an early years teacher (both 36 per cent). The small number of staff with QTS at group-based providers were most likely to be setting managers (45 per cent) or room leaders (33 per cent) (Figure 15).

Figure 15: Role of staff with QTS, by provider type, May 2025



Unweighted bases: GBP n=174, SBP n=93

At school-based providers, around a third of full-time staff with QTS earned an annual salary between £31,001 and £43,607 (28 per cent, main pay scale range for teachers excluding London and the Fringe); a third earned between £43,608 and £50,000 (33 per cent, upper pay scale range for teachers); and, nearly a sixth (15 per cent) earned over £50,000 (Table 8). In contrast, at group-based providers, only a fifth (20 per cent) earned over £31,000.

Table 8: Annual salary of a full time member of staff with QTS, May 2025

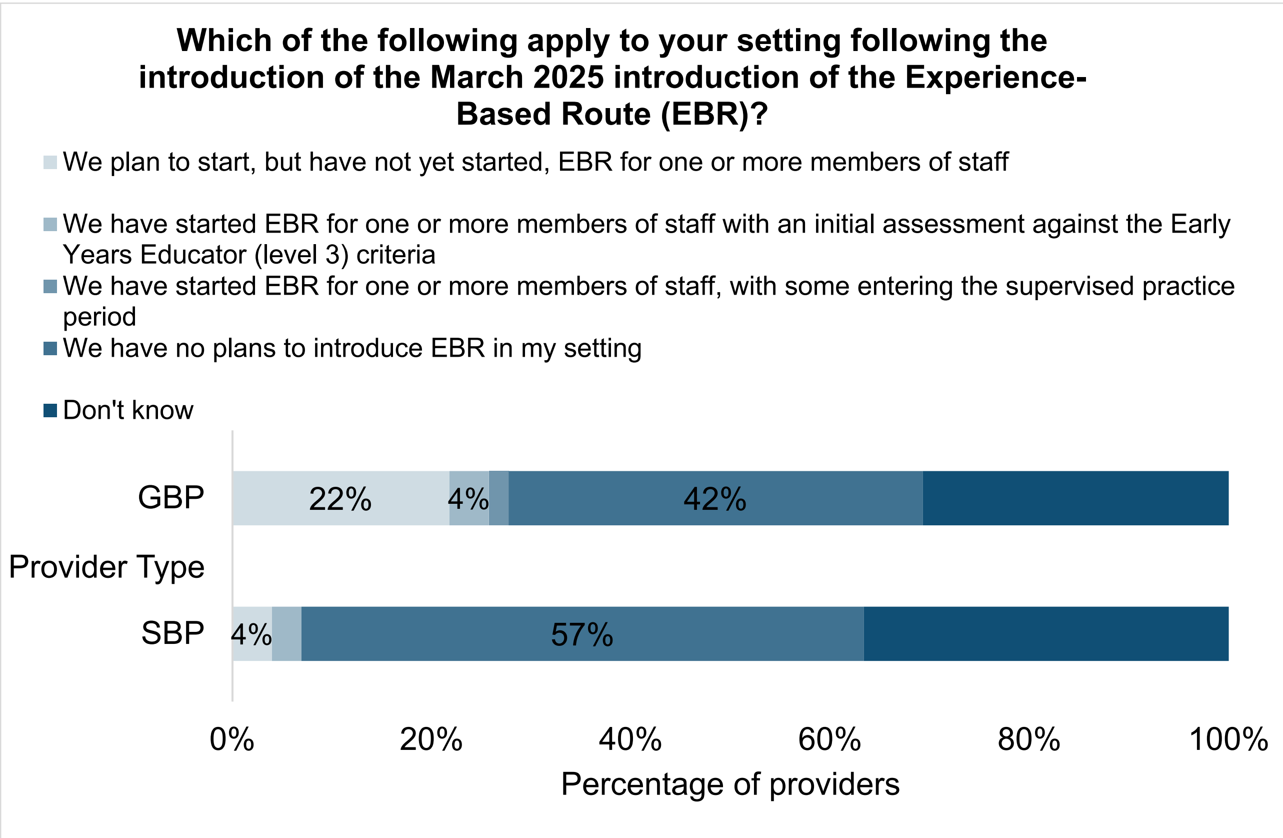
Provider type / salary band	SBP	GBP
£21,000 or less	1%	21%
£21,001 - £31,000	2%	33%
£31,001 - £43,607	28%	18%
£43,608 - £50,000	33%	2%
£50,001 – £76,000	15%	0%
Don't know / prefer not to say	21%	26%

Unweighted bases: GBP n=174, SBP n=93

Experience-based route

On 3rd March 2025, the Department for Education introduced the Experience-Based Route (EBR) for early years staff. This is an optional flexibility that allows suitable and experienced early years staff who do not hold full and relevant qualifications to be included in the staff:child ratios at level 3, following a period of supervised practice. The flexibility was introduced to support the sector to recruit and retain sufficient, skilled, staff in early years settings and to enable suitable staff to progress in their career on the basis of their skills, knowledge and experience.[17]

Figure 16: Provider intentions with regards to the EBR, May 2025



Unweighted bases: GBP n=714, SBP n=112

[17] https://www.gov.uk/government/publications/experience-based-route-for-early-years-staff

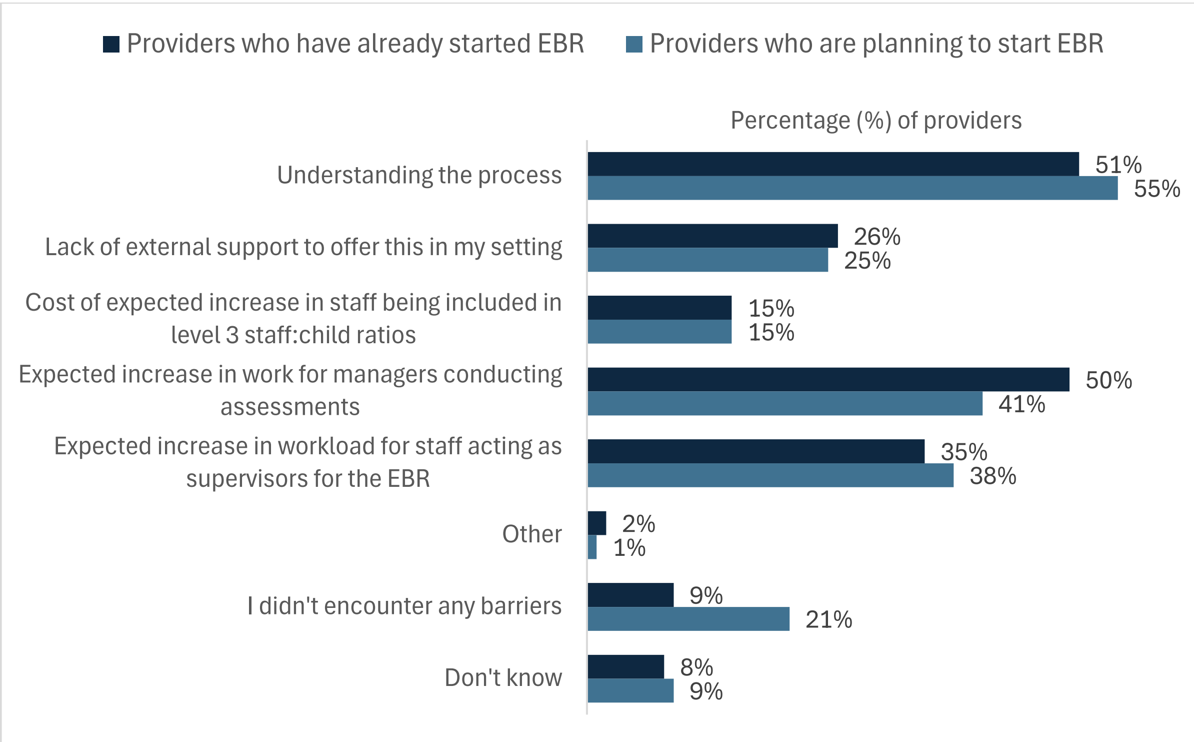
At the time of the May survey, relatively small proportions of group-based providers (6 per cent) and school-based providers (3 per cent) had started the EBR for one or more members of staff (Figure 16).

Looking forward, over a fifth (22 per cent) of group-based providers planned to start the EBR for one or more members of staff, however only a small number (4 per cent) of school-based providers planned to do so.

For those group-based providers who have started or plan to start the EBR for some members of staff, on average they expect 2 members of their staff on completion of the EBR to be included in the staff:child ratios at level 3 over the next year.

Over two fifths (43 per cent) of group-based provider staff who have started the EBR held a full and relevant level 2 qualification and a third (33 per cent) had at least one year experience working with early years children in the same early years setting.

Figure 17: Barriers encountered introducing EBR, May 2025



Unweighted bases: GBP n=180, SBP n = 7

The most frequently encountered barriers by those who have started or plan to start introducing the EBR for some members of their staff were understanding the process (51 per cent who've started and 55 per cent who plan to start), the expected increase in work for managers conducting assessments (50 per cent and 41 per cent) and the expected increase in workload for staff acting as EBR supervisors (35 per cent and 38 per cent) (Figure 17)

Wellbeing

Setting managers were asked a series of questions in November and March about their wellbeing.

Managers' satisfaction with their life

Setting managers were asked, using a scale of 1-10[18] to rate their satisfaction with their life. For group-based providers, satisfaction levels remained relatively stable, averaging 6.7 in November and 6.4 in March. In contrast, school-based providers saw a noticeable decline, with setting managers' satisfaction dropping from 6.9 in December to 5.5 in March.

Extent to which managers feel the things they do are worthwhile

Setting managers were asked, using a scale of 1-10[19], to what extent they feel the things they do are worthwhile. Group-based providers reported an average rating of 7.4 in November and 7.0 in March. In contrast, school-based providers experienced a slight decline, with ratings dropping from 7.6 in November to 6.6 in March, indicating a decrease in managers' perception of the value of their work.

How happy managers felt yesterday

Setting managers were asked, using a scale of 1-10[20], how happy they felt yesterday. Results remained steady for group-based providers, averaging 6.7 in November and 6.4 in March. Similarly, school-based setting managers reported averages of 6.7 in November and 6.1 in March, reflecting a slight decline.

Managers' level of anxiousness yesterday

Setting managers were asked, using a scale of 1-10[21], how anxious they felt yesterday. Anxiety levels among both group-based and school-based setting managers remained moderate. Group-based managers reported an average of 4.7 in November, rising slightly to 5.1 in March. School-based managers recorded 4.9 in November, with a slight decrease to 4.5 in March.

[18] Where 1 represents not at all satisfied and 10 represents completely satisfied.
[19] Where 1 represents not at all satisfied and 10 represents completely satisfied.
[20] Where 1 represents not at all satisfied and 10 represents completely satisfied.
[21] Where 1 represents not at all anxious and 10 represents completely anxious.

Waiting lists

Providers were asked in November 2024 about waiting lists, specifically children who are on a waiting list to start immediately, rather than those on a waiting list by choice to start in the future.

How common waiting lists are and how many children are on them

Over half (51 per cent) of group-based providers and around a third of school-based providers (30 per cent) and childminders (34 per cent) had at least one child on a waiting list. For providers who had at least one child on their waiting list, the Table 9 shows the mean size of waiting lists by provider type:

Table 9: Mean number of children on waiting lists, by provider type, November 2024

GBP	SBP	CM
14	10	3

Unweighted bases: GBP n=312, SBP n=15, CM n=276

Caution: small SBP sample sizes.

Change in size of waiting lists

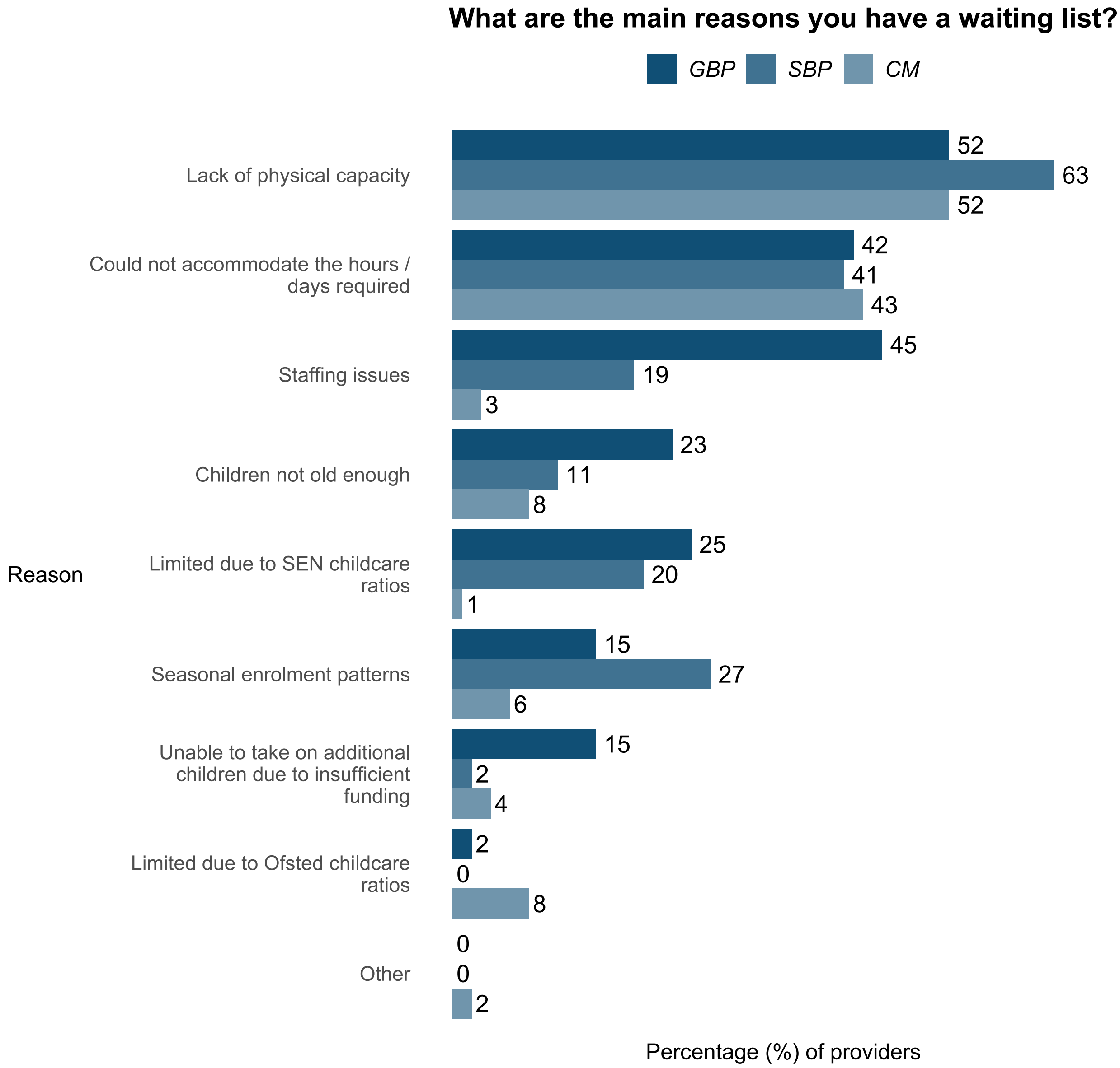
Since the September 2024 entitlements expansion, 66 per cent of providers reported that the number of children on their waiting lists have increased, particularly at childminders (68 per cent) and group-based providers (66 per cent).

Reasons for having a waiting list

The most common reason for having a waiting list was lack of physical capacity, cited by 52 per cent of group-based providers, 63 per cent of school-based providers and 52 per cent of childminders (Figure 18). The second most common reason was that the provider could not accommodate the hours/days required, cited by 42 per cent of group-based providers, 41 per cent of school-based providers and 43 per cent of childminders.

For providers who gave more than one reason for having a waiting list, the largest proportion (28 per cent) said a lack of physical capacity was the most important reason for their setting.

Figure 18: Main reasons providers having a waiting list, November 2024



Nov 2024 unweighted bases: GBP n=312, SBP n=15, CM n=276
Caution: small SBPs sample size.

Early Years Pupil Premium

Early Years Pupil Premium (EYPP) is additional funding that providers can claim for the most disadvantaged children taking up early education entitlements[22]. Providers were surveyed in November 2024 and May 2025 about EYPP, and between these two surveys, a 45 per cent uplift was announced in the EYPP funding rate[23], from £388 per child per year to £570 per child per year from 1st April 2025. In the run up to changing the rate, the department published new guidance for local authorities on the use of EYPP[24].

Awareness and claiming of EYPP

In May 2025, the majority of providers (92 per cent) were aware of EYPP, and the proportion claiming EYPP rose to 47 per cent (from 43 per cent in November 2024).

However, there was a stark difference in claiming across provider types. Group-based providers (75 per cent, in-line with 76 per cent in May 2024) and school-based providers (85 per cent, up from 81 per cent in May 2024) were far more likely to be claiming EYPP than childminders (18 per cent, up from 12 per cent in May 2024).

Use of EYPP

Use of EYPP funding varied across provider types and overtime between the November 2024 and May 2025 surveys (Table 10). However, at all settings and for both surveys the most commonly cited use of EYPP was for “learning materials / resources for use at the setting”.

- School-based providers: Between the November 2024 and May 2025 survey the largest percentage point rises in providers’ use of EYPP were for “learning materials / resources for used at the setting” (76 per cent, up from 59 per cent) and “learning materials / resources for use at the home” (22 per cent, up from 10 per cent). In contrast, the biggest percentage point declines were for “staff training – numeracy” (16 per cent, down from 29 per cent) and “staff training – literacy” (18 per cent, down from 29 per cent).

- Group-based providers: Between the November 2024 and May 2025 survey the largest percentage point rises in providers’ use of EYPP were for “staff training - literacy” (35 per cent, up from 24 per cent) and “staff-training - communication” (55 per cent, up from 46 per cent).

- Childminders: Between the November 2024 and May 2025 survey the largest percentage point rises in providers’ use of EYPP were for “staff training -

[22] https://www.gov.uk/get-extra-early-years-funding
[23] https://www.gov.uk/government/news/over-2-billion-boost-to-secure-expansion-in-early-education
[24] Early years pupil premium: guide for local authorities - GOV.UK

communication” (19 per cent, up from 9 per cent) and “staff-training - numeracy” (13 per cent, up from 7 per cent).

Table 10: Use of EYPP funding, by provider type

Provider type	SBP	SBP	SBP	GBP	GBP	GBP	CM	CM	CM
Survey date	**Nov-24**	**May-25**	**Diff. (ppt)**	**Nov-24**	**May-25**	**Diff. (ppt)**	**Nov-24**	**May-25**	**Diff. (ppt)**
Staff resource / pay	44%	47%	3%	34%	32%	-2%	15%	16%	1%
Learning materials / resources for use at the setting	59%	76%	17%	89%	88%	-1%	91%	89%	-2%
Learning materials / resources for use at home	12%	22%	10%	25%	33%	8%	24%	22%	-2%
Staff training - communication	50%	49%	-1%	46%	55%	9%	10%	19%	9%
Staff training – literacy	29%	18%	-11%	24%	35%	11%	9%	14%	5%
Staff training – numeracy	29%	16%	-13%	23%	31%	8%	7%	13%	6%
Extra activities /special experiences	0%	3%	3%	6%	6%	0%	4%	9%	5%
Additional hours / sessions	5%	0%	-5%	5%	5%	0%	1%	1%	0%
Food and consumable costs	5%	1%	-4%	3%	3%	0%	0%	1%	1%
Food or clothing for families	0%	0%	0%	2%	2%	0%	0%	1%	1%
Additional special needs support / sessions	0%	0%	0%	0%	3%	3%	0%	0%	0%

Unweighted bases: Nov 2024: SBP n=68, GBP n=453, CM n=92; May 2025: SBP n=94, GBP n=532, CM n=155

Barriers to using EYPP

In November 2024, around a third of group-based providers (35 per cent) and less than a quarter of school-based providers (23 per cent) reported no barriers to using EYPP (Table 11). In contrast, over half (58 per cent) of childminders reported no barriers to using EYPP.

The most frequently mentioned barriers by group-based providers were funding (32 per cent) and uncertainty about parents’ eligibility (29 per cent); whilst for school-based providers they were difficulties getting parents to apply (43 per cent) and funding rates (40 per cent). The most commonly identified barriers by childminders was uncertainty about parents’ eligibility (20 per cent).

Table 11: Barriers to use of EYPP funding, by provider type, November 2024

Provider type	SBP	GBP	CM
Uncertainty about parents' eligibility	28%	29%	20%
Amount of funding is too low	40%	32%	8%
Difficulties getting parents to apply	43%	25%	9%
Uncertainty around funding value and timings	18%	21%	9%
Complicated application process	8%	7%	7%
There are no barriers to using EYPP	23%	35%	58%

Unweighted bases: SBP n=83, GBP n=585, CM n=745

Childminders

New flexibilities

On 1st November 2024, the DfE introduced new flexibilities for childminders in England with the objective of slowing a long-term decline in childminder numbers, including:

- Increasing the total number of people that can work together under a childminder's registration from 3 to 4 (including the childminder);
- An increase in the time a childminder may spend operating on a non-domestic premises (removing the requirement that at least 50 per cent of their time must be spent providing childcare at home); and,
- A new category of childminder, 'childminder without domestic premises' for childminders who decide to work entirely from non-domestic premises (for example a community or village hall).

Asked about their awareness of these new flexibilities in November 2024, 91 per cent of childminders were aware of the new flexibilities; 6 per cent were not aware; and, 3 per cent did not know.

Asked whether these would make use of these flexibilities:

- 10 per cent surveyed in November 2024 reported they would work with an additional person (compared with 14 per cent when surveyed in November 2023[25]);
- 4 per cent surveyed in November 2024 said they would spend more time working on non-domestic premises (compared with 9 per cent when surveyed in November 2023);
- 4 per cent said they would register as a 'childminder without domestic premises'.

Universal Credit

Surveyed in November 2024, less than one in ten (9 per cent) of childminders were currently in receipt of Universal Credit, the majority (90 per cent) were not currently in receipt of Universal Credit, and 1 per cent preferred not to say either way.

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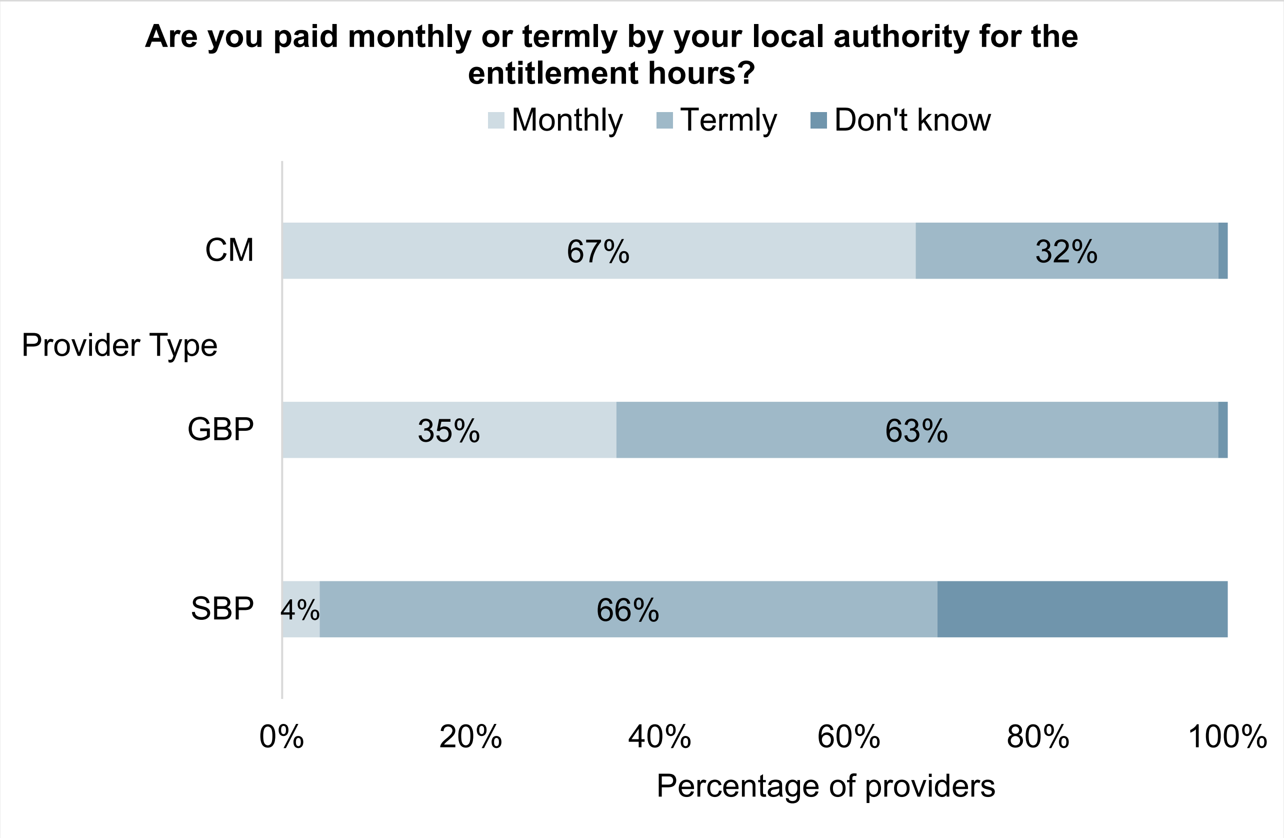
25 https://assets.publishing.service.gov.uk/media/673f60262ff787d4e01b0a34/Pulse_Survey_of_Childcare_and_Early_Years_Providers_April_2024.pdf

Entitlement funding payment schedules

Asked in November 2024 how frequently they were paid by their local authority for funded hours offered to children, group-based providers (63 per cent) were more commonly paid on a termly basis, whereas childminders (67 per cent) were most frequently paid monthly (Figure 19).

Of those paid on a termly basis, 62 per cent of group-based providers and 73 per cent of childminders received more than one payment per term.

Figure 19: Frequency of entitlement funding payments, November 2024



Nov 2024 unweighted bases: GBP n = 207, SBP n = 15, CM n = 202

Caution: small SBP sample sizes.

The majority of group-based providers (71 per cent) and childminder (78 per cent) were happy with their local authority's payment schedule.

Use of 'free-flow' outdoor space

According to EYFS regulations[26], childcare providers must meet the following indoor space requirements:

- Children under two years – $3.5m^2$ floor space per child;
- Two year olds – $2.5m^2$ floor space per child; and,
- Children aged three to five years – $2.3m^2$ floor space per child.

From 12th May 2025 to 11th July 2025, the DfE ran the 'Space requirements in early years childcare settings in England'[27] consultation, which sought feedback on: a proposal to allow 'free-flow' outdoor space (such as a garden linked to a childminder's domestic premises, or a playground linked to a school or nursery) to count towards the indoor space requirements in the EYFS framework; and a second proposal, to put a 'cap' on the number of additional places that can be added (on top of existing maximum indoor capacity).

A set of questions were included in the March 2025 survey asking providers about using a hypothetical 'free-flow' outdoor space flexibility to offer additional places to children.

Likelihood of using 'free-flow' outdoor space to offer additional places

Overall, 28 per cent of providers reported they would likely use a 'free-flow' space flexibility in the future to offer additional places to children (62 per cent reported they were unlikely). Broken down by broad provider types, 31 per cent of group-based providers, 34 per cent of school-based providers and 26 per cent of childminders reported they would likely[28] use such a flexibility in the future.

For those providers who reported it is likely they would use this flexibility in the future, 75 per cent reported they would use it straight away (defined as within a fortnight) to offer additional places to children. Broken down by broad provider types, 74 per cent of group-based providers, 52 per cent of school-based providers and 78 per cent of childminders reported they would use it straight away.

Numbers of additional places

Those providers who said they were likely to use this new 'free-flow' space flexibility straight away were asked how many additional places they could offer for children aged 2 years and above.

On average, group-based providers reported they could offer an additional 10 places and childminders an additional 3 places. Asked how many of these places they could offer

[26] https://www.gov.uk/government/publications/early-years-foundation-stage-framework--2
[27] https://www.gov.uk/government/consultations/space-requirements-in-early-years-childcare-settings-in-england
[28] Either 'likely' or 'very likely'.

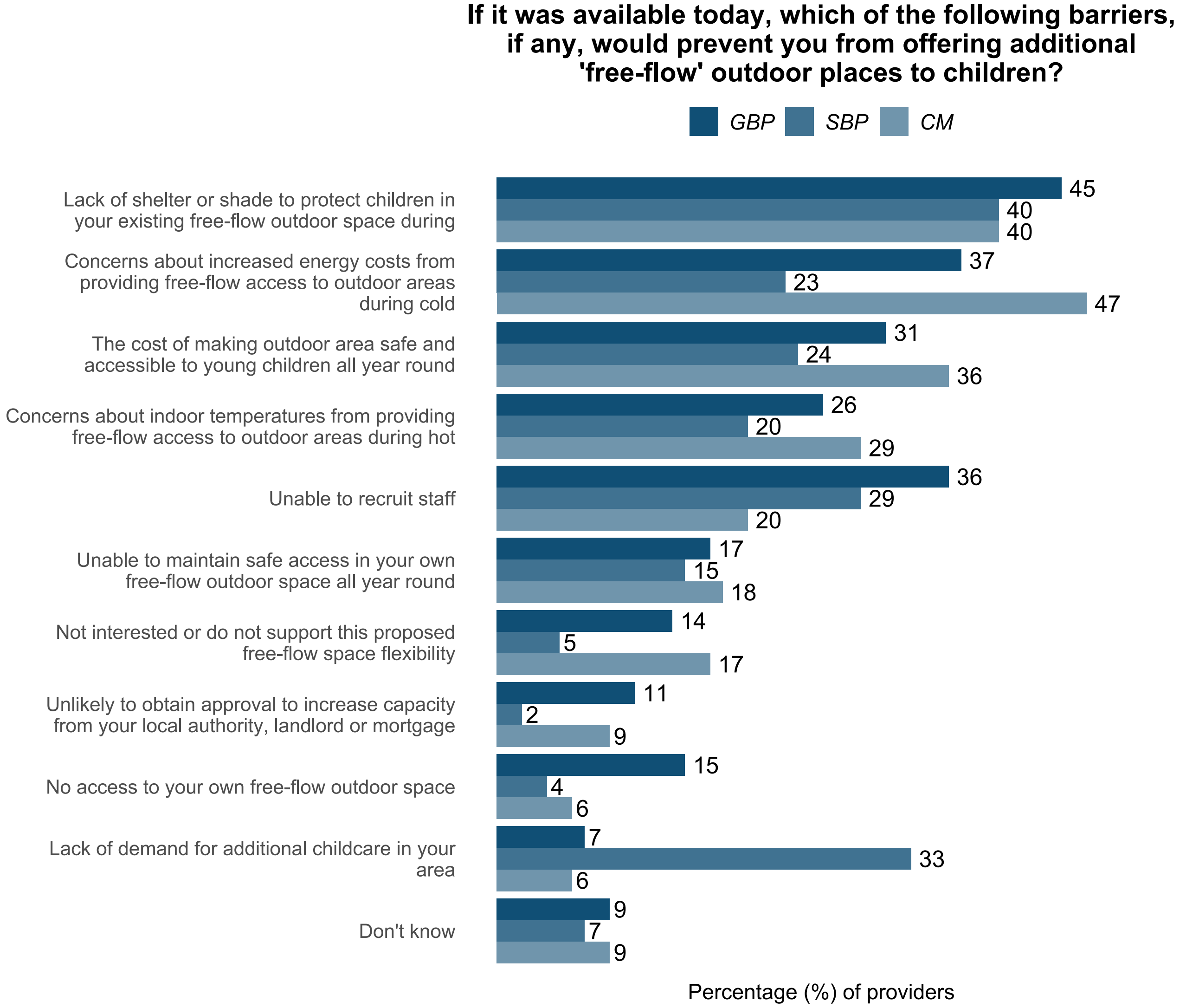
straight away (within a fortnight), on average, group-based providers reported they could offer an additional 7 places and childminders an additional 2 places for children.

Barriers to offering additional places

The was some variation in the most frequently reported barriers across different provider types to offering additional places if the new 'free-flow' space flexibility was available today.

For group-based providers the most commonly cited barriers were a lack of shelter/shade to protect children during bad weather (45 per cent); concerns about increased energy costs during cold winter months (37 per cent); and, an inability to recruit staff (36 per cent) (Figure 20).

Figure 20: Barriers to using 'free-flow' outdoor space to offer additional places



Mar 2025 unweighted bases: GBP n = 544, SBP n = 64, CM n = 774

For school-based providers, the most frequently cited was again a lack of shelter/shade to protect children during bad weather (40 per cent); this was followed by concerns about local demand (33 per cent) and an inability to recruit staff (29 per cent).

In contrast for childminders, the most commonly given reason was increased energy costs during cold winter months (47 per cent); followed by a lack of shelter/shade to protect children during bad weather (40 per cent); and the costs of making outdoor areas safe and accessible all year round (36 per cent).

EYFS updates

Over the past couple of years, the Government has made a number of changes to the Early Years Foundation Stage (EYFS) statutory framework[29] to provide more flexibility and remove burdens for early years providers while maintaining quality and safety standards.

In September 2023 these included changing the staff:child ratios for two-year-olds to 1:5 (from 1:4); clarifying childminder flexibilities in ratios; and, updating supervision whilst eating requirements. In January 2024, the changes included removing the requirement for Level 3 practitioners to hold a Level 2 maths qualification to count within staff:child ratios, allowing students and apprentices to count in staff:child ratios; and, allowing childminder assistants to be a child's key person. More recent changes (November 2024 and April 2025) introduced specific childminder flexibilities and a new Experience-Based Route for certain early years workers; these findings are referenced in early sections of the report and not included here.

Adoption of flexibilities

Of those EYFS changes giving providers more flexibilities in managing their workforce and floorspace, therefore their ability to meet increased demand following the expansion in funded childcare entitlements from April 2024:

- "Increased maximum 2-year-old staff:child ratios to 1:5" was adopted by 40 per cent of group- and school-based providers in May 2025 (unchanged from 40 per cent in May 2024) [30].

- "Including usable 'kitchen' space within floor space requirements" was adopted by 33 per cent of childminders in May 2025 (compared with 37 per cent in May 2024).

- "Allowing students on long-term placements and apprentices to count within the level 2 staff:child ratios at the level below their level of study, if the provider is satisfied that they are competent and responsible" was adopted by 29 per cent of group- and school-based providers in May 2025 (compared with 34 per cent in May 2024).

- "Including practitioners without a level 2 maths qualification within level 3 staff:child ratios" was adopted by 25 per cent of group- and school-based providers in May 2025 (compared with 23 per cent in May 2024).

[29] https://www.gov.uk/government/publications/early-years-foundation-stage-framework--2

[30] https://assets.publishing.service.gov.uk/media/6746eaa67a52b1e407d77733/Pulse_Surveys_of_Childcare_and_Early_Years_Providers_-_2024.pdf

- “Making a childminder assistant a key person” was adopted by 16 per cent of childminders in May 2025 (compared with 13 per cent in May 2024).

Of those EYFS changes intended to maintain quality and safety standards:

- “Altered their approach to mealtimes ensure children are within sight and hearing” was adopted by 65 per cent of providers in May 2025 (compared with 55 per cent in May 2024).

- “Changed the way you support children with English as an additional language in your setting” was adopted by 30 per cent of providers in May 2025 (compared with 26 per cent in May 2024).

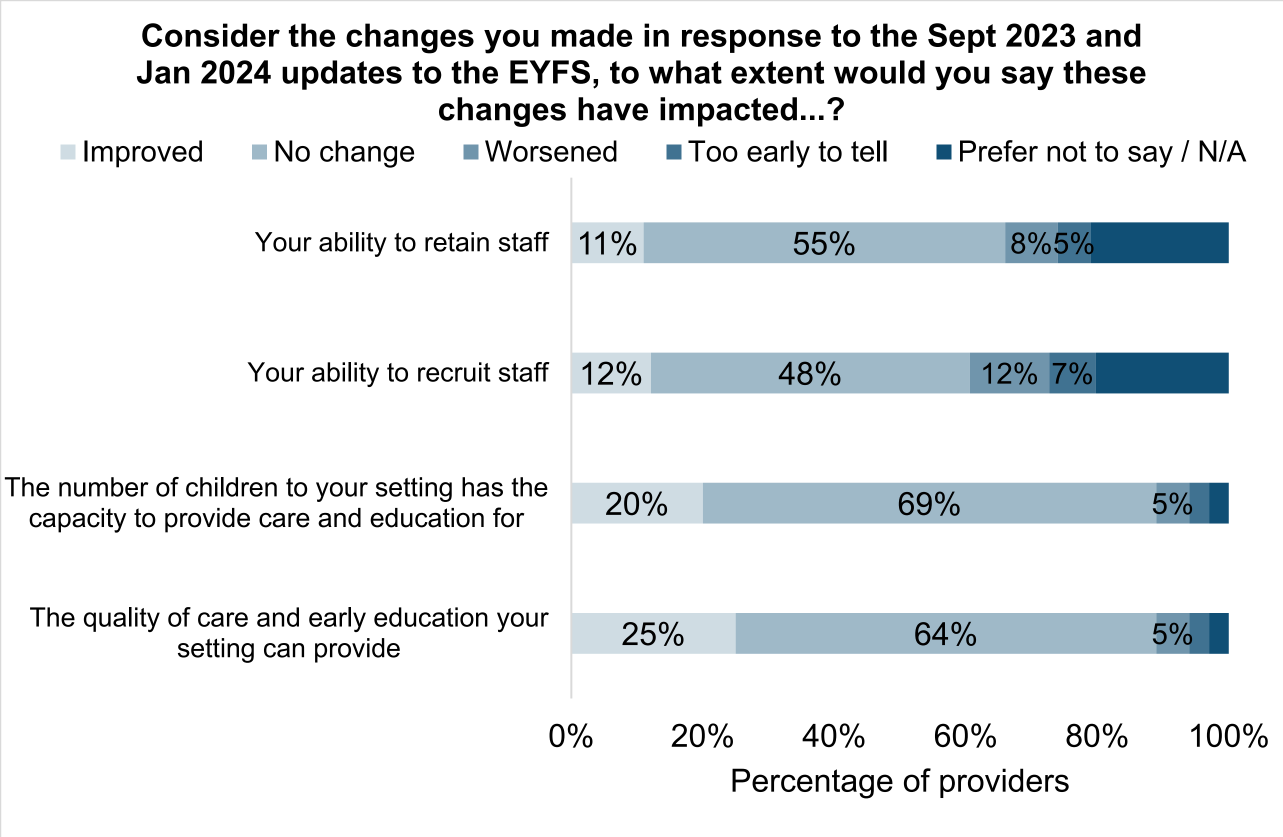
Impact of adopting flexibilities

Providers who made changes in response to EYFS updates were asked how this impacted on the quality of their provision, capacity, ability to recruit and retain staff:

- Quality: More (25 per cent) of providers said the changes had improved the quality of care and early education they provide (up from 23 per cent in May 2024), than said they had worsened it (5 per cent) (Figure 21). Group-based providers (28 per cent were most likely to report they had improved quality and school-based providers (17 per cent) the least likely.

- Capacity: More (20 per cent) of providers said the changes had increased the number of children they can care for and educate (up from 16 per cent in May 2024) than reported it had reduced (5 per cent) their capacity. Group-based providers (21 per cent) were most likely to report the changes had increased capacity and school-based providers (11 per cent) the least likely.

Figure 21: Impact of implementing the EYFS updates, May 2025



Unweighted base: 1,341

- Recruitment: Equal proportions of providers said the changes had improved and worsened (both 12 per cent) their ability to recruit staff/childminder assistants. This contrasts favourably with May 2024 when 16 per cent of providers reported they had worsened and 8 per cent improved their ability to recruit. Group-based providers were both most likely to report in May 2025 the changes had improved (13 per cent) and worsened (22 per cent) their ability to recruit new staff.

- Retention: More (11 per cent) of providers said the changes had improved their ability to retain staff/childminder assistants (up from 7 per cent in May 2024) than report it had worsened (8 per cent) (down from 11 per cent in May 2024). Group-based providers were both most likely to report the changes had improved (16 per cent) and worsened (15 per cent) their ability to retain staff.

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