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City of London

**Childcare Sufficiency Assessment
Service: Update**

Summer 2025

September 2025

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Key Findings – Summer 2025

- 1 The City of London continues to account for a childcare occupancy which is concentrated during the midweek period of Tuesday – Thursday - an outcome that is triangulated via feedback from employers, which confirmed that a Tuesday – Thursday flexible working practice is a notable facet of their offer to employees.
From the perspective of parental feedback in summer 2025, it was observed that the majority of respondents who stated that they were in *some form of employment* outlined that they were able to work from home.
- 2 From a collective perspective, it is evident that the vital themes of recruitment and retention have not been as challenging an issue as it has been (aligned to relevant feedback from City of London childcare providers), in the past two years - and that a previous theme/problem(s) of applicants either not attending interviews, or not lasting for any reasonable length of time in a position, had not been experienced to the extent they had been.
- 3 Parents and carers were asked whether there was any type of childcare they would like to use between September 2025 - August 2027 that they were **not** currently using.
Parents and carers of *0-4 year olds* most frequently stated that they would like, in the forthcoming years, to access a **local** day nursery (39%) - followed in frequency by a **local** after school club (19%).
- 4 As the second part of the decade progresses, it can *continue to be* considered important context that the numbers of nursery children moving in to a Reception class are decreasing in inner-London boroughs - although for the City of London this needs to be considered within a further context that occupancy of City of London childcare settings is, to a notable extent, particularly influenced by working parents that commute in to the City...
- 5 ...However, an ongoing trend, that is further evidenced via the summer 2025 sufficiency research, is that City of London-based childcare providers continue to (as they did in 2024) report that demand - in the form of enquiries and eventual take-up – for places for babies/infants is both buoyant and increasing.
- 6 All parents and carers of 0-11 year olds were invited to state in summer 2025 whether there was anything that the **City of London should - in their opinion - be doing**, in terms of supporting parents and carers with early years childcare in general in the future?
The two types of recurrent responses were received from approximately 5-6 parents and were (words to the effect):

“Help to develop more informal Stay and Play-type childcare within the City area”.

“The ‘childcare’ at The Aldgate School needs to be retained”.

- 7 The City of London Education and Early Years Service could consider including consultation with (the London Borough of Islington-based) Prior Weston Primary School about their childcare provisions as part of its ongoing twice-yearly engagement with *relevant* 'local' providers - given the fact that some families that are resident in the City of London access early years childcare places at the setting, including via the City of London's Childcare Accessibility Scheme¹. This process could begin in autumn 2025.
- 8 In summer 2025, the Childcare Sufficiency service attempted for the first time to engage with City of London-based employers. This proved to be a challenging undertaking and the research struggled to convince employers (and their HR/personnel departments) that this was a meaningful issue, of which employers could benefit from having an amplified understanding. The City of London Education and Early Years Service should, moving forward, consider how it can best engage with such employers about the theme of early years and childcare - *and* the role of the Family Information Service - from a mutually beneficial perspective.

¹ <https://www.fis.cityoflondon.gov.uk/asset-library/city-of-london-childcare-policy-june-20-2025.pdf>
Place Group – September 2025

Introduction

The City of London Education and Early Years' Service (EEYS) continues to ensure that every child living or educated in the City of London has the opportunity to achieve their maximum potential and thrive in their unique 'square mile' community.

To this effect, in summer 2024, the City of London commissioned an extended three-year sufficiency service whereby up to mid-2027, the ongoing sufficiency and sustainability of childcare provision in the locality would be monitored and subject to evolving (twice yearly) strategic recommendations.

The sufficiency service continues to:

- Assess the existing childcare provision in the City of London, monitoring supply and demand and gaps (as they evolve) in the childcare market
- Monitor prevailing vacancies/occupancy being experienced by the City of London's childcare providers
- Review and continue to summarise evolving demographic data, including (as they become new and available) child population projections by age group
- Undertake periodic surveys and consultation exercises with local parents and carers
- (At relevant intervals) assess the ongoing awareness of the City of London Accessibility scheme
- (At relevant intervals) monitor the impact of the City of London Family Information Service regarding access to and sharing of relevant early years and childcare-themed information
- (At relevant intervals) monitor the ongoing reach, accessibility and use of the City of London Coltale programme by local families.

The role of that service therefore informed this report at the period: summer 2025.

Context in summer 2025 *includes*:

The City of London participates on an annual basis in the Coram Family and Childcare annual survey². The (relevant to inner-London) 2025 outcomes focused to a notable degree on childcare costs and fees:

- On average, Inner London is 70% more expensive than the Midlands region for full-time childcare
- In the English regions, the cost of 25 hours of childcare for children under two varies substantially. 'Nursery costs' are highest, on average, in Inner-London (£92.01), which is 52% more expensive than the lowest cost in the Yorkshire and the Humber region (£60.51)
- Childminder costs in Inner London (£82.55) are 68% more expensive than in the Midlands region (£49.27)
- For children aged two, nursery costs are again highest in Inner London (£90.25), 56% higher than in the East Midlands region (£57.69), which has the lowest cost
- Within the English regions, the cost of a full-time nursery place (for those aged under two) is 62% higher in Inner London (£319.24) than in the East Midlands region (£197.48)
- Inner London has the lowest levels of provision for two-year-olds who are entitled to the 15-hour funded entitlement for disadvantaged families (55%) and for three- to four-year-olds who are entitled to the 15-hour universal funded entitlement (55%)

² <https://www.familyandchildcaretrust.org/childcare-survey-2025>
Place Group – September 2025

Additionally, throughout 2025, the DfE has been supporting local authorities with estimates and forecasts aligned to the funded entitlements – for example:

Table A - Estimated percentage of eligible 3 and 4 year old children taking up registered provision in 2024 and 2025 in Inner London boroughs, including the City of London

London Borough	Number of 3 & 4s in provision at an early years setting inside or outside of the City of London	Estimated number of eligible 3 & 4s (based on 2024 published data)	Estimated % take up (based on 2024 published data)	Estimated number of eligible 3 & 4s (based on 2025 published data)	Estimated % take up (based on 2025 published data)	Change
n	80	189	42.3%	178	45.0%	2.7%
Westminster	2,526	5,143	49.1%	3,949	64.0%	14.9%
Lambeth	5,215	6,783	76.9%	5,745	90.8%	13.9%
Southwark	5,110	7,432	68.8%	6,258	81.7%	12.9%
Camden	2,929	5,414	54.1%	4,424	66.2%	12.1%
Wandsworth	6,066	7,738	78.4%	6,817	89.0%	10.6%
Hackney	6,103	7,222	84.5%	6,473	94.3%	9.8%
Lewisham	5,982	7,683	77.9%	6,953	86.0%	8.1%
Haringey	5,120	6,231	82.2%	5,877	87.1%	4.9%
H&F	2,871	4,034	71.2%	3,786	75.8%	4.6%
Islington	3,548	4,768	74.4%	4,578	77.5%	3.1%
Tower Hamlets	6,240	8,307	75.1%	8,091	77.1%	2.0%
RBKC	2,562	2,765	92.7%	2,763	92.7%	0.0%
Newham	8,804	9,748	90.3%	10,193	86.4%	-3.9%

Table A indicates for the City of London a marginal increase in take-up across the period 2024-2025 – at a similar percentage to the bordering London Borough of Islington and the London Borough of Tower Hamlets, however, not to the same extent as other bordering London Boroughs, such as the London Borough of Hackney and especially the City of Westminster.

However, Table B (overleaf) indicates a typical trend that is observable across all inner-London Boroughs and those boroughs that border the City of London – a decreasing number of pupils entering a primary school reception cohort due to falling birth rates and an increasing number of families moving outward from London, in this case for the period 2015-2016 – 2024-2025.

Table B - Number of pupils entering primary School Reception Year in Inner London LAs for 2015 – 2025

Local Authority	2015-2016	2024-2025	Change	%
City of London	30	29	-1	-3%
Westminster	1,562	1,019	-543	-35%
Southwark	3,590	2,528	-1,062	-30%
Camden	1,727	1,234	-493	-29%
Islington	2,115	1,513	-602	-28%
Lambeth	3,236	2,368	-868	-27%
Hackney	2,814	2,072	-742	-26%
Haringey	3,209	2,684	-525	-16%
Tower Hamlets	3,418	3,102	-316	-9%
London	105,705	88,651	-17,054	-16%
England	661,962	585,544	-76,418	-12%

Table B also indicates that two of the boroughs to the north of the City of London, which share a number of affiliations with the City of London: (a) London Borough of Hackney and: (b) London Borough of Islington have experienced Reception class roll decreases of circa 27% in the past. Therefore, as the second part of the decade progresses it can be considered important context that the numbers of nursery children moving in to a Reception class are decreasing in inner-London - although for the City of London this needs to be considered within a further context that occupancy of City of London childcare settings is, to a notable extent, particularly influenced by working parents that commute in to the City.

Finally, with further consideration for the London Borough of Islington: during the course of the period 2024-2025 it has become increasingly evident that a progressive (though still relatively small) number of parents and families that are resident in the northern vicinity of the City of London are accessing early years childcare places which are situated at Prior Weston Primary School and Children's Centre - which is located approximately 100 yards outside of the City geographical boundary, and which is more expensive for City of London resident families than it is for families who are resident in the London Borough of Islington. This provision has:

- 15 full-time equivalent places for children aged 6 months to 2 years
- 24 places for children aged 2-3 years old in a toddler room and;
- 60 places in a nursery class for 3-4 year olds,

and thus, to an extent, represents a degree of competition to City of London childcare providers that are located within relatively close proximity to Prior Weston Primary School, *including*:

- Newpark Childcare Centre
- Barbican Playgroup
- Hatching Dragons Nursery
- City Child Bright Horizons.

Summer 2025 Childcare Sufficiency Assessment Research Methodology

This Childcare Sufficiency update report has been researched and produced via:

1. Analysis of the outcomes of structured interviews - that took place in June 2025 - with the early years childcare providers/settings situated in the City of London.
2. Analysis of an online survey with City of London resident parents and carers, which was promoted via sources including: (a) City of London Family Information Service; (b) The Aldgate School and; (c) City of London libraries service.
3. Analysis of the outcomes of an online survey with major City of London employers.

1 Feedback from City of London Early Years Childcare Providers

The narrative below summarises feedback, aligned to specific themes, received (as an outcome of structured interviews undertaken through virtual/web e-interviews or visits) from representatives of six of the City's early years childcare providers during the period June & July 2025.

1.1 Evident occupancy in summer 2025

For context, Table 1 below outlines the number of children that are reported to attend in summer 2025, the six main early years childcare providers situated in the City of London, on a typical weekday.

Table 1 - Early years *childcare* settings located in the City of London and the numbers of children stated to attend on a typical weekday, in summer 2025³

Provider	Number of children who attend on a typical weekday
The Aldgate School childcare element	15
The Aldgate School Nursery	26 sessional part-time morning and afternoon places
Hatching Dragons Nursery	27
Smithfield House Nursery	35
Newpark Childcare Centre	25
Barbican Playgroup	11
City Child Bright Horizons	30

- 1.1.1 The general feedback about the theme of occupancy was positive, with just one of the six representatives stating that it was a challenge/lower than they would ideally like (although they were expecting an increase in numbers *"in late June 2025"*.)

Positive feedback included:

"It is much better than it was in 2024... and we are generally more positive now about numbers".

"Occupancy is currently very good, and we have a waiting list of babies".

³ It can be noted that Charterhouse Square School hosts a nursery, however there is no provision of free entitlement places.

Image 1 below indicates the frequency with which responding early years childcare providers stated that two particular weekdays were their busiest day.

Image 1 - Frequency with which particular weekdays were a setting’s busiest

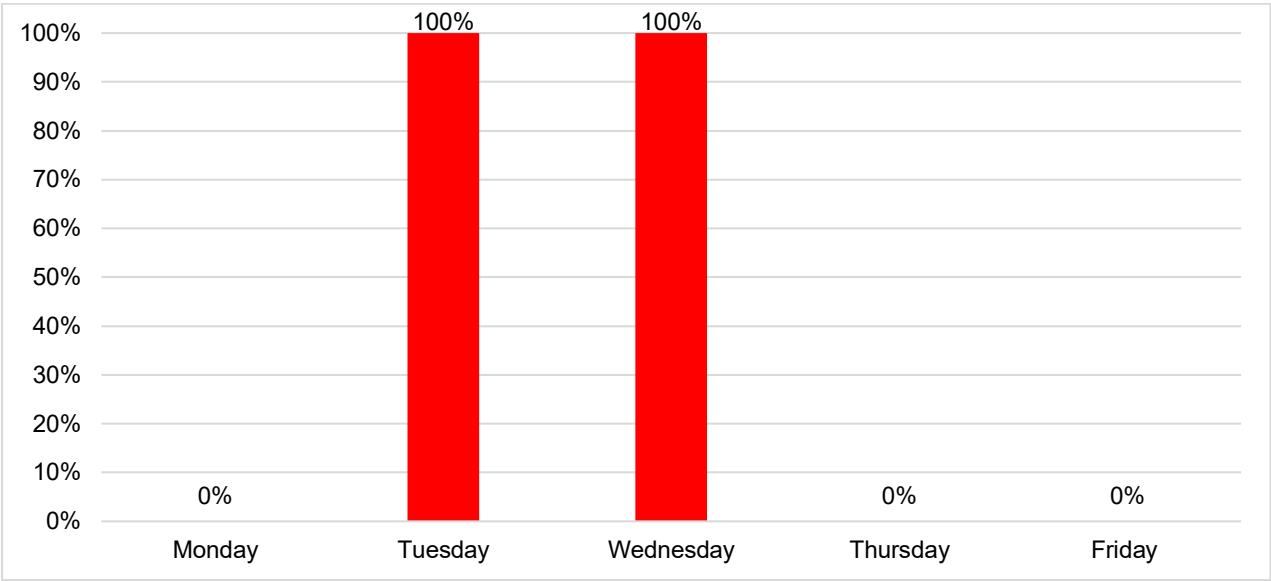


Image 1 is self-explanatory and indicates that midweek continues to be when City of London early years childcare settings are experiencing the most pronounced demand and occupancy. One representative summarised their own situation (which reflected the situation for three other settings) when stating that:

“On Mondays and Fridays... we see half the numbers that we do midweek”.

1.1.2 Five of the six responding early years childcare providers/settings stated that they had a waiting list in summer 2025.

As with the winter 2024-2025 sufficiency update research and report, one theme was repeated: that parents/carers were placing a child’s name on a waiting list when the child was an infant (aged 0-12 months), and this included for places for 9 month year olds – 23 months.

Feedback included:

“Demand for our baby room is much higher than it has ever been before”.

“We are going to have to have a think about how we possibly remodel our business and make it more viable to take [more] babies”.

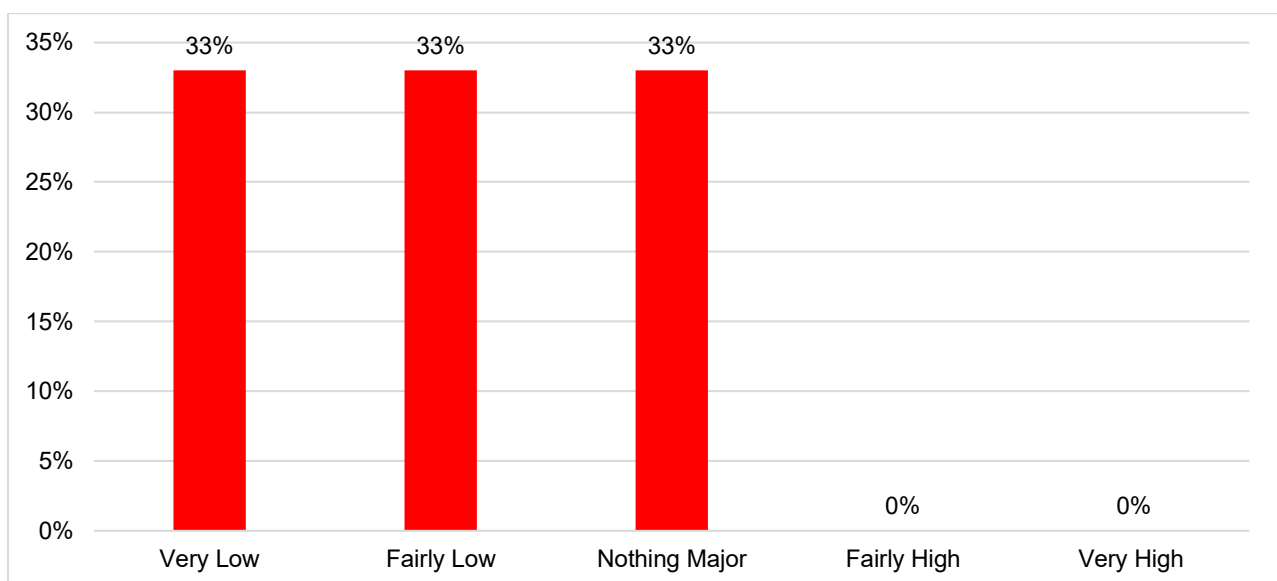
1.1.3 All early years childcare providers/settings were invited to state: the percentage of families attending their setting who were resident in the City of London – in comparison to the percentage of families attending their setting who were resident outside of the City of London.

- The average percentage of City of London residents was: 45%
- The average percentage of non-City of London residents was: 55%.

Only one setting stated that all of their families/children were resident in the City of London. Two settings estimated that less than 20% of their families/children were resident in the City of London.

It was observed too that representatives of two settings outlined how, in their experience - as was the case in late 2024 sufficiency update - families were moving out of central London and that this included estates such as the Barbican. As with previous feedback, they tended to align this occurrence to the ability for professionals to work from home and therefore not to have the disadvantages of living in central London.

- 1.1.4 All early years childcare providers/settings were invited to also outline (in Image 2) the type of demand that they were in summer 2025 experiencing aligned specifically to the September 2025 extended offer for working parents of 9 months – 3 years old who can receive up to 30 hours a week free education and childcare, if eligible. In response:



Relevant qualitative feedback included:

"I think, in total, we have only received two enquiries that specifically ask about 'September 2025'..."

"The 'demand' tends to be reflected in what we are seeing 'waiting list-wise', i.e. names being put down when a child is a baby".

"We think the level of enquiries for 'September 2025' will increase in the summer".

"We have not had many enquiries, but the parents who have enquired – once again, in some instances – think that the whole place will be free".

1.2 Childcare places which are fee-based

- 1.2.1 Table 2 below outlines the **average** hourly fees per age group outlined by the relevant responding early years childcare providers

Aged 0 –12 months	Aged 1 year	Aged 2 years	Aged 3 years	Aged 4 years
Summer 2025 hourly fees				
Av. Hourly rate: £12.09	Av. Hourly rate: £12.09	Av. Hourly rate: £13.04	Av. Hourly rate: £11.48	Av. Hourly rate: £11.48 ⁴
...In comparison with Autumn 2024 hourly fees				
Av. Hourly rate: £11.68	Av. Hourly rate: £11.68	Av. Hourly rate: £11.20	Av. Hourly rate: £11.48	Av. Hourly rate: £11.39

Table 2 therefore, indicates that the average fee level had increased over the past 12 months, in particularly for places for over 2 year olds.

- 1.2.2 The representatives of the early years childcare providers were asked: *Do you continue to believe that the (new) hourly funding rates from the City – including for the April 2024 and September 2024 extended funded entitlements – are at sufficient levels?*

Feedback was mixed. 50% stated: Don't Know; 33% stated: yes, they are fine – and one representative stated: No, with a qualifying response that:

“For every 2 year old [funded place] we are losing approximately £2.00... babies fees are making up for it... but September 2024 changes in fact changed everything for us... but it is not a big worry”.

1.3 Recruitment and retention of staff

- 1.3.1 Two early years childcare providers stated that they were, in summer 2025, experiencing issues with recruitment and retention. The feedback from these two specific representatives was as follows:

“We are, as always, struggling with agency fees and the variable quality of temporary staff that agencies provide... we are noticing too that the CVs we are being sent have the details redacted concerning the applicant's experience”.

“We seem to have people leave – and then they want to come back... and some of the younger staff, less experienced tend to see it not as a profession, but as them almost ‘babysitting’”.

The other four representatives outlined how, in general, recruitment and retention were not as challenging an issue as they had been in the past two years, and that a previous theme/problem(s) of applicants either not attending interviews, or not lasting for any reasonable length of time in a position, had improved.

⁴ The above calculations does not include the fees for the sessional Barbican Playgroup, which would have inflated an average.

2 Outcomes of summer 2025 consultation with parents and carers

The narrative below summarises the outcomes of an online survey which was promoted by the City of London to local parents and carers during the period June – August 2025.

71 parents and carers responded to the survey during an 8-week window, and they provided feedback about contemporary themes - including their views and intentions aligned to the extended funding.

- From **April 2024**, working eligible parents of two-year-olds were able to access 15 hours of funded childcare
- From **September 2024**, 15 hours of funded childcare was extended to all children of eligible parents from the age of nine months
- From **September 2025**, working eligible parents of children under the age of five will be entitled to 30 hours funded childcare per week.
- **and the theme of wraparound childcare...**

Essentially, their feedback provides an insight into **demand-themed** factors, that can inform the City of London's strategic planning.

2.1 Backgrounds of Respondents

2.1.1 Table 3 indicates the frequency with which responding parents/carers (who stated that they had a child(ren) aged 0-11 years) had a child(ren) of a specific age cohort.

Table 3 - Percentage of City resident children from specific age cohorts that were being raised by responding parents/carers

Age Cohort of children	Percentage of responding parents with at least one child in age cohort ⁵
Expectant	7%
0-8 months	28%
9-12 months	6%
1 year	32%
2 years	22%
3 years	16%
4 years	12.5%
5 years	6%
6 years	4%
7 years	4%
8 years	10%
9 years	6%
10 years	9%
11 years	4%

⁵ It was, of course, possible that parents/carers could denote more than one age group.

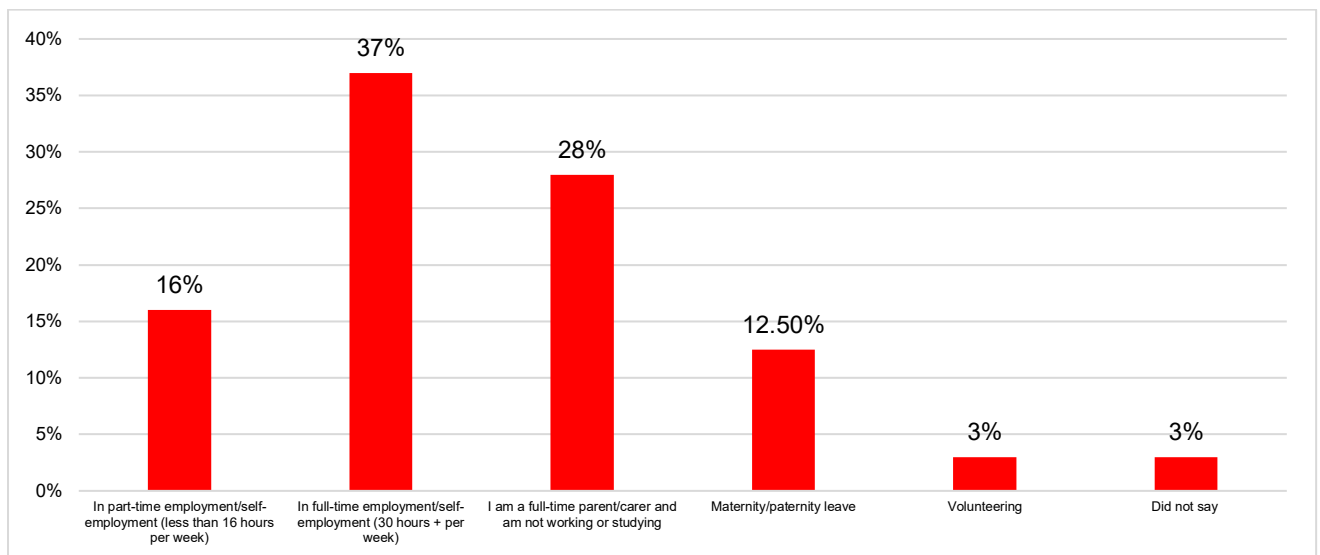
Table 3 indicates that parents/carers with children aged 1 year participated in the survey, with the highest frequency.

Additionally, 2.5% of responding parents/carers stated that they had twins, within the same age group - which was most frequently (twins of) 2 years of age.

2.1.2 7% of the respondents stated that they had a child or children with (diagnosed) Special Education Needs and/or Disabilities (SEND) - this was most frequently a child with Autistic Spectrum Disorder, who was 1-3 years of age. These carers, if they were accessing a type of formal childcare, were most frequently accessing a PVI sector day nursery.

2.1.3 All parents and carers were invited to state (what best described) their current employment circumstances.

Image 3 - Incidence of responding parents' employment circumstances



75% of those respondents who stated that they were in some form of employment additionally outlined that they were engaged in a type of flexible working arrangement, with the three most frequent being (in order of frequency):

- Working from home
- Flexi-time
- Compressed hours.

2.2 Current Usage of Formal Childcare

2.2.1 All parents and carers were asked about their current childcare usage.

58% were, at the time of the survey, using at least one type of formal early years childcare for 0-11 year olds. Table 4 below indicates the frequency with which responding parents/carers stated specific types of early years childcare.

Table 4 - Types of early years childcare used by applicable responding parents and carers⁶

Type of registered childcare	Percentage of relevant responding parents/carers
PVI-sector Day Nursery – full or part-time	61%
Sessional Pre School/Playgroup	11%
School-based Pre School/Nursery	6%
Registered Childminder	17%
Breakfast Club	11%
After School Club	20%
School Holiday Club	11%

19% of the relevant parents/carers stated that they were using early years or out of school childcare, which was located (to the best of their knowledge) outside of the City locality, most frequently within the London Borough of Islington.

Parents who were accessing a type of early years and childcare most frequently stated that this was for 30 hours/week or over – followed in frequency by 16-20 hours/week.

2.2.2 All responding parents and carers were invited to state their annual family income bracket (before tax).

Table 5 - Incidence of gross household income per year (before deductions/tax)

Annual household income	Percentage of relevant responding parents/carers	Most frequently stated type of <i>formal</i> childcare accessed during term-time
Up to £16,190	3%	Day nursery – full or part-time
£16,190 - £29,999	3%	Day nursery – full or part-time
£30,000 - £54,999	9%	Day nursery – full or part-time
£55,000 - £99,999	31%	Day nursery – full or part-time
£100,000 or above	54%	Day nursery – full or part-time

⁶ Respondents were able to denote more than one type of formal childcare.

2.2.2 All respondents who stated they were using formal childcare, were asked whether they - ideally - would like to increase the number of childcare hours they were using in the next three years.

28% of all responding parents/carers stated that they would like to increase their hours of formal childcare over the forthcoming years - and this was most frequently stated by parents who had a 1- 3 year old. The *average* number of (further, future) hours stated by such a parent was 10.5 hours.

Additionally, all parents and carers were asked whether there was any type of childcare they would like to use between September 2025 - August 2027 (that they were **not** currently using).

Table 6 below shows which types of childcare parents and carers stated they would ideally like to use in the forthcoming future.

Table 6 - Type(s) of formal childcare envisaged for future use up to 2028 ⁷

Type of childcare registered	Percentage of all parents/carers
Day nursery – full or part-time	39%
Sessional Pre School/Playgroup	12%
School-based Pre School/Nursery	23%
Registered Childminder	14%
After School Club	19%
Breakfast Club	12%
School Holiday Club	21%

Parents and carers of *0-4 year olds* most frequently stated that they would like, in the forthcoming years, to access a local day nursery (39%), followed in frequency by a school-based pre-school/nursery (23%).

2.2.3 All parents and carers of 0-4 year olds who were **not** currently using any type of formal childcare were invited to state the reasons why. Three repeated reasons for not using any type of formal childcare were (in order of frequency):

- I am waiting until I can use my free entitlements (12% of parents)
- I find formal childcare too expensive (7% of **relevant** parents)
- I prefer my children to be looked after by family and/or friends (7%).

^{7 7} Respondents were able to denote more than one type of formal childcare.

2.3 Intended Future Usage of Funded Extended Entitlements

2.3.1 In terms of the Government’s childcare entitlements, parents and carers who stated they had a child aged 0-4 years were asked whether they had heard of - or were using - one of them.

22% of responding parents/carers resident in the City stated that they had a child aged 2 years. 57% of *these* parents/carers subsequently stated that they were currently accessing a funded entitlement for 2 year olds (with the other 43% stating that they had not heard of the existence of this funded entitlement).

2.3.2 40% of responding parents/carers stated that they had a child aged 3 and/or 4 years and 75% of these parents/carers subsequently stated that they were currently accessing the universal 15 hours funded entitlement for 3 and 4 year olds.
25% of relevant parents stated: I have heard of it, but I am not currently using it...

2.3.3 ...(As above) 75% of all responding parents/carers stated that they had a child aged 3 and/or 4 years and 37% of these parents/carers subsequently stated that they were currently accessing the working parents 30 hours childcare offer/entitlement for 3 and 4 year olds. 40% of relevant parents stated: I have heard of it, but I do not think I am eligible to use it.
(16% of relevant parents stated: I have heard of it and will use it in the future).

2.3.4 Considering the previous Government’s March 2023 announcement, that more parents will be supported through an **expansion of the funded childcare offers – see page 12 above** (which the Labour Party Government committed to continuing since it was elected in July 2024), including providing a set number of hours of funded childcare for children aged 9 months to 3 years, *all* parents and carers were asked specifically how this may change their childcare usage over the forthcoming years.

The image below demonstrates how parents and carers of children aged 0-4 years old believed this would specifically change the **hours** of childcare they currently used.

Image 4 - How the extension to the entitlements could change the way responding parents/carers use childcare in the future

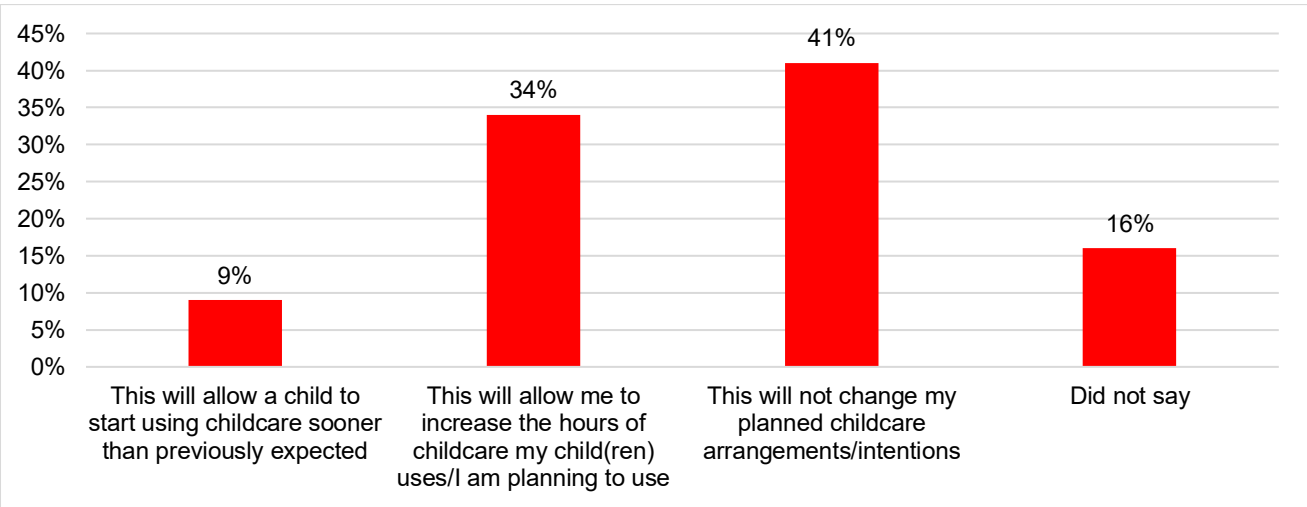
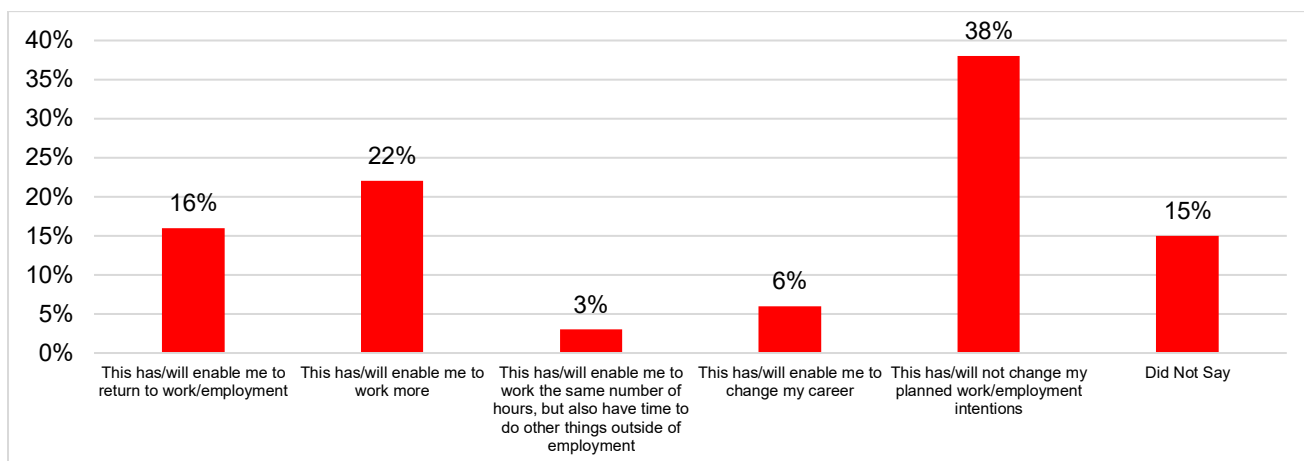


Image 5 - How parents and carers believe the recent changes (i.e. extensions) to the funded entitlements may change their employment circumstances/intentions



38% of responding parents and carers stated that the changes/extensions to the funded entitlements - which commenced throughout 2024 - would enable them to work more.

It was also observed that almost 40% of responding parents and carers did not believe the forthcoming changes to the funded entitlements would change their employment circumstances or intentions.

2.3.6 Responding parents/carers were invited to state whether - to the best of their knowledge they were aware of/eligible for: (a) Universal Credit and (b) Tax Free Childcare:

Table 7 - Responses aligned to (a) Universal Credit and (b) Tax Free Childcare

Age Cohort	Percentage of Parents/Carers who stated: Universal Credit	Percentage of Parents/Carers who stated: Tax Free Childcare
Yes, and I access	5%	34%
Yes, however I am not eligible	67%	34%
I don't know what this is	9%	6%
Not sure	19%	26%
Did not say	0	0

Parents/carers were then invited to state whether they had encountered any barriers when trying to access Tax Free Childcare. There were two recurrent responses:

1. I **think** I/we earn too much to apply (14% of all responding parents)
2. I do not understand the eligibility criteria (7%)

2.4 Parents and Wraparound Childcare

2.4.1 All parents and carers of 0-11 year olds were invited to state if they were accessing wraparound childcare, in early 2025.

6% of responding parents/carers stated that in summer 2025 they were accessing wraparound childcare all of the time.

17% of responding parents/carers stated that in summer 2025 they were accessing wraparound childcare some of the time.

18% of responding parents/carers stated that in summer 2025 they were not accessing wraparound childcare at any time.

59% of responding parents/carers stated that in summer 2025 they did not think that they needed to access wraparound childcare.

2.4.2 Relevant responding parents/carers (i.e. 23% of the total respondents), outlined the type of wraparound childcare that they were currently accessing.

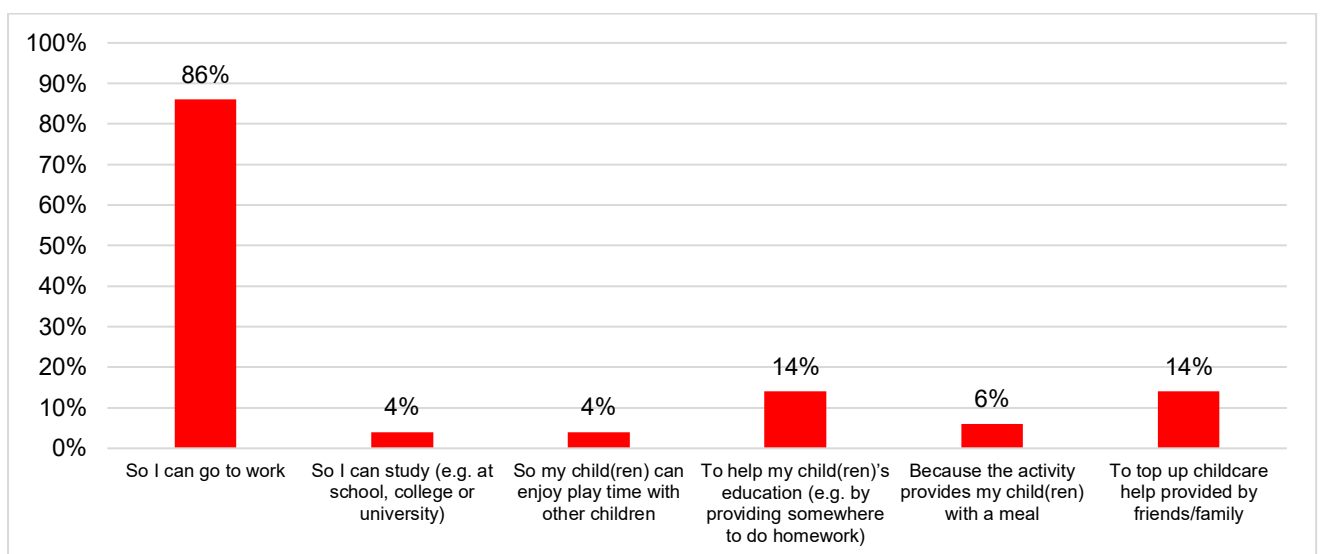
There were three *repeated* types of wraparound childcare that relevant respondents were accessing:

- Full wraparound at a primary school club run by the school (most frequently denoted as Prior Weston Primary School or Charterhouse Square School)
- Breakfast club only - with an off-site provider
- After school club only at a primary school club run by the school.

A number of responding parents/carers stated that they were not accessing wraparound childcare at the present time, however, would seek to do so – particularly in the form of a breakfast club – when they returned to employment.

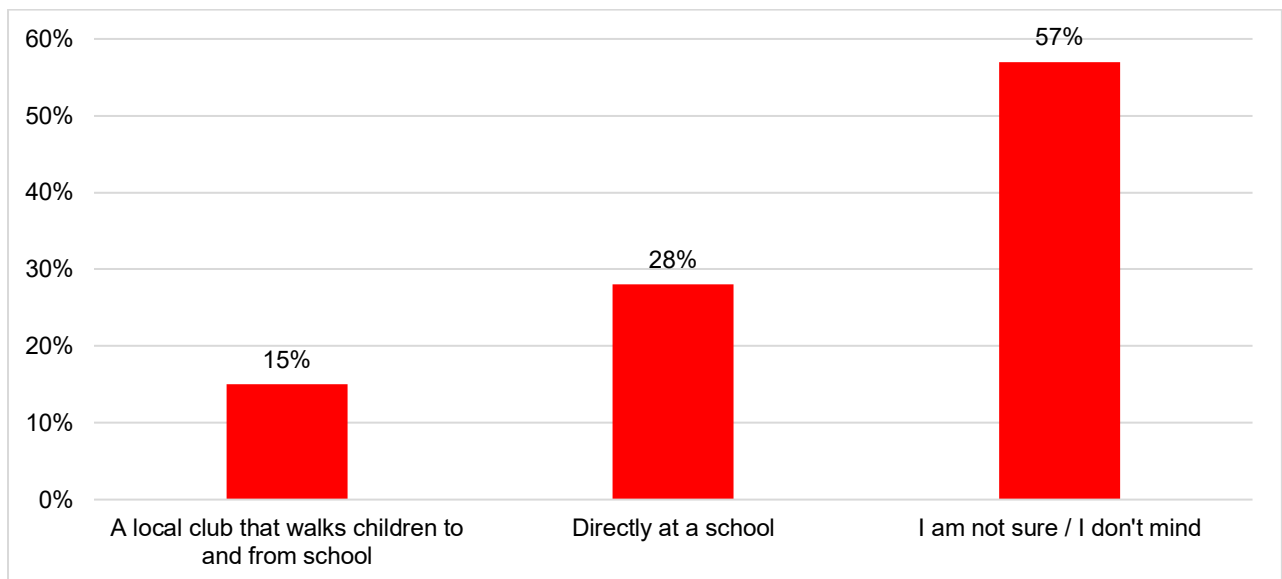
2.4.3 **Relevant** parents/carers were invited to state the reason(s) why they were currently accessing wraparound childcare.

Image 6 - Incidence of reasons why parents/carers were accessing wraparound childcare

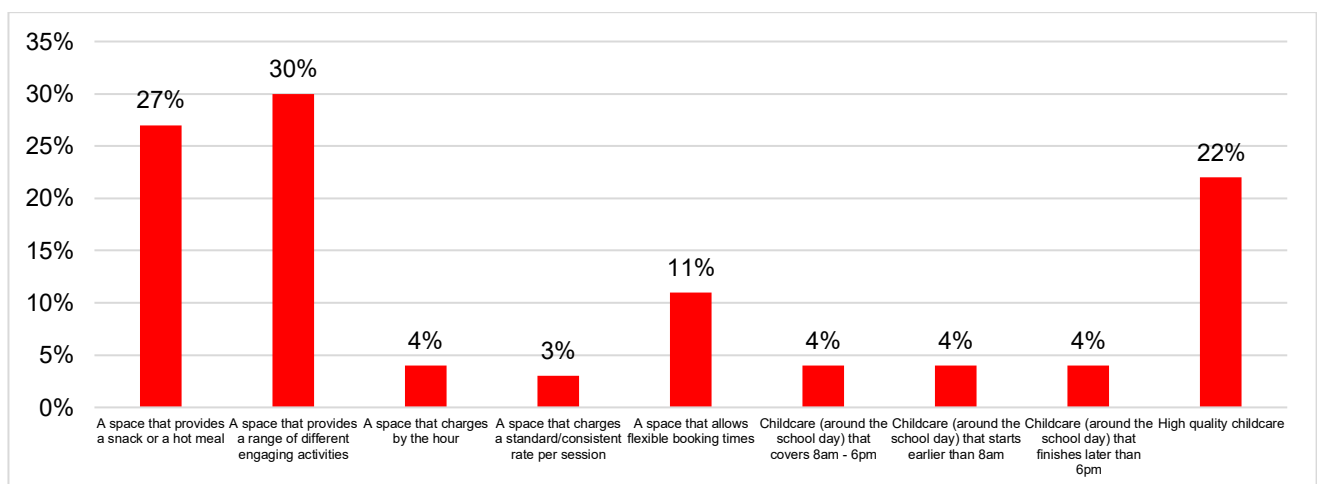


2.4.4 Relevant parent/carers who were not using wraparound childcare (77%) - whether they had used it in the past but stopped using it, or chosen not to use it at all - were asked to give their reasons why. The most frequent specific reason provided for this was: because I do not want to use it until my child(ren) start school (12% of relevant parents) followed by: because it (in the past) did not meet either/or both my and a child's special needs (10% of relevant parents).

2.4.5 All parents/carers who had a child(ren) 3-11 years old, were invited to respond to the following question: *If you were to continue to use **or start to use** wraparound childcare in the future for any of your children, where would you prefer this to be provided by?*
 - see Image 7



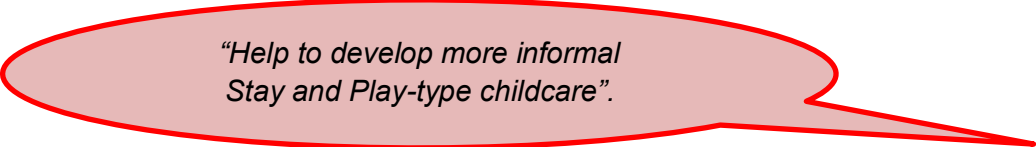
2.4.6 All parents/carers were finally invited to state what would be important to them, in the future, as and when they chose a type of wraparound childcare - Image 8



2.5 Parents' perceptions of the role of the City and London and early years and childcare

All parents and carers of 0-11 year olds were invited to state whether there was anything that the **City should - in their opinion - be doing**, in terms of supporting parents and carers with early years childcare in general in the future?

The first repeated type of feedback was (words to the effect):



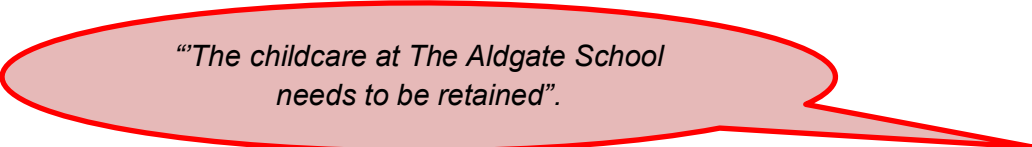
"Help to develop more informal Stay and Play-type childcare".

Specific feedback on this theme *included*:

"Having drop-in parent and toddler groups is vital for City parents or family members to have spaces to access during the week for playtime and activities for our little ones. General areas for parents to bring their children for regular sessions of play makes a big difference for those of us who are trying to plan things to do with the little ones we provide childcare for at home. It helps to provide parents with a social activity as well to keep from feeling isolated".

"I'd like the City to help provide more sessions like 'Stay and Play toddler groups' so there is choice in the surrounding areas. This makes it easier for those parents who are not eligible for childcare hours, or are on maternity/paternity leave, to make a routine during the week for them and their children".

The second repeated type of feedback focused on *parental perceptions* of the (future of the) nursery which is based at The Aldgate School – i.e. words to the effect:



"The childcare at The Aldgate School needs to be retained".

Specific feedback on this theme *included*:

"I'd like the City to continue to ensure that the 0-2 years provision at The Aldgate School can continue... Closing the only 'subsidised nursery' within the City of London would mean I am unable to afford childcare, or continue to work as frontline NHS staff". [Parent resident in the Aldersgate ward]

"It would be good if 'we' can retain the 0–2 childcare provision at the Aldgate School beyond 202 through a long term funding plan". [Parent resident in the Aldersgate ward]

"Could 'the City' continue to fund 'The Aldgate School 0-2 service' on a long term basis, to give confidence to the local residents that this facility will be maintained". [Parent resident in the Tower ward]

3 Outcomes of consultation with City of London employers

A total of 4 City of London employers responded to an online survey about childcare provision in the City locality and funded childcare entitlements, and their key feedback is detailed below.

3.1 Background of responding employers

- 3.1.1 The average number of employees in a responding employer’s organisation was 2,900.
- 3.1.2 Table 8 indicates the frequency with which responding employers stated that their employees (to the best of their knowledge) had children aged 18 years or younger.

Table 8 - Employers workforce with children aged 18 years or under

Percentage of workforce with children aged 18 years or under	Percentage of employers
Up to 25%	50%
Up to 50%	50%
Up to 75%	0

- 3.1.3 A key statistic was that, on average, 47.5% of responding employers’ workforce were working from home.

3.2 Impact of COVID-19

- 3.2.1 All employers were asked if they had seen a change in the way employees access flexible working arrangements since the conclusion of the COVID-19 pandemic. 50% of respondents stated: Yes and 50% stated: No. Those who responded: Yes were invited to elaborate on what changes they have continued to see - specific feedback included:

“More employees work on a hybrid arrangement - partly in the office and partly from home”.

3.3 Employers' perception of childcare in the City

- 3.3.1 All employers were asked if they think there is enough formal/registered current childcare provision across the City of London – and all 4 stated: Don't Know.
- 3.3.2 All of the responding employers stated that as of summer 2025 they "*rarely*" experience problems with an employee not continuing to work in their organisation following a maternity/paternity leave.
- 3.3.3 All employers were presented with a number of statements and were asked if they *agreed* or *disagreed* with the statements. 100% of respondents: *strongly agreed* that the City of London's childcare provision should ideally cost less.
- 3.3.4 None of the responding employers stated that they were aware of the existence of the City of London Family Information Service.

3.4 Funded entitlements

- 3.4.1 All employers were asked if they actively inform their employees about the funded childcare entitlements.

50% of employers evidently actively informed employees about the funded entitlement for 2 year olds – and 50% did not.

Additionally, 50% of employers stated that they actively inform employees about the 15 hours and 30 hours entitlements for parents with 3 and/or 4 year olds – with 50% not doing so.

- 3.4.2 All employers were asked if they are aware of the upcoming changes to funded childcare entitlements – i.e.:

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

Encouragingly, 100% of employers stated that they were aware of the extended funded entitlements which were introduced in April 2024, commencing with the extended entitlement for 2 year olds.

3.5 Employer's childcare benefits

3.5.1 All employers were asked if they provide any childcare related benefits or support for their employees. 100% confirmed they *do provide* such benefits, which included:

"10 days of paid childcare".

"Support with emergency 'back-up' childcare".

3.5.2 Flexible non-full time patterns of working implemented by all responding employers were:

- Part-time working
- Tuesday – Thursday working
- 9-day fortnight

3.5.3 None of the responding employers stated that they had any plans to initiate any (other) forms of childcare support for their employees in the immediate future – in particular, this related to any physical on-site childcare provision type(s).