

EARLY YEARS EDUCATION AND CHILDCARE MARKET STUDY

Update

25 September 2026

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Executive summary

1. The CMA launched its market study into early years education and childcare in England on 1 July 2026. As part of this work, we have been gathering information from across the sector using a variety of methods. This update sets out the key themes that have emerged from what we have heard, confirms the focus of our study and sets out the issues we will examine further. Our evidence gathering and analysis are ongoing, so this update does not present findings or conclusions.
2. Our engagement broadly supports the five areas of focus identified when we launched the study: access to high-quality services; affordability and funding; information and consumer choice; the role of public bodies; and cost drivers and the impact of different provider types. The evidence collected so far also shows how closely these issues are inter-connected.
3. Families have told us that childcare needs to be affordable, available and suitable for their circumstances. They have highlighted the importance of quality, location and flexibility and some have described difficulties finding places at the times or in the areas they need. They have also raised concerns about high overall costs, additional charges, complex eligibility rules for government support and a lack of clarity of information about additional fees and charges.
4. Providers have raised issues around the level and structure of funding, workforce pressures and administrative requirements. Providers have described common challenges including recruiting and retaining staff, meeting rising costs, and supporting children with special educational needs and disabilities (SEND). We have also heard how different provider types have different strengths, and experience challenges specific to the type of provision they offer. Many also noted the decline in the number of independent childminders.
5. On the role of government and public bodies, stakeholders highlighted questions about how funding, regulation and local authority administration operate together. They mentioned variation in local authority processes, issues around coordination between public bodies, and questioned whether these bodies had the tools, resources and information needed to identify and address gaps in provision.
6. Across the sector, we have heard that access, affordability and quality could not be considered in isolation, and that there was significant interaction between funding arrangements, workforce pressures, regulation, local authority administration, and provider sustainability.
7. We will consider all of these issues as our market study progresses.

Purpose of this document

8. This document provides an update on the evidence gathering we have been doing since we launched our market study, what we have heard so far, and how our thinking is developing as the study progresses.
9. In this update, we:
 - explain the engagement and evidence gathering we have done and will continue to do across the sector;
 - summarise key themes and insights from feedback to the Statement of Scope,¹ meetings with stakeholders and responses to our public Call for Views; and
 - confirm the scope of our market study and provide some further detail on our areas of focus.
10. We recognise that many professionals, providers, families (which we use as shorthand for parents and guardians) and others have taken the time to provide us with information and their views. We would like to thank everyone who has contributed to the market study so far. These contributions are important to our work, and continuing to hear directly from the full range of participants in this sector will help us build a strong evidence base to inform our thinking as the market study progresses.
11. As our evidence gathering and analysis is still underway, this update does not set out findings or conclusions. As outlined in our Project Roadmap,² we expect to set out our interim findings and emerging thinking on possible ways to improve outcomes in our interim report. We expect to publish this in December 2026, and we will seek views on the findings and options presented in that report.

¹ At launch, we invited views on the proposed scope of the market study, and set out a number of questions in the [Statement of Scope](#) to help inform responses. The deadline for responses was 26 July 2026.

² [How to engage with the CMA's childcare market study](#).

How we are engaging and gathering evidence

12. We are building our evidence base from a broad range of participants across the early years education and childcare sector.
13. We know that the provider landscape is diverse, and we are therefore keen to understand the perspectives of different provider types across the private, voluntary, and independent (PVI) sector (including smaller providers, childminders and childminder agencies), as well as school-based providers and maintained nursery schools.
14. We have also been engaging with families by gathering first-hand insights through the Call for Views, and by engaging with family representative organisations – for example, those representing the interests of families with children with SEND. To continue building a well-rounded evidence base we are ensuring that our qualitative research includes direct family perspectives.
15. Below we outline the main things we are doing to understand how the early years education and childcare sector is functioning.

Engagement	Who's involved	What we have been doing
 Opportunities to input and give views	Anyone with an interest in early years education and childcare	We invited submissions on the Statement of Scope, receiving 42 responses.³ We also issued a Call for Views (see the appendix for more information) receiving responses from 878 families, 977 providers and professionals, and 40 other interested people (these included organisations with an interest in the education and childcare sector and other members of the public). While they may not be representative of family, provider or professional views generally, responses to the Call for Views have provided useful insights which have informed our thinking.

³ We have published non-confidential versions of these submissions on our project page. One response has not been published at the request of the respondent.

Engagement	Who's involved	What we have been doing
 Gathering information and documents from larger childcare providers, agencies and investors	PVI providers including childminder agencies Private equity investors	We have issued formal notices under section 174 of the Enterprise Act 2002,⁴ requiring the production of information and documents to over 20 of the largest PVI providers. We have also issued formal notices to childminder agencies and a number of private equity investors in the largest PVI providers.
 Gathering information from smaller providers (including childminders)⁵	PVI providers including childminders Maintained nursery schools School-based providers	We have issued questionnaires to a number of different types of providers. We have sought to sample a set of providers in each of these groups. We sought feedback from relevant trade associations on the scope and format of our questionnaires before we issued them, to help ensure a proportionate approach.
 Bilateral meetings	Providers Trade associations and representative organisations Organisations with a policy interest Investors and investor organisations Local authorities and public bodies Government bodies in other jurisdictions (to provide international comparators)	We have had valuable conversations with a wide range of stakeholders building on engagement we had with the sector in considering whether to launch the market study. These conversations are useful to extend our understanding of the sector and hear stakeholder views. We will continue this engagement as the study progresses.

⁴ In a market study, the CMA may use information-gathering powers under section 174 of the Enterprise Act 2002 to require businesses and other relevant parties to provide specified information or documents to assist the CMA in carrying out its evidence gathering.

⁵ In a market study, the CMA may gather information from a wide range of sources, including information provided voluntarily by participants, consumers and consumer groups within the sector. While the CMA may use information-gathering powers under section 174 of the Enterprise Act 2002, the CMA will use these powers in a proportionate manner.

Engagement	Who's involved	What we have been doing
 Qualitative research	Local authorities Providers Families	We have commissioned an independent research agency to conduct qualitative interview-based research with participants in the sector across a number of local areas. We are focusing on capturing the perspectives of different provider types and families, including vulnerable families, in both urban and rural areas. We will publish the final research report.
 Webinars and roundtables	Trade associations and representative organisations Organisations with a policy interest Providers	In July, we held two webinars – one focused on anyone with an interest in the early years education and childcare sector, and the other focused on providers, including owners, managers and investors. We are planning to host several roundtables with stakeholders in October and November 2026. At these roundtables, we will test some emerging thinking and explore potential options for improving outcomes.
 Experts	Academic experts Sector specialists	We are engaging with experts and sector specialists to help test our understanding of the sector and to gain input on specific questions arising from our evidence gathering and analysis.
 Literature review and desktop research	Public bodies (including Ofsted and the Department for Education) International comparators PVI providers	We are reviewing existing research and available evidence alongside gathering new evidence. We are identifying relevant literature and data from international childcare sectors to supplement our analysis. We are using automated tools to gather information from PVI providers' websites.

16. The table above is not exhaustive. We will also draw on market data and additional sources of information to help us understand this sector.

Our study themes: what we have heard and what we are focusing on

17. We confirm that the five themes which we will continue to focus on in our market study are:
 - access to high-quality services;
 - affordability and funding;
 - information and consumer choice;
 - the role of public bodies; and
 - cost drivers and the impact of different provider types.
18. We set out these five areas of focus in the Statement of Scope, and invited responses to our proposals. These areas of focus were shaped by our early assessment of the sector, based on (among other things) initial conversations with government and other stakeholders, and a review of the extensive existing literature and research on the sector, as well as our experience of undertaking previous market studies. We confirm that these continue to form the areas of focus for our market study.
19. For each of the focus areas, we set out themes that have emerged from our engagement so far, taking into account responses to the Statement of Scope, meetings with various stakeholders and key insights from the Call for Views. We also provide some more detail on how we will explore these issues as our study continues.
20. In the following section, we address some additional points raised in response to the Statement of Scope. We confirm that our study will focus on England, and that we will share perspectives and draw out relevant insights for the devolved governments as the market study progresses. We also confirm which early years education and childcare services are in scope.
21. Many of the issues we have heard about so far are closely connected and may have overlapping causes. Rather than addressing issues in isolation, we will consider how they interact to shape outcomes across the sector as our work develops.
22. Reflecting that our evidence gathering is ongoing, we do not set out any findings or conclusions at this stage. We will continue to build and assess the evidence base as we develop our emerging thinking.

Access to high-quality services

Things we have heard

From families

23. In response to the Call for Views, families frequently highlighted the importance of being able to access childcare that met their needs. When choosing a provider, they focused on quality, including staff experience and consistency, safeguarding, the environment and facilities, and support for children's learning and development. Some raised concerns that workforce issues, including staff turnover and low pay, could affect the consistency and quality of care. Families highlighted that childcare also needed to be available in a location that worked alongside their work, home, or siblings' schools.
24. Families also raised issues around the availability and flexibility of childcare. They described difficulties securing places in some areas, for some age groups, and at times that matched their needs. They commonly mentioned long waiting lists, limited local capacity and challenges accessing full-time or flexible provision. Families valued childcare that fitted around work and family life, but some said fixed sessions, term-time-only offers and restrictions on how they could use funded hours made this more difficult.

From providers, professionals, local authorities and other stakeholders

25. Respondents to the Statement of Scope generally agreed that a 'well-functioning market'⁶ should support access to high-quality early years education and childcare, but many said this should be assessed by reference to child outcomes as well as availability and price. Emphasis was given to children's development, safety, continuity of care and suitability of provision.
26. Some respondents to the Call for Views described specific changes which they said had improved quality and better reflected children's developmental needs, including updates to the Early Years Foundation Stage (EYFS) framework and stronger safeguarding guidance. Some also commented on changes to staff-to-child ratios, noting potential benefits from these changes as well as challenges to implement them in practice. Overall, responses often highlighted that financial pressures, regulatory demands and administrative burdens made it more difficult to maintain quality and affected capacity in the sector.

⁶ A 'well-functioning market' is a term that is used to mean one that displays the beneficial aspects of competition which make markets work well for customers and ultimately leads to the best outcome for consumers, but not an idealised, perfectly competitive market (see [Guidance on CMA market reviews, market studies, market investigations and the monitoring and review of market remedies](#) (CMA3), 3 February 2026, paragraphs 4.18 to 4.22).

Supply in particular areas or at particular times

27. We heard that a family's ability to access childcare could vary significantly between locations, such that the aggregate picture was not reflective of local experience. A clear majority of respondents of different types, including local authorities, providers, charities and representative bodies pointed to shortages in rural areas and in disadvantaged communities. Several respondents highlighted the continued fall in childminder numbers which, in their view, might contribute to this.
28. Respondents told us that there were often mismatches between the demand from families for care for certain age groups, hours, days of the week and types of providers and the supply that was available in a local area; and that local supply issues were made more acute by the mismatches between demand and supply as regards specific hours or types of care. Some respondents also said the 38-week funding model, fixed intake points and local funding rules could exacerbate this and create long waiting lists.
29. Several local authorities agreed that, although the expansion of the working families' entitlements had increased provision, some families faced accessibility challenges, including difficulties securing childcare in their preferred location or the hours they need. Childminder, nanny and home-based childcare organisations said that flexible forms of care could be important for some families, but the importance of this might be under-recognised and this should be investigated.

Provision for children with SEND

30. We heard from many stakeholders that families faced particular difficulties finding provision for children with SEND. Respondents described shortages of specialist staff, delays in securing support and limited access to suitable settings. Local authorities also reported that children with SEND could face difficulties accessing early years childcare, reflecting recruitment challenges, the level of support required, and, parents possibly choosing to enrol their children at an older age due to their needs or providers declining a place after learning about a child's needs. One organisation said that SEND children were often turned away from settings and/or would have fewer hours than families would like as the setting was unable to meet need for all the hours requested, and that individual settings which met the needs of SEND children could become 'honeypot settings' known to be good with children with SEND.
31. Responding to the Call for Views, providers and professionals frequently raised difficulties in recruiting and retaining qualified staff and SEND-related challenges as key issues affecting access to services. Whilst respondents welcomed the greater awareness of SEND, they also highlighted the increasing number of children with SEND and other additional needs, and said that funding, specialist

support and staffing capacity had not kept pace with demand. Long lead times for assessments and associated funding meant that providers might be expected to meet complex needs without adequate resources.

Barriers to increasing the supply of childcare

32. Respondents to the Statement of Scope said recruitment and retention difficulties limited the number of places providers could offer. Some said that this resulted in settings operating below registered capacity because they could not recruit enough qualified staff, while others said it made flexible provision harder and limited expansion into underserved areas and for support for children with additional needs. Respondents differed on whether staffing ratios (or the difference in ratios for staff with different levels of qualification) could or should change, with some stressing their role in supporting quality standards.
33. Respondents highlighted a number of other factors that could limit entry and expansion, including workforce constraints, premises availability, planning processes and financial viability. Many of the barriers described by respondents were linked to underlying cost pressures and financial viability – we consider these issues in more detail below under the ‘cost drivers and the impact of different provider types’ focus area.
34. Respondents told us that administrative and regulatory requirements might also act as barriers to entry or expansion. Childminder and home-based childcare organisations raised additional concerns about registration costs, landlord permission and inadequate information on local authority websites, which did not recognise non-Ofsted registered childminders on the same basis.

What we said we would look at

Availability of places, including 'cold spots' in certain areas or for particular needs, such as for children with SEND, or those requiring non-typical hours; and whether regulation, workforce supply and other barriers to entry and expansion can create challenges to achieving good market outcomes.

We confirm that this remains an area of focus, and note some particular issues we are exploring

Overall, respondents described access as a problem of suitability as well as supply. Our analysis will therefore continue to include consideration of whether families can access childcare that is available in the right place, at the right times, for the right age group and with the right support.

We are looking at whether childcare places are sufficient, including at the local level, and whether particular (types of) areas experience lower availability. This includes examining whether particular needs are well-served, such as childcare for peak days, atypical hours, during holiday periods, and provision for children with SEND or other vulnerable groups. Where a type of need is not well served, we will look to identify why.

We are looking at whether particular barriers exist which may limit entry, expansion or flexibility of provision, including workforce constraints, access to suitable premises, funding for expansion, and regulatory requirements.

We are also looking at particular drivers behind changes in availability of provision, such as the reduction in the number of childminders, and how this affects the particular groups who may depend on childminders.

Affordability and funding

Things we have heard

From families

35. Affordability was a commonly raised issue across families' responses to the Call for Views. Families said that funded childcare hours reduced costs and helped parents return to work, but they also highlighted that funded hours did not cover all the childcare they needed and significant costs remained. Many said costs were a significant pressure on households and affected decisions such as work, finances and family planning.
36. Some families felt that charges for consumables, activities and other extras reduced the financial value of funded hours. Others highlighted eligibility issues such as income thresholds, working requirements, term-based start dates, and

other eligibility gaps. Some respondents also said that the value of government funded hours might not cover providers' actual costs, and could contribute to higher fees, additional charges and restrictions on funded hours, or reduce sustainability of provision.

From providers, professionals, local authorities and other stakeholders

37. Affordability and funding were common themes across providers and professionals' responses to the Statement of Scope and Call for Views. Several respondents to the former identified affordability, provider sustainability and effective funding arrangements as important characteristics of a 'well-functioning market' in this sector.⁷

Level and structure of funding

38. Respondents to the Statement of Scope argued that government funding rates did not cover the cost of delivering funded childcare places and that there might be trade-offs between funding and quality (since funding rates which did not fully reflect delivery costs could reduce providers' ability to invest in staffing, resources and service quality). Many also suggested that this created financial pressures for providers, affected their sustainability and might ultimately reduce the availability of childcare places. Some respondents said this meant providers also had to recover costs across age groups and across funded and privately-paid provision. Local authorities raised similar concerns about the extent to which funding rates vary between age groups. Several local authorities said that the funding rate for three- and four-year-olds might not cover provider costs.
39. A trade association said that current funding rates impacted the ability of providers to pay (better) wages for staff. In the Call for Views, we heard that the gap between government funding rates and the cost of delivering childcare had widened, and people highlighted rising costs, including for staffing, premises, utilities, insurance and other overheads. Some said that the limited ability to offset shortfalls through additional charges or top-ups had compounded these pressures.
40. Respondents highlighted that the funding model could present disadvantaged families in particular with affordability concerns. In addition, respondents raised concerns about the adequacy of funding and support arrangements for children with SEND. This view was endorsed by various representative organisations. One organisation told us that there had been huge pressure on SEND budgets across the board and that in some areas local authorities had focussed their spending on school age children.

⁷ See footnote 6 above.

41. Some respondents to the Statement of Scope said that childminders faced particular challenges, with respondents suggesting that funding rates and administrative requirements might not fully reflect their operating model and costs. Other respondents noted that maintained nursery schools and school-based provision might benefit from access to funding, resources or cost-sharing opportunities that were not available to all providers.
42. Some respondents argued that funding and regulatory requirements might have different effects on providers of different sizes. Several respondents suggested that larger providers and groups might benefit from greater administrative capacity, economies of scale and the ability to spread costs across multiple sites, while smaller and single-site providers might be more exposed to funding shortfalls and compliance costs.

Impact of differences in funding on access

43. Local authorities and provider trade associations explained that families eligible for certain entitlements might be preferred by providers at the expense of others.
44. Several stakeholders also highlighted access barriers for disadvantaged families, families not covered by the working families' entitlements and families needing atypical or irregular hours. They said employment-linked eligibility rules, lower private demand in some areas and limits on funded-only places could affect whether providers offered places that met these families' needs. Local authorities noted that they each received different funding rates from the Department for Education (DfE) depending on factors such as levels of deprivation – one local authority said this difference could influence providers' decisions about where to establish provision, with some providers potentially favouring areas offering higher funding rates.

Transparency and additional charges

45. Pricing transparency and additional charges were also raised by many respondents.
- (a) Some argued that charges for meals, consumables (such as suncream and nappies), activities and other services were a necessary response to funding levels that did not fully reflect delivery costs.
 - (b) Some respondents highlighted potential inconsistencies between current statutory guidance on additional charges and the funding arrangements underpinning funded childcare.

- (c) Some respondents expressed concern that additional charges could make it difficult for parents to understand the total cost of childcare and might also reduce the practical value of funded entitlements.
- (d) Respondents to the Call for Views frequently suggested that funding arrangements should be simpler and more consistent, and that funding and eligibility rules should better reflect the circumstances of different providers, children and their families.

46. Local authorities told us that they were doing more to ensure that additional charges, such as for consumables, are clear and transparent so that parents can make informed choices. Some said that they were working to ensure providers published their pricing structures in line with DfE statutory guidance; but we heard that approaches differed between local authorities, and that it could be challenging to implement the guidance.

What we said we would look at

Whether government-funded hours cover delivery costs, how providers manage costs and use cross-subsidies, and how this affects affordability for families. How the model for government funding affects market dynamics, family choices, incentives for providers and their financial sustainability.

We confirm that this remains an area of focus, and note some particular issues we are exploring

We are looking at whether government funding, self-pay hours and other charges⁸ align with providers' costs, including how this varies across different provider characteristics and locations and whether this affects provider viability and sustainability.

We are also looking at how funding arrangements influence provider costs and provider decisions about pricing and quality as well as which places, hours, ages or types of need they are willing or able to serve.

We are looking at the extent to which families still face high childcare costs after government support, including how far this is driven by self-pay hours, additional charges, or bundled services.

We are also looking at whether the design of the funding model affects family choice and take-up, and how eligibility criteria affect different types of families.

⁸ Other charges include those for food, consumables (such as suncream and nappies) and enrichment activities, as well as registration fees, cancellation fees and other administrative charges.

Information and consumer choice

Things we have heard

From families

47. Families highlighted the importance of having clear information when choosing childcare. They valued transparent information about prices, availability, quality and how funded childcare could be used. Families often used Ofsted ratings, recommendations and online reviews when assessing quality, but some said these could be outdated or misleading, making it difficult to assess quality before enrolment.
48. Many families also questioned the extent to which they could exercise genuine choice. Some said limited availability, waiting lists and local capacity constraints reduced the range of options available and meant they could not always choose their preferred provider. Some said the childcare support system could be difficult to understand and navigate, making it harder to compare options and understand the support available. Families also raised concerns about how funded childcare is communicated, particularly the use of the term 'free' hours where additional charges still applied.

From providers, professionals, local authorities and other stakeholders

49. Many told us that information and transparency were central to families' ability to make appropriate choices. The most frequently raised issue was the use of 'free' childcare terminology and wider government communications, which respondents said could create expectations from families that did not reflect providers' funding realities. In the Call for Views, we heard concerns about funded childcare being described as free, because this did not reflect gaps between funding rates and providers' costs, and therefore the additional costs families continued to face.
50. Stakeholders also pointed to difficulties comparing the full cost of childcare where additional charges, complex funding and entitlements, or other terms were not presented consistently. In the Call for Views, we heard from providers that clearer information on childcare support, eligibility and entitlements would help families better understand the support available and make informed decisions.
51. Respondents to the Statement of Scope mentioned challenges with accessing comparable information about all options in one place, as well as the need for information to be comprehensive and balanced to help families make an informed choice (one trade association we spoke with noted that some providers publish complex price lists, which could make it harder for parents to understand the overall cost of childcare). This was raised both as a general consumer journey issue and as a potential source of disadvantage for families with less time, support

or capacity to navigate the system – a view supported by local authorities which told us that accessing and assessing information can be a challenge and overwhelming for some families, especially those who have limited English language, who culturally prefer to keep their children home until school age, low digital confidence or limited access to support agencies.

52. Some respondents cautioned against treating childcare as a conventional ‘market’ in which consumers could readily switch between providers, given the importance of relationships, location, availability and children’s needs.
53. Some respondents noted practices or conduct that might warrant further consideration because of their potential impact on consumers or competition. These included unclear presentation of prices and additional charges, notice periods, session restrictions, fee increases and limited flexibility. Concerns generally focused on whether such practices limit families’ ability to understand commitments, compare providers and make appropriate choices.
54. Some respondents commented that the shared complaint redress responsibilities of Ofsted, local authorities and providers might not be well understood by families. A number of respondents said there was a lack of clear oversight or escalation routes, and suggested that complaint processes should be clear, proportionate, evidence-based and quick. In its response to the Statement of Scope,⁹ Ofsted said it was working alongside government to improve regulation of providers on the childcare register and was committed to helping parents understand how inspection and regulation varied across provider types but that some parents remained unclear about Ofsted’s limited role in relation to some providers. It explained that it was working with government to support regulatory reform on multiple providers, who make up a large part of the childcare sector albeit it is unable to address parents’ individual disputes with providers, particularly when they relate to fees or contractual issues.

⁹ [Ofsted statement of scope response](#)

What we said we would look at

Whether families can access and use information at the right time to choose childcare that meets their needs and understand funding entitlements. How market practices and contract terms are affecting how families make effective choices.

We confirm that this remains an area of focus, and note some particular issues we are exploring

We are considering whether information is clear, reliable and comparable, including information on prices, funded hours, additional charges, opening hours, flexibility and quality. This includes whether families receive the necessary information early enough in the process to support their choice of provider.

We will also consider how families assess quality and suitability when choosing childcare, including whether existing quality indicators align with the factors families care about.

In addition, we are looking at how availability and affordability factors (as outlined above under those focus areas) impact consumer choice. We will consider whether some families face greater challenges making effective choices, including those families with children with SEND, lower incomes, or atypical working patterns.

We are also looking at whether contract terms affect families' ability to compare providers, make informed choices or switch when they want to.

The role of public bodies

Things we have heard

55. Respondents to the Statement of Scope and Call for Views said that public bodies had important responsibilities in the sector. Many highlighted that regulation played an important role in supporting quality and safeguarding. Several pointed to the EYFS as providing a clear framework for this. Some respondents raised issues about how the responsibilities of public bodies interacted in practice, such as Ofsted registration and its timescales, local authority processes or requirements (including individual funding applications), and statutory guidance. Some suggested that better coordination between relevant public bodies could make it easier for providers to operate effectively by easing cumulative administrative burdens. Some raised a broader question on whether the current framework gave public bodies the right tools, resources and incentives to support good outcomes for families and providers.

Role of local authorities in shaping provision

56. Respondents to the Statement of Scope said that local authorities had statutory duties to assess childcare sufficiency, but limited ability to influence the development of local provision due to (in their view) lack of resource, skill and capacity. One respondent thought that this limitation might make it harder for the sector to respond efficiently to local demand and to support a balanced and sustainable childcare sector. Another highlighted the potential role of mayoral combined authorities (MCA) in supporting a more strategic or scaled approach to local market management. One MCA agreed that MCAs could play an important role, but emphasised that a lot was dependent on specific place-based factors as well as the quality of existing connections between different local organisations.
57. A representative body respondent to the Statement of Scope said that local authority sufficiency assessments might not fully capture whether families can access places that meet their needs. Similarly, one organisation we spoke with said that sufficiency assessments should consider specifically whether there is sufficiency of provision for children with SEND, in addition to local authorities improving how they forecast expected SEND in the population.

Variation in funding and processes

58. Several respondents to the Statement of Scope and the Call for Views highlighted variation in the proportion of incoming early education and childcare funding retained by local authorities. Respondents to the Call for Views called for greater consistency, transparency and simplification of local processes to reduce administrative burdens and improve the flow of funding to providers. One respondent to the Statement of Scope noted, however, that retained funding might support necessary services, such as local authority run settings and SEND services.
59. Many providers and representative bodies also emphasised issues which arose from variation in processes and rules between local authorities. They told us that different interpretations of the DfE's statutory guidance, provider agreements, payment schedules, claims processes and audit requirements created uncertainty and administrative costs. This was particularly felt by providers who operated across several local authorities, who had to navigate multiple processes and requirements. Several also said that changes to guidance, including guidance on additional charges, might contribute to inconsistent local implementation. We were also told that local differences in provider funding agreements could create uncertainty, with one respondent stating that providers had limited ability to negotiate terms even where agreements appeared inconsistent with statutory guidance. Local authorities acknowledged that national guidance could be interpreted differently locally, and agreed that greater clarity could help reduce inconsistency in implementation.

Children with SEND

60. Respondents to the Statement of Scope and the Call for Views highlighted the importance of support from specialist services and other public bodies for children with SEND. Several respondents highlighted issues with local authority processes for children with SEND, which they said could also be compounded by local variation in processes and support. Some providers said that applications for multiple individual funding streams could be complex, uncertain and time consuming, and that funding could arrive late while providers remained responsible for meeting the child's needs.
61. A number of providers and representative bodies had found that practical support from local authorities for SEND children had reduced over time, including advice on quality improvement and help with funding applications. In the Call for Views, many described shortages in specialist and multi-agency support and said they were increasingly expected to undertake wider support roles without sufficient funding or assistance from other services. Stakeholders highlighted related pressures on local authorities themselves, with limited resources to undertake increasing compliance work and complaints handling. One respondent to the Statement of Scope said that providers were also being increasingly expected within standard ordinary provision to document and deliver support to children that might previously have been undertaken or closely supported by specialist public services.

Collaboration between local authorities

62. Local authorities acknowledged the need to work collaboratively with their neighbouring authorities to ensure consistency in the delivery of childcare entitlements as well as to manage supply in the local area. One local authority told us that it would welcome stronger formal mechanisms for outward-looking collaboration, noting that planned local government reorganisation may provide a platform for this. Another local authority said that improved national expectations would reduce disputes and differing local guidance interpretations. One organisation described local authorities as having a duty to develop the market, but limited levers to make improvements, often finding it difficult to challenge providers.

Complexity of the funding system

63. Respondents to the Statement of Scope said that the childcare funding system was complex for both providers and parents. Complex entitlement rules, differing support schemes, the use of 'stretched' hours offers and variation in local authority implementation were noted as factors that could make it difficult for parents to understand the support available and the overall cost of childcare, as well as creating administrative costs for providers.

64. Respondents to the Statement of Scope said that the current funding arrangements created high administrative costs for providers and were inconsistently applied across local authorities. In the Call for Views, providers and professionals welcomed specific aspects of the funding regime, such as introduction of monthly funding payments and changes to the Tax-Free Childcare system. However, many said the expansion of funded childcare had increased administrative demands and intensified existing financial pressures.

Support in understanding rules and policies

65. Some respondents to the Call for Views said changes to funding arrangements, eligibility requirements and other sector policies were not always communicated clearly or introduced with sufficient notice. They suggested changes should be developed with greater engagement with and input from the sector, introduced with sufficient notice, and supported by longer-term funding arrangements to reduce uncertainty and enable effective planning.

What we said we would look at

How local authorities, mayoral combined authorities and other regulatory levers can harness the sector to deliver good outcomes.

We confirm that this remains an area of focus, and have noted particular areas to explore

We are considering how local authorities assess sufficiency of provision, and whether they are able to resolve identified sufficiency gaps (including for particular times and needs, such as SEND) using the powers, capacity and practical levers available to them. We are also looking at how local authorities work together, and with mayoral combined authorities.

We are considering how maintained nursery schools and school-based provision contribute to local supply, including whether they are targeted at areas or groups with unmet demand and how they interact with other local providers.

We are also exploring how the regulatory framework operates in practice, including how providers navigate compliance and administrative requirements, and how they respond to changes in regulation.

Cost drivers and the impact of different provider types

Things we have heard

66. Respondents to the Statement of Scope across a broad range of provider types highlighted the relationship between provider costs, government funding arrangements and long-term sustainability. Providers, representative

organisations, local authorities and investors often described the interaction between funding, workforce pressures and provider viability as central to understanding how the sector operates.

Main types of costs

- 67. Respondents identified staffing as the largest component of provider costs. Providers, representative organisations and trade unions pointed to rising wage costs, National Insurance contributions and, as noted above, difficulties recruiting, training and retaining staff. Some respondents said that supporting children with SEND increased costs further as did achieving higher quality standards – for example, through employing more highly-qualified staff.
- 68. Respondents also identified premises costs, business rates, planning requirements, fit-out costs and premise-use rules as important cost drivers, particularly for providers seeking to expand.
- 69. We heard similar views on cost drivers from private investors. We also heard that policy uncertainty from limited visibility over long-term funding and regulation increases investment risk and can delay capacity decisions.

Ways to reduce costs

- 70. Respondents suggested there could be opportunities to reduce system costs through simplification and greater consistency. Respondents also suggested standardising local authority processes, simplifying funding administration and streamlining planning and registration procedures. One provider said that greater flexibility around staffing ratios and qualifications could reduce inefficiencies. Some unions and workforce representatives argued that lowering workforce requirements would not address the underlying causes of cost pressures and could undermine quality.

Sustainability

- 71. Respondents raised concerns about the long-term sustainability of childcare provision, particularly for smaller providers, childminders and settings operating in areas where a higher proportion of families used funded childcare rather than privately funded hours. Small independent providers, preschools, childminders and representative organisations commented that funding shortfalls, workforce costs and increasing administrative burdens were contributing to provider exits, reduced flexibility in offerings (eg hours) or decisions not to expand.

Different provider types and ownership models

72. Some unions and representative bodies suggested that our market study should examine private equity ownership and its impact on market concentration. One representative body said that the CMA should specifically examine whether private equity ownership might be affecting affordability, accessibility, quality and value for money. Two respondents commented that outcomes should not be attributed to ownership type alone and that differences in funding arrangements, local demographics, deprivation and the mix of funded versus privately paid hours should be considered before drawing conclusions about performance or sustainability.
73. One respondent emphasised that larger providers, including some private equity backed organisations, had greater access to investment and capital than smaller providers. They suggested that this could support expansion, investment in facilities and systems. A number of small providers and representative organisations suggested that large groups, private equity backed providers and school-based providers might benefit from advantages not available to smaller independent settings, including access to capital, central functions, public support or opportunities to spread costs across multiple locations.
74. In the Call for Views, we heard how differences in how policy, funding arrangements and regulation affect different provider types. Respondents said that childminders and small providers faced particular challenges compared with school-based provision and larger providers, including funding pressures, regulatory burdens and more limited access to specialist support. Some respondents called for a more equitable approach for different provider types and greater recognition of the role they play in the sector.

What we said we would look at

What factors drive providers' underlying cost base, such as labour, property and regulatory compliance, the extent to which this varies by provider and service type, how it affects provider sustainability, and whether there could be potential to reduce system costs. The impact of different provider ownership types on outcomes in the sector and understanding whether there are specific challenges from certain provider models.

We confirm that this remains an area of focus, and have noted particular aspects to explore

In addition to assessing cost drivers and the potential to reduce system costs, we will take account of different provider types and business models in our market study and bring this analysis together with evidence from across our focus areas to understand how these factors may affect availability, affordability, and other outcomes as well as how different provider ownership types may affect outcomes in the sector, including where particular provider models have specific challenges or opportunities.

Additional points raised in response to the Statement of Scope

75. We received a number of submissions about whether the CMA should make a market investigation reference.¹⁰ We will consider this as our evidence gathering and analysis progresses, and set out (and consult) on our provisional view in our interim report in December.
76. We also received a number of submissions on the scope of the market study, including the geographic scope, and in relation to the types of provision which should be in scope.
77. In relation to the geographic scope, respondents were generally supportive of the scope being focused on England. Many recognised that education and childcare systems differ across the devolved nations, and that examining them together would require detailed evidence gathering in each nation to reflect properly those different contexts. We confirm that our market study will focus on England.
78. At the same time, some respondents also highlighted that comparisons with education and childcare systems in the devolved nations could provide useful learning for our study. We agree and we have been engaging with the devolved governments, and we will share perspectives and draw out relevant insights for the devolved governments as the market study progresses, as well as consider the extent to which our findings and any recommendations may also be relevant to other UK nations.
79. In relation to the types of provision we should look at, some respondents have asked us to include other forms of childcare, such as in-home provision by nannies, within scope of the study.
80. While we recognise the important role these other forms of childcare, both ‘formal’ such as nannies and ‘informal’ such as other family members like grandparents take in supporting families, we intend to continue to focus on funded and regulated education and childcare services on the basis that there are material differences between other forms of childcare (such as nannies) and PVI nurseries, childminders and school-based nurseries – for example, the requirement on PVI nurseries, childminders and school-based nurseries to use the Early Years Foundation Stage (EYFS) framework – and that there are different regulatory regimes.¹¹ This scope covers the vast majority of families’ use of ‘formal’

¹⁰ A market investigation comprises a more extended, in-depth assessment of a market, specifically to determine whether there is an adverse effect on competition, and possible outcomes include CMA-imposed remedies (see [Guidance on CMA market reviews, market studies, market investigations and the monitoring and review of market remedies](#) (CMA3), 3 February 2026, page 6, Table 1).

¹¹ For example, there is no mandatory requirement for nannies to be registered with Ofsted.

childcare¹² and will enable the CMA to focus its resources where we can achieve most impact. Nevertheless, we remain open to considering relevant evidence about how different childcare options affect families' choices.

¹² DfE (2025), [Childcare and early years survey of parents](#), accompanying table 1.1 (accompanying tables can be found within supporting files). DfE estimates 'formal' childcare provided by nannies or au pairs at one per cent or less in the period 2010-11 to 2024.

Next steps

81. Over the coming months, we will continue our evidence gathering and analysis. We will also continue our participative engagement with stakeholders across the early years education and childcare sector – for example, through roundtables and through qualitative research.
82. We expect to set out our interim findings and emerging thinking on possible options for improving outcomes in our interim report. We expect to publish this in December 2026, and we will seek views on the findings and options presented in that report. We will continue targeted evidence gathering and analysis during the consultation period, before publishing our final report in May 2027. Our Project Roadmap sets out more detail on key staging points.¹³

How to contact us

83. If you would like to hear from us about this market study, you can [sign up to our mailing list](#).
84. If you wish to contact us about anything discussed in this update, please email us at: childcare@cma.gov.uk.

¹³ [How to engage with the CMA's childcare market study - GOV.UK](#).

Appendix: Key themes arising from responses to the Call for Views

1. When we launched the market study, we invited views from families, providers, professionals and other interested people through the Call for Views. These were designed to help us gather first-hand experiences across the education and childcare sector to inform our further engagement and evidence gathering plans. All respondents could contribute anonymously.
2. In this section, we illustrate some of the key themes arising from the Call for Views by reference to the category of respondent. For each free text question, we present the most common themes across the responses.¹⁴ Where relevant, we have grouped these together under our areas of focus (on which, see the section Our study themes: what we have heard and what we are focusing on above).
3. For each question, we provide a short summary of the responses, followed by individual charts; a bubble chart showing the most commonly raised themes, and a bar chart of sentiment expressed within each theme. For the key questions answered by the majority of respondents, we also provide a table in which we summarise the topics and issues respondents raised within those themes.

Use of AI

As indicated at launch of this market study, we have used AI to help us identify topics which were raised across the free text responses. The themes which have emerged reflect the content of those responses, rather than topics selected by the CMA in advance. We have summarised these common topics and themes; however, we have not made broader conclusions at this stage about the views or experiences described. Applying best practice on the use of AI, we conducted human review of a subset of responses to verify AI outputs.

¹⁴ The number of themes shown for each question varies according to how frequently they appeared in responses, rather than applying a fixed cut-off across all questions.

Families

Who responded

We heard from **878 families**, of whom 640 used funded childcare hours to cover some or all of the cost of their childcare.¹⁵ Over half of respondents (481) also used Tax-Free Childcare. Most families (606) reported that they use a nursery provider.

While the geographic scope of this market study is focused on England, we invited views from across the United Kingdom. We received a total of 22 responses from respondents in Northern Ireland, Scotland and Wales which we have included in our analysis.

4. We asked families about:

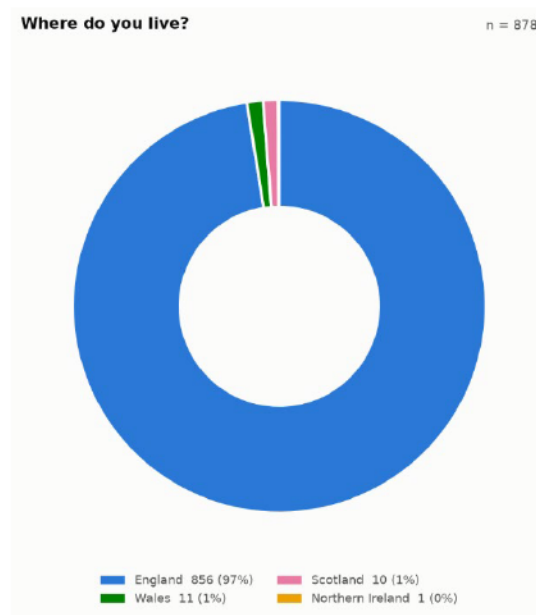
- The types of childcare provider(s) they use and what factors were important to them when deciding which provider(s) to use.
- What forms of government childcare support they use, and their views on funded childcare hours.
- Their general experiences of childcare provision.
- For families which do not currently use a childcare provider, the reasons behind this.

¹⁵ 728 respondents answered this question, with 640 saying they used funded childcare hours to cover some or all of the cost of their childcare. See also question 8 below.

Questions and themes

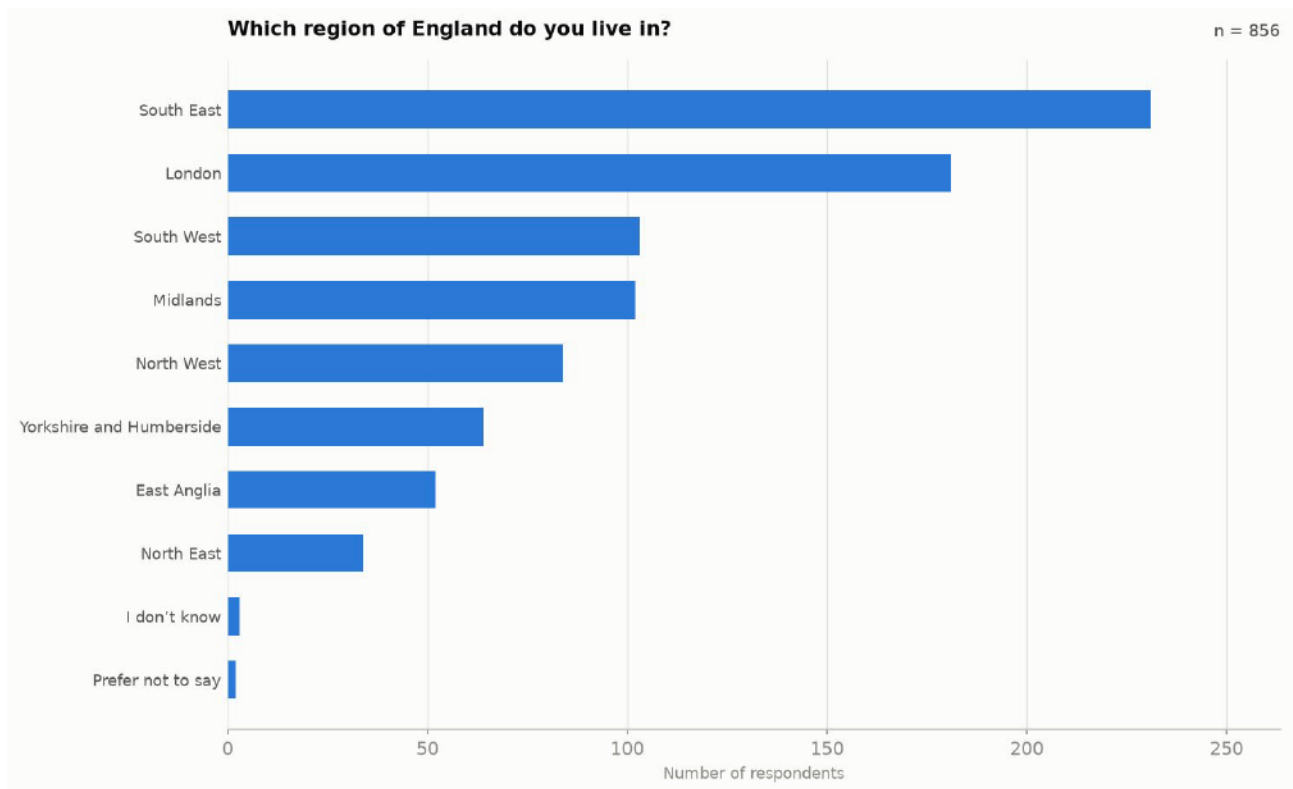
Q1: First, please tell us where you live.

- ☐ England
- ☐ Northern Ireland
- ☐ Scotland
- ☐ Wales
- ☐ Outside the UK
- ☐ Prefer not to say



Q2: Which region of England do you live in?

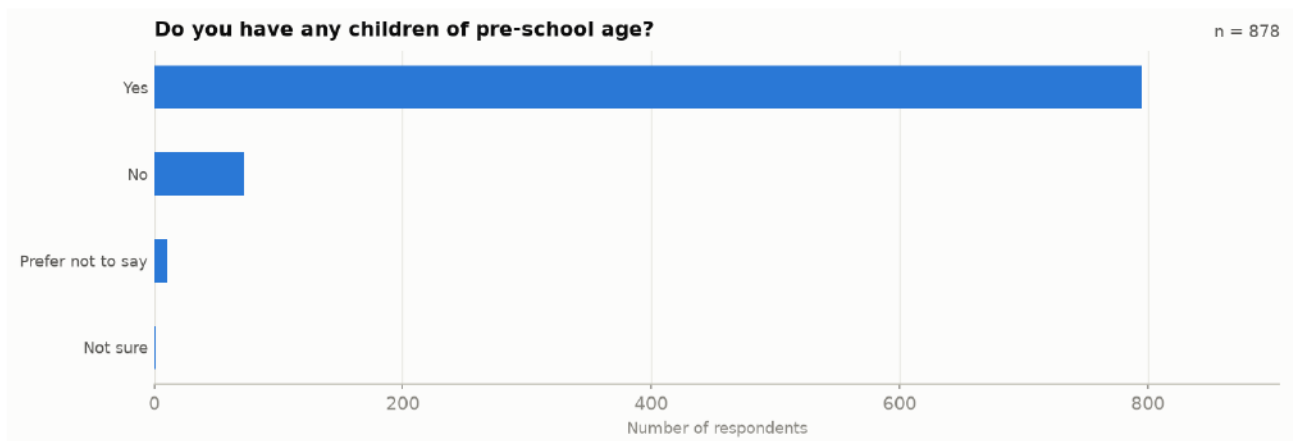
- ☐ East Anglia
- ☐ London
- ☐ Midlands
- ☐ South East
- ☐ South West
- ☐ North East
- ☐ North West
- ☐ Yorkshire and Humberside
- ☐ Prefer not to say
- ☐ I don't know



Q3: Do you have a child or children of pre-school age?

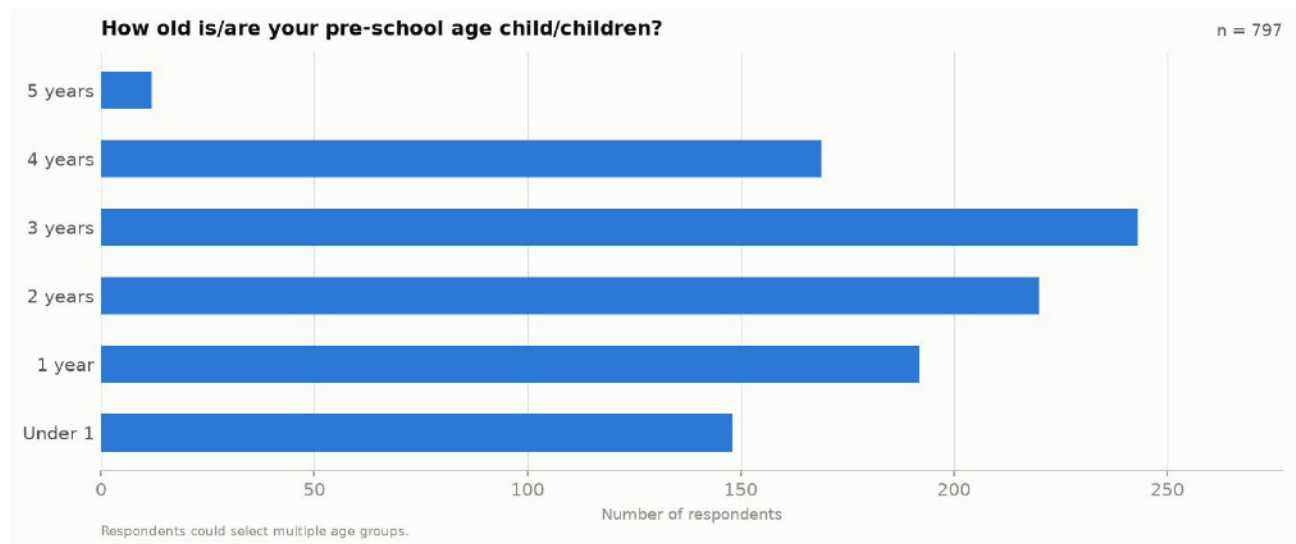
Explanatory text: 'Pre-school age' means a child who hasn't started school (i.e. they haven't yet gone into a Reception or P1 class at infant or primary school).

- ☐ Yes
- ☐ No
- ☐ Prefer not to say
- ☐ Not sure



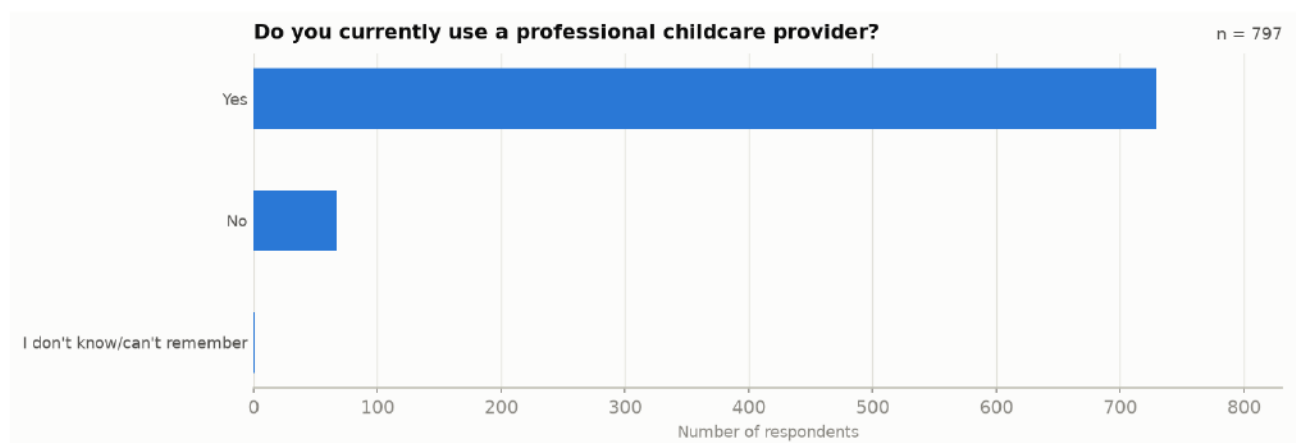
Q4: How old is (are) your pre-school age child (children)?

- ☐ Under 1 year old
- ☐ 1 year old
- ☐ 2 years old
- ☐ 3 years old
- ☐ 4 years old
- ☐ 5 years old



Q5: Do you currently use a professional childcare provider?

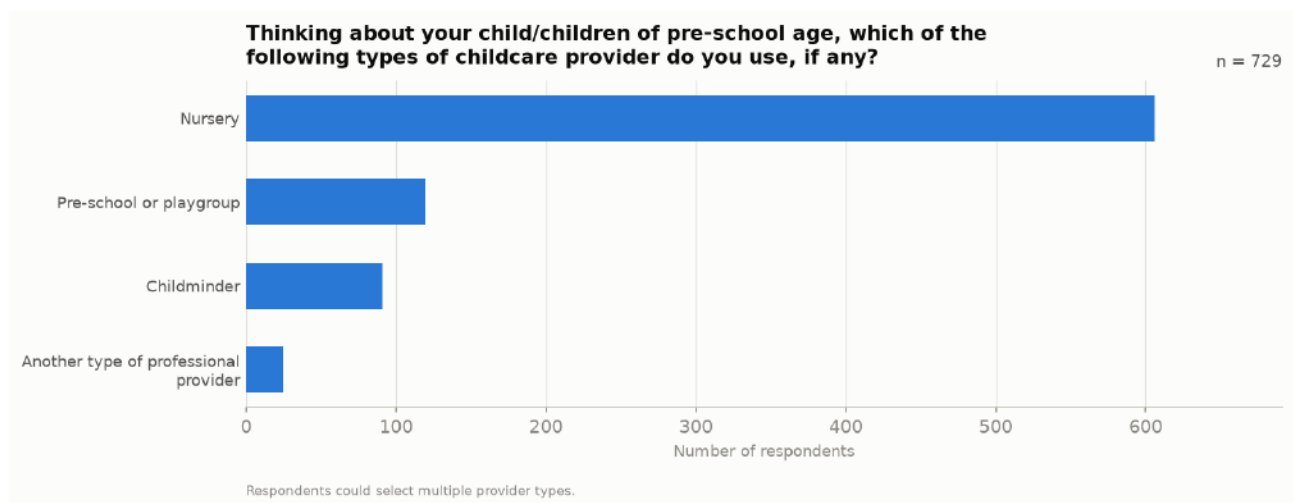
- ☐ Yes
- ☐ No
- ☐ I don't know / can't remember



Q6: Thinking about your child/children of pre-school age, which of the following types of childcare provider do you use currently, if any?

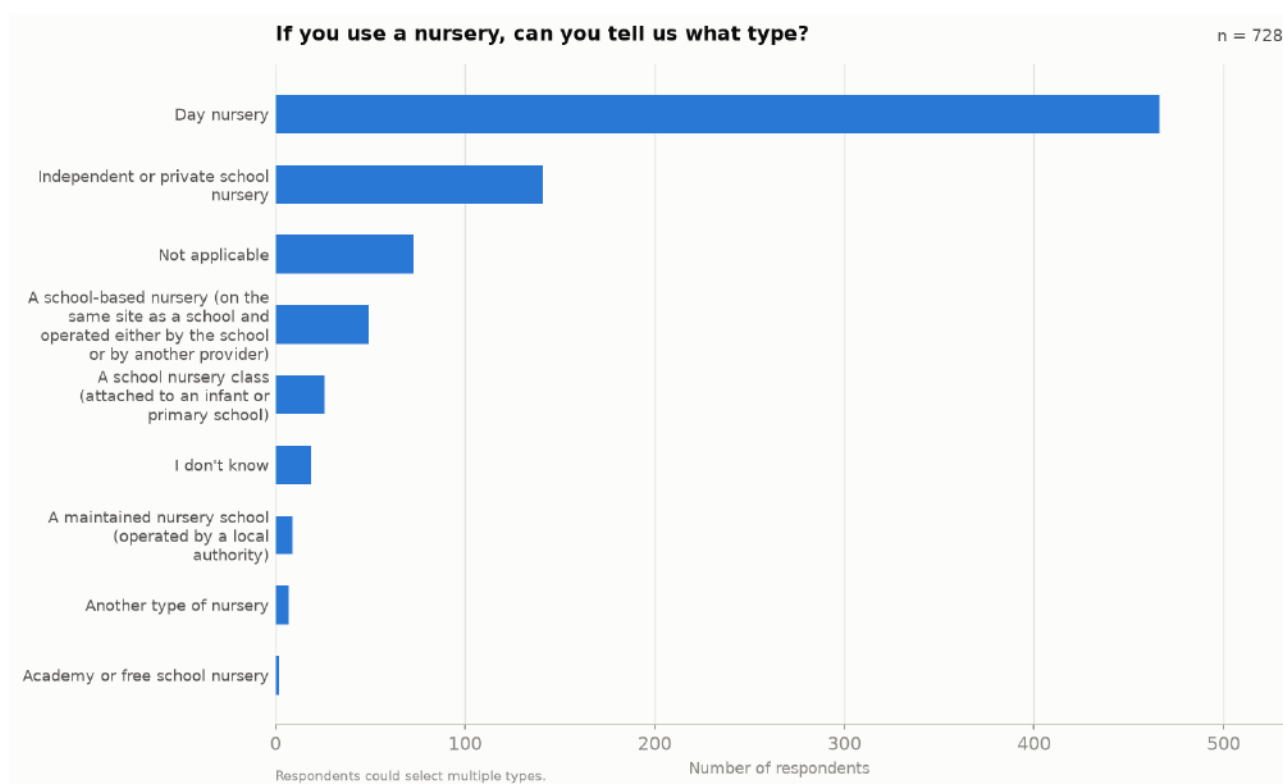
Explanatory text: Professional providers of childcare services (providers you pay to care for your child/children) include registered childminders, nurseries, and pre-schools and playgroups. Nurseries, and pre-schools and playgroups, are run by a range of different organisations providers, including community and voluntary groups, employers, local authorities, private individuals, schools, and independent or chains and groups of businesses.

- ☐ Childminder
- ☐ Nursery
- ☐ Pre-school or playgroup
- ☐ Another type of professional childcare provider (please write in)



Q7: If you use a nursery, can you tell us what type?

- ☐ Independent or private school nursery
- ☐ Day nursery
- ☐ Academy or free school nursery
- ☐ A maintained nursery school (operated by a local authority)
- ☐ A school-based nursery (on the same site as a school and operated either by the school or by another provider)
- ☐ A school nursery class (attached to an infant or primary school)
- ☐ Another type of nursery
- ☐ I don't know
- ☐ Not applicable

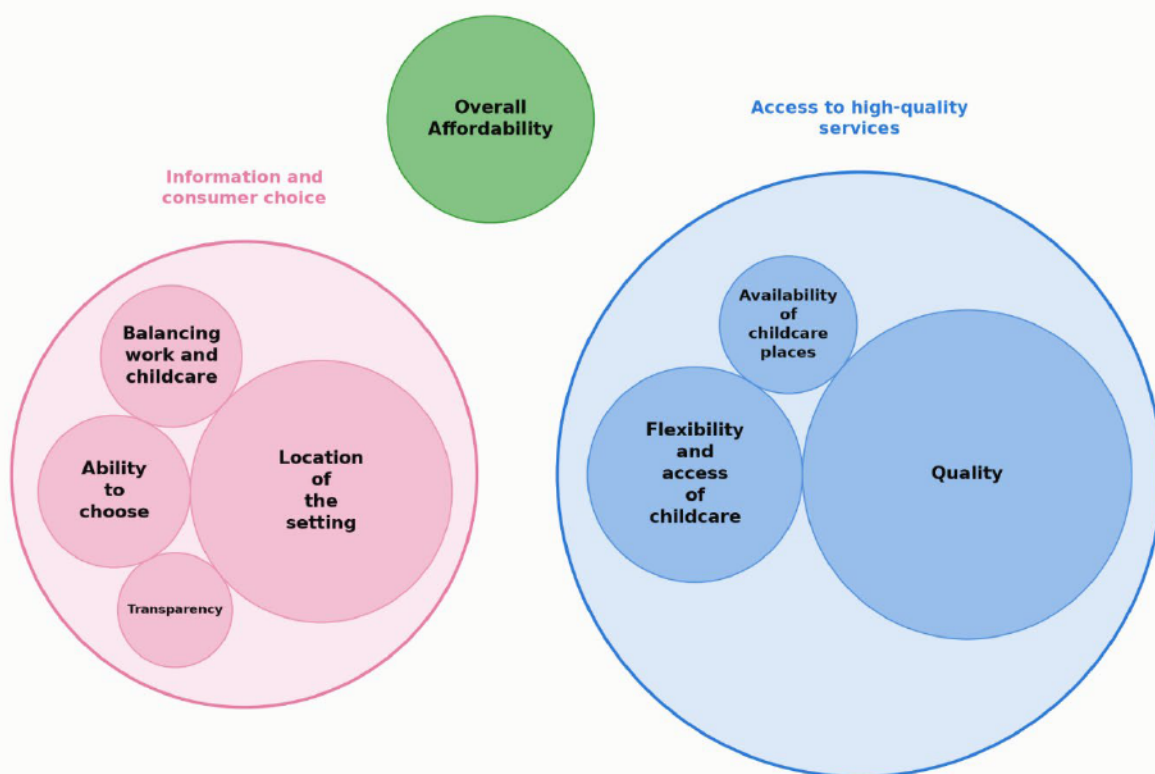


Q8: In your own words, what factors were important to you when you were deciding which childcare provider(s) to use?¹⁶

When describing what was important to them when choosing a provider, families most often described factors related to access, with families frequently raising quality, flexibility and the availability of places. Families also highlighted the importance of affordability and funding, particularly overall costs. Other factors relating to information and consumer choice included the location of the setting, the availability of clear and transparent information, how childcare choices interacted with work, and the extent to which families felt able to choose between providers.

In your own words, what was important to you when you were deciding which childcare provider(s) to use?

719 families responded to this question



This chart displays the 8 most common themes raised by respondents to this question. Related themes have been grouped together, and the size of each bubble reflects the relative frequency with which respondents mentioned each theme.

¹⁶ We have not included sentiment analysis of this question because it asked respondents to identify factors that were important when choosing a childcare provider, rather than to express positive or negative views.

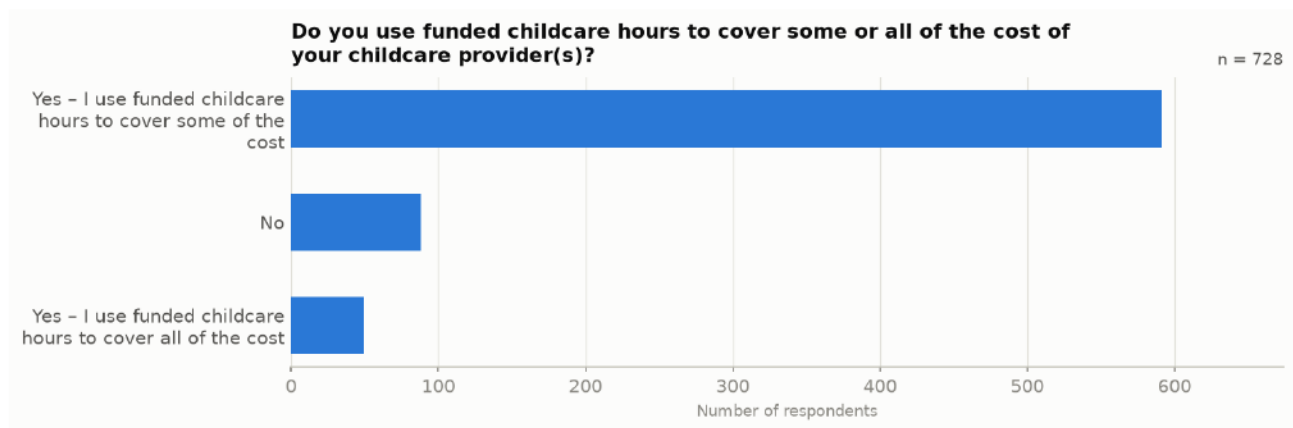
For each theme, we include some of the topics and issues that families commonly raised in response to this question:

In your own words, what was important to you when you were deciding which childcare provider(s) to use?	
Themes	What families said
<i>Access to high-quality services</i>	
Quality	Families said staff quality and consistency were important when choosing a provider, including staff turnover, low child-to-staff ratios and smaller group sizes. Families also referred to child safety, safeguarding and hygiene standards. A welcoming environment, where children appeared happy and settled, was also important. They also referred to facilities such as outdoor space, educational quality, children's development and preferences for particular learning frameworks or approaches. Ofsted ratings, word-of-mouth recommendations and online reviews were useful quality indicators, but some said these could be outdated or misleading, making it difficult to assess quality before enrolment.
Flexibility and access of childcare	Accessibility and flexible hours were important, including ease of drop-off and pick-up, early starts, late finishes, wraparound care and year-round availability.
Availability of childcare places	Respondents said that limited availability of places on required days, long waiting lists and limited local capacity made it harder to secure childcare.
<i>Affordability and funding</i>	
Overall affordability	Families said that the cost of childcare was a major factor when choosing a provider. They referred to affordability, value for money and whether providers accepted government-funded hours and Tax-Free Childcare.
<i>Information and consumer choice</i>	
Location of the setting	Responses highlighted that the location of the setting was a key factor, particularly proximity to home, work, commute routes or siblings' schools. They described this as important for making daily drop-off and pick-up practical and manageable.
Ability to choose	Families questioned whether they were able to exercise choice between providers, including whether they had suitable alternatives to choose from and whether their choice was constrained. Families also said limited availability of places on the days they needed, long waiting lists and limited capacity limited choice and led them to compromise on preferred providers.
Balancing work and childcare	Families said decisions about which provider to use and how much childcare to take up involved balancing childcare costs with working hours and decisions about whether to work, reduce hours or stop working.
Transparency	Respondents emphasised that clear, regular communication and transparent updates from providers were important. They referred to availability of clear and comparable information about providers, pricing, availability and quality when making childcare decisions.

Q9: Do you use funded childcare hours to cover some or all of the cost of your childcare provider(s)?

Explanatory text: Eligible families are offered government support – often called “funded childcare” – to help meet the cost of providers’ services for children of pre-school age. This support allows families to receive a certain number of hours of childcare per year.

- ☐ Yes – I use funded childcare hours to cover some of the cost
- ☐ Yes – I use funded childcare hours to cover all of the cost
- ☐ No
- ☐ I don’t know / can’t remember

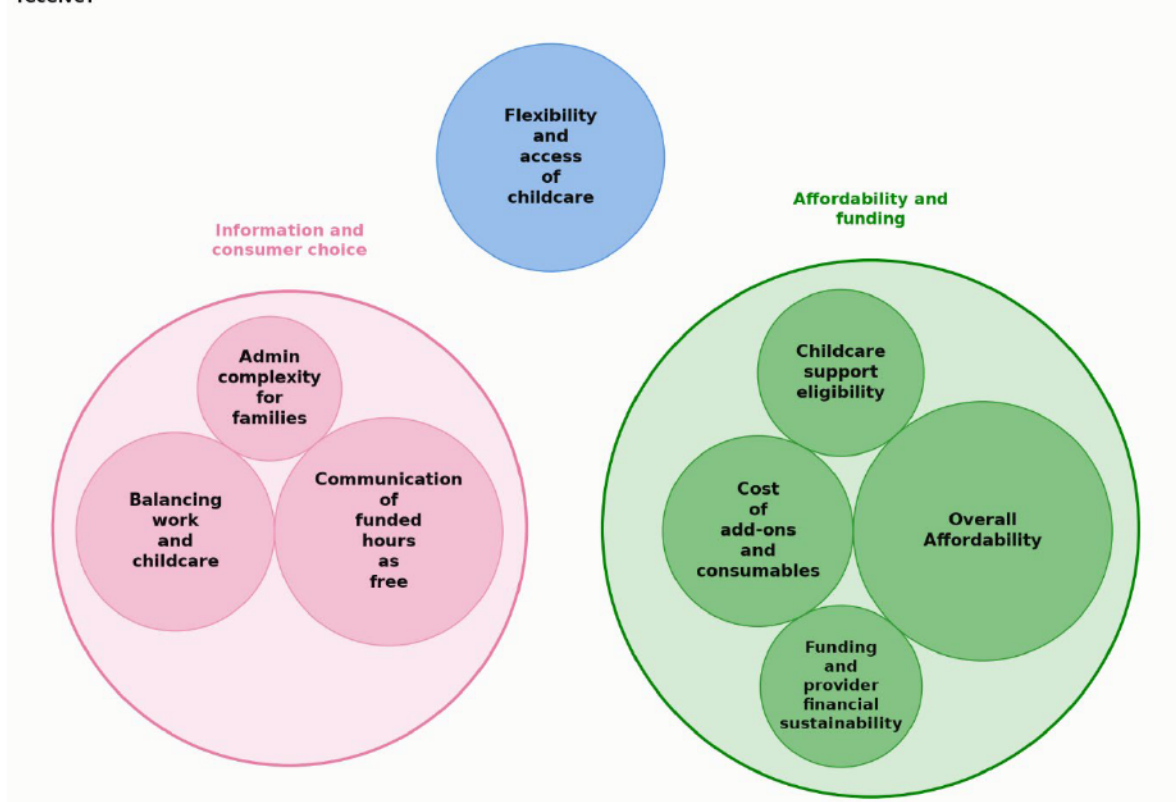


Q10: In your own words, is there anything you'd like to tell us about the funded childcare hours you receive?

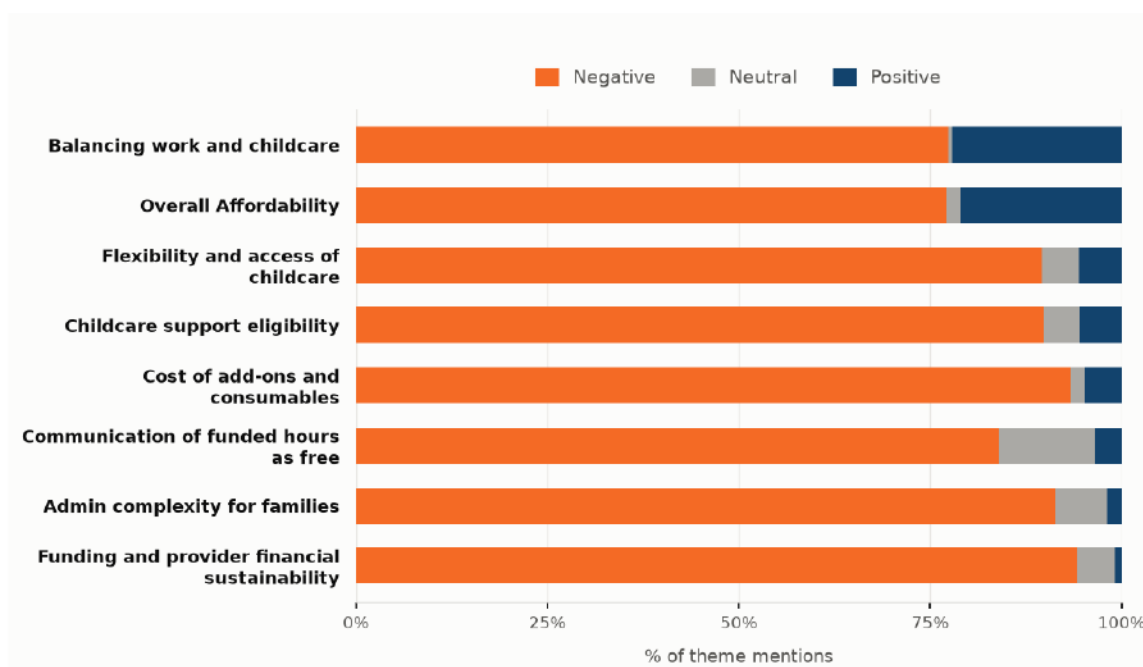
Many families who responded to this question welcomed funded hours and the support they provided, but more frequently highlighted ongoing challenges. The most common themes related to affordability and funding, including high overall costs, add-on charges, eligibility rules and provider funding. In relation to access, issues with flexibility of funding were commonly raised. Families also described issues around information and consumer choice, particularly how funded childcare was communicated, the complexity of navigating the system, and how it could affect choices around work.

In your own words, is there anything you'd like to tell us about the funded childcare hours you receive?

591 families responded to this question



This chart displays the 8 most common themes raised by respondents to this question. Related themes have been grouped together, and the size of each bubble reflects the relative frequency with which respondents mentioned each theme.



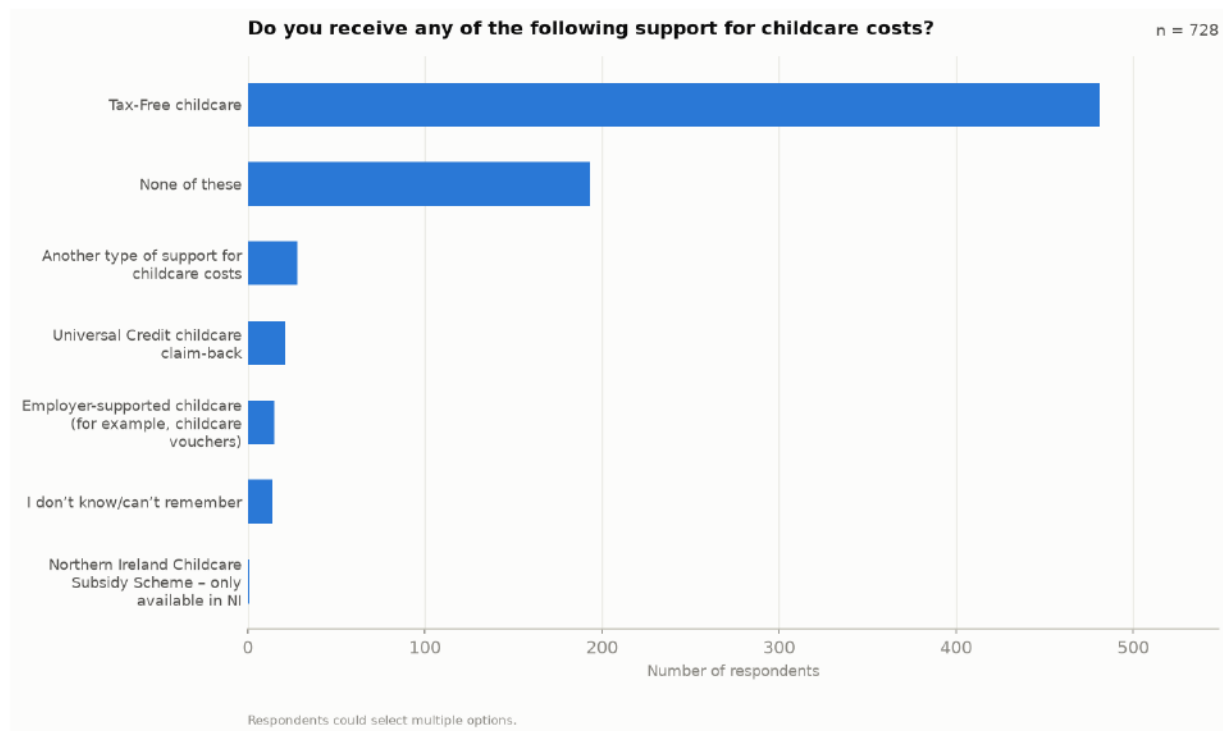
For each theme, we include some of the topics and issues that families commonly raised in response to this question:

In your own words, is there anything you'd like to tell us about the funded childcare hours you receive?	
Themes	What families said
<i>Affordability and funding</i>	
Overall affordability	Many families said that funded hours did not always cover the childcare needed by working parents, and residual childcare costs remained high. Some also said funded hours provided meaningful and welcome support, including by reducing costs and helping some parents return to work.
Cost of add-ons and consumables	Additional charges for meals, consumables, nappies, activities and wraparound care were raised as issues. Some said these charges reduced the financial value of funded hours and were difficult to avoid or challenge.
Childcare support eligibility	Families raised concerns about eligibility rules for funded hours and other childcare support, including income thresholds, working requirements and whether eligibility should be assessed by household rather than individual income. Responses also said term-based start dates and birth-month cut-offs could create delays before support begins, including gaps between the end of statutory maternity pay and the start of funded hours. Some families highlighted the eligibility gaps which affect students, parents unable to work due to illness, single parents, families on certain visas, and those using nannies.
Funding and provider financial sustainability	Families said that the value of government funded hours might not cover providers' actual costs, which could contribute to higher fees, additional charges, lower staff pay or reduced sustainability of provision.

<i>Access to high-quality services</i>	
Flexibility and access of childcare	We heard that term-time-only funding could create gaps during school holidays and half-terms, leaving working parents with additional costs or childcare gaps. Families said providers applied funded hours in different ways, including through daily caps, minimum attendance requirements, time-of-day restrictions and limits on wraparound care. Some said this reduced flexibility and made it harder to use funded hours in a way that met family needs.
<i>Information and consumer choice</i>	
Communication of funded hours as free	People said that describing funded childcare hours as 'free' could be misleading where hours are funded rather than free in practice, particularly where entitlements are stretched across the year or additional charges apply. Some suggested that support should be better aligned with working hours, provider costs and a wider range of family circumstances.
Balancing work and childcare	Responses highlighted that childcare costs remained high even after funded hours were applied, which affected decisions about work or whether to have additional children. Some said that eligibility cliff-edges discouraged career progression. Some also reflected positively that funded hours enabled them to return to work.
Admin complexity for families	We heard that the funded childcare system could be complex and difficult to navigate, including due to unclear eligibility rules, quarterly reconfirmation processes, platform issues and Universal Credit childcare evidence requirements.

Q11: Do you receive any of the following support for childcare costs?

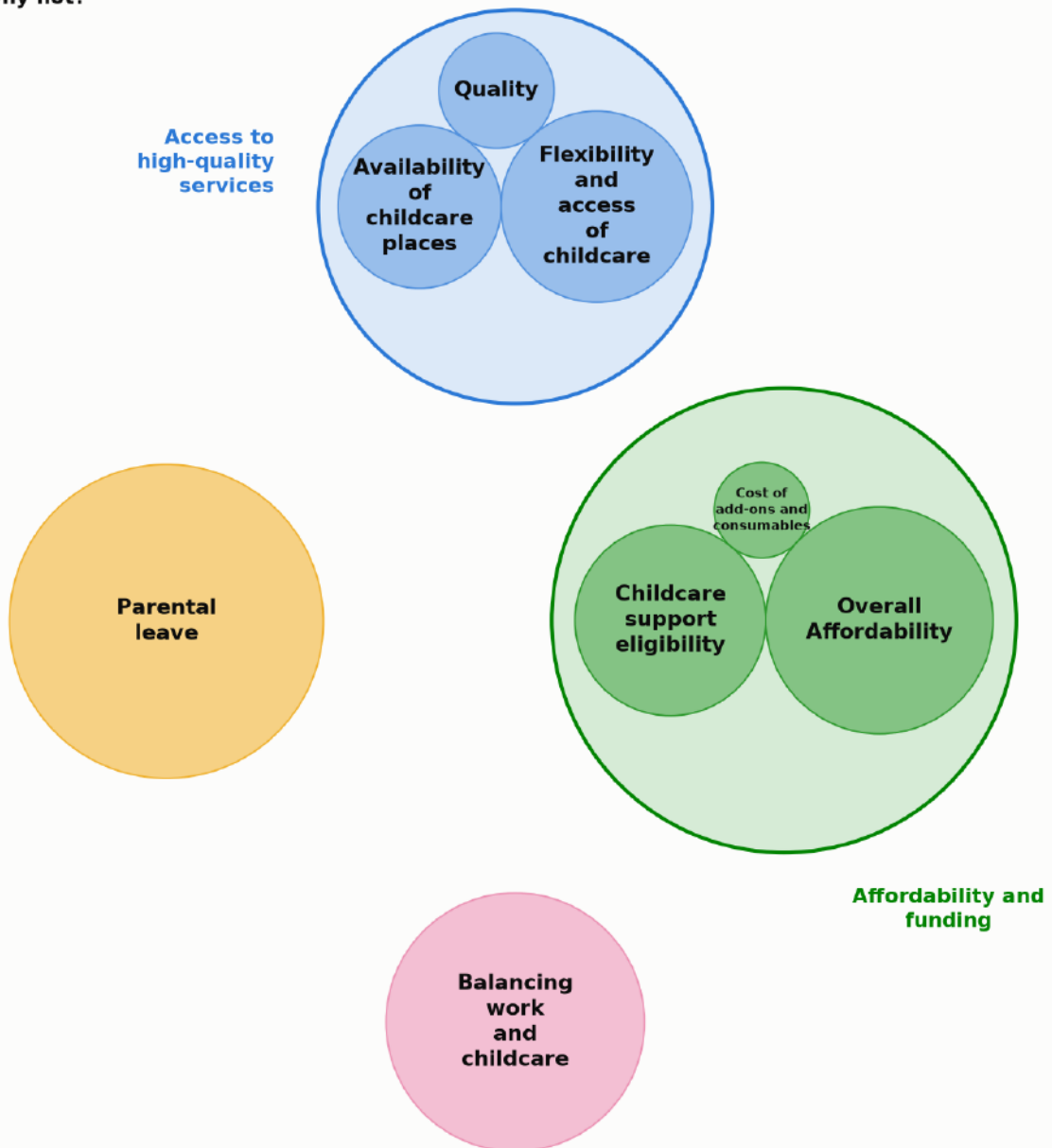
- ☐ Employer-supported childcare (for example, childcare vouchers)
- ☐ Help with childcare while you study
- ☐ Tax-Free Childcare
- ☐ Universal Credit childcare claim-back
- ☐ Northern Ireland Childcare Subsidy Scheme – only available in NI
- ☐ Another type of support for childcare costs (please write in)
- ☐ None of these
- ☐ I don't know / can't remember



Q12: You said that you currently do not use a professional childcare provider. In your own words, why not?

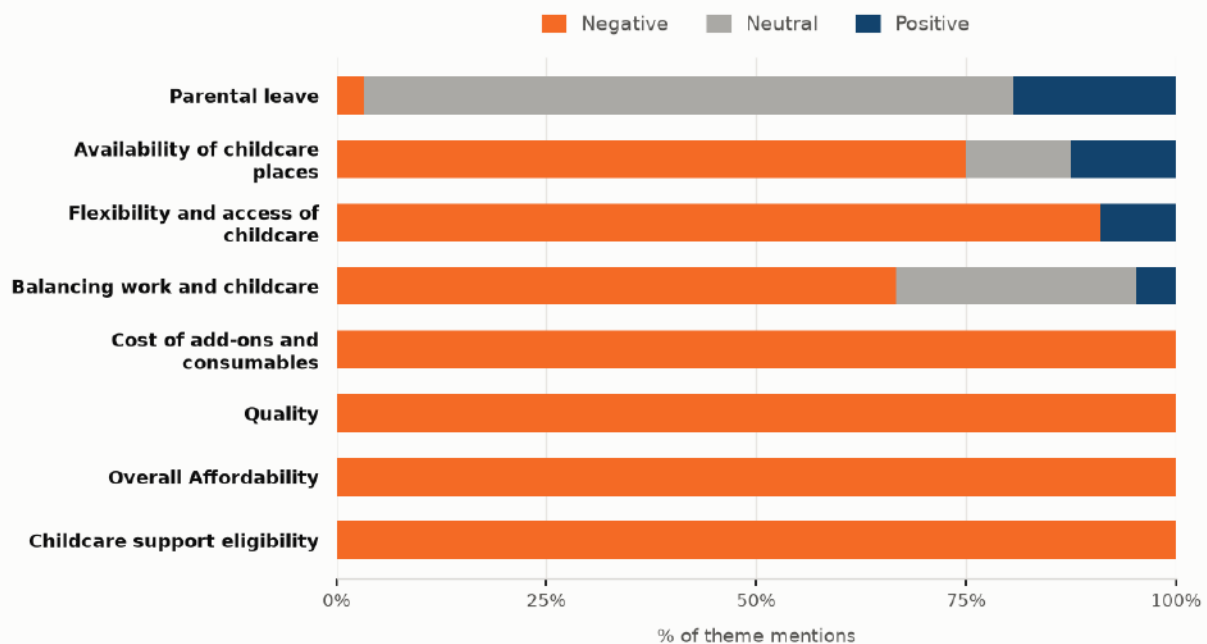
You said that you currently do not use a professional childcare provider. In your own words, why not?

69 families responded to this question



This chart displays the 8 most common themes raised by respondents to this question. Related themes have been grouped together, and the size of each bubble reflects the relative frequency with which respondents mentioned each theme.

You said that you currently do not use a professional childcare provider. In your own words, why not?

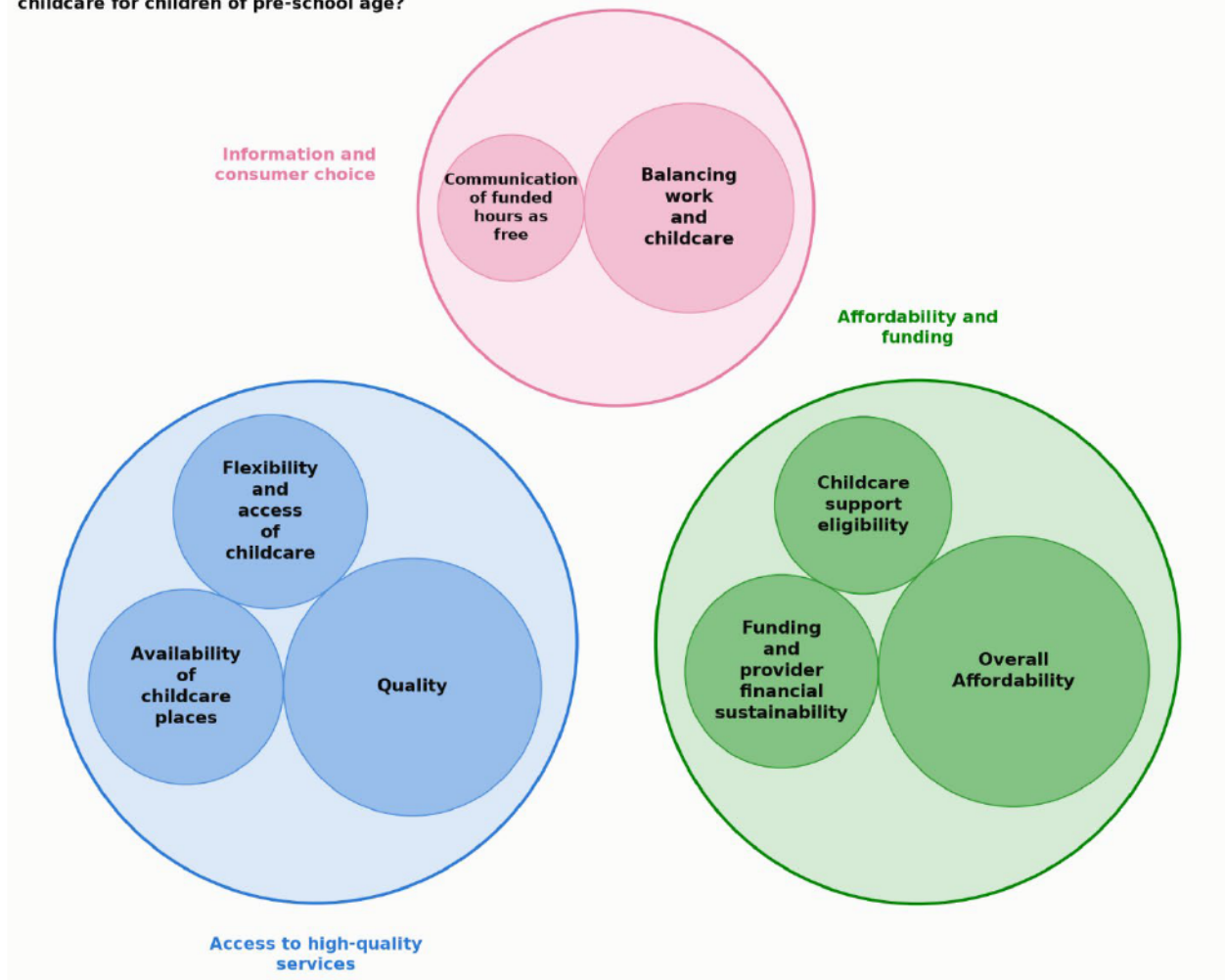


Q13: Is there anything else you'd like to tell us about your experiences of early years education and childcare for children of pre-school age?

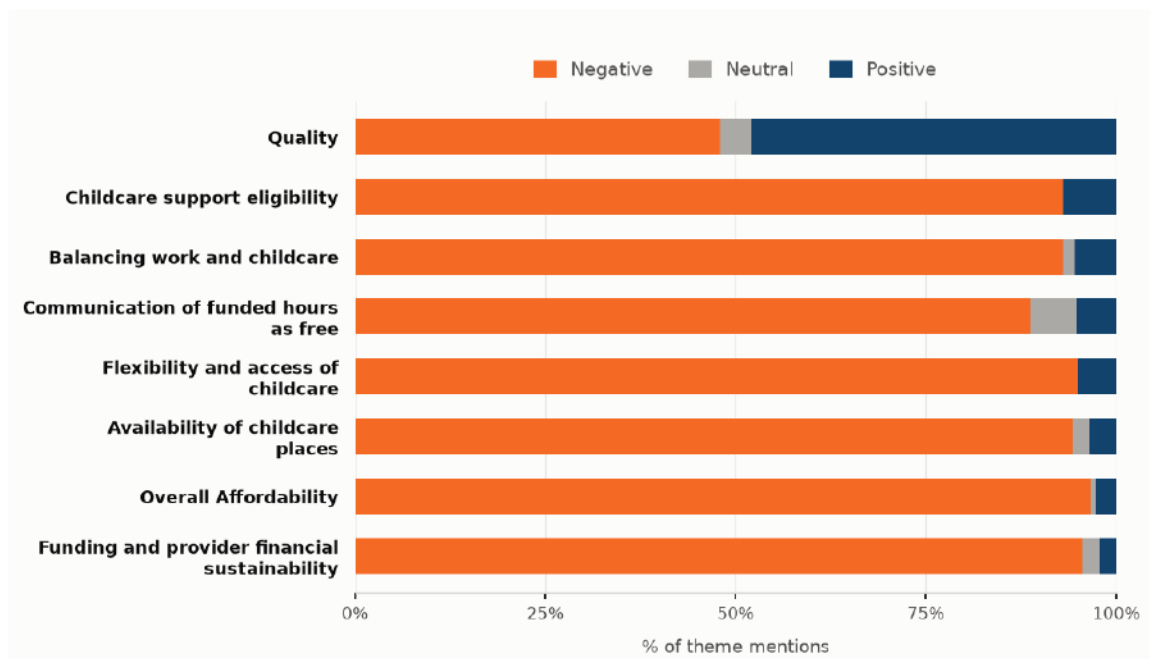
In answering this question, families most often raised issues relating to affordability and funding, particularly high costs, eligibility rules, and how this also related to provider financial sustainability. Respondents also frequently discussed access to high-quality services, including quality, flexibility and the availability of childcare places. Themes relating to information and consumer choice focused on the interaction between childcare and work, and how funded childcare was communicated. While families had both positive and negative experiences particularly relating to quality, comments about affordability, availability and flexibility were more focused on challenges.

Is there anything else you'd like to tell us about your experiences of early years education and childcare for children of pre-school age?

613 families responded to this question



This chart displays the 8 most common themes raised by respondents to this question. Related themes have been grouped together, and the size of each bubble reflects the relative frequency with which respondents mentioned each theme.



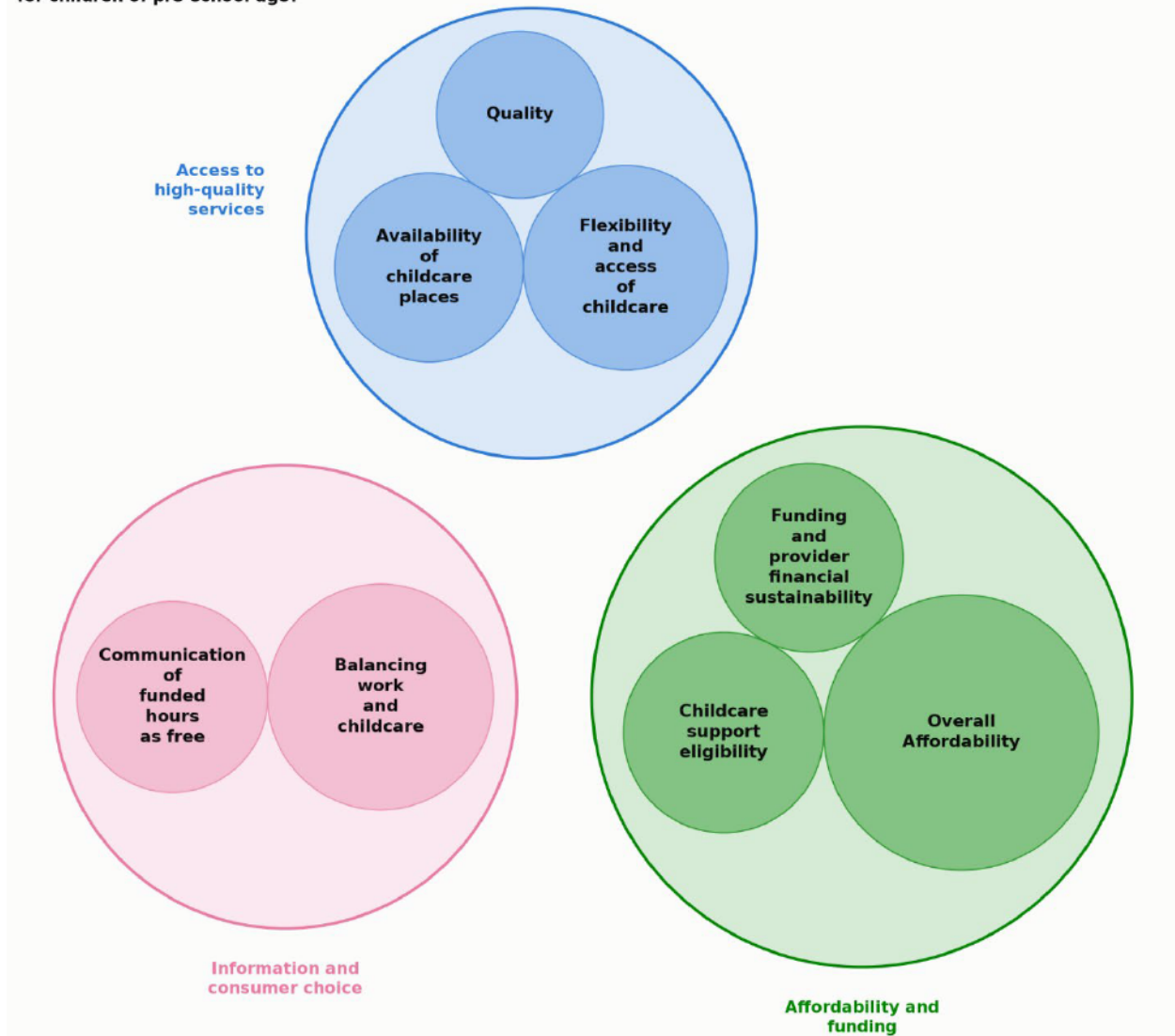
For each theme, we include some of the topics and issues that families commonly raised in response to this question:

Is there anything else you'd like to tell us about your experiences of early years education and childcare for children of pre-school age?	
Themes	What families said
<i>Affordability and funding</i>	
Overall affordability	Families described childcare costs as a significant pressure on household finances, affecting decisions about work, finances and whether to have more children.
Funding and provider financial sustainability	Responses described the funding system as complex and raised concerns about whether funding rates reflected provider costs. Some linked funding arrangements to additional charges, limits on funded-only places and financial pressures on providers.
Childcare support eligibility	Responses raised issues with eligibility rules for funded hours and other support, including income thresholds, term-based cut-offs, fixed sessions and reconfirmation requirements. Some said this affected access or added administrative burden.
<i>Access to high-quality services</i>	
Quality	Responses highlighted good-quality childcare as important for children's development. Some had positive experiences with settings and staff, while others raised concerns about variation in quality, safeguarding, facilities, staffing turnover and consistency of care. The sentiment expressed by families was approximately equal between positive and negative experiences.
Availability of childcare places	Many referred to difficulties securing childcare places in some areas, for some age groups and at times that matched their needs. Some mentioned waiting lists, local capacity constraints and challenges for under-twos or families seeking full-time or flexible provision.
Flexibility and access of childcare	Families referred to difficulties finding childcare that matched working patterns, family routines or changing needs, including fixed sessions, limited atypical-hours provision, holiday cover, and term-time-only offers.
<i>Information and consumer choice</i>	
Balancing work and childcare	Families said that childcare costs, availability and flexibility affected their ability to work, increase hours or progress in employment. Some highlighted particular impacts for mothers, single parents and families with less flexible working patterns.
Communication of funded hours as free	Families said describing funded hours as 'free' could be confusing where additional charges applied. Some referred to charges for meals, consumables, activities, deposits or registration fees, and said this could make it harder to understand and compare total childcare costs.

Q14: What would you like to tell us about your experiences of early years education and childcare for children of pre-school age?¹⁷

What would you like to tell us about your experiences of early years education and childcare for children of pre-school age?

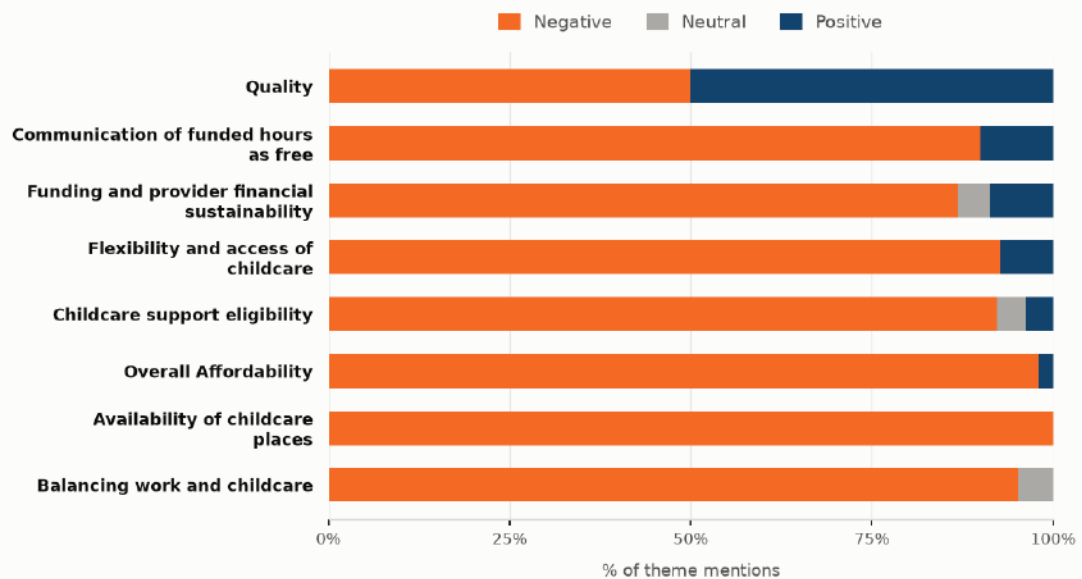
83 families responded to this question



This chart displays the 8 most common themes raised by respondents to this question. Related themes have been grouped together, and the size of each bubble reflects the relative frequency with which respondents mentioned each theme.

¹⁷ Only respondents who indicated they do not have children of pre-school age answered this question.

What would you like to tell us about your experiences of early years education and childcare for children of pre-school age?



Providers and professionals

Who responded

We heard from **977 providers and professionals**, of whom 382 were childminders, 248 were owners, and 156 nursery managers. On the ownership structure of their setting, most respondents (732) identified from a pre-defined list that their setting was 'independently owned', whilst a smaller number (111) said it was 'charity, community or voluntary'.

While the geographic scope of this market study is focused on England, we invited views from across the United Kingdom.¹⁸ We have included these few responses in our analysis.

5. We asked providers and professionals about:

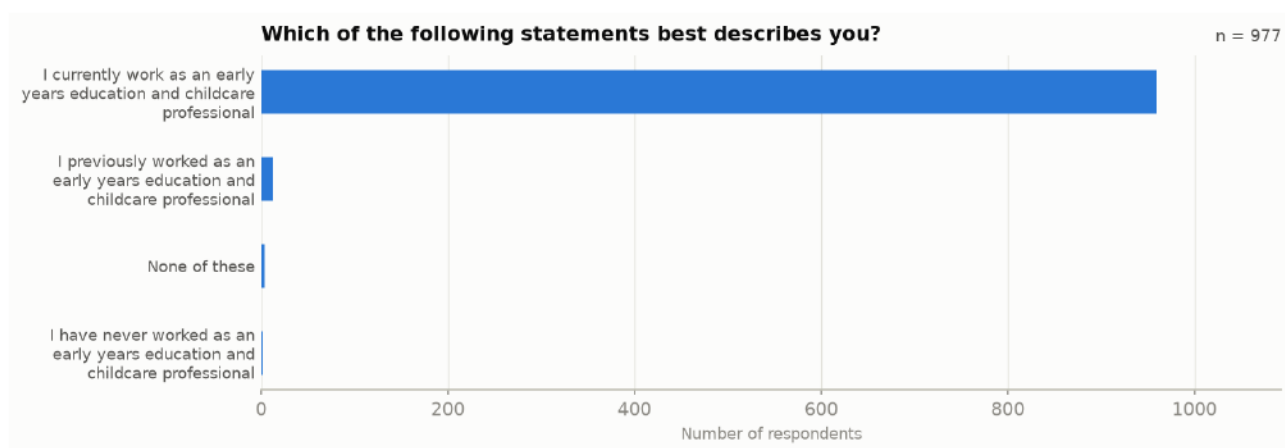
- Their role as an early-years education and childcare professional, and the types of settings in which they provide childcare.
- Their views on the funding model for childcare and how this affects their ability to provide services.
- Their views on the different challenges and opportunities involved in providing these services, including whether there are particular challenges involved in providing childcare for certain children.
- Their views on any improvements or benefits brought about by changes to the sector in recent years, and what (if any) other changes they would like to see.
- Their broader views and experiences of the sector.

Questions and themes

Q1: Which of the following statements best describes you?

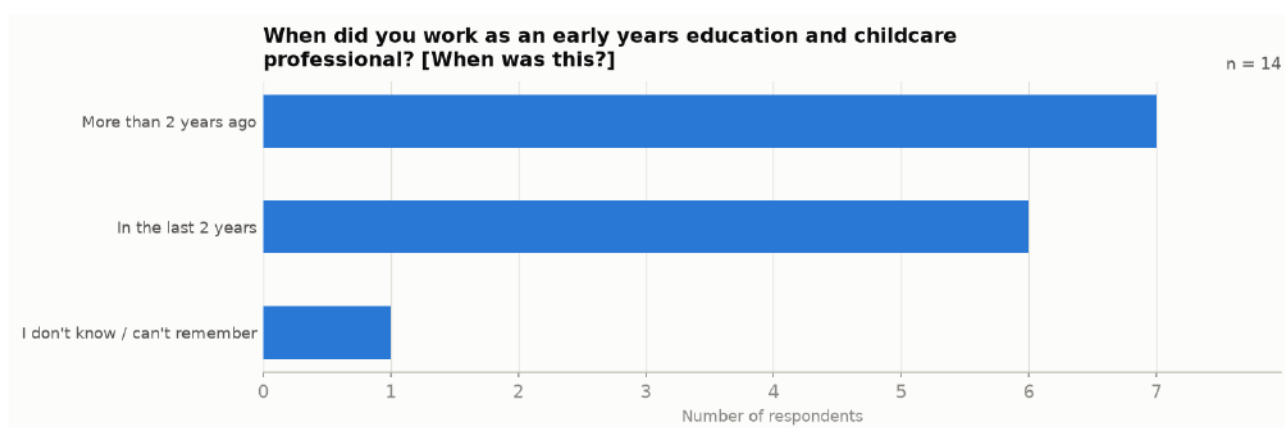
- ☐ I currently work as an early years education and childcare professional
- ☐ I previously worked as an early years education and childcare professional
- ☐ I have never worked as an early years and childcare professional
- ☐ None of these

¹⁸ A total of seven responses were received from those who provide(d) early years education and childcare services in Northern Ireland, Scotland and Wales. A further 13 respondents did not provide their location.



Q2: When was this?¹⁹

- ☐ In the last two years
- ☐ More than two years ago
- ☐ I don't know / can't remember



Q3: Please tell us why you stopped working in the sector and what, if anything, might encourage you to return.²⁰

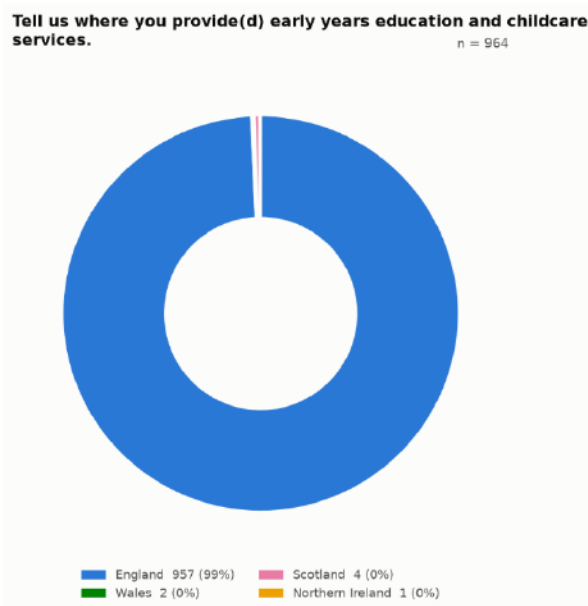
Respondents to this question raised issues that were consistent with the themes set out above. Given the lower number of responses to this question, we have not included a thematic analysis of these responses.

¹⁹ 14 of the respondents who indicated they no longer work as an early years education and childcare professional answered this question.

²⁰ 5 of the respondents who indicated they no longer work as an early years education and childcare professional answered this question.

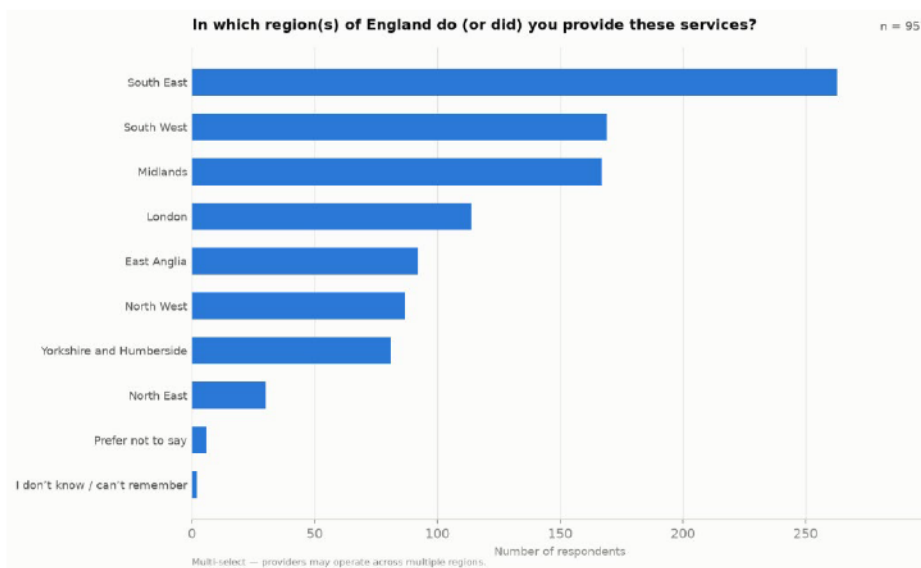
Q4: Tell us where you provide(d) early years education and childcare services.

- ☐ England
- ☐ Northern Ireland
- ☐ Scotland
- ☐ Wales
- ☐ Outside the UK
- ☐ Prefer not to say



Q5: In which region(s) of England do (or did) you provide these services?

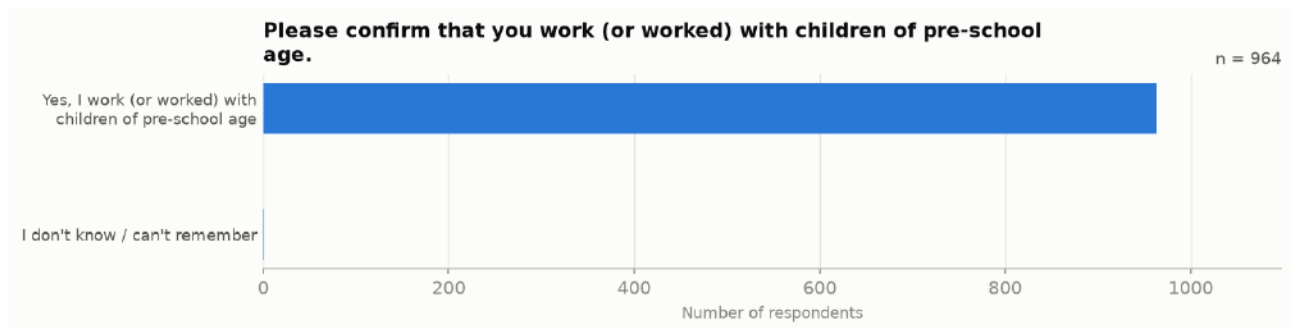
- ☐ East Anglia
- ☐ London
- ☐ Midlands
- ☐ North East
- ☐ North West
- ☐ South East
- ☐ South West
- ☐ Yorkshire and Humberside
- ☐ Prefer not to say
- ☐ I don't know / can't remember



Q6: Please confirm that you work (or worked) with children of pre-school age.

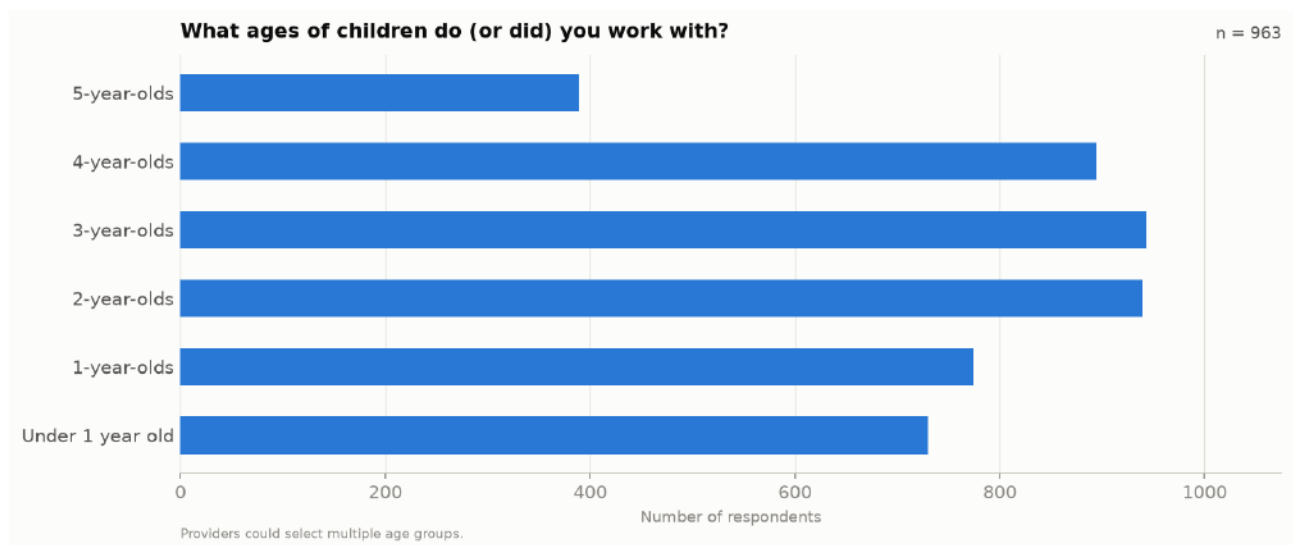
Explanatory text: 'Pre-school age' means a child who hasn't started school (i.e. they haven't yet gone into a Reception or P1 class at infant or primary school).

- ☐ Yes, I work (or worked) with children of pre-school age
- ☐ No, I work (or worked) with children of school age only
- ☐ I don't know / can't remember



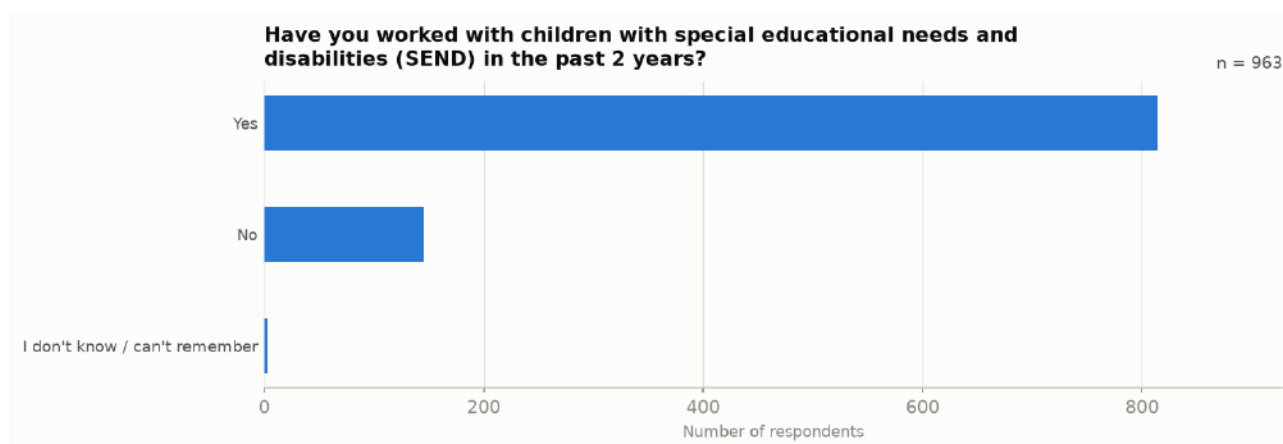
Q7: What ages of children do (or did) you work with?

- ☐ Under 1 year old
- ☐ 1-year-olds
- ☐ 2-year-olds
- ☐ 3-year-olds
- ☐ 4-year-olds
- ☐ 5-year-olds



Q8: Have you worked with children with special educational needs and disabilities (SEND) in the past two years?

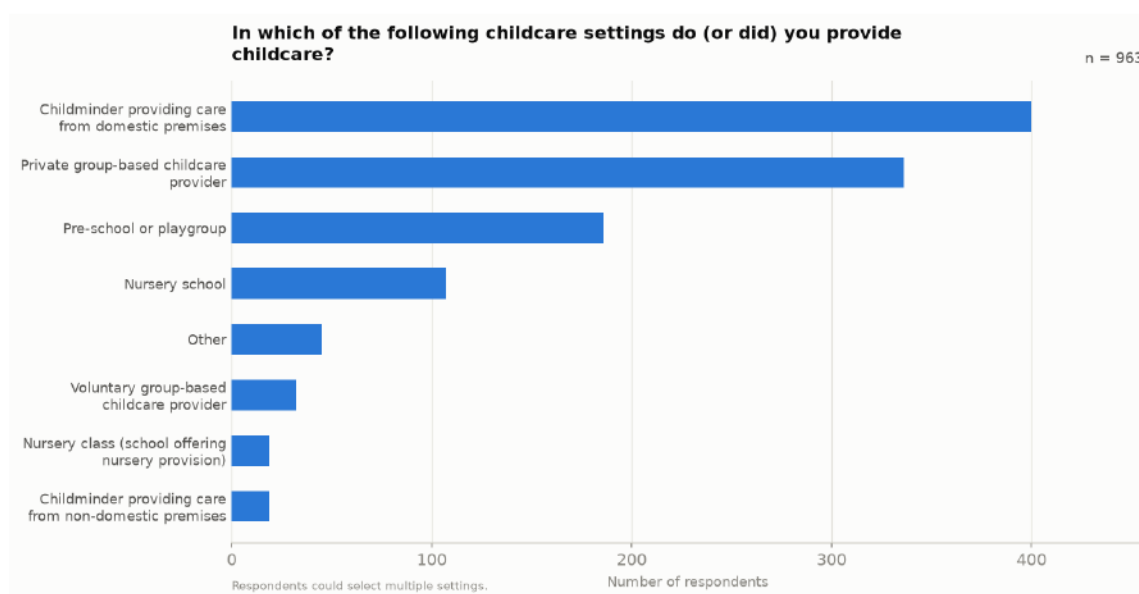
- ☐ Yes
- ☐ No
- ☐ I don't know / can't remember



Q9: In which of the following settings do (or did) you provide childcare?

Explanatory text: By 'setting', we mean the premises where you deliver(ed) childcare.

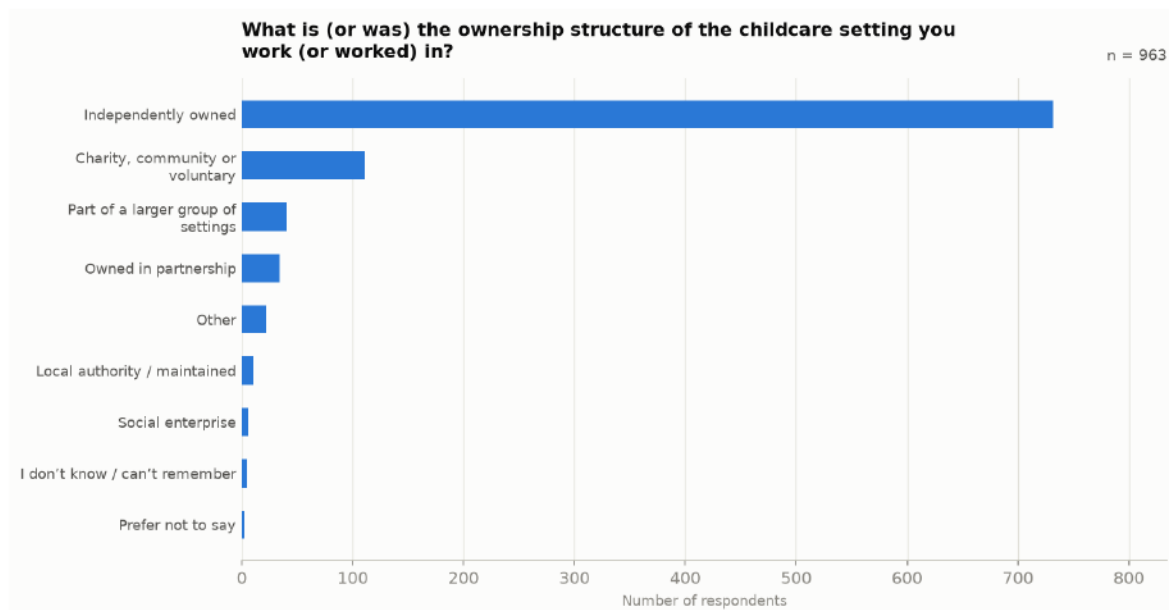
- ☐ Childminder providing care from domestic premises
- ☐ Childminder providing care from non-domestic premises
- ☐ Nursery school
- ☐ Nursery class (school offering nursery provision)
- ☐ Pre-school or playgroup
- ☐ Private group-based childcare provider
- ☐ Voluntary group-based childcare provider
- ☐ Other (please write your answer in the text box below)



Q10: What is (or was) the ownership structure of the setting you work (or worked) in?

Explanatory text: By 'setting', we mean the premises where you deliver(ed) services. Select 'I don't know' if you are unsure. If you are not currently working as an early years education and childcare professional, please tell us about the setting you worked in most recently.

- ☐ Independently owned
- ☐ Owned in partnership
- ☐ Part of a larger group of settings
- ☐ Local authority / maintained
- ☐ Charity, community or voluntary
- ☐ Social enterprise
- ☐ Other (please write your answer in the text box below)
- ☐ Prefer not to say
- ☐ I don't know / can't remember

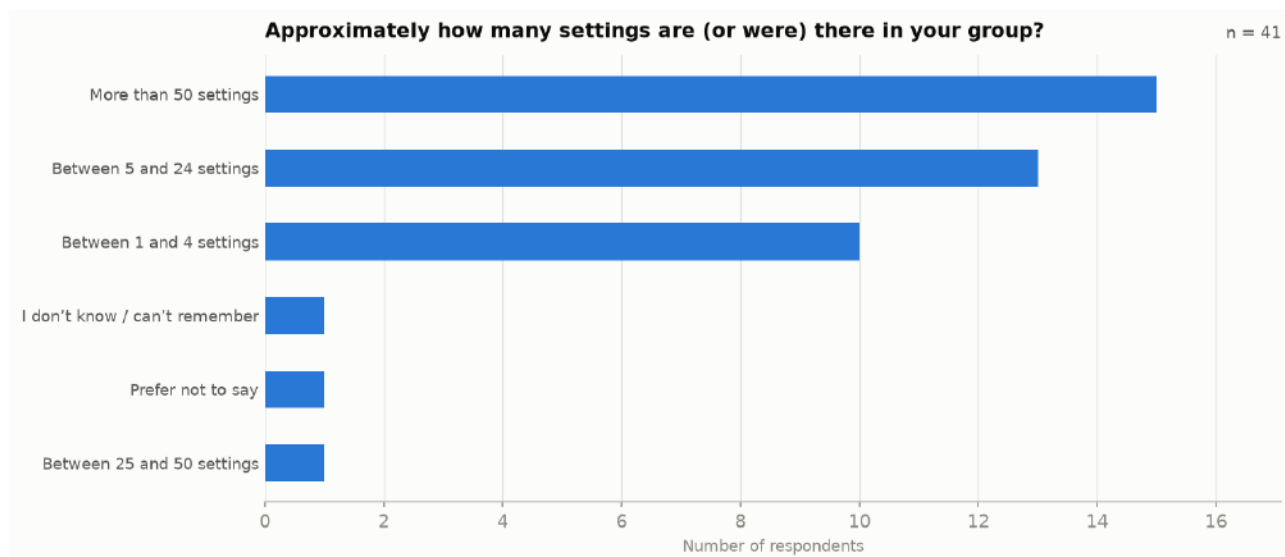


Q11: Approximately how many settings are (or were) there in your group?²¹

Explanatory text: By 'settings,' we mean the number of branches, locations, or sites in your group. If you are not currently working as an early years education and childcare professional, please tell us about the group you worked in most recently.

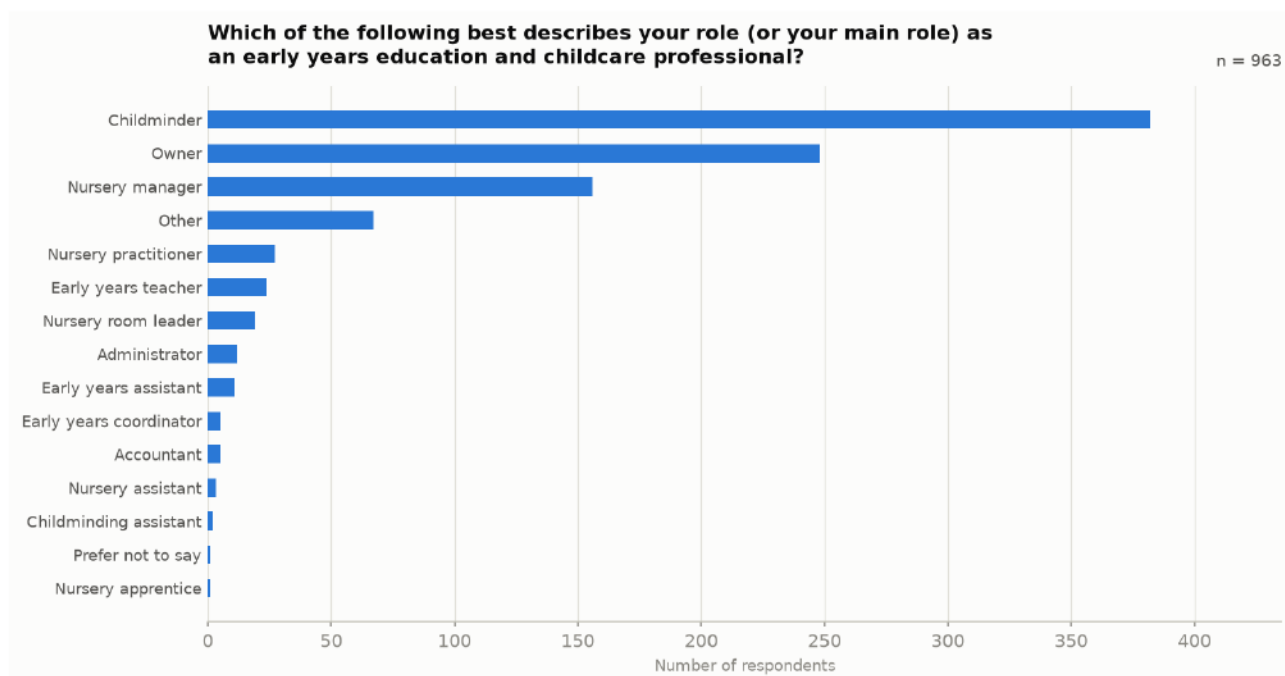
- | | |
|---|--|
| ☐ Between 1 and 4 settings | ☐ More than 50 settings |
| ☐ Between 5 and 24 settings | ☐ Prefer not to say |
| ☐ Between 25 and 50 settings | ☐ I don't know / can't remember |

²¹ 41 of the respondents who indicated they work (or worked) in a setting which is part of a larger group answered this question.



Q12: Which of the following best describes your role (or your main role) as an early years education and childcare professional?

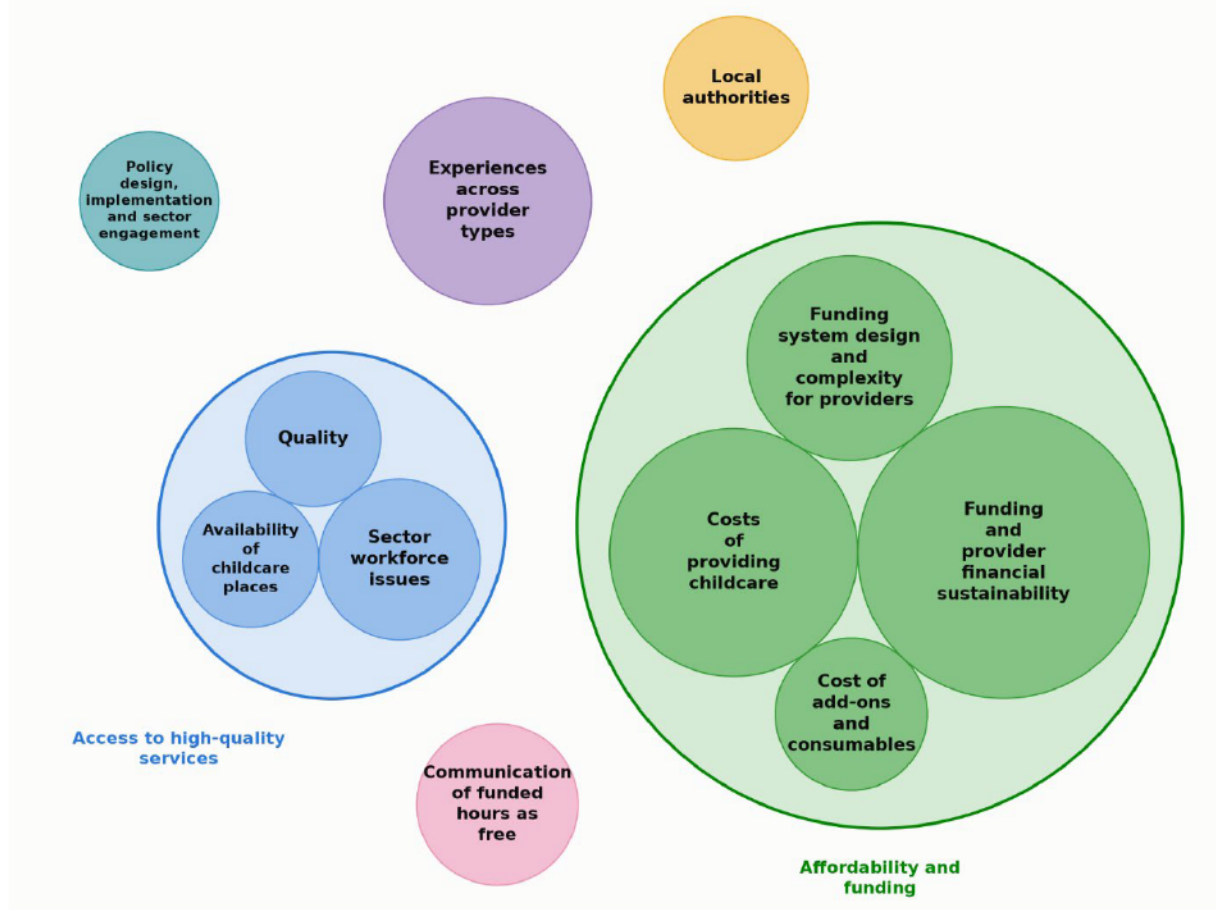
- | | |
|--|---|
| ☐ Childminder | ☐ Nursery manager |
| ☐ Childminding assistant | ☐ Owner |
| ☐ Early years assistant | ☐ Accountant |
| ☐ Early years coordinator | ☐ Administrator |
| ☐ Early years teacher | ☐ Other (please write your answer in the text box below) |
| ☐ Nursery apprentice | ☐ Prefer not to say |
| ☐ Nursery assistant | |
| ☐ Nursery practitioner | |
| ☐ Nursery room leader | |



Q13: Is there anything you would like to tell us about the funding model for early years education and childcare services and how this affects (or affected) your ability to provide these services?

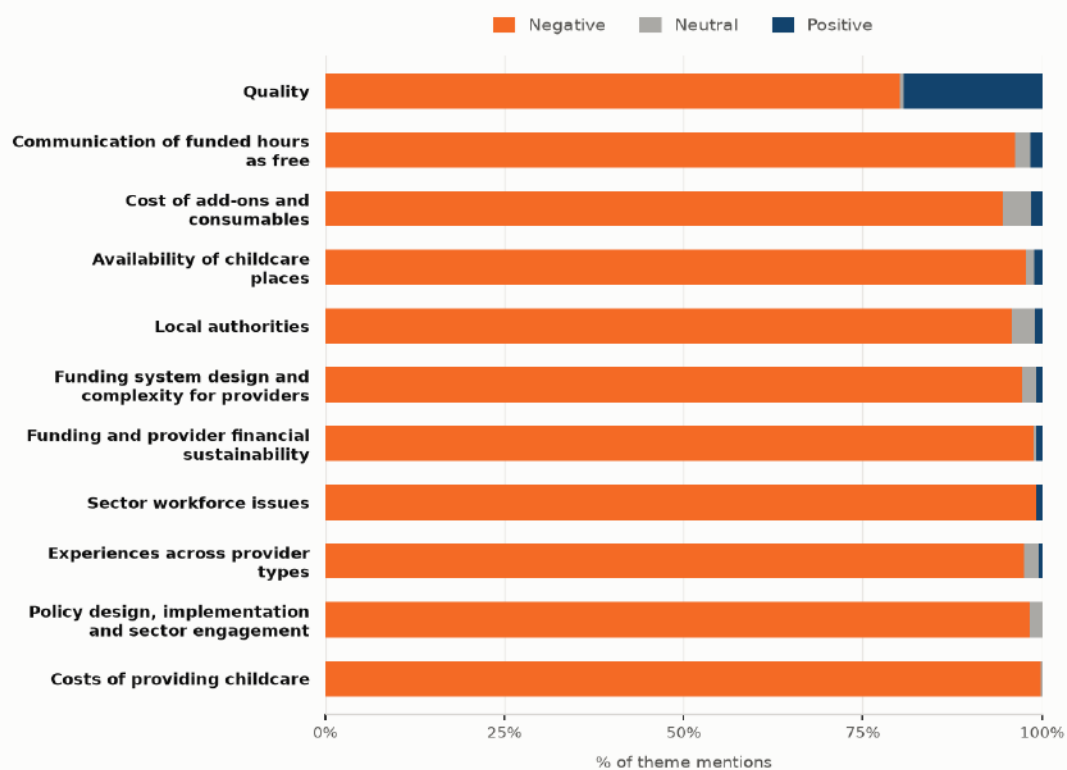
Is there anything you would like to tell us about the funding model for early years education and childcare services and how this affects (or affected) your ability to provide these services?

773 providers responded to this question



This chart displays the 11 most common themes raised by respondents to this question. Related themes have been grouped together, and the size of each bubble reflects the relative frequency with which respondents mentioned each theme.

Is there anything you would like to tell us about the funding model for early years education and childcare services and how this affects (or affected) your ability to provide these services?

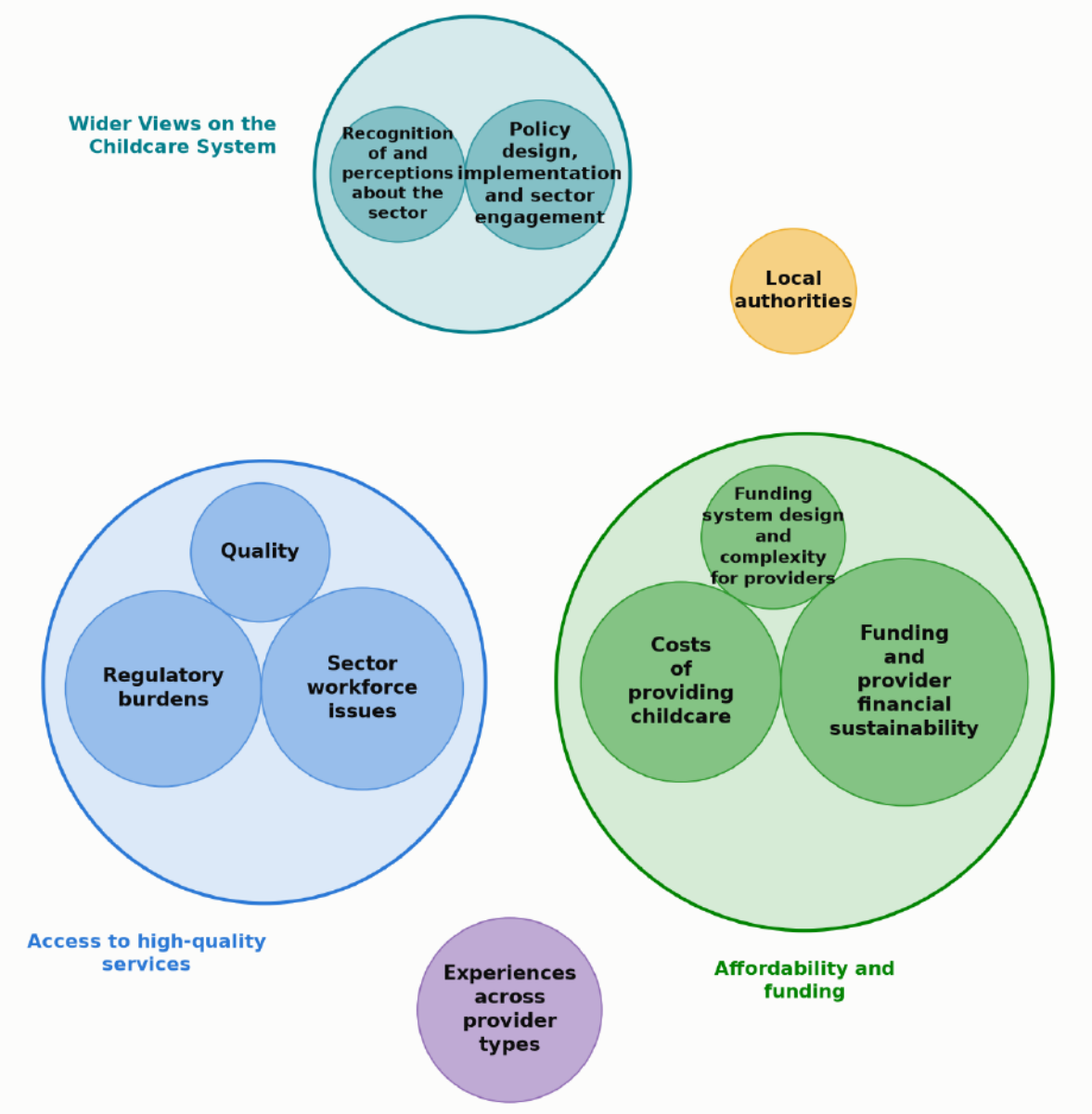


Q14: Is there anything you would like to tell us about the challenges and opportunities involved in operating as a provider in this sector?

Explanatory text: For example, starting or expanding a childcare business.

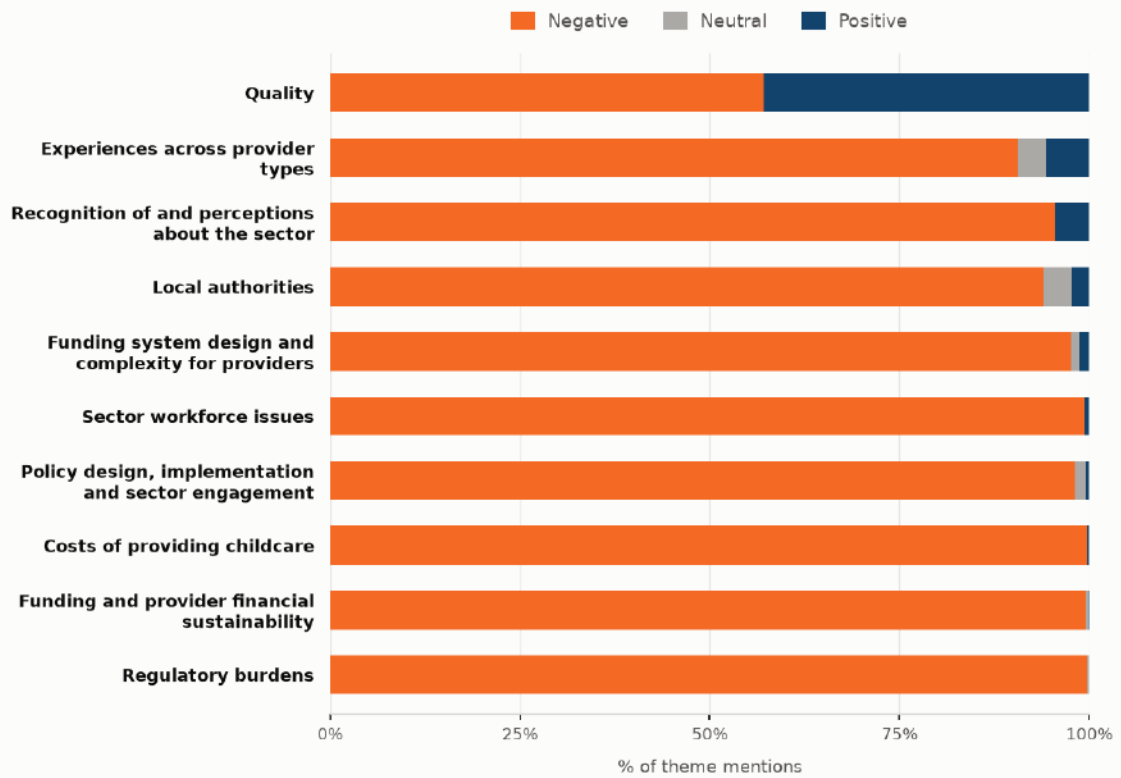
Is there anything you would like to tell us about the challenges and opportunities involved in operating as a provider in this sector?

708 providers
responded to this question



This chart displays the 10 most common themes raised by respondents to this question. Related themes have been grouped together, and the size of each bubble reflects the relative frequency with which respondents mentioned each theme.

Is there anything you would like to tell us about the challenges and opportunities involved in operating as a provider in this sector?



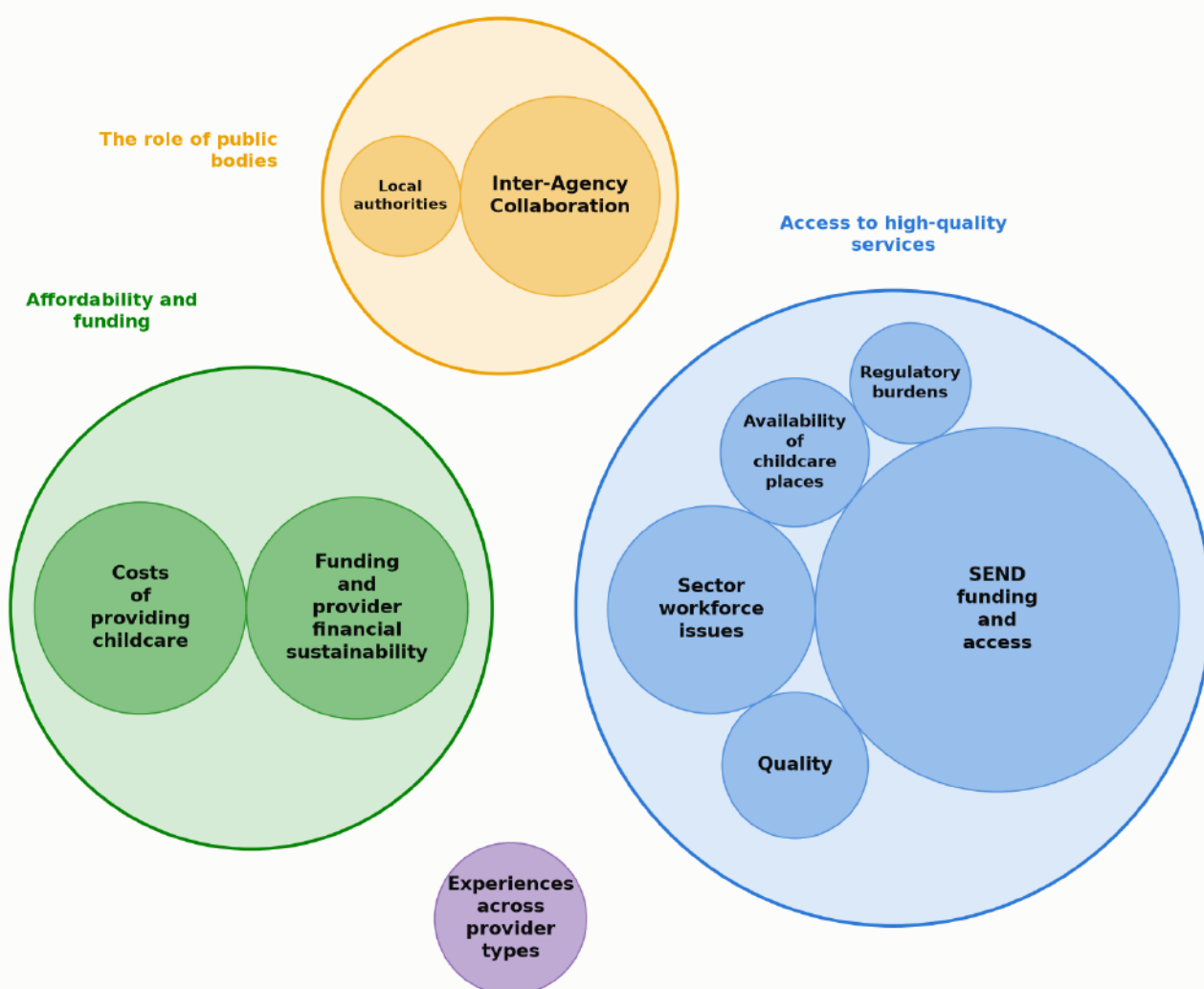
Q15: Are there any particular challenges involved in providing childcare for certain children?

Explanatory text: For example, children with special educational needs or those living in rural or disadvantaged areas.

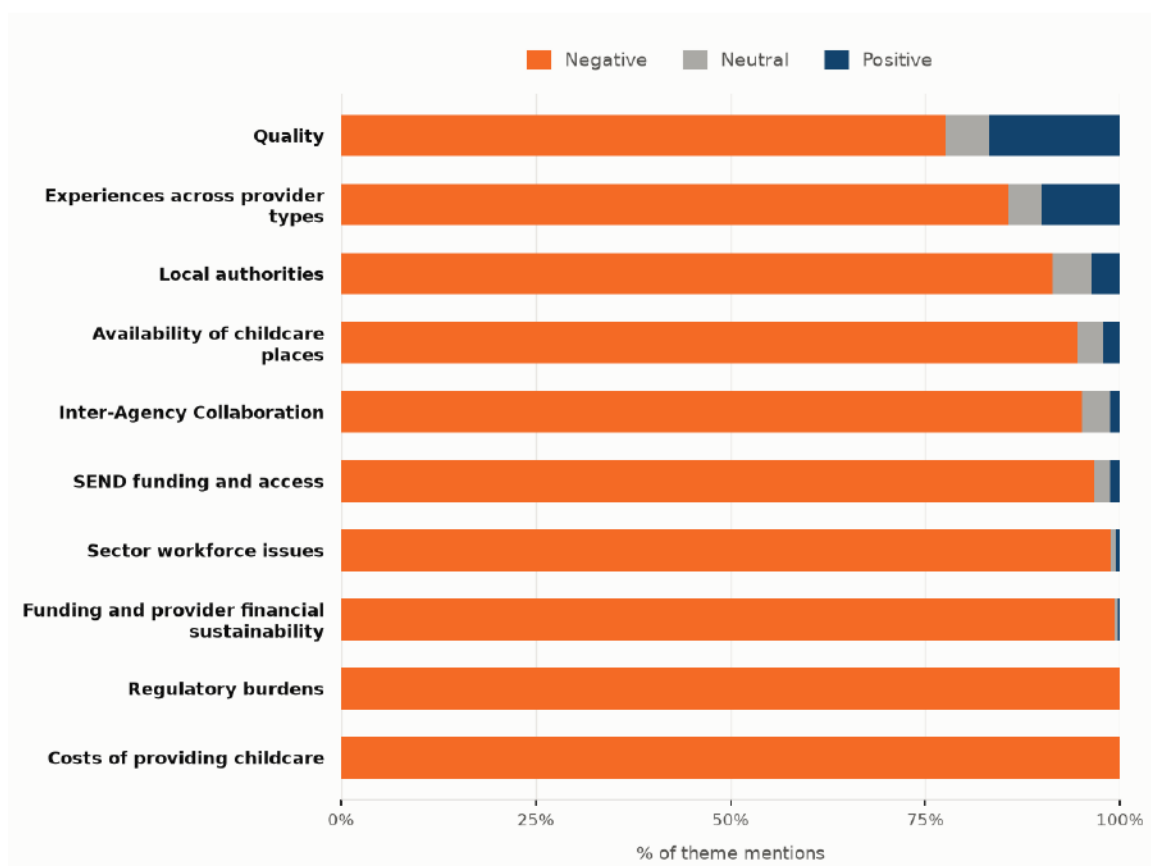
When asked about the challenges involved in providing childcare for certain children, respondents raised issues relating to SEND funding and access, including funding levels, access to specialist support and assessment processes. Many also highlighted related workforce issues, other rising costs, and how these challenges affected their financial sustainability. Respondents also raised the lack of availability of suitable provision and the pressures this placed on providers.

Are there any particular challenges involved in providing childcare for certain children?

638 providers responded to this question



This chart displays the 10 most common themes raised by respondents to this question. Related themes have been grouped together, and the size of each bubble reflects the relative frequency with which respondents mentioned each theme.



For each theme, we include some of the topics and issues that providers and professionals commonly raised in response to this question:

Are there any particular challenges involved in providing childcare for certain children?	
Themes	What providers and professionals said
Access to high-quality services	
SEND funding and access	The majority of respondents said SEND funding often did not cover the cost of appropriate support, and some said inequitable funding created a 'postcode lottery' for support. Delays in assessments, diagnoses and specialist services could leave providers meeting complex needs without funded support. Respondents also highlighted rising SEND prevalence and complexity, which they said was outpacing funding, specialist support and staffing capacity.
Sector workforce issues	Many said it was difficult to recruit and retain staff with the skills to support complex needs. Respondents also linked reduced training access and the demands of managing challenging behaviours to burnout, turnover and exits from the sector.
Availability of childcare places	Alongside increasing demand, closures of specialist settings have compounded pressure on providers to accept children with complex needs. Some said they were expected to provide care without enough staffing, equipment, funding or training.

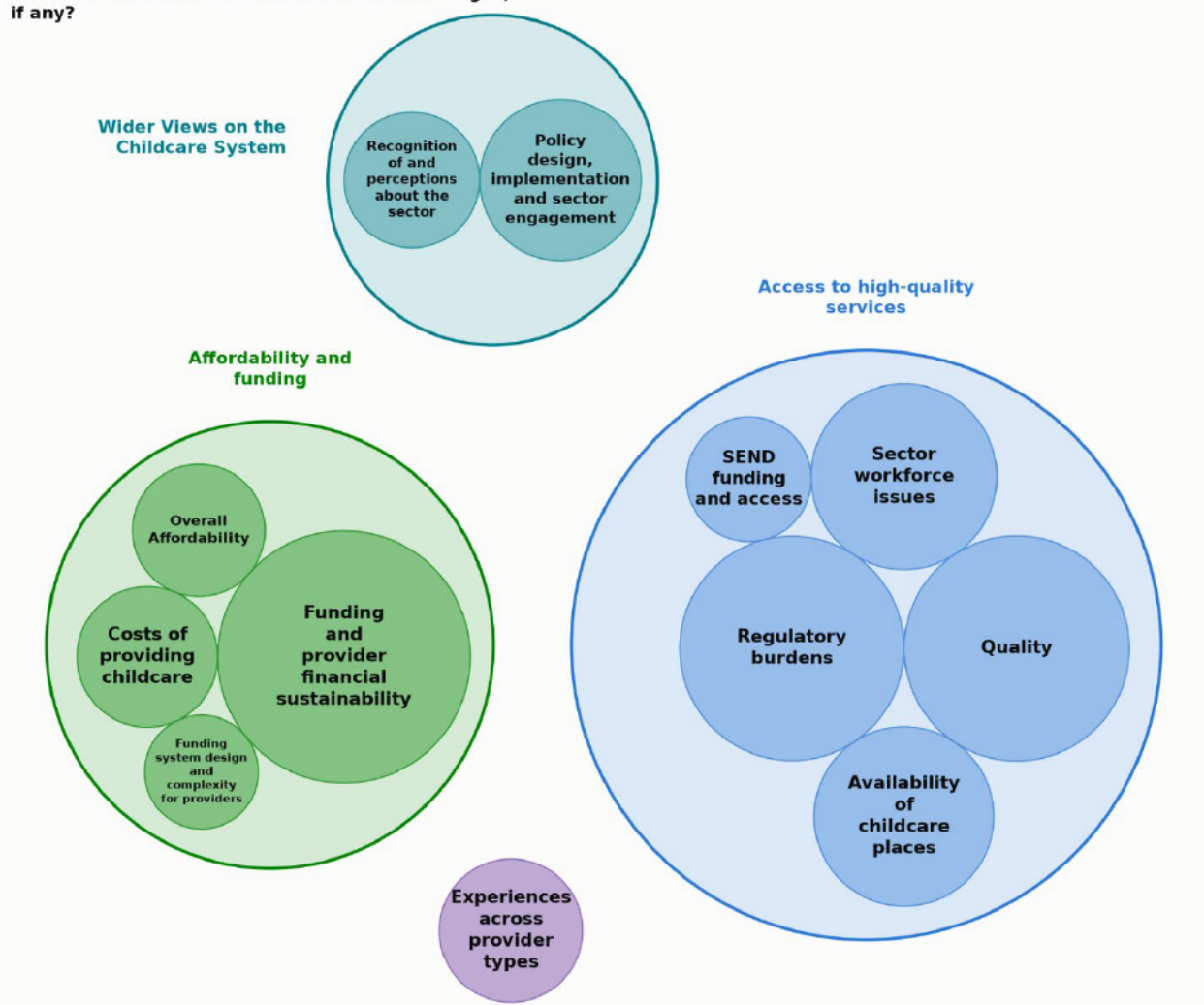
Quality	Professionals and providers said inclusive care without appropriate resources could affect quality for all children. Respondents also said that well-resourced, stable care could support strong progress for children with SEND and disadvantaged backgrounds.
Regulatory burdens	Respondents highlighted the administrative burden of regulatory requirements linked to SEND and looked-after children, including paperwork, education, health and care plan (EHCP) applications, meetings and safeguarding requirements. Some said these costs and time pressures were largely unfunded and diverted time from direct work with children, with small providers and childminders particularly affected.
<i>Affordability and funding</i>	
Funding and provider financial sustainability	We heard that the cost of inclusive provision could be financially unsustainable for many providers, and was particularly acute for providers who served areas with higher levels of developmental need. This included insufficient funding mechanisms to support the higher levels of developmental and language needs of children from disadvantaged backgrounds and those with English as an additional language.
Costs of providing childcare	Respondents set out the additional costs involved in supporting children with additional needs, including staffing, specialist resources, training and adaptations.
<i>Role of public bodies</i>	
Inter-Agency Collaboration	Shortages of specialist and multi-agency support were emphasised, and respondents said they were increasingly filling wider support roles without enough recognition, support from other professional agencies, or funding. The shortages of specialist support services were also said to cause delays in interventions.
Local authorities	Respondents said SEND funding and associated support varied significantly between local authorities, including in relation to funding applications, assessment processes and funding decisions. Some said this meant providers' ability to support children with SEND could depend on local processes as well as the level of funding available.
<i>Cost drivers and the impact of different provider types</i>	
Experiences across provider types	Childminders, small settings and rural providers described the particular challenges and disproportionate effects they faced such as reduced access to funding or specialist support, constraints of lone working, ratio requirements and disproportionate regulatory burdens. Rural providers also said they faced higher costs and recruitment difficulties.

Q16: In recent years, there have been a number of changes to the early years education and childcare sector. What improvements have you seen, if any, and what have been the benefits of these changes, if any?

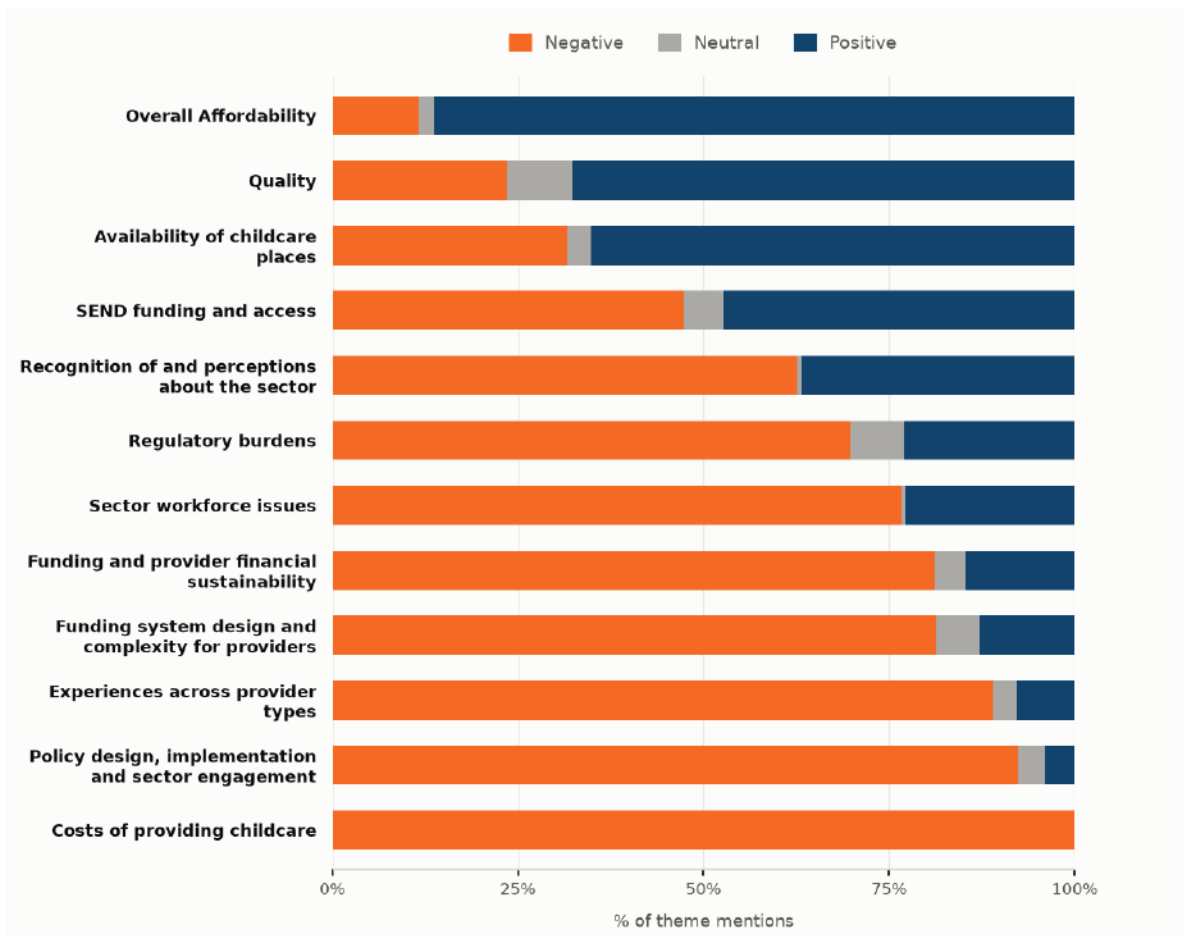
Reflecting on recent changes in the sector, providers and professionals described some specific improvements but highlighted that challenges remain. Themes relating to affordability and funding focused on the expansion of funded childcare hours and the support this had provided to families, alongside concerns about provider financial sustainability and rising costs. In relation to access to high-quality services, respondents highlighted specific improvements to quality and greater awareness of SEND, while also describing continued workforce challenges and capacity constraints which also impact delivery of SEND support. Respondents also commented on the effectiveness of policy design and implementation, recognition of the workforce and the impact of changes on different provider types.

In recent years, there have been a number of changes to the early years education and childcare sector. What improvements have you seen, if any, and what have been the benefits of these changes, if any?

798 providers responded to this question



This chart displays the 12 most common themes raised by respondents to this question. Related themes have been grouped together, and the size of each bubble reflects the relative frequency with which respondents mentioned each theme.



For each theme, we include some of the topics and issues that providers and professionals commonly raised in response to this question:

In recent years, there have been a number of changes to the early years education and childcare sector. What improvements have you seen, if any, and what have been the benefits of these changes, if any?	
Themes	What providers and professionals said
<i>Affordability and funding</i>	
Funding and provider financial sustainability	Respondents focused on how recent changes, such as the expansion of funded childcare hours and changes to national guidance on additional charges, have impacted their financial sustainability and reduced ability to manage funding shortfalls. Some highlighted this was leaving many settings financially unviable and at risk of closure.
Costs of providing childcare	Providers described the increases of various costs involved in delivering their services, including staff costs, employer National Insurance contributions, premises and utilities, insurance, food, and other overheads.
Overall Affordability	Respondents said the expansion of government-funded childcare hours had reduced costs for families, improved access to early education and supported parental workforce participation.

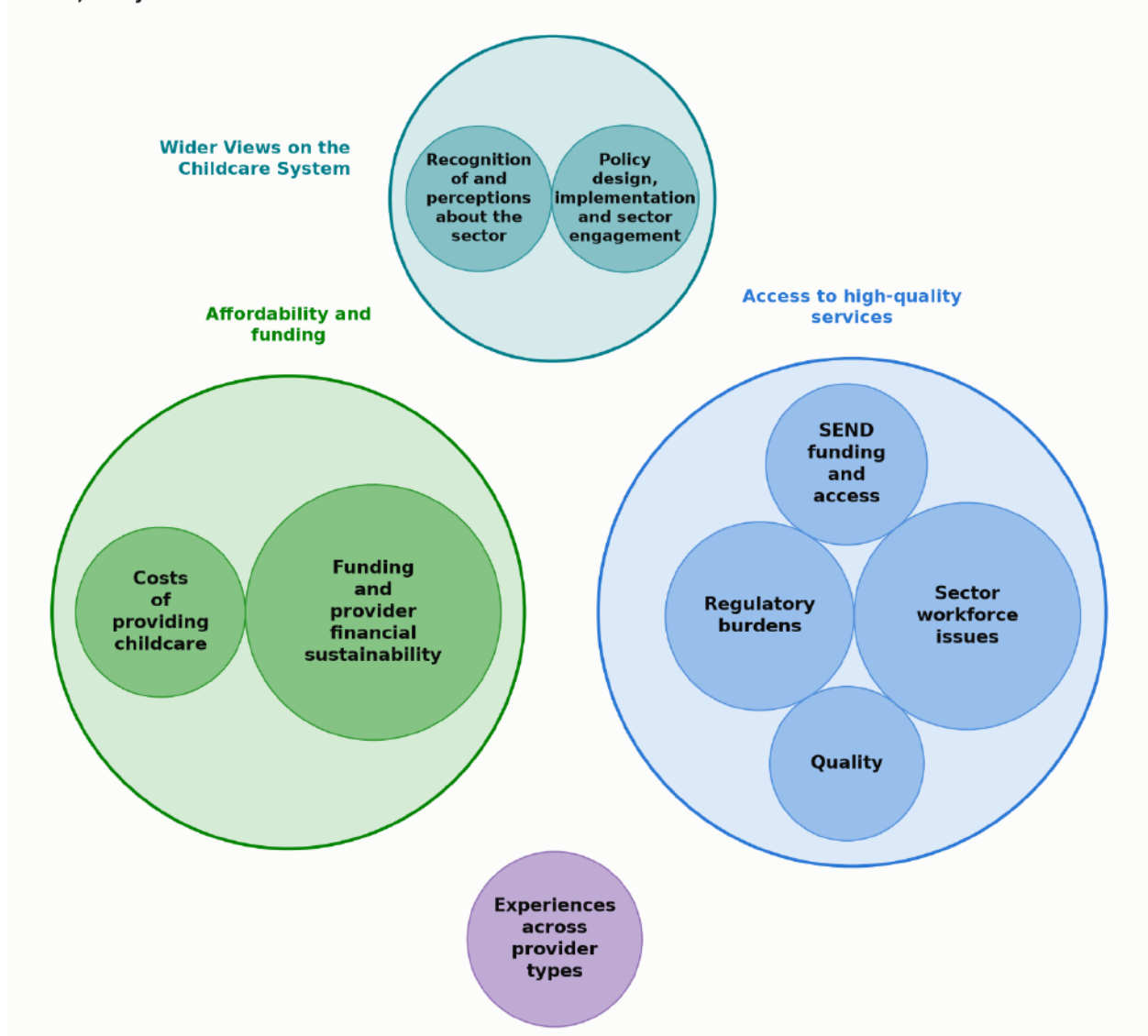
Funding system design and complexity for providers	Respondents highlighted several improvements to the funding system, including monthly funding payments, Tax-Free Childcare and greater transparency in billing. However, many said the expansion of funded childcare had increased administrative work, including managing eligibility codes, funding claims and compliance requirements. Some also said Tax-Free Childcare remained difficult to use because of delays and reliability issues.
Access to high-quality services	
Quality	Providers and professionals described a range of changes which they said had improved quality and better reflected children's developmental needs, including updates to the EYFS framework and stronger safeguarding guidance. Some also commented on changes to staff-to-child ratios, including potential benefits, as well as challenges to implement them in practice.
Regulatory burdens	Respondents described a range of experiences of changes to the Ofsted inspection framework. While some welcomed the new framework, others said inspections remained stressful, inconsistent, and disproportionate, particularly for smaller providers and childminders. They also highlighted increasing compliance requirements and said some regulatory requirements could be disproportionate or costly.
Sector workforce issues	Respondents highlighted continuing recruitment and retention challenges linked to low pay, workload pressures and wider sector pressures. Some also raised concerns about delays in the Disclosure and Barring Service process. They also said higher qualification standards, improved professional opportunities and new entry routes had helped raise the professional status of the workforce.
Availability of childcare places	The expansion of funded childcare hours had improved access to childcare and supported parental workforce participation. However, respondents said that the increase in demand was outpacing available capacity.
SEND funding and access	Providers welcomed greater awareness and earlier identification of SEND, neurodiversity, and speech and language needs. However, insufficient funding, specialist support services and local authority resources had not kept pace with increasing demand.
Wider Views on the Childcare System	
Policy design, implementation and sector engagement	We heard that policy changes were often introduced without sufficient consultation, preparation or realistic implementation timescales. Some also said that, despite numerous policy changes, conditions in the sector had not improved and had worsened in some respects.
Recognition of and perceptions about the sector	Some respondents welcomed greater public and employer recognition of the role of early years education and childcare in children's development, school readiness and reducing inequalities, with providers increasingly recognised as educators.
Cost drivers and the impact of different provider types	
Experiences across provider types	Many respondents highlighted that policy and funding changes could affect provider types differently. Particularly for childminders and small providers, respondents referred to challenges relating to regulation, access to funding and pressures associated with the expansion of school-based provision. Some also said funding arrangements and policy favoured school-based provision.

Q17: What do (or did) you see as the main challenges facing the early years education and childcare sector, if any?

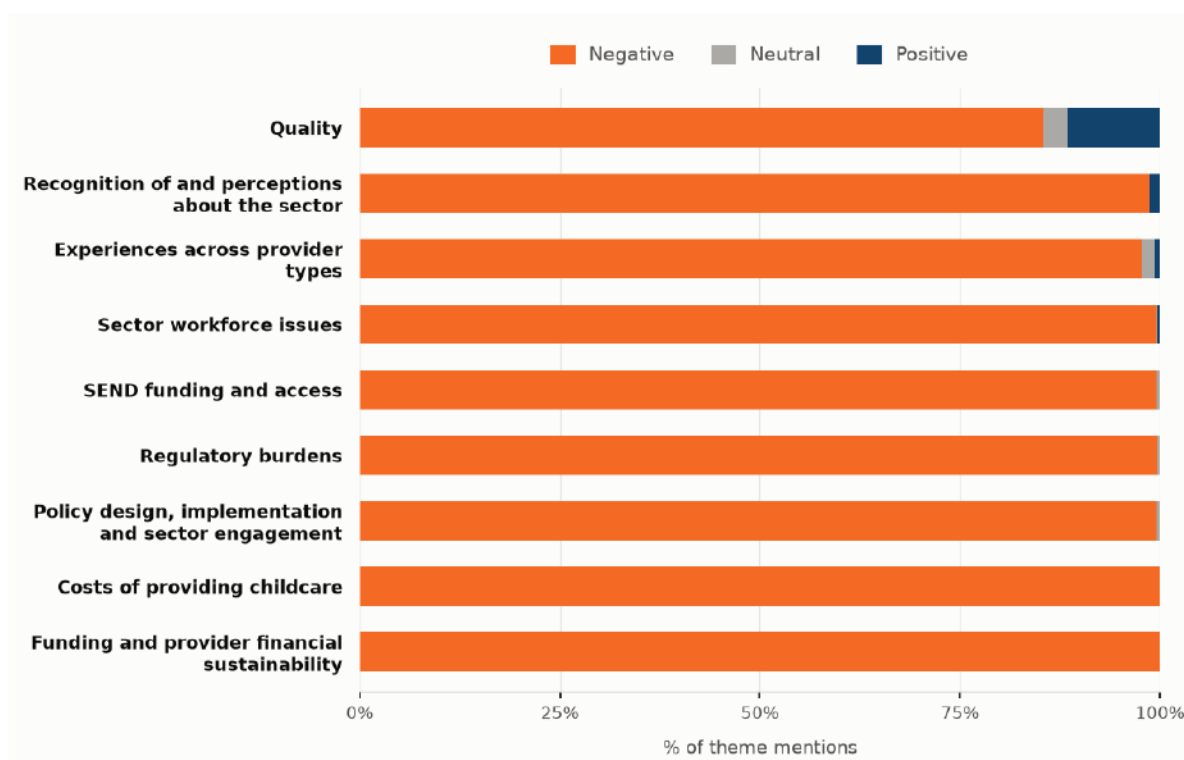
When asked about the main challenges facing the sector, providers and professionals most often raised issues relating to affordability and funding, particularly their financial sustainability, as well as related issues such as workforce challenges, regulatory burdens and SEND funding and access. Respondents also highlighted differences in how policy, funding arrangements and communications affect different provider types, alongside wider concerns about policy design, implementation and perceptions of the sector.

What do (or did) you see as the main challenges facing the early years education and childcare sector, if any?

916 providers responded to this question



This chart displays the 9 most common themes raised by respondents to this question. Related themes have been grouped together, and the size of each bubble reflects the relative frequency with which respondents mentioned each theme.



For each theme, we include some of the topics and issues that providers and professionals commonly raised in response to this question:

What do (or did) you see as the main challenges facing the early years education and childcare sector, if any?	
Themes	What providers and professionals said
Affordability and funding	
Funding and provider financial sustainability	The majority of respondents highlighted government funding rates as being a key challenge for the sector, which have led to providers operating at a loss, closing, or reducing capacity. Some said that the limited ability to offset shortfalls through additional charges or top-ups had compounded these pressures. Respondents also highlighted the combined impact of financial pressures and staffing shortages, which they said were contributing to closures among PVI nurseries, preschools and childminders.
Costs of providing childcare	Many also raised rising costs, including wages, employer National Insurance contributions, utilities, insurance, rent and other operational costs, which had widened the gap between providers' costs and income.
Access to high-quality services	
Sector workforce issues	Providers and professionals highlighted challenges in recruiting and retaining qualified practitioners. They linked this to low pay, workload pressures, burnout, limited career progression, access to continuing professional development, and a lack of pay recognition for higher qualifications.

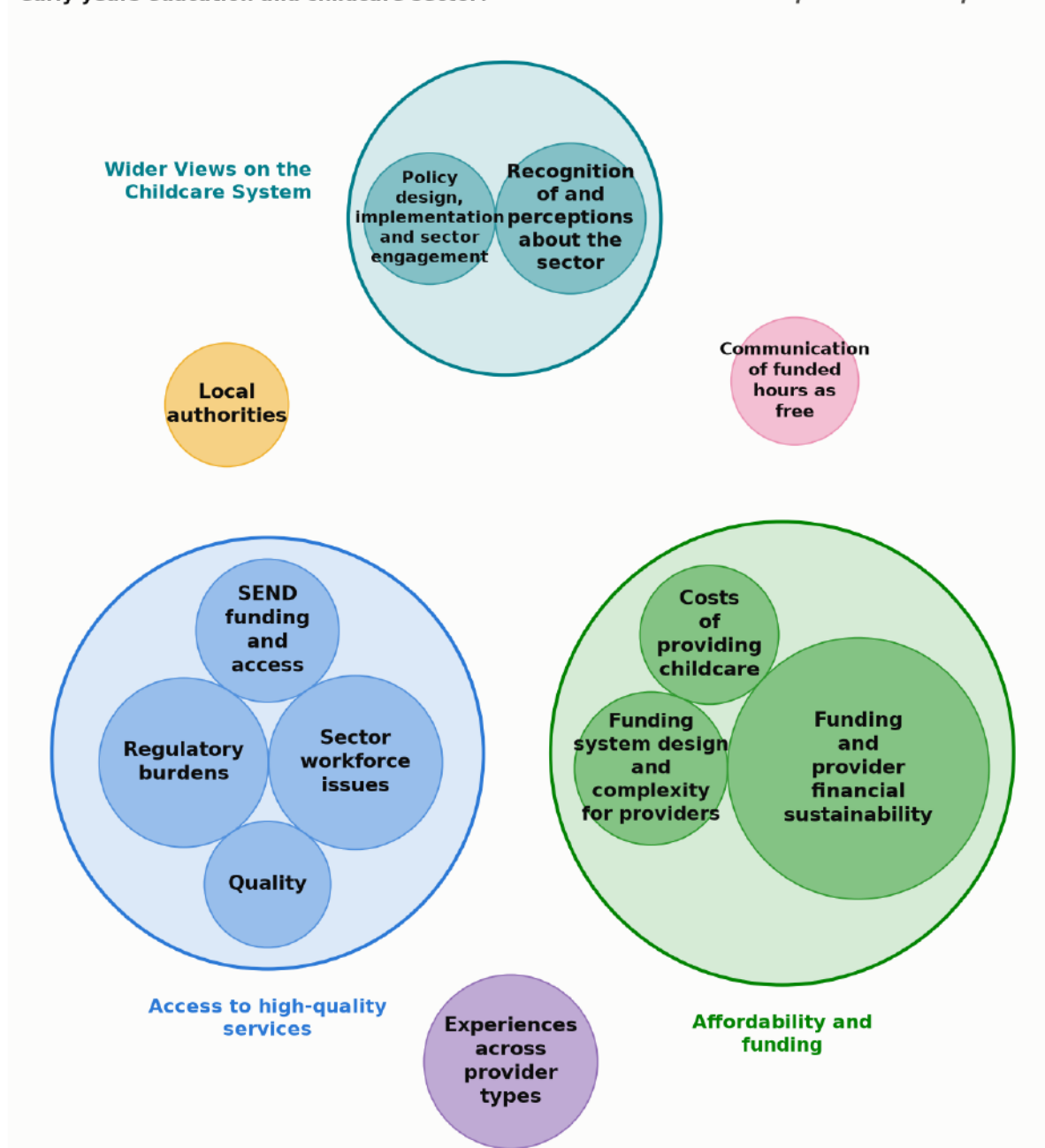
Regulatory burdens	Respondents said that compliance, documentation, safeguarding, funding administration and Ofsted inspection requirements placed significant demands on staff time. Some said inspections could be demanding and inconsistent and highlighted the particular impact of these requirements on smaller providers.
SEND funding and access	Respondents highlighted increasing numbers of children with SEND, developmental delays, and other additional needs. Some raised concerns about the level, consistency and timeliness of SEND funding and specialist support, and said providers were often required to meet complex needs without adequate resources.
Quality	Providers and professionals emphasised the important role of early years practitioners in supporting children's development, learning and safeguarding. Some also said that workforce challenges, financial pressures and administrative demands could make it more difficult to maintain high-quality services.
<i>Cost drivers and the impact of different provider types</i>	
Experiences across provider types	Respondents highlighted differences in how policy, funding arrangements and communications affected different provider types. They said these could create challenges for childminders and PVI providers, particularly in comparison with school-based provision and larger providers. Some also linked the decline in childminder numbers to disproportionate challenges of funding arrangements, tax changes and regulatory requirements.
<i>Wider views on the childcare system</i>	
Policy design, implementation and sector engagement	Respondents described challenges created by frequent changes to funding rules, qualification requirements, inspection frameworks, EYFS requirements and wider legislation. Many said changes were not always communicated clearly or introduced with sufficient notice, creating uncertainty and making long-term planning more difficult.
Recognition of and perceptions about the sector	Providers and professionals raised concerns about how the sector is perceived and represented. Some said public and policy perceptions focused disproportionately on safeguarding failures and did not sufficiently recognise positive practice across the sector. Some also said the sector was often viewed primarily as enabling parental employment, rather than as an important stage in children's early education and development.

Q18: What changes, if any, would you like to see in the early years education and childcare sector?

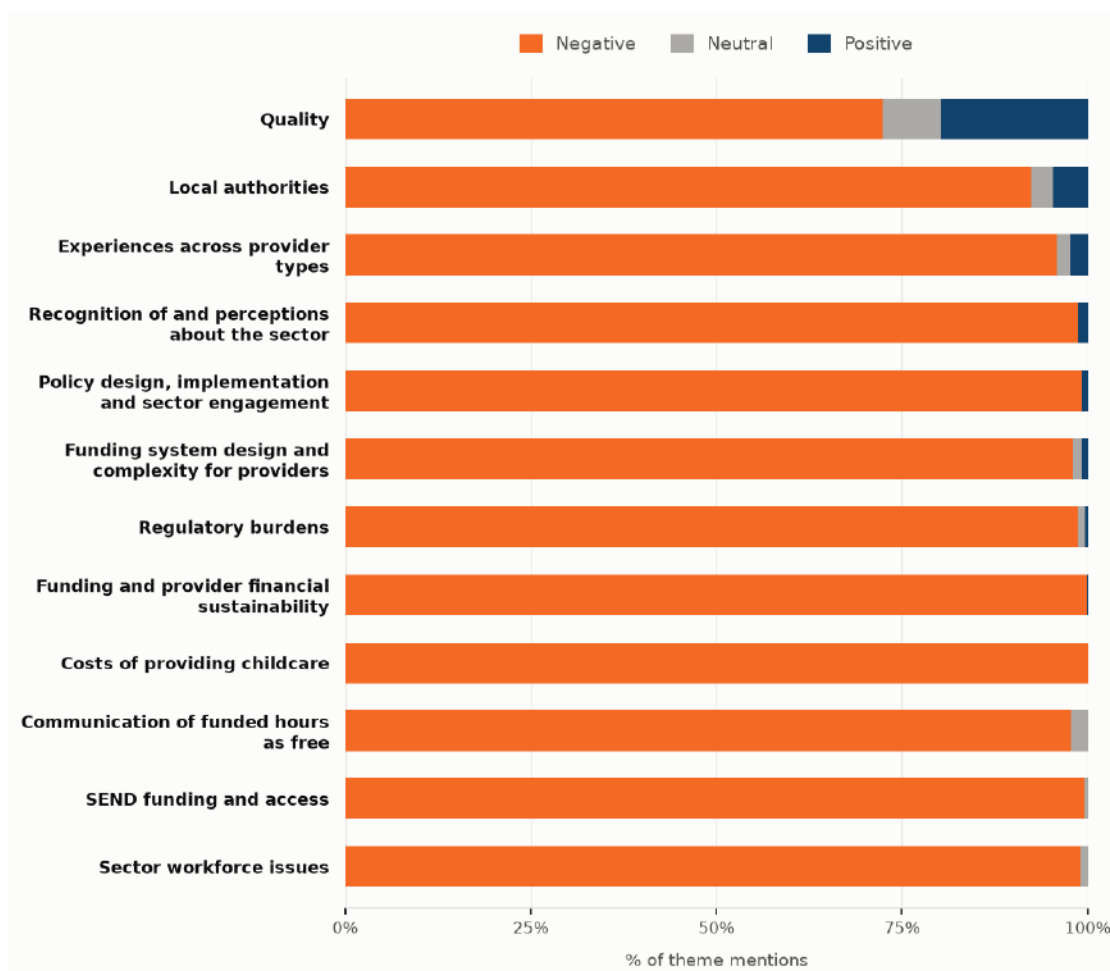
When asked what changes they would like to see in the sector, providers and professionals most often suggested improvements relating to funding and their financial sustainability, particularly funding rates, system design and the costs of providing childcare. Respondents also frequently highlighted changes to improve access to high-quality services, including on workforce issues, regulatory burdens and SEND funding and access. Other commonly raised themes related to policy design, the role of public bodies, differences across provider types, and how funded childcare is communicated to families.

What changes, if any, would you like to see in the early years education and childcare sector?

909 providers responded to this question



This chart displays the 12 most common themes raised by respondents to this question. Related themes have been grouped together, and the size of each bubble reflects the relative frequency with which respondents mentioned each theme.



For each theme, we include some of the topics and issues that providers and professionals commonly raised in response to this question:

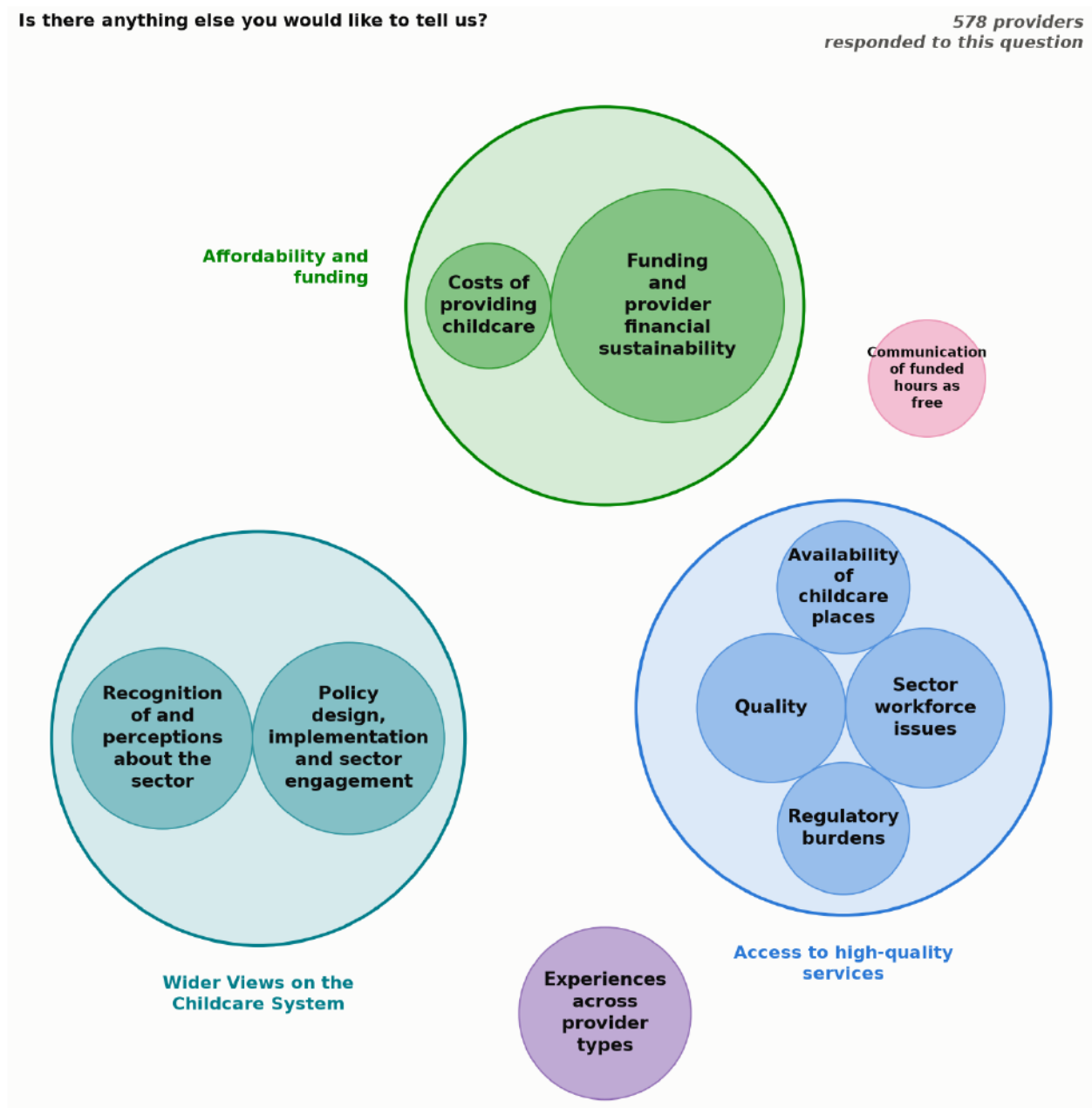
What changes, if any, would you like to see in the early years education and childcare sector?	
Themes	What providers and professionals said
Affordability and funding	
Funding and provider financial sustainability	The majority of providers and professionals suggested changes to funding they would like to see, particularly that funding rates should better reflect the cost of delivering childcare, including staffing, premises and other operating costs. Some also said funding should be updated more regularly and applied more consistently across provider types, age groups and locations, and that providers should have greater flexibility to recover shortfalls.
Funding system design and complexity for providers	Respondents suggested changes to the design of the funding system which would reduce complexity, including that entitlements should not be structured on a 38-week model. Some also proposed changes to eligibility criteria and funding arrangements to better reflect different family circumstances and children's needs.
Costs of providing childcare	Respondents said PVI providers face higher operating costs than some other provider types, including through business rates, VAT and employer National Insurance contributions. Some suggested these differences should be reduced.

Access to high-quality services	
Sector workforce issues	Providers and professionals suggested changes to address sector workforce issues, including higher pay, clearer career pathways and greater investment in workforce development. They said this would also support recognition of early years education and childcare as a skilled profession.
Regulatory burdens	Many set out changes to the inspection and regulatory framework, including a more proportionate approach to quality assessment and a reduction in administrative requirements, which could ease disproportionate challenges for smaller providers. Many also highlighted related regulatory processes which could be simplified such as, paperwork, funding claims, reporting requirements and eligibility checks.
SEND funding and access	Respondents called for improvements to SEND funding and support, to make it more responsive to children's needs. Some also highlighted the importance of earlier intervention, timely assessments and stronger collaboration between providers and public services.
Quality	Some respondents raised concerns and suggested changes to staffing ratios, saying that increased ratios could affect quality of care and place additional pressures on staff, particularly when supporting children with additional needs.
Wider Views on the Childcare System	
Recognition of and perceptions about the sector	Providers and professionals highlighted that early years education and childcare should be better recognised as an important part of children's early development and asked for greater recognition of their role within the wider system of support for children and families.
Policy design, implementation and sector engagement	Respondents said policy changes should be developed with greater engagement with and input from the sector, introduced with sufficient notice, and supported by longer-term funding arrangements to enable effective planning.
Cost drivers and the impact of different provider types	
Experiences across provider types	Respondents highlighted differences in how policy, funding arrangements and regulation affect different provider types, and said these should operate more equitably across the sector. Some raised concerns that policy support for school-based nurseries had affected childminders and PVI providers, and called for greater recognition of the role these providers play.
Information and consumer choice	
Communication of funded hours as free	Many raised concerns about how funded childcare is described and communicated as 'free', and said clearer information on childcare support, eligibility and entitlements would help families better understand the support available.
Role of public bodies	
Local authorities	Respondents highlighted variation in how local authorities administer funding and implement national guidance. Some called for greater consistency, transparency and simplification of local processes to reduce administrative burdens and improve the flow of funding to providers.

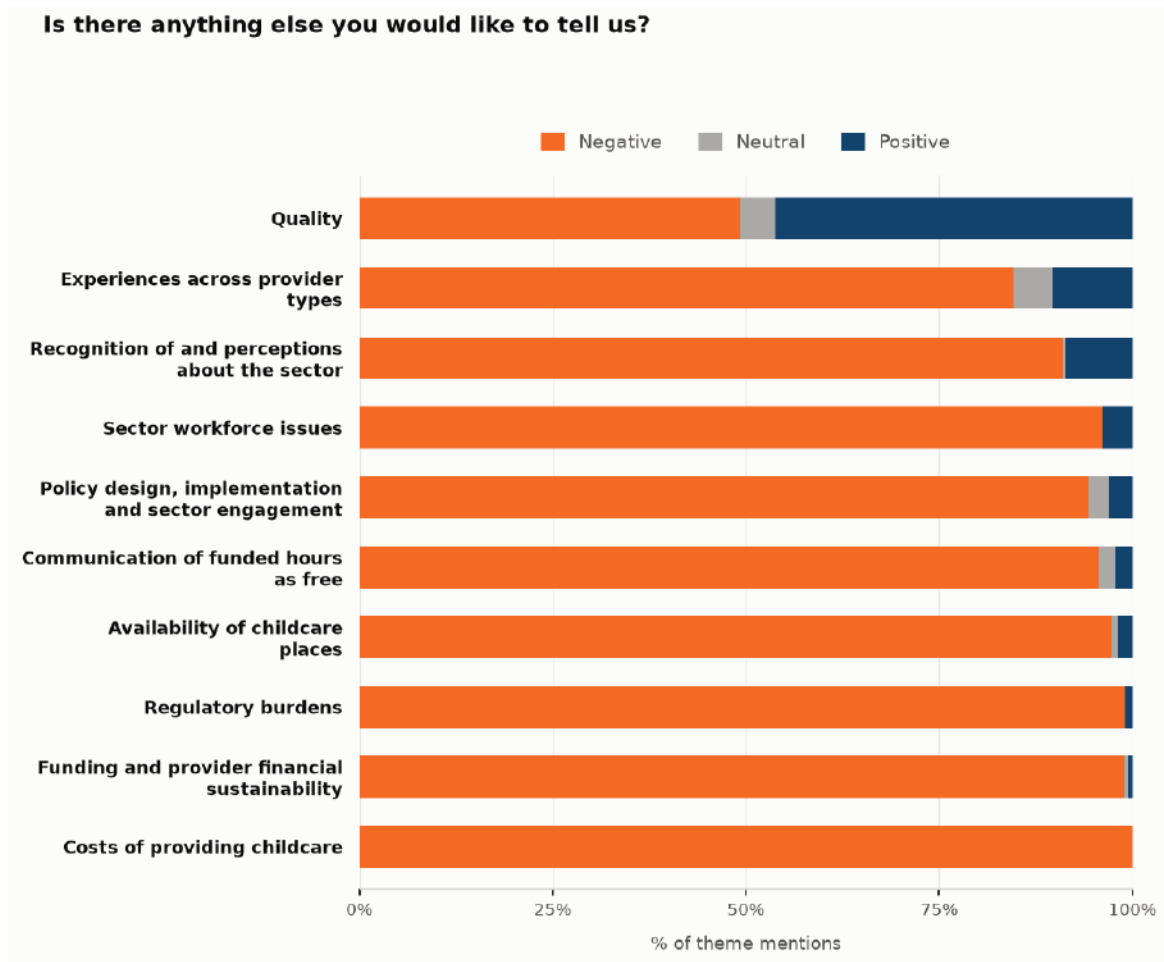
Q19: Is there anything else you would like to tell us?

Is there anything else you would like to tell us?

578 providers
responded to this question



This chart displays the 10 most common themes raised by respondents to this question. Related themes have been grouped together, and the size of each bubble reflects the relative frequency with which respondents mentioned each theme.



Q20: What would you like to tell us about early years education and childcare?²²

Respondents to this question raised issues that were consistent with the themes set out above. Given the lower number of responses to this question, we have not included a thematic analysis of these responses.

²² 18 respondents who indicated they only worked as an early years education and childcare professional outside the UK, more than two years ago, never, or only provided care to school-age children, answered this question.

Other interested people

Who responded

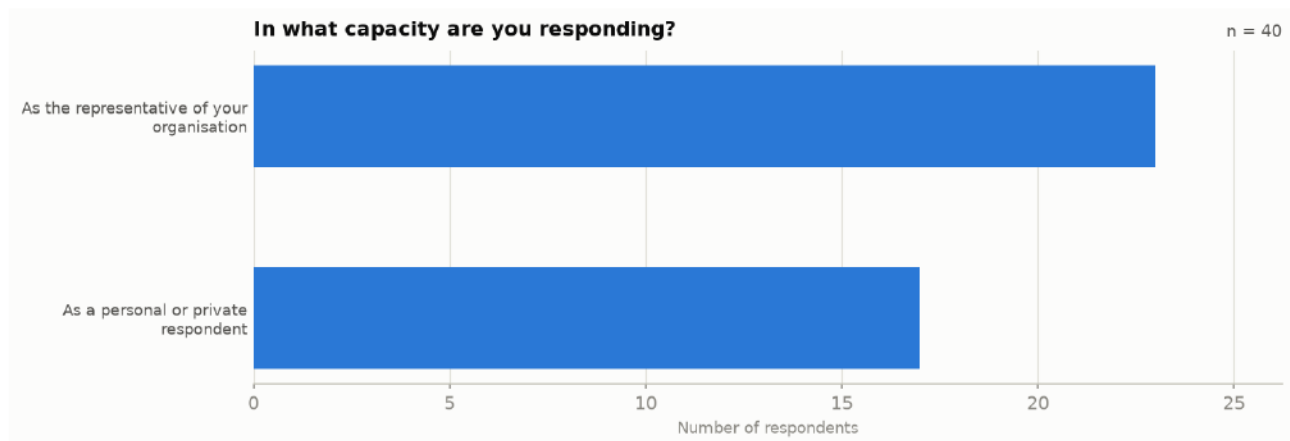
We heard from **40 other interested people**. These included organisations with an interest in the education and childcare sector (23) and other members of the public (17).

Given the smaller number of responses received from other interested people, below we provide a shorter summary of the themes which have emerged, many of which reflected those set out above.

Questions

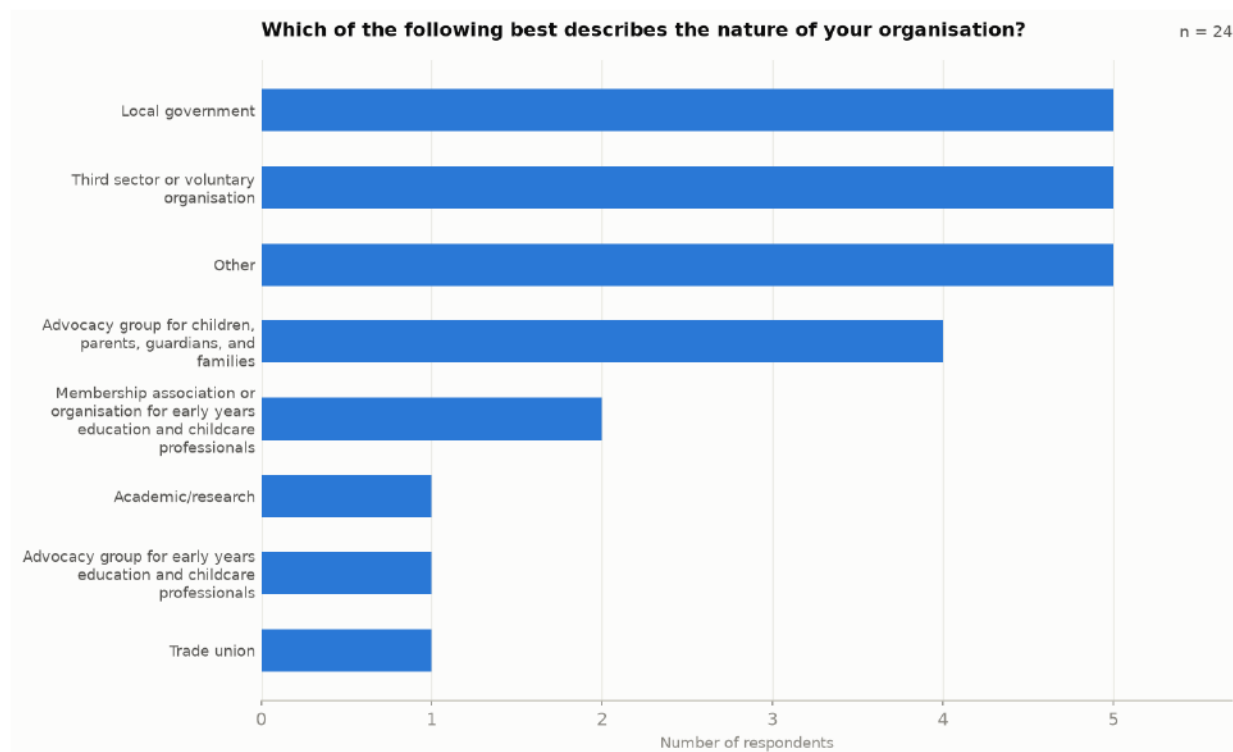
Q1: In what capacity are you responding?

- ☐ As the representative of your organisation
- ☐ As a personal/private respondent



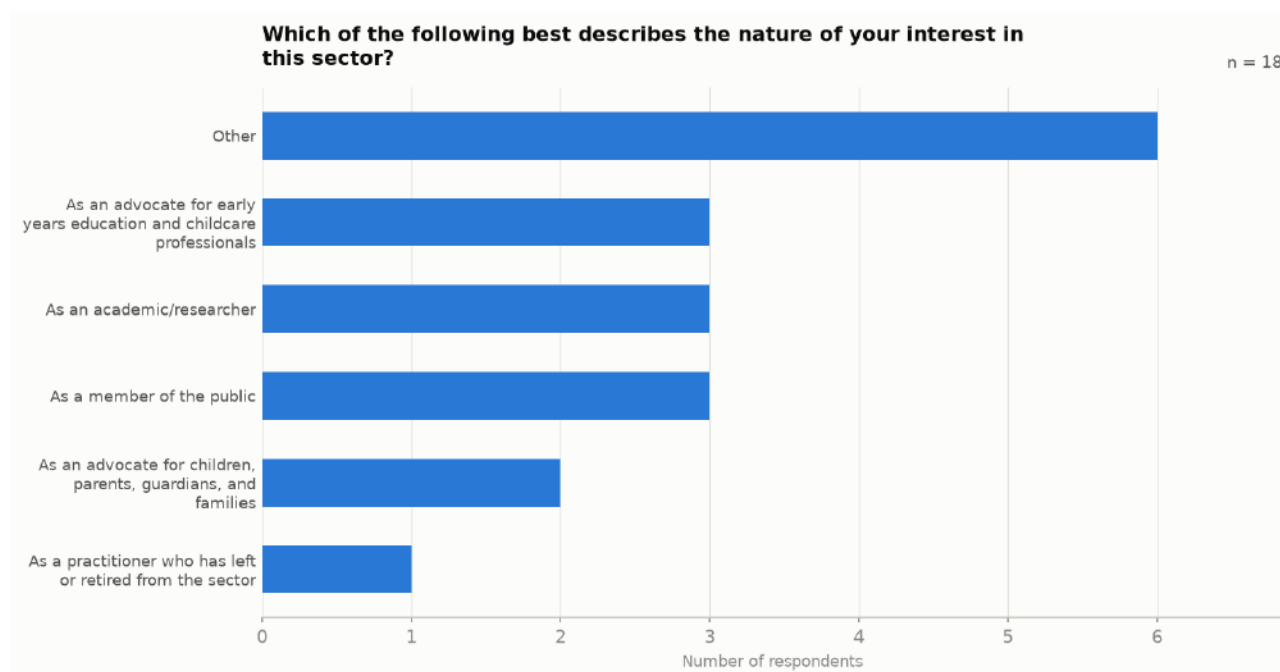
Q2: Which of the following best describes the nature of your organisation?

- ☐ Academic/research
- ☐ Advocacy group for early years education and childcare professionals
- ☐ Advocacy group for children, parents, guardians, and families
- ☐ Employer of parents with children of pre-school age
- ☐ Local government
- ☐ Membership association or organisation for early years education and childcare professionals
- ☐ Think tank
- ☐ Third sector or voluntary organisation
- ☐ Trade union
- ☐ Other (write your answer in the text box below)



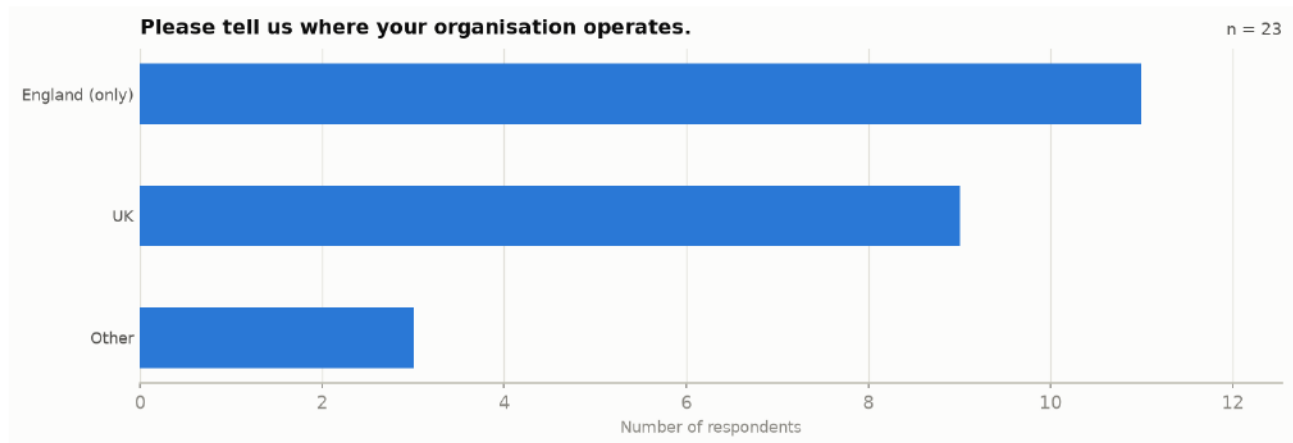
Q3: Which of the following best describes the nature of your interest in this sector?

- ☐ As an academic/researcher
- ☐ As an advocate for early years education and childcare professionals
- ☐ As an advocate for children, parents, guardians, and families
- ☐ As an employer of parents with children of pre-school age
- ☐ As a member of the public
- ☐ As a practitioner who has left or retired from the sector
- ☐ Other (write your answer in the text box below)



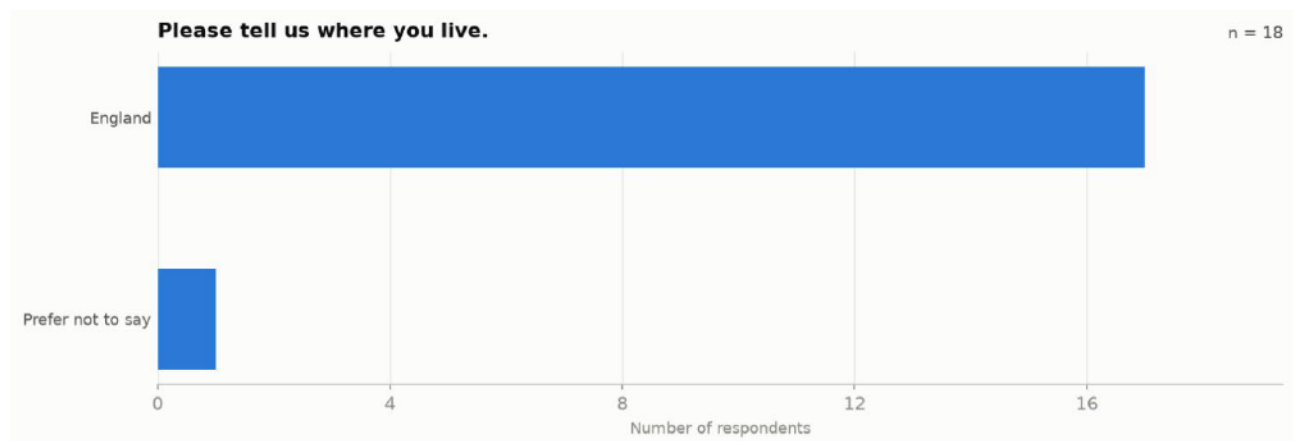
Q4: Please tell us where your organisation operates.

- ☐ England (only)
- ☐ Scotland (only)
- ☐ Wales (only)
- ☐ Northern Ireland (only)
- ☐ England and Wales (only)
- ☐ Great Britain
- ☐ UK
- ☐ Other (write your answer in the text box below)



Q5: Please tell us where you live.

- ☐ England
- ☐ Northern Ireland
- ☐ Scotland
- ☐ Wales
- ☐ Outside the UK
- ☐ Prefer not to say



Q6: Are there any specific features of early years education and childcare services in England that you wish to bring to our attention?

Q7: Are there any publications, sources of information or organisations you think we should consult for our market study?

Q8: Please share anything else you would like to tell us about early years education and childcare.

In their free text responses, respondents highlighted funding issues, including concerns that funding rates did not cover delivery costs, as well as wider barriers to affordable, high-quality provision for disadvantaged children, children with SEND and families in areas with limited services. They frequently raised workforce pay, qualifications and retention as a key barrier which could undermine provider sustainability and quality. Respondents also had concerns about policy stability and the ability of local authorities to oversee and shape provision effectively. Some said that complex funding and eligibility arrangements, alongside poor communication of funded entitlements and the use of additional charges, could make it difficult for families to understand the support available and make informed choices.