

Childcare Sufficiency Duty Report 2026

An assessment of childcare provision in
Portsmouth, measuring supply against demand to
ensure the needs of parents and carers can be met



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1 Introduction

Local authorities are legally required to ensure there is enough childcare provision to support parents in employment, education, or training that leads to work. To achieve this, councils must actively manage and develop the local childcare sector, guaranteeing that places are available, affordable, and accessible, with flexible options across a variety of high-quality settings.

This 2026 Portsmouth Childcare Sufficiency Duty Report plays a pivotal part in helping the city fulfil these statutory obligations. Its main purpose is to deliver a thorough assessment of current childcare provision, highlight gaps where demand exceeds supply, and set out plans to improve the accessibility, affordability, and quality of childcare services.

This report is essential for supporting parents who work, fostering economic development, and ensuring that every child can access early education, which forms the bedrock for lifelong learning and growth. Through ongoing assessment of childcare provision, the council is equipped to adapt to demographic trends, shifts in parental employment, and policy changes. In addition, this annual publication is an important resource for decision-makers, providers, and stakeholders, offering evidence-based analysis and practical recommendations to shape future investments and improvements within Portsmouth's childcare sector.

2 Executive Summary

Portsmouth's childcare market remains broadly stable, with overall supply largely keeping pace with demand across most age groups and wards. However, the balance is delicate, and the city continues to rely on a small number of wards and provider types to meet the majority of need. This creates structural vulnerabilities that require ongoing monitoring and targeted intervention.

Supply is concentrated in Cosham, Drayton & Farlington, Hilsea, and Charles Dickens, which together provide over 40% of all early years places. Smaller wards such as Baffins, Fratton, Eastney & Craneswater, and Central Southsea each contribute only 4-5% of total capacity. Across all wards, provision is heavily weighted towards 3 and 4 year olds, with significantly fewer places available for under 2s.

Demand follows a similar pattern, with the same high pressure wards accounting for the largest share of required places. Most wards show a close proportional alignment between their share of supply and their share of demand, indicating that provision is generally located where families need it. Where mismatches occur, they are modest but meaningful, particularly in Central Southsea and Drayton & Farlington, where demand slightly exceeds supply.

The provider landscape is dominated by PVI group settings, which deliver 81% of all early years places. Childminders remain critical for under 2 provision, while school based settings and 'Other' providers contribute only a small proportion of overall capacity.

School aged and wraparound childcare is an increasingly important part of the sufficiency landscape, particularly in light of new national expectations and the School Aged Childcare Local Authority Capacity Funding Guidance (2025/26). Provider side survey data shows that a significant proportion of PVIs do not offer any wraparound or school aged childcare, with only a small number offering flexible or extended hours provision.

Complementary Local Authority data from the national wraparound programme indicates that all mainstream schools in Portsmouth currently offer some form of before- or after-school provision, either on-site or through partnership arrangements. However, none of the city's four special schools provide wraparound provision, creating a gap in access for families whose children may require more specialist support. This results in an uneven pattern of availability across the city, with some wards well served and others reliant on limited capacity.

Overall, Portsmouth's childcare system is functioning but fragile. Localised pressures, limited under-2s capacity, reliance on PVIs, and gaps in wraparound provision for special-school pupils highlight the need for continued strategic oversight to ensure the market remains sustainable and responsive to the needs of families.

3 Context and Data Representations

3.1 Expanded Early Years Entitlements and Other Government Initiatives

The expanded early years entitlements continue to reshape the childcare landscape following their full rollout in September 2025. From April 2024, eligible working parents of 2-year-olds were able to access 15 hours of funded early education per week, and this entitlement was extended to children aged from 9 months in September 2024. From September 2025, eligible working families have been able to access up to 30 hours per week of funded childcare from the term after a child turns 9 months until they start school, under the national early years entitlements framework.

These reforms sit within the government's Best Start in Life strategy to improve access, affordability and quality of early education and childcare.

Further detail about these and emerging government initiatives can be found on the government's **Best Start In Life** website.

3.2 Geographic and Demographic Overview of the City of Portsmouth

Portsmouth is a vibrant coastal city on the south coast of England, predominantly situated on Portsea Island, and is one of the most densely populated local authorities in the UK outside London. The city's population was estimated at approximately 214,300 in mid-2024,¹ with around 75% of residents living on Portsea Island,² highlighting the city's compact urban geography.

The city has a diverse demographic profile, encompassing young professionals, families with young children, older adults, and a notable student population associated with the University of Portsmouth, which contributes to a transient element in local demographics. Portsmouth also has a relatively large working-age population, with around 139,300 residents aged 18–64¹, and an employment rate of approximately 79.7%³ between April 2024 and March 2025, slightly above the national average.

In terms of early years, around 13,644 children aged 0-5 live in Portsmouth, representing roughly 6.4% of the local population.⁴ This cohort underpins the demand for early education and childcare places, particularly in the context of expanded entitlements and wraparound care programmes. The city's sector includes childminders, nursery classes within schools, and private voluntary and independent settings, with the majority rated good or outstanding by Ofsted⁴, ensuring a strong foundation for meeting local childcare needs.

Taken together, Portsmouth's dense population, high proportion of working families, and significant cohort of young children highlight the critical importance of accessible and affordable early years and childcare provision for the area.

1 ONS mid-2024 population estimates

2 Portsmouth City Council 2024 – Health and Wellbeing Joint Strategic Needs Assessment

3 Nomis – Official Labour Market Statistics (2025)

4 Ofsted Explore Local Authority Data (2026)

3.3 Focus on Childcare and Working Parents

Portsmouth offers a wide range of childcare provision, including nurseries, preschools, childminders, and wraparound care. However, geography and transport continue to influence accessibility. The M275 motorway divides the city, contributing to variations in access across different areas.⁵

On Portsea Island, high population density drives strong demand for childcare, while around 30% of households have no access to a car or van, increasing reliance on public transport and active travel.⁶ In northern areas such as Cosham and Drayton, more space exists for development, but limited public transport links to central childcare facilities can still pose challenges for families without private vehicles.

Employment patterns further shape demand. Key sectors include education, healthcare, retail, and public administration, while HMNB Portsmouth supports a significant local workforce. Over 37,000 residents, around 18% of the population, belong to the armed forces community, many of whom require flexible and reliable childcare to accommodate non-standard schedules.⁷

3.3.1 School-Aged Childcare

Alongside early years provision, the government has recently increased its focus on school-aged childcare, recognising that the need for accessible childcare continues beyond the early years. In December 2025 (updated February 2026), the Department for Education (DfE) published Local Authority Capacity Support Funding guidance for the 2026-27 financial year, allocating £12.9 million to support local authorities in strengthening school-aged childcare systems, including before- and after-school care, free breakfast clubs, and holiday childcare.

School-aged childcare refers to paid-for and free childcare for children from reception age onwards, delivered outside normal school hours, such as before and after school, during school holidays and on inset days. It includes provision delivered by schools, private voluntary and independent (PVI) providers, and childminders both on and off school sites, as well as programmes such as free breakfast clubs and the Holiday Activities and Food Programme (HAF).

The DfE guidance emphasises the importance of local authorities using capacity support funding to enhance understanding of local supply and demand, support the sustainability of existing childcare places, and work with providers to maximise inclusive, high-quality provision. Local authorities are also expected to engage with DfE's sufficiency support offer, coordinate with HAF and free breakfast clubs programmes, and promote awareness of childcare options and financial support for families.

As data collection for this 2026 report predates the detailed local implementation of the new funding arrangements, the analysis is limited to a high-level overview of school-aged childcare rather than a comprehensive sufficiency assessment of this type of childcare. Nevertheless, the policy direction and funding focus signal that school-aged childcare is set to become an increasingly important element of local childcare planning and future sufficiency work.

⁵ Portsmouth City Council infrastructure reports, including Census 2021 transport analysis.

⁶ ONS Census 2021

⁷ Portsmouth City Council (2025). Armed Forces Community Profile

3.4 Presentation of Information and Data

This report presents details on childcare provision, covering demand, supply, and gap analysis. The information will be shown in one of four formats, depending on the type of data being presented. These will be:

- By different provider types as follows:

Figure 1 - Provider types

Provider Type	Description
Childminder	Home Based Childcare
Other	Charitable Organisations, Independent Schools etc.
PVI Group Setting	Day Nurseries, Pre-School Playgroups
School Based Setting	Maintained Nursery Schools, Nursery Classes

- Or at one of three geographical levels as follows:

Figure 2 - Geographical areas

LA Level	District Level	Ward Level
Portsmouth City Council	North	Cosham
		Drayton and Farlington
		Paulsgrove
	South	Baffins
		Central Southsea
		Charles Dickens
		Copnor
		Eastney and Craneswater
		Fratton
		Hilsea
		Milton
		Nelson
		St Jude
		St Thomas

3.5 Data Sources

Information about childcare provision (supply) and how childcare is accessed and funded is held by the Children, Families and Education Department of Portsmouth City Council. This data, coupled with other local and national data sets have been used to inform this Childcare Sufficiency Duty Report. Data sources, references, and methodologies used are quoted throughout the document and appropriately explained where applicable.

4 Supply of childcare

4.1 Data collection methodology

To gain a comprehensive understanding of the childcare market in Portsmouth, all childcare providers were requested to complete a questionnaire alongside the Early Years Census (January 2026). This approach aimed to thoroughly analyse the supply and delivery of various childcare components. 115 responses were received giving a response rate for the questionnaire of 78%, and the results are detailed as follows:

Figure 3 - Overall returns

PROVIDER TYPE	Total Number of Providers	Number of Returns	Percentage Return Rate
Childminder	61	47	77%
Other	3	3	100%
PVI Group Setting	74	57	77%
School Based Setting	10	8	80%
All Provider Types	148	115	78%

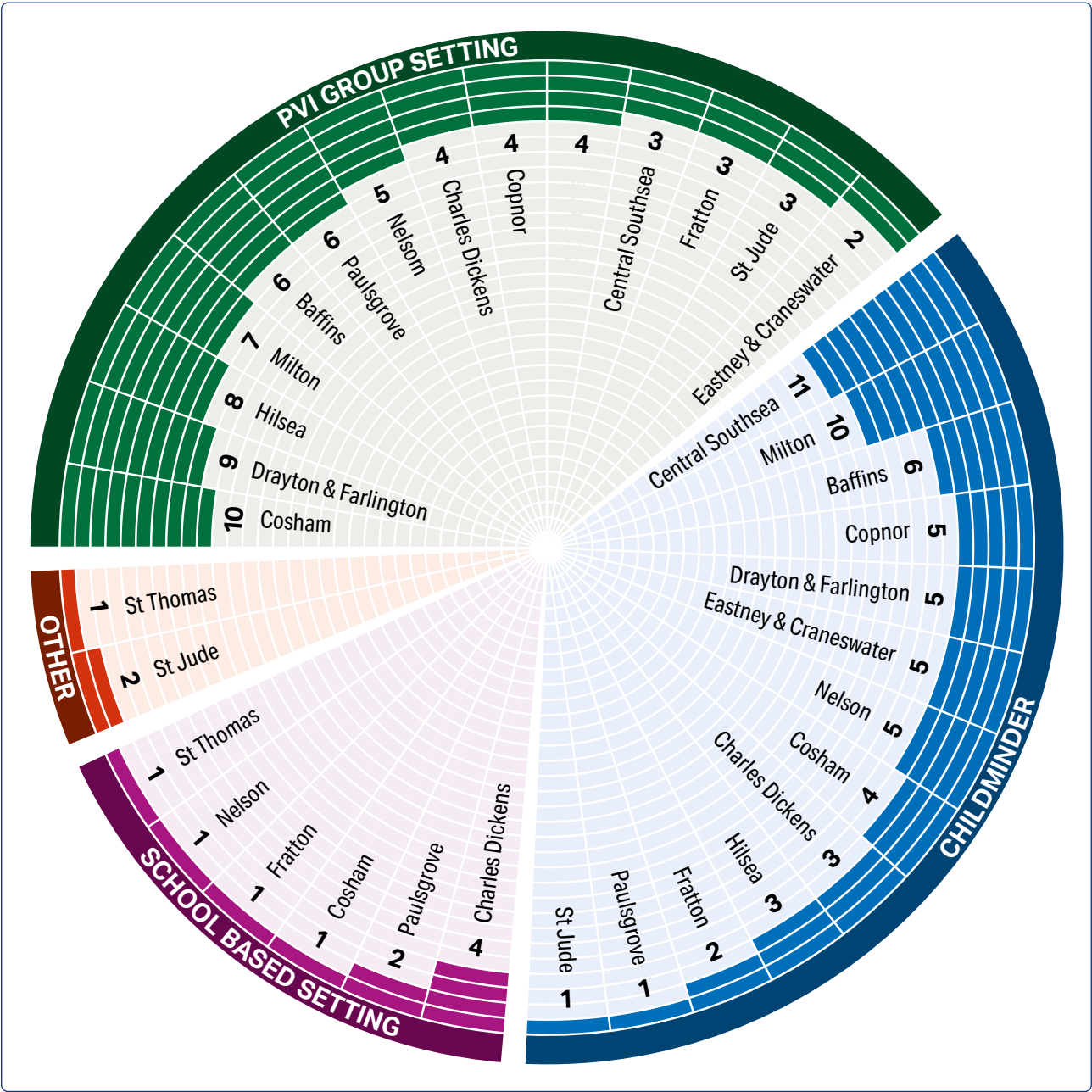
Unless otherwise stated, data tables, infographics and insights are based on 115 returns.

If a response was not received from a provider or the response was incomplete, locally held data, Ofsted registration information, and averages from fully completed returns were used to provide a comprehensive view of the childcare market, specifically regarding the number of available childcare places. This method is explained in detail where appropriate.

4.2 Types of Childcare Provision

Analysis of the responses to the childcare questionnaire coupled with local knowledge have indicated that childcare in Portsmouth is delivered as follows:

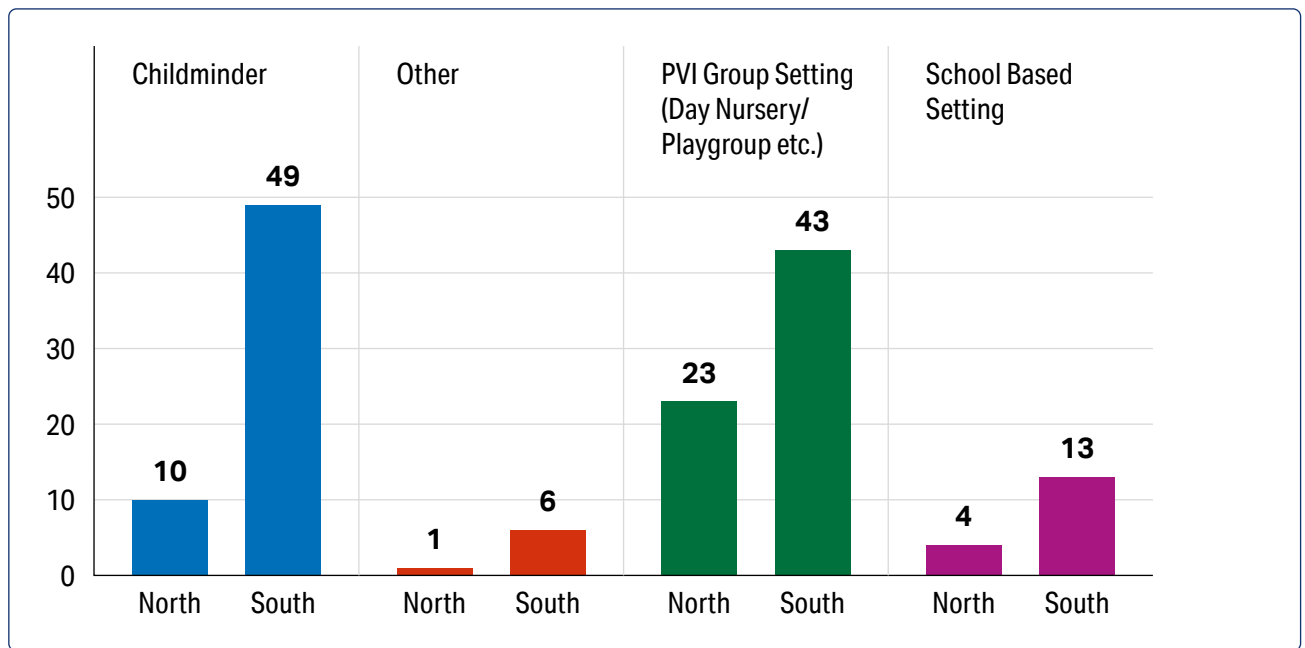
Figure 4 - Number of providers by ward



Based on 115 returns and locally held data regarding childcare provision.

Insights: The wards of Fratton, St Jude, and St Thomas jointly have the lowest amount of provision (6 providers per ward). There are no childminders based in St Thomas ward.

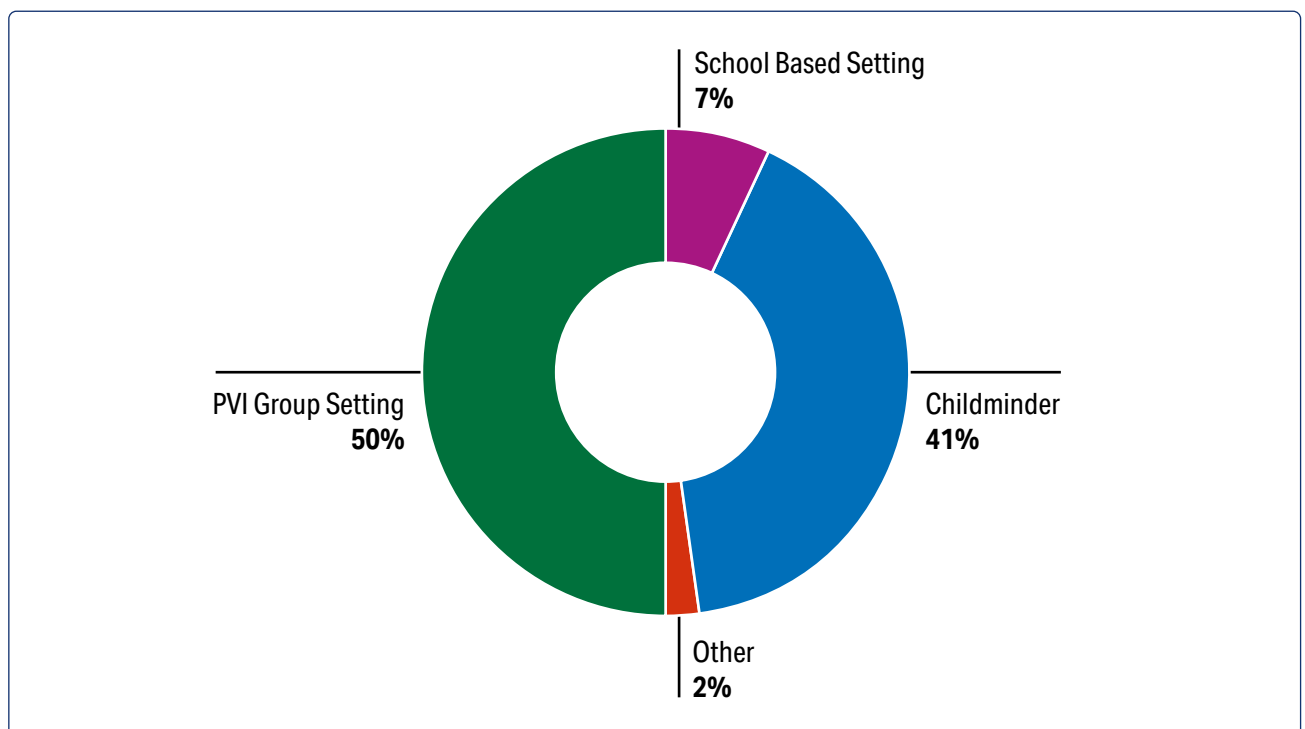
Figure 5 - Number of providers by district



Based on 115 returns and locally held data regarding childcare provision.

Insights: As is expected, there is more provision in the south of the City, as this is a much larger geographical area. Across all provision types, there are more PVI settings in Portsmouth than any other.

Figure 6 - Childcare market percentage distribution by provider type



Insights: Only 7% of the childcare provision available in Portsmouth is delivered by school-based settings. Half of the childcare available overall, is delivered by PVI Settings.

Figure 7 - Map of provision by Ward

Paulsgrove

Childminder:	1
Other:	0
PVI:	6
School-Based:	2

Cosham

Childminder:	4
Other:	0
PVI:	10
School-Based:	1

Drayton & Farlington

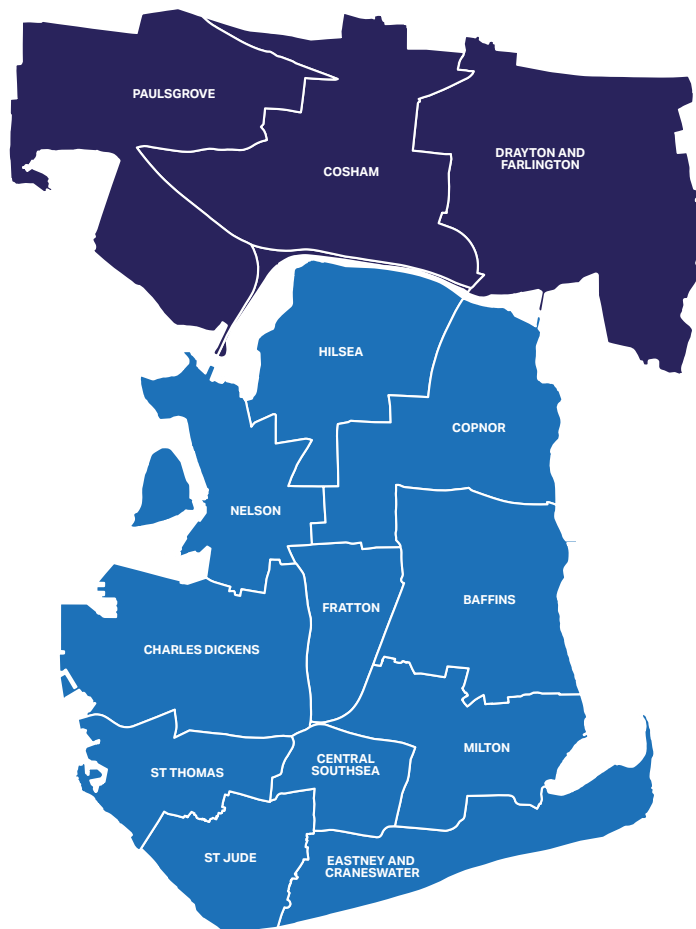
Childminder:	5
Other:	0
PVI:	9
School-Based:	0

Copnor

Childminder:	5
Other:	0
PVI:	4
School-Based:	0

Hilsea

Childminder:	3
Other:	0
PVI:	8
School-Based:	0



Baffins

Childminder:	6
Other:	0
PVI:	6
School-Based:	0

Nelson

Childminder:	5
Other:	0
PVI:	5
School-Based:	1

Fratton

Childminder	2:
Other:	0
PVI:	3
School-Based:	1

Charles Dickens

Childminder:	3
Other:	0
PVI:	4
School-Based:	4

Milton

Childminder:	10
Other:	0
PVI:	7
School-Based:	0

St. Thomas

Childminder:	0
Other:	1
PVI:	4
School-Based:	1

St. Jude

Childminder:	1
Other:	2
PVI:	3
School-Based:	0

Central Southsea

Childminder:	11
Other:	0
PVI:	3
School-Based:	0

Eastney & Craneswater

Childminder:	5
Other:	0
PVI:	2
School-Based:	0

Maps reproduced from Ordnance Survey 1:1250 Base Map © Crown copyright and database right 2015, under licence 100019671.

4.3 Wraparound and School-Aged Childcare

School-age and wraparound childcare has recently become a clear national priority, reflected in the publication of the School-Aged Childcare Local Authority Capacity Funding Guidance (2025/26) and the wider government commitment to expanding access to wraparound provision. As further national guidance and expectations are due during 2026, future sufficiency reports will place greater emphasis on this area as the policy landscape develops.

The questionnaire informing this report was drafted at the point the new guidance was released. As a result, the data collected reflects the perspective of childcare providers - primarily PVI settings and childminders, who together account for approximately 91% of registered childcare places in Portsmouth. This provides valuable insight into the availability, capacity and challenges experienced by the childcare market. However, it does not on its own provide a complete picture of school-age childcare, particularly provision delivered directly by schools.

To address this, the Sufficiency Report supplements provider-side survey data with additional Local Authority information gathered through the national wraparound programme, including school-level data submitted as part of funding applications for the expansion of wraparound care. This school-side dataset provides a complementary view of what provision is available at each school site, enabling a more rounded understanding of the sufficiency of school-age childcare across the city.

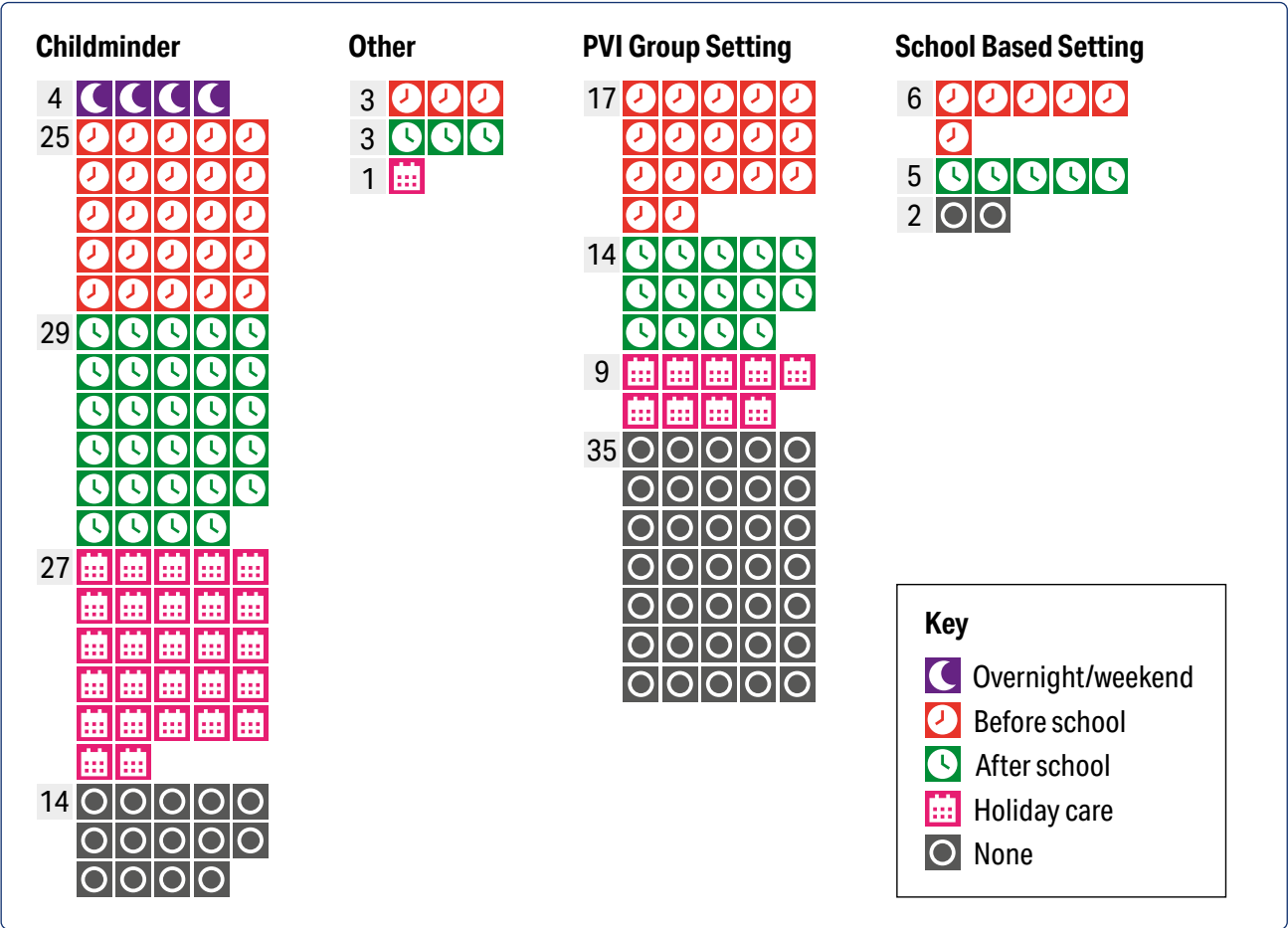
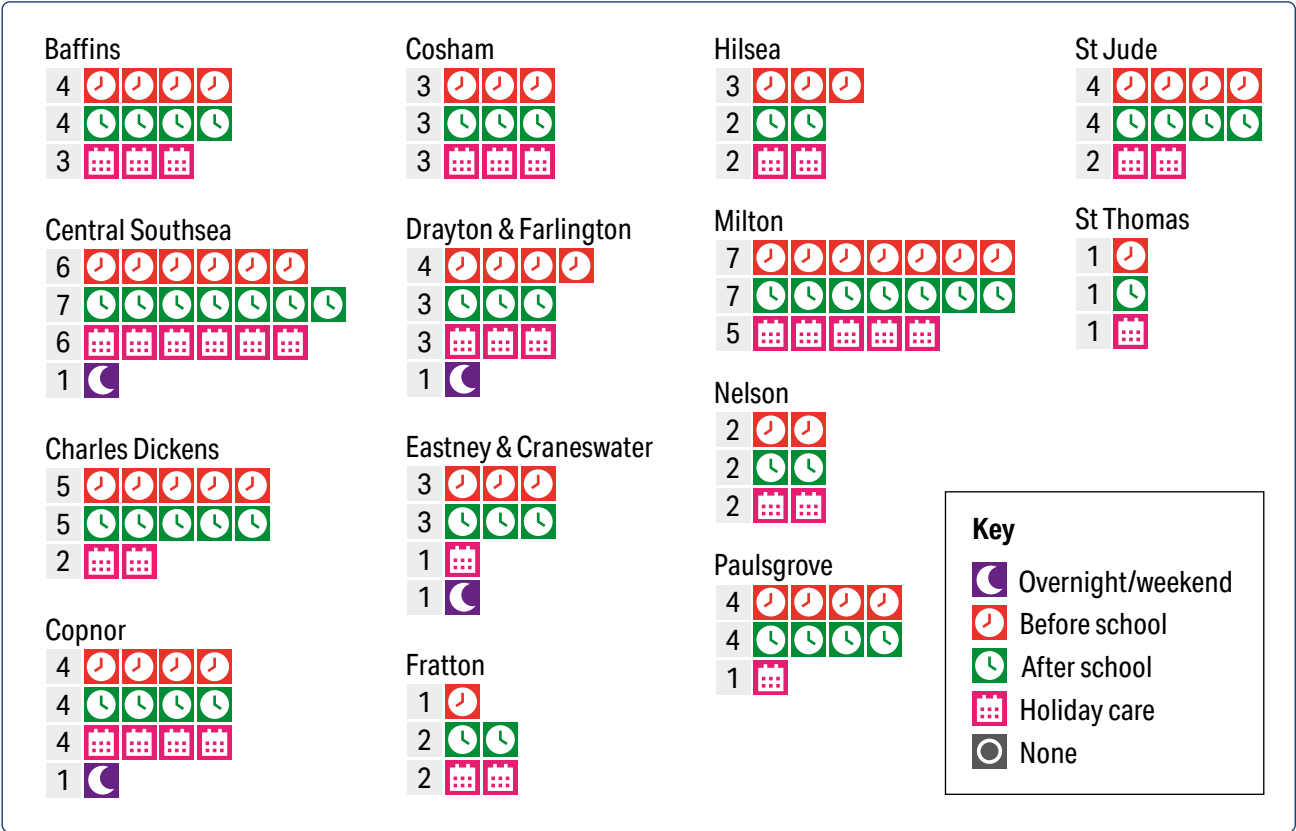


Figure 8 - Number of providers offering different types of wraparound care

Based on 115 returns only.

Insights: There are only 4 providers offering overnight/weekend care and these are all childminders.



Interestingly, over half of the PVIs who responded (61%) indicated that they do not offer any type of wraparound or school-aged childcare.

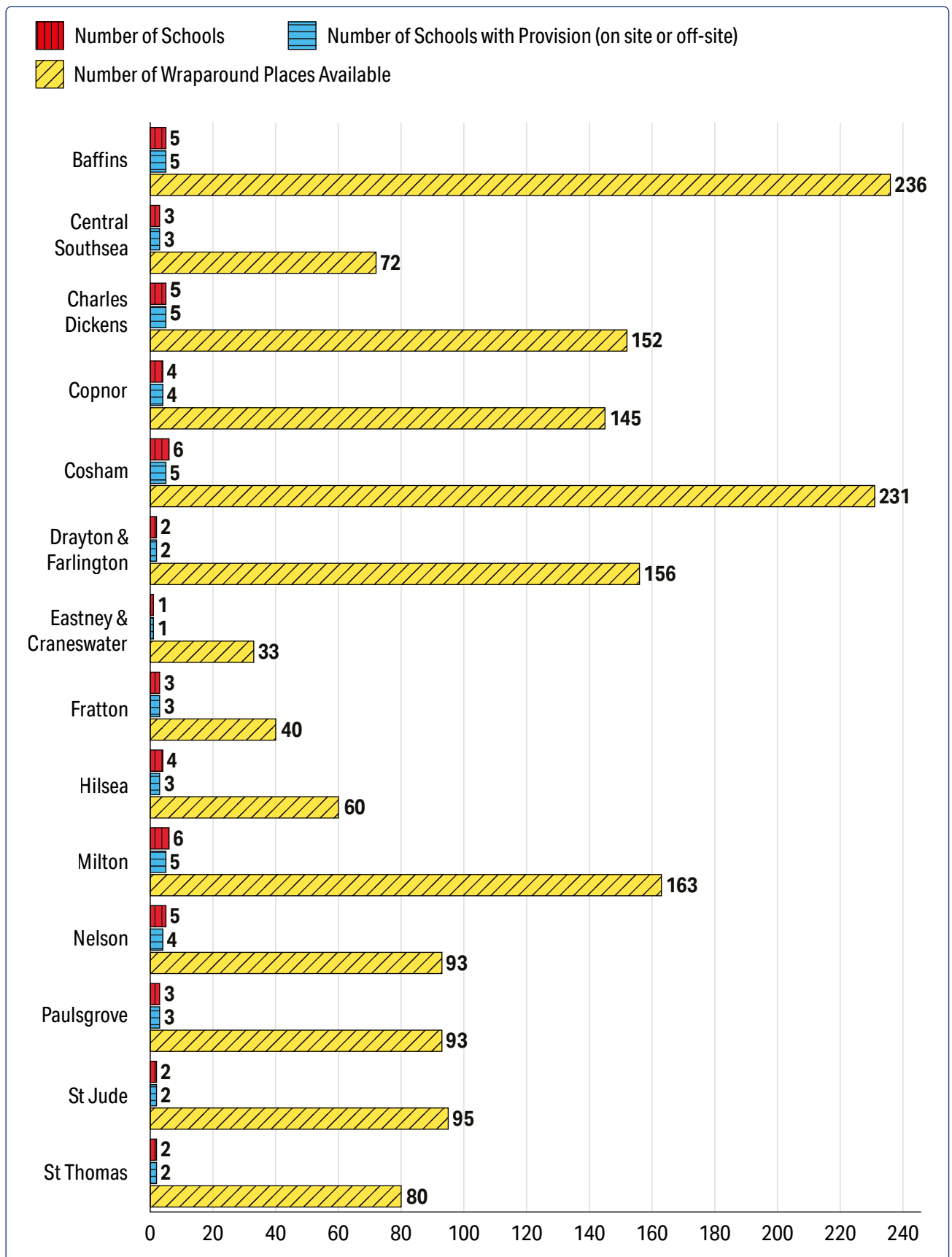
Figure 9 - Availability of wraparound childcare (according to responses) by ward

Based on 115 returns only.

Insights: Many wards have a very low supply of wraparound care available. Although access to overnight/weekend care is spread across four different wards, very few providers offer this type of care. Limited access to this type of flexible childcare poses challenges for Portsmouth families with military personnel and shift workers. Without these options, many may struggle to balance demanding work schedules with family responsibilities. Expanding flexible childcare is essential for supporting workforce participation and the wellbeing of families who require care beyond standard hours.

Additional Local Authority data, including information gathered to support national wraparound programme funding applications and local planning for the expansion of wraparound care further informs the availability of school-aged childcare and indicates the following:

Figure 10 - Number of schools and wraparound provision



Source: LA Wraparound Programme, submission to DfE. The number of wraparound places available per ward is calculated by aggregating the average of morning (AM) and afternoon (PM) places offered at each school within the ward. For example, if a school provides 20 AM places and 40 PM places, an average of 30 places is attributed to that school.

Insights: The distribution of wraparound childcare across Portsmouth shows a broadly strong level of coverage, with all mainstream schools offering some form of before- and/or after-school provision, either on-site or through an off-site partner. The only schools without wraparound provision are the city’s four special schools, reflecting the distinct operational and staffing requirements of specialist settings rather than a gap in mainstream sufficiency.

Capacity varies significantly between wards. Baffins, Cosham, Milton and Drayton & Farlington offer the highest number of wraparound places, each providing over 150 places and collectively forming the main hubs of school-aged childcare. In contrast, wards such as Eastney & Craneswater, Fratton and Hilsea have much smaller volumes of provision, with no more than 60 places available in each. This uneven distribution means that while access is strong in many areas, some wards rely on relatively limited capacity, which may constrain parental choice or flexibility.

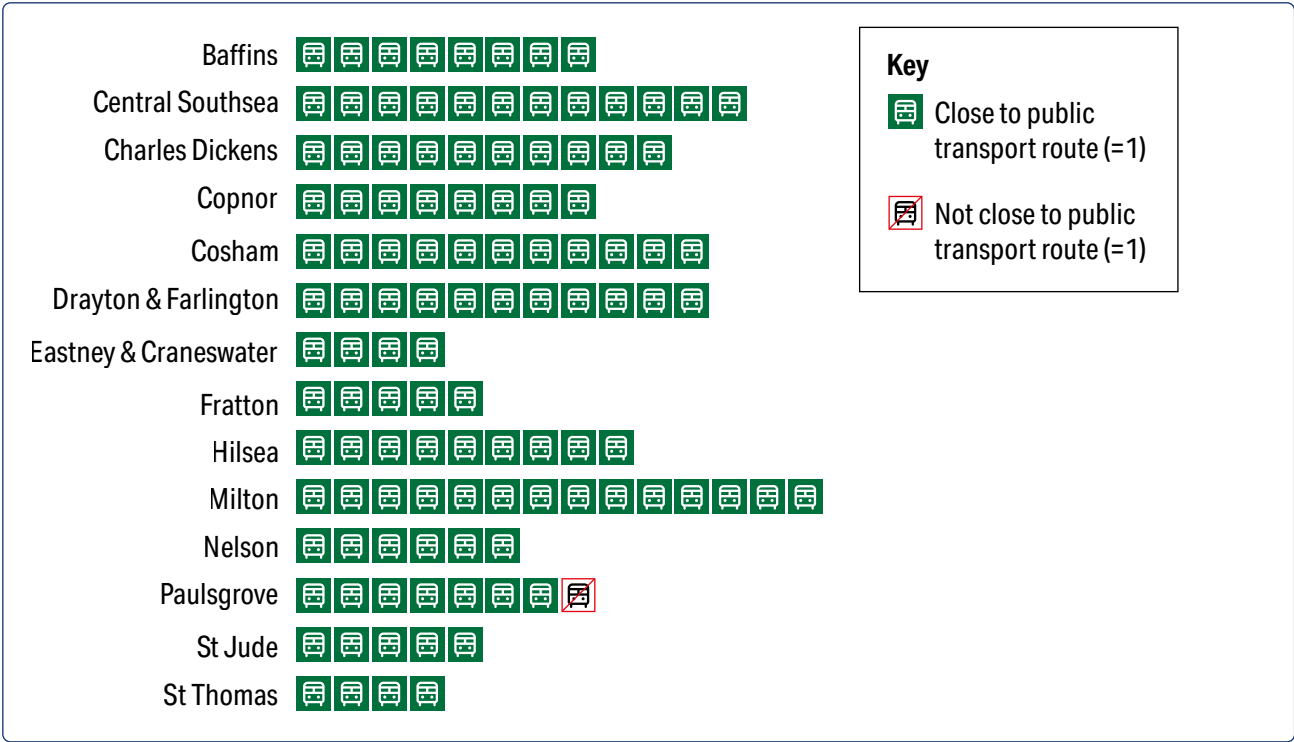
One school in Cosham is also delivering a DfE-funded Free Breakfast Provision, introduced as part of the government’s wider wraparound expansion programme. Although the school has the capacity to offer up to 435 breakfast places, using this figure would significantly distort ward-level totals. For consistency across the report, the analysis therefore uses the school’s current take-up of around 80 places, ensuring comparability with other settings.

Overall, the data indicates that Portsmouth has achieved full mainstream coverage of wraparound childcare, but the volume of places varies widely by ward, with a small number of areas carrying a disproportionate share of the city’s total capacity. As national expectations for wraparound expansion continue to evolve, these patterns highlight the importance of ongoing monitoring and targeted support.

4.4 Childcare Accessibility

Providers were asked in the questionnaire about the proximity of their setting to local transport, specifically whether their setting was within a five-minute walk of public transport routes.

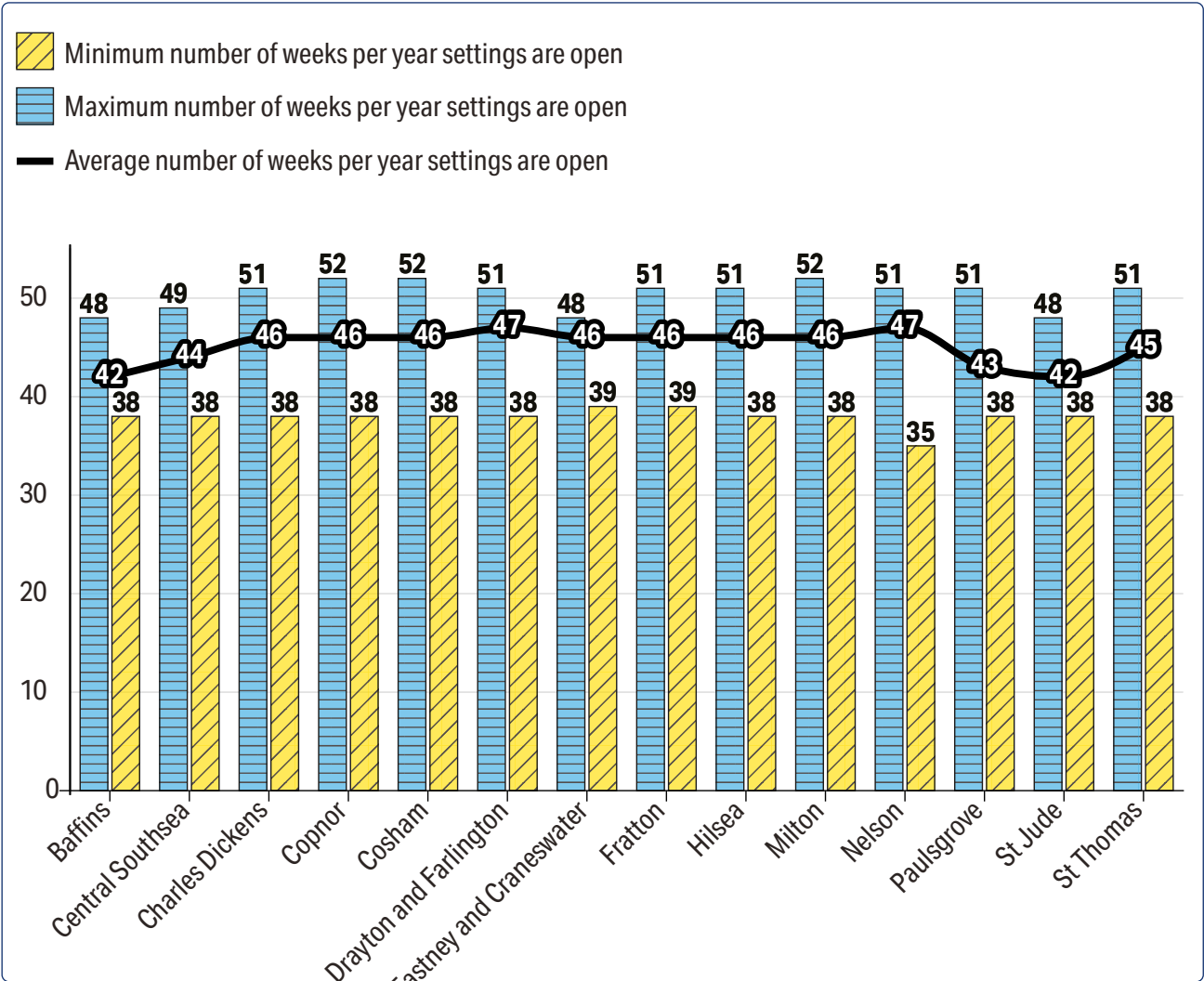
Figure 11 - Provider proximity to public transport



Insights: Out of 115 returns, only 1 provider indicated they were not close to a public transport route, this is a PVI setting in Paulsgrove.

Providers were asked how many weeks per year they were open.

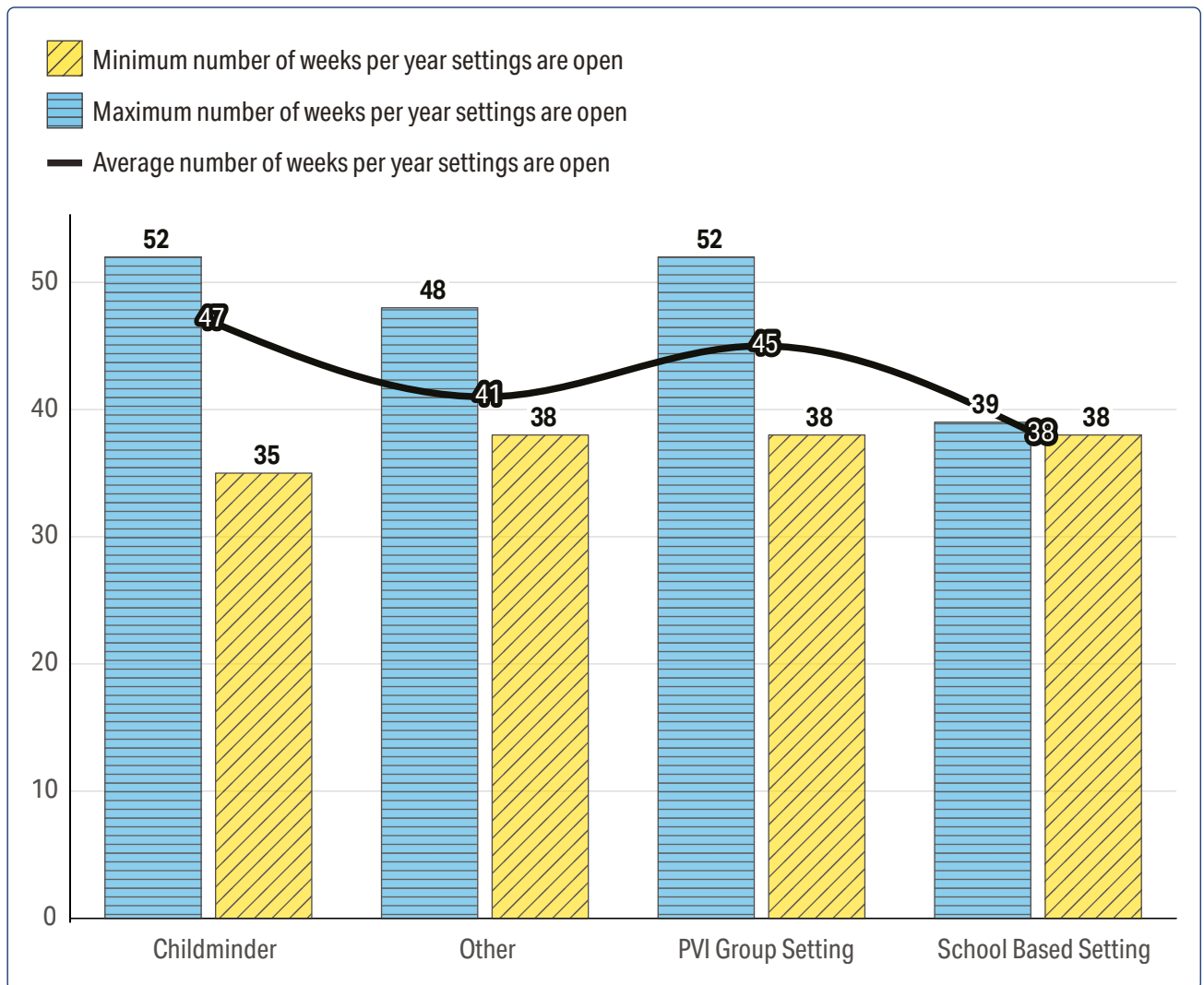
Figure 12 - Number of weeks provision is open by ward



Based on 115 returns.

Insights: Settings are open an average of 45 weeks per year, whereas in Baffins and St Jude they are only open for an average of 42 weeks per year.

Figure 13 - Number of weeks provision is open by provider type

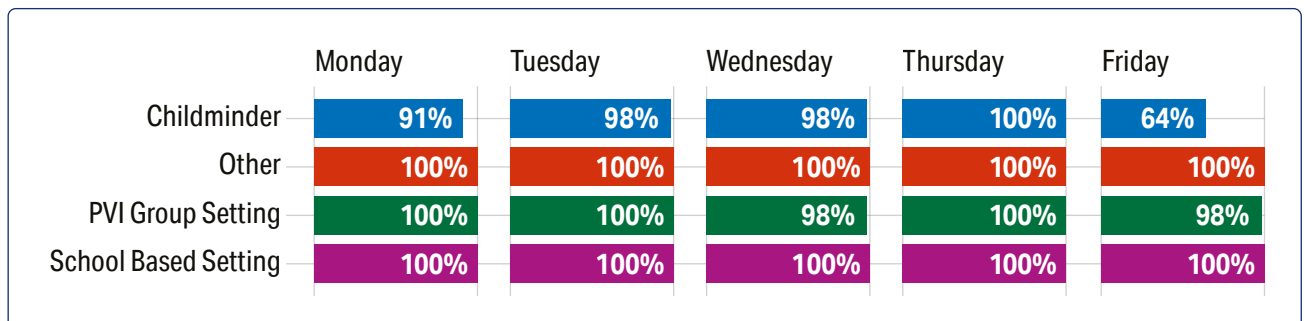


Insights: As would be expected, school-based settings are open for an average of 39 weeks and PVI settings open for most weeks of the year.

Based on 115 returns.

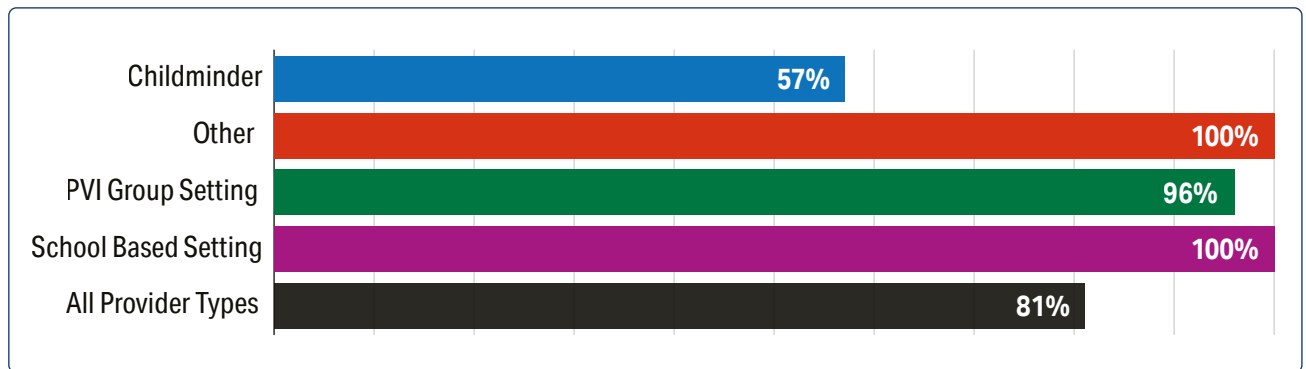
Providers were asked which days of the week they operated.

Figure 14 - Percentage of providers open each day by provider type



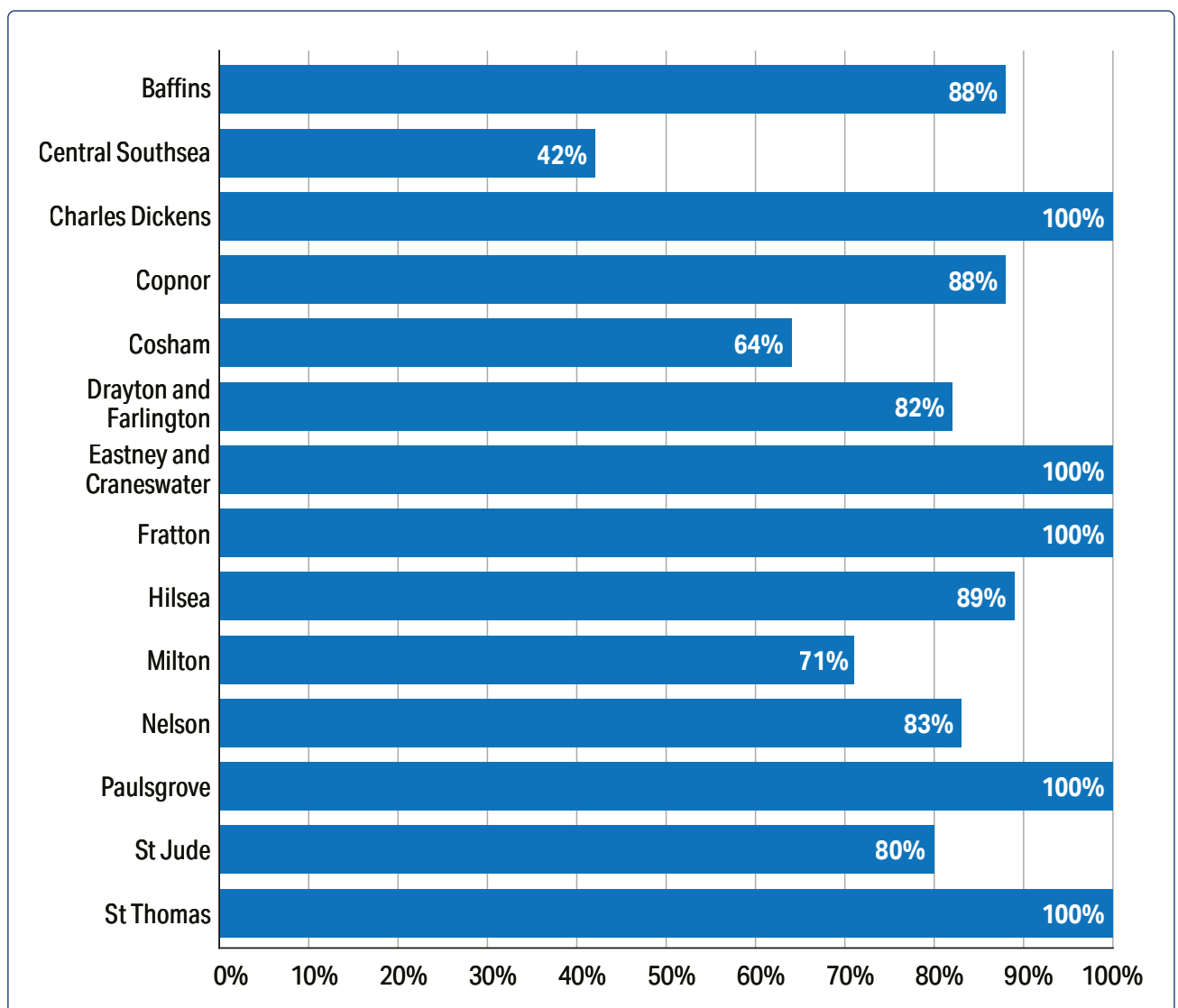
Insights: Most providers are open Monday through Friday. Although some childminders claim to offer overnight or weekend wraparound care, none report opening on weekends. This indicates limited flexibility for weekend childcare, which can affect access for parents working irregular hours. Additionally, only 64% of childminders operate on Fridays, further restricting availability and flexibility in childcare options.

Figure 15 - Percentage of providers open every weekday by provider type



Insights: 81% of providers overall are open Monday to Friday, but only 57% of childminders work every weekday. This situation again, highlights a potential issue with the availability of flexible childcare, considering that this gap in provision during weekdays is not compensated by availability on weekends.

Figure 16 - Percentage of providers open Monday to Friday by ward



Insights: Only 42% of providers in Central Southsea are open every weekday.

Providers were asked about their opening times.

Figure 17 - Earliest opening/latest closing times, plus minimum and maximum number of hours open by provider type

PROVIDER TYPE	Earliest Time Settings Open	Latest Time Settings Close	Minimum Number of Hours Settings are Open	Maximum Number of Hours Settings are Open
Childminder	6:00 AM	7:00 PM	8hrs	12hrs
Other	7:30 AM	6:00 PM	10hrs	10hrs 30mins
PVI Group Setting	6:00 AM	8:00 PM	6hrs	14hrs
School Based Setting	7:30 AM	5:30 PM	7hrs	9hrs 45mins
All Provider Types	6:00 AM	8:00 PM	6hrs	14hrs

Based on 115 responses – times are rounded to the nearest 15 minutes

Figure 18 - Earliest opening/latest closing times, plus minimum and maximum number of hours open by ward

WARD	Earliest Time Settings Open	Latest Time Settings Close	Minimum Number of Hours Settings are Open	Maximum Number of Hours Settings are Open
Baffins	7:00 AM	6:00 PM	6hrs 10mins	11hrs
Central Southsea	7:00 AM	6:00 PM	6hrs 45mins	11hrs
Charles Dickens	7:00 AM	6:00 PM	7hrs 10mins	11hrs
Copnor	6:00 AM	6:30 PM	8hrs	11hrs
Cosham	6:00 AM	8:00 PM	6hrs 30mins	14hrs
Drayton and Farlington	7:00 AM	6:00 PM	6hrs	11hrs
Eastney and Craneswater	6:00 AM	7:00 PM	9hrs	12hrs
Fratton	7:00 AM	6:00 PM	6hrs 45mins	10hrs 30mins
Hilsea	7:30 AM	6:00 PM	6hrs	10hrs 30mins
Milton	6:15 AM	6:00 PM	6hrs 35mins	11hrs
Nelson	7:00 AM	6:00 PM	9hrs	10hrs 30mins
Paulsgrove	7:00 AM	6:30 PM	7hrs 15mins	11hrs 30mins
St Jude	7:30 AM	6:00 PM	7hrs	10hrs 30mins
St Thomas	7:30 AM	6:00 PM	7hrs	10hrs 30mins
All Wards	6:00 AM	8:00 PM	6hrs	14hrs

Based on 115 responses – times are rounded to the nearest 15 minutes

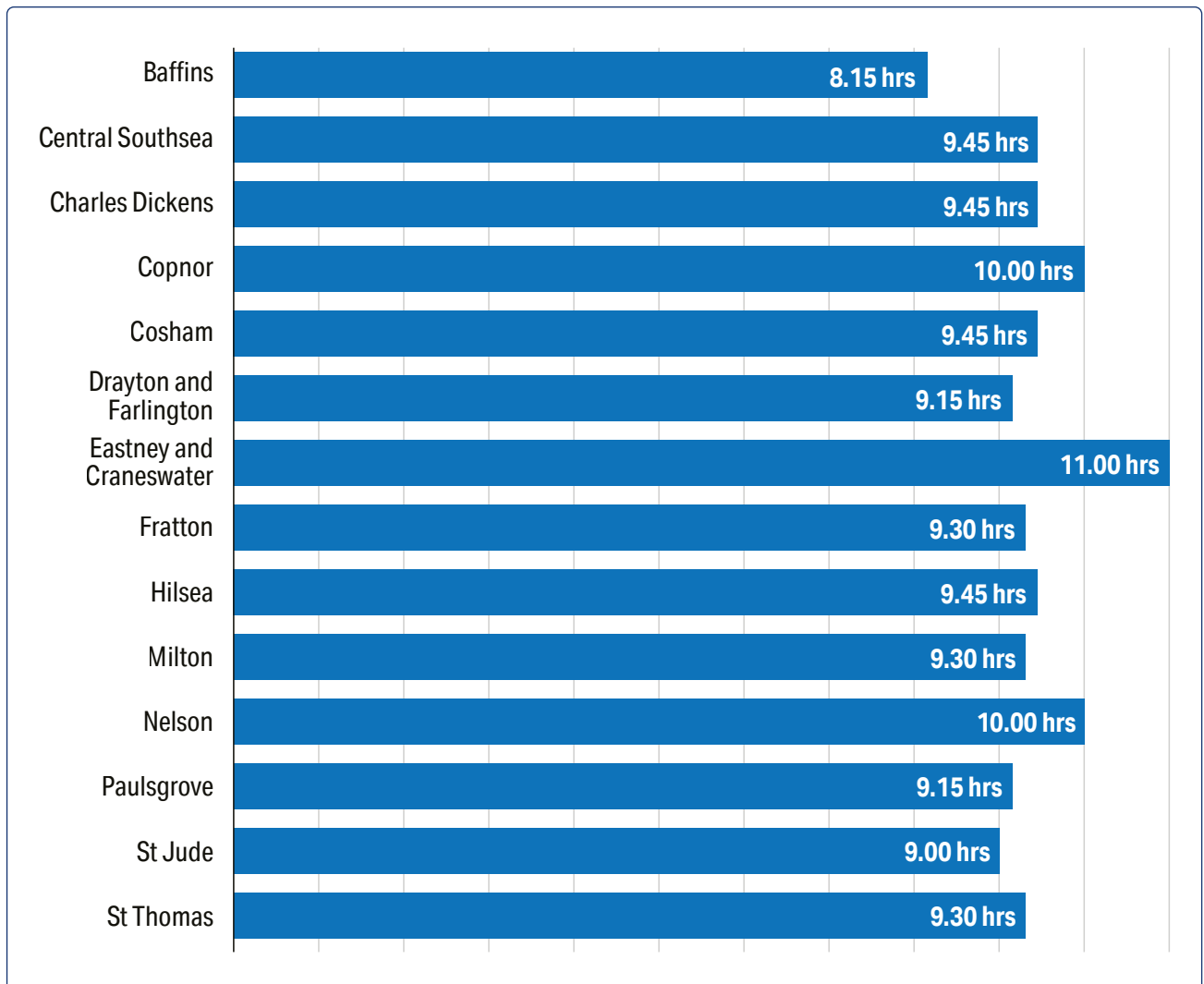
Figure 19 - Average opening and closing times and average length of time settings are open by provider type

PROVIDER TYPE	Average Opening Time	Average Closing Time	Average Length of Time Settings are Open for
Childminder	7:30 AM	5:30 PM	10hrs
Other	7:45 AM	6:00 PM	10hrs 15mins
PVI Group Setting	8:00 AM	5:00 PM	9hrs
School Based Setting	8:00 AM	4:30 PM	8hrs 30mins
LA Average	7:45 AM	5:15 PM	9hrs 30mins

Based on 115 responses – times are rounded to the nearest 15 minutes

Insights: Settings are generally open from 7:45am until 5:15pm with the earliest setting(s) open at 6:00am until the latest time of 8:00pm.

Figure 20 - Average length of time settings are open by ward



Based on 115 responses – times are rounded to the nearest 15 minutes

4.5 Childcare Affordability

Providers were asked to report their hourly costs for different types of childcare sessions and age ranges. It is understood that some providers do not charge for childcare and that others do not use an hourly rate. Many offer services charged per session or per day. However, for consistency and comparability, providers were requested to calculate and report an hourly cost, where possible.

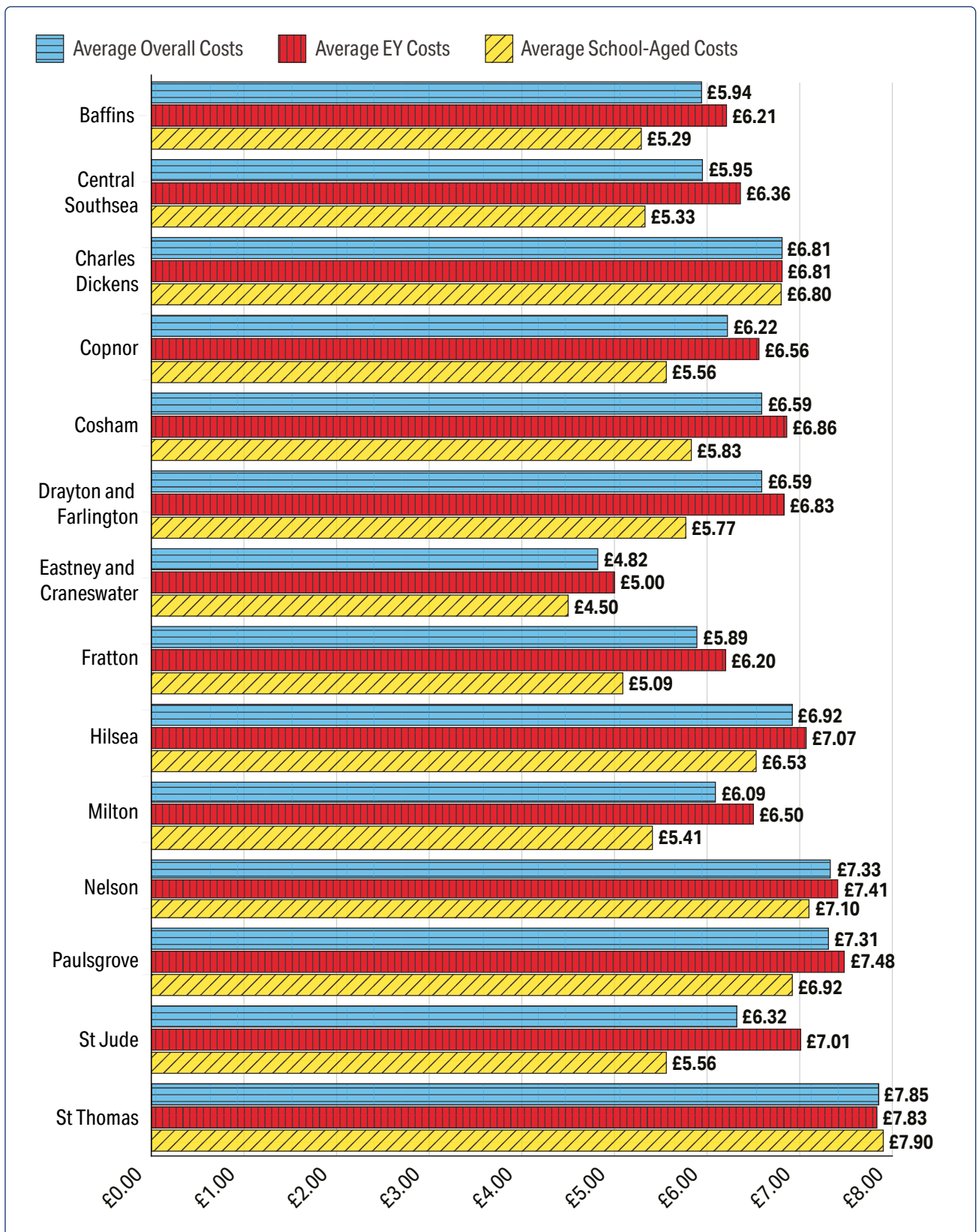
Figure 21 - Average hourly costs by childcare type



Based on 115 responses

Insights: The average cost of childcare in the city is £6.42 across all provision types and age ranges. As expected, early years provision is more expensive than school-aged childcare due to additional running costs including staff-to-child-ratios.

Figure 22 - Average hourly costs by ward and childcare type



Based on 115 responses

Insights: The average cost of childcare is highest in St Thomas ward and lowest in Eastney and Craneswater.

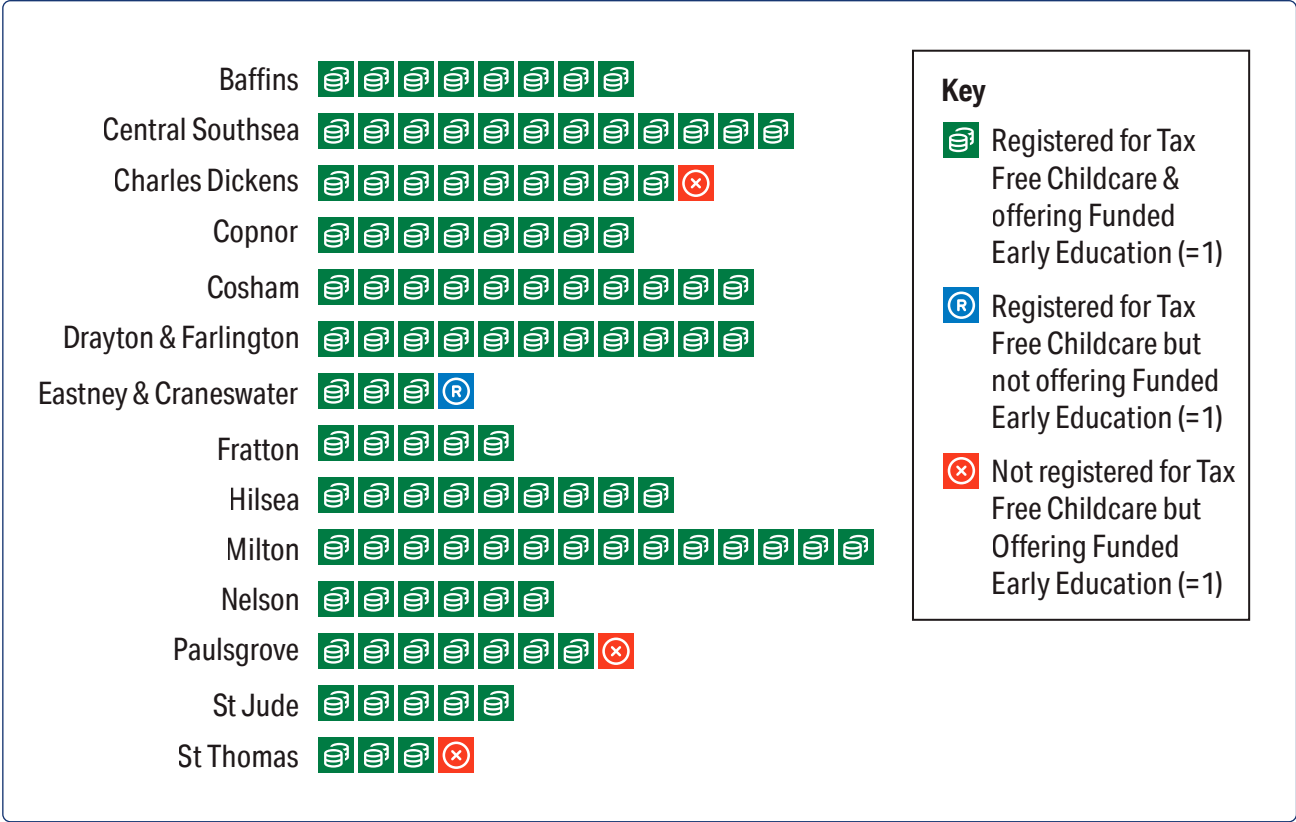
Figure 23 - Average hourly costs per provider type



Based on 115 responses

Providers were asked whether they were registered for Tax Free Childcare.

Figure 24 - Number of providers registered for Tax Free Childcare and offering Funded Early Education Places by ward



Based on 115 responses

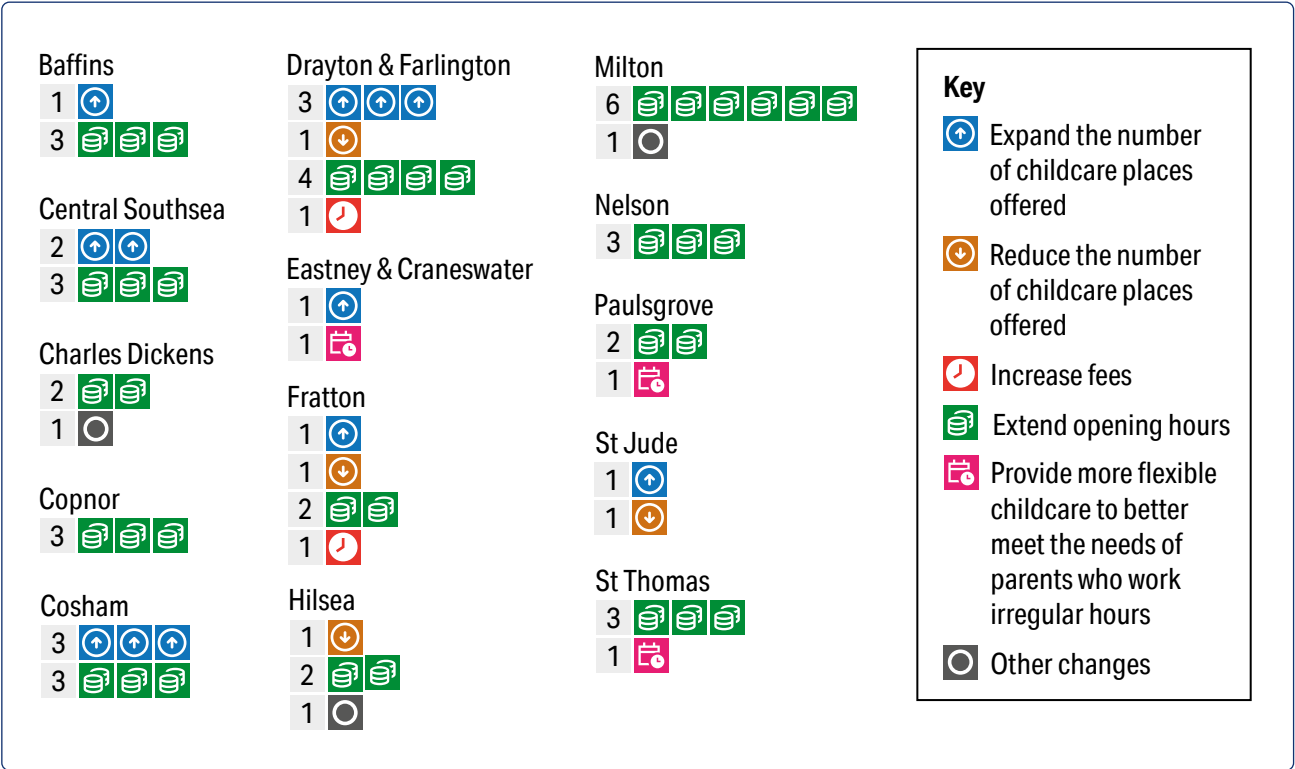
Insights: Just 3 providers indicated that they were not registered for Tax Free Childcare. Reasons for not providing it were: No one has asked for it; Only offer funded places; Staffing constraints.

All except one childminder indicated that they offer Free Early Years Education. The childminder stated that they only cater for school-aged children.

4.6 Provider Changes and Expansion

Providers were asked if they had plans to make any significant changes over the next 12 months.

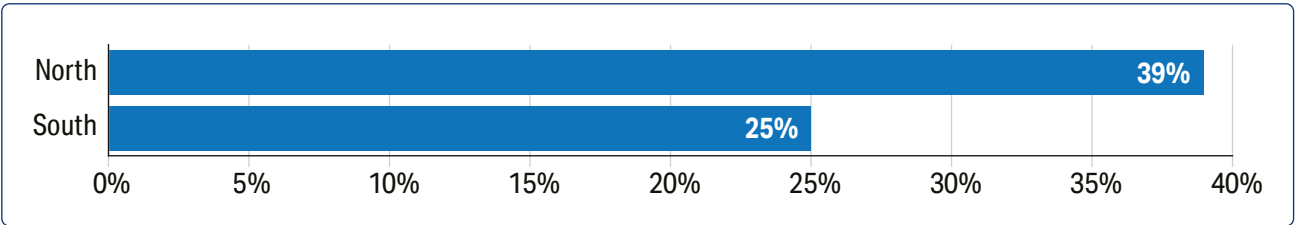
Figure 25 - Significant changes planned over the next 12 months by ward



Insights: Out of 115 returns, 12 providers indicated that they were planning to expand the number of childcare places offered, whilst 36 indicated that they were planning to increase fees. Notably, the survey was conducted prior to the start of the 2026/27 tax year, when changes such as increases in the National Minimum Wage and annual National Insurance threshold updates were scheduled to come into effect. These adjustments are expected to increase operating costs for early years providers, prompting many to consider fee increases and reassess their capacity for expansion.

Providers who indicated that they **did not** have plans to make any significant changes over the next 12 months (69 providers), were asked if they would **consider** expansion.

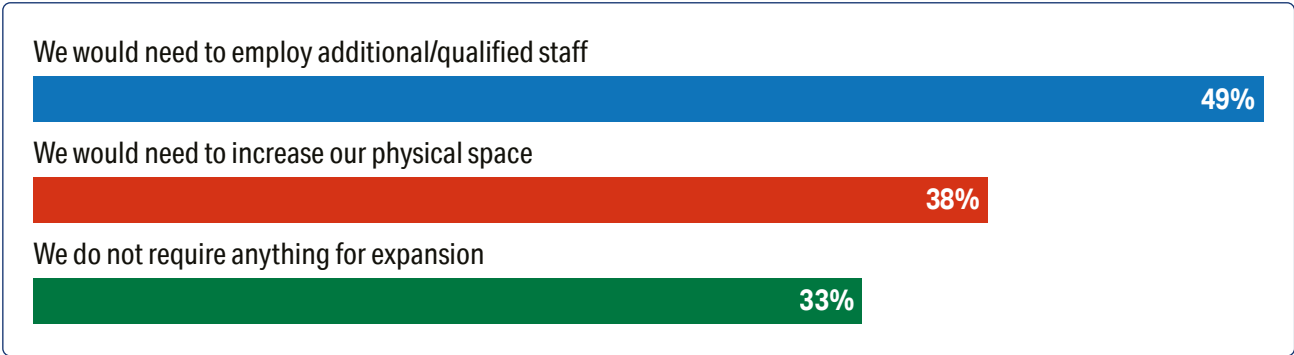
Figure 26 - Percentage of providers who would consider expansion by district



Insights: 39% of the providers who responded from the North of the City indicated that they would consider expansion.

Providers indicating that they would consider expansion, were subsequently asked what they would need to do this.

Figure 27 - Provider requirements for expansion

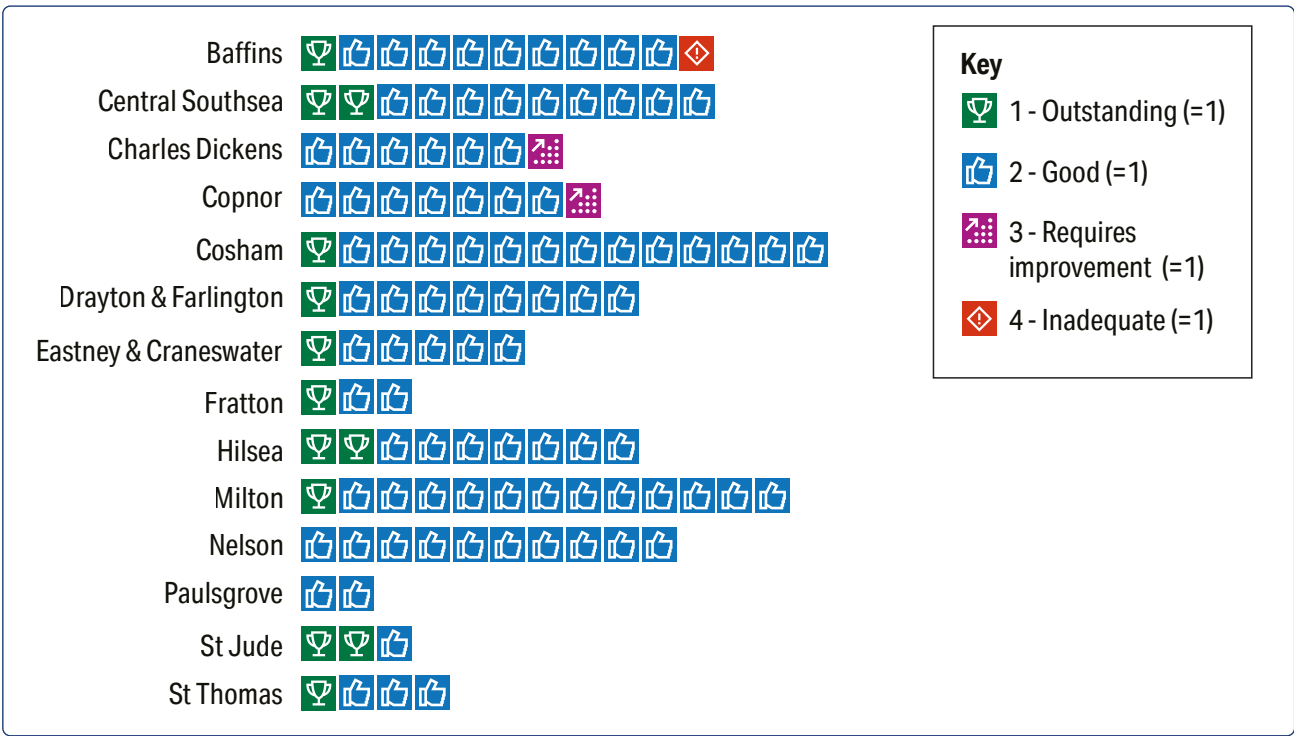


Insights: Out of 69 responses, 49% of providers indicated that they would require additional staff. This is indicative of a broader national trend concerning shortages within the early years workforce.

4.7 Childcare Quality

An Ofsted data extract of Latest Inspections of all registered providers as of 31 December 2025 (published January 2026), indicates that provision in Portsmouth is generally either ‘Good’ or ‘Outstanding’:

Figure 28 - Ofsted ratings (for overall effectiveness) by ward

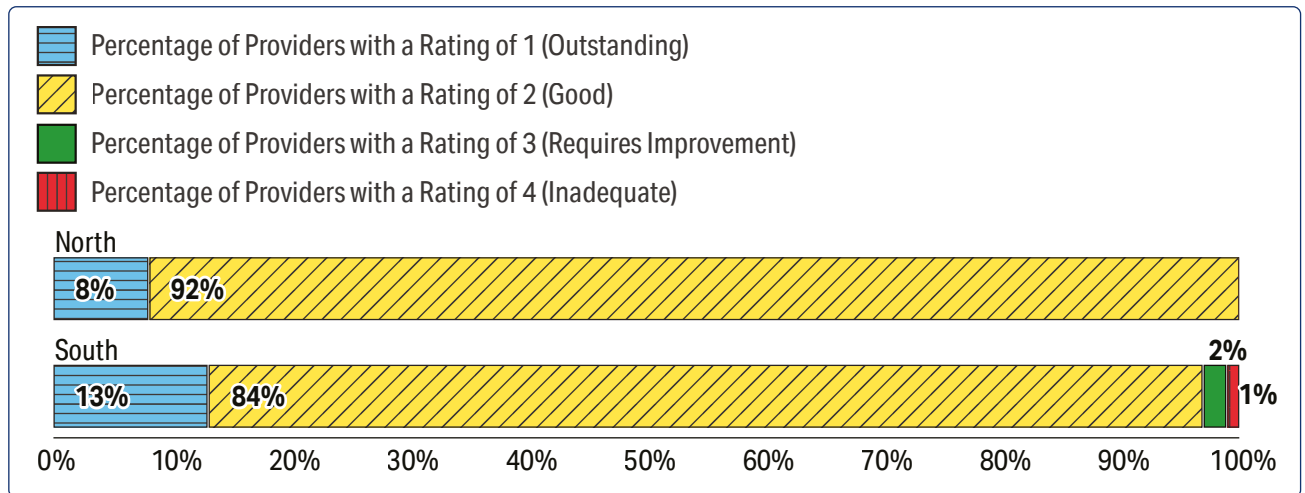


From a total of 110 inspections

The analysis excludes provisions that are not pertinent to the overall data sets used in the sufficiency analysis (e.g., out-of-school care only, playgroups, etc.). Additionally, it includes only inspected provisions (not all provisions have been inspected by Ofsted). The date range of the included inspections is from 29/06/2016 to 30/09/2025 – there were zero relevant inspections reported under the new (November 2025) Inspection Framework.

Insights: There are no 'Outstanding' providers in four of the fourteen wards (Charles Dickens, Copnor, Nelson, and Paulsgrove). There is just one provider with a rating of 'Inadequate' and that provider is based in Baffins.

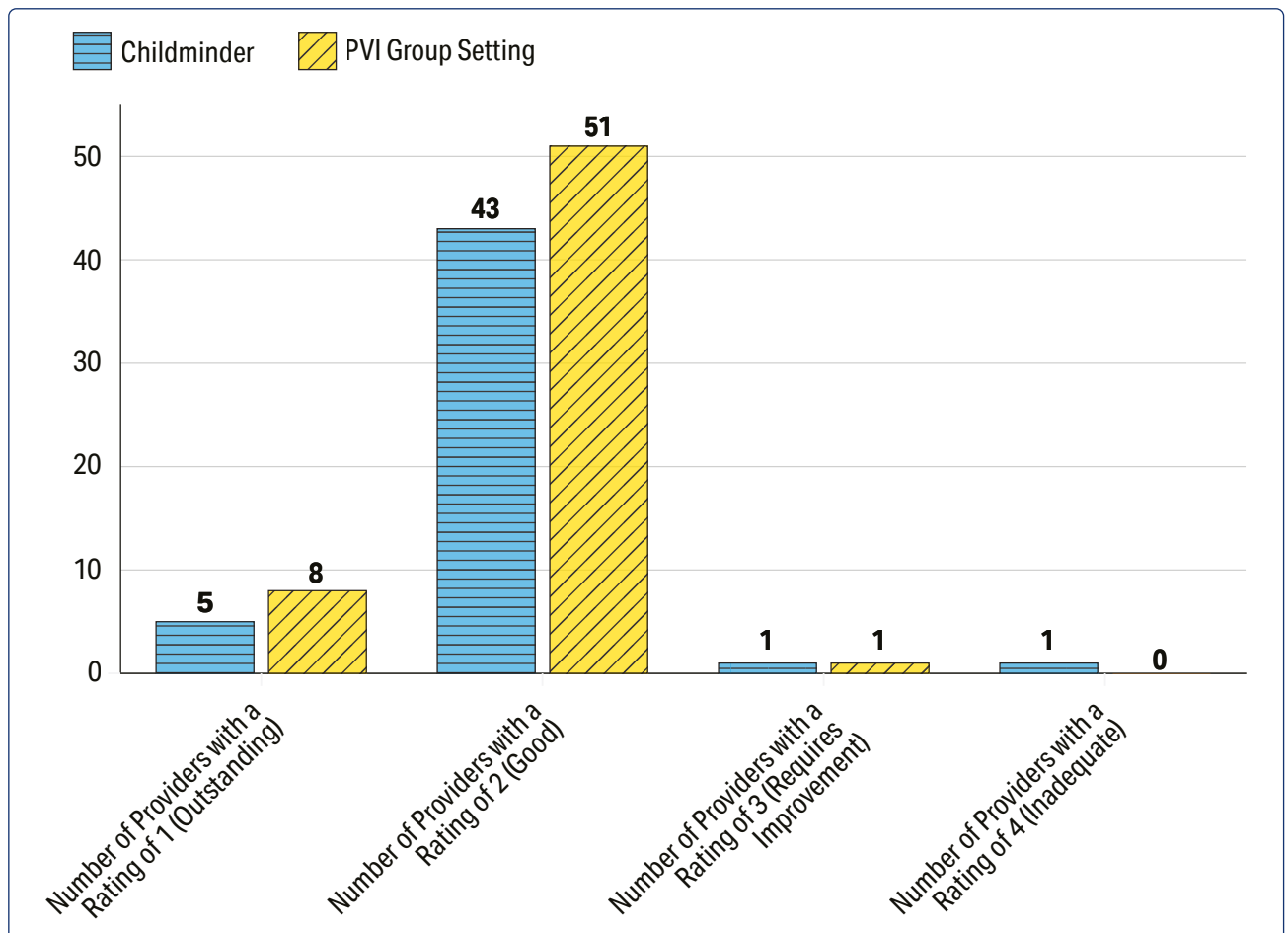
Figure 29 - Ofsted ratings by district



From a total of 110 inspections

Insights: In terms of quality, providers perform comparatively across both districts. Although the South does have more settings which have been rated as Outstanding. 2% of the settings inspected in the South 'Require Improvement' with 1% rated inadequate.

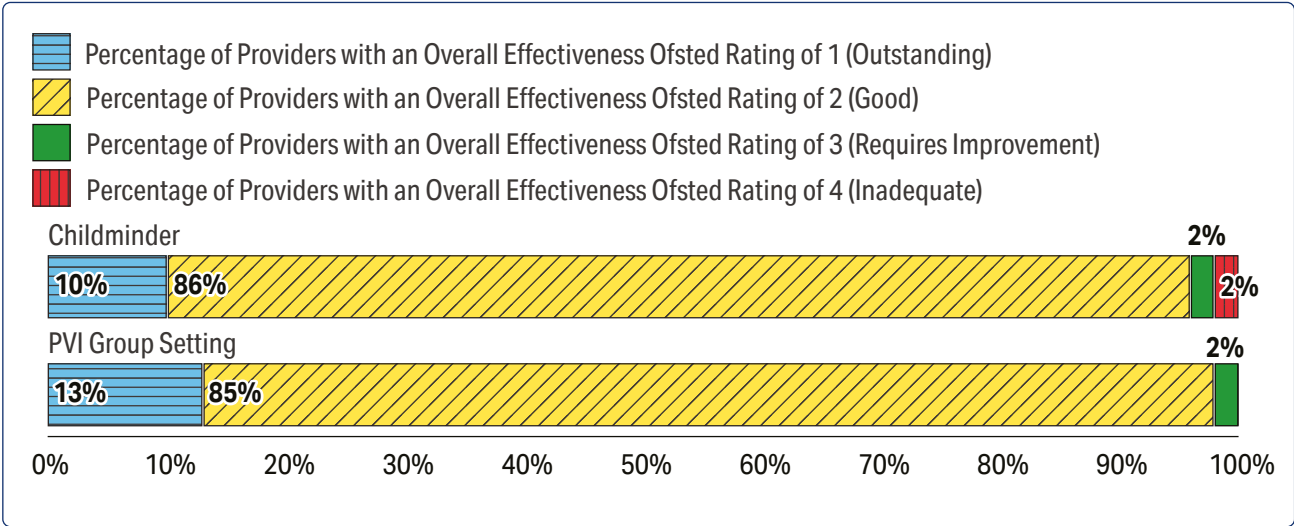
Figure 30 - Ofsted ratings by provider type



From a total of 110 inspections

Insights: The Ofsted outcomes show a broadly strong quality profile across both Childminders and PVI group settings, with the majority of providers rated either Outstanding or Good. Childminders demonstrate a slightly higher proportion of lower-graded outcomes, with two settings rated below Good (one Requires Improvement and one Inadequate), compared with only one Requires Improvement and no Inadequate ratings among PVIs.

Figure 31 - Percentage Ofsted rating by provider type



From a total of 110 inspections

Insights: The percentage breakdown reinforces the strong quality profile across both Childminders and PVI group settings, with over 95% of provision in each category rated either Outstanding or Good. PVIs show a slightly higher share of Outstanding outcomes (13% compared with 10% for Childminders), while Childminders have a marginal presence of Inadequate provision (2%) that is absent in the PVI sector.

Overall, the Ofsted data suggests a stable and high performing early years market, with only a very small proportion of Childminders requiring targeted support to reach Good or better.

4.8 Childcare Workforce

This year’s questionnaire included a dedicated section on the local childcare workforce, reflecting the growing importance of understanding workforce dynamics in sustaining sufficient provision. The data gathered enables the local authority to identify emerging pressures, pinpoint specific recruitment and retention challenges, and assess the extent to which workforce constraints are influencing providers’ operational decisions. This intelligence is critical for shaping targeted interventions, informing partnership work with training and employment services, and supporting the development of a more resilient and attractive early years workforce.

The findings from this section provide a detailed picture of current workforce conditions across the local childcare market. The following analysis summarises the key themes emerging from provider responses, highlighting the pressures most affecting recruitment, retention, and workforce stability.

Workforce-related questions were primarily directed at group-based providers and childminders who employ assistants, as these settings are most affected by staffing structures, qualification requirements, and recruitment challenges. A small number of questions were also asked of solo

childminders to capture information on qualifications. Of the 115 providers who responded to the survey, 77 were either group-based settings or childminders employing assistants.

4.8.1 Workforce Composition (including training and qualifications)

Figure 32 - Number of childminders and assistants

DISTRICT	Total Number of Childminders (Responses)	Number of Childminders Employing Assistants	Number of Assistants Employed
North	10	4	8
South	51	5	7
Grand Total	61	9	15

Based on 61 responses

Insights: 15 assistants are employed by 9 childminders across the city.

Figure 33 - Number of staff currently working directly with children under 5-years-old (excluding volunteers) by ward

WARD	Full-Time Staff		Part-Time Staff		Apprentices/ Trainees	
	Total	Holding Level 3+ Qualifications	Total	Holding Level 3+ Qualifications	Total	Holding Level 3+ Qualifications
Baffins	14	18	18	11	2	0
Central Southsea	3	3	2	2	1	0
Charles Dickens	52	39	27	22	11	0
Copnor	37	30	20	16	6	0
Cosham	101	66	42	16	12	0
Drayton and Farlington	42	30	23	12	16	0
Eastney and Craneswater	0	0	0	0	0	0
Fratton	27	35	1	2	5	0
Hilsea	52	36	26	19	16	2
Milton	61	41	29	18	14	0
Nelson	34	28	18	10	11	0
Paulsgrove	49	42	7	4	5	0
St Jude	17	13	11	6	1	0
St Thomas	28	21	37	27	2	0
Grand Total	517	402	261	165	102	2

Based on 77 responses

Insights: The workforce data, drawn solely from provider survey responses, shows notable variation in staffing levels across wards, likely reflecting differences in response rates as much as actual workforce distribution. Cosham, Milton, Hilsea, Charles Dickens, and Drayton & Farlington appear as the largest employment clusters, with Cosham reporting the highest combined number of full-time, part-time, and trainee staff. Eastney & Craneswater, shows no recorded staff, which is more indicative of non-response than an absence of staff/provision. Across all wards, the majority of

staff hold a Level 3 or higher qualification, demonstrating a broadly skilled workforce, although the volume of apprentices, particularly in Drayton & Farlington, Milton, and Hilsea, suggests an active but still-developing pipeline of new practitioners.

Figure 34 - Number of staff currently working directly with children under 5-years-old (excluding volunteers) by Provider Type

PROVIDER TYPE	Full-Time Staff		Part-Time Staff		Apprentices/ Trainees	
	Total	Holding Level 3+ Qualifications	Total	Holding Level 3+ Qualifications	Total	Holding Level 3+ Qualifications
Childminder	13	9	5	2	5	0
Other	17	13	4	2	0	0
PVI Group Setting	450	347	241	153	94	2
School Based Setting	37	33	11	8	3	0
Grand Total	517	402	261	165	102	2

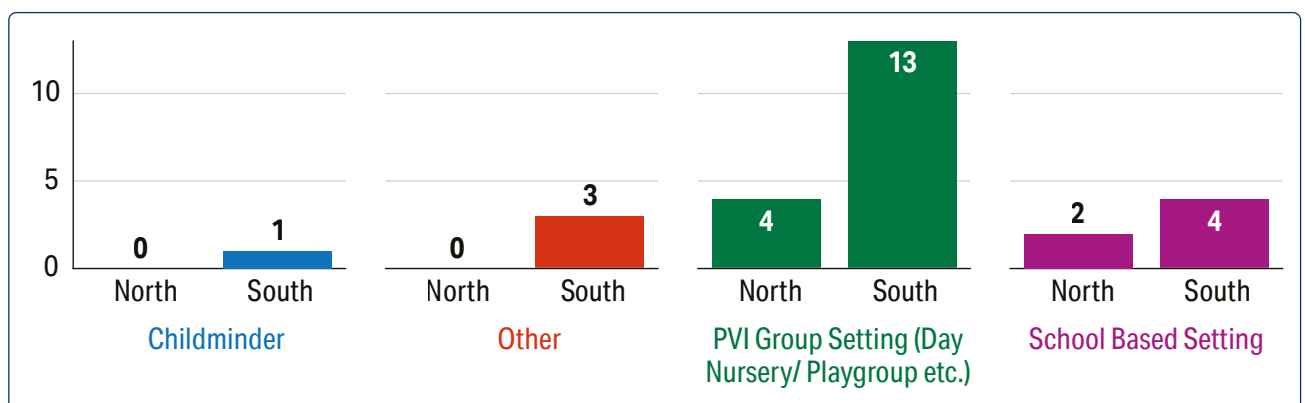
Based on 77 responses

Insights: PVI group settings account for the overwhelming majority of the workforce, employing most full-time, part-time, and trainee staff, and holding the strongest qualification profile. Childminders and school-based settings contribute smaller but important proportions of the workforce, with childminders showing a relatively higher reliance on apprentices compared with their overall staffing numbers.

Overall, the survey responses indicate a predominantly well-qualified workforce concentrated in key localities, though the uneven distribution of responses means these patterns should be interpreted as indicative rather than definitive.

Figure 35 - Settings employing staff with Early Years Teacher Status (EYTS) or Qualified Teacher Status (QTS) who work with children under 5-years-old

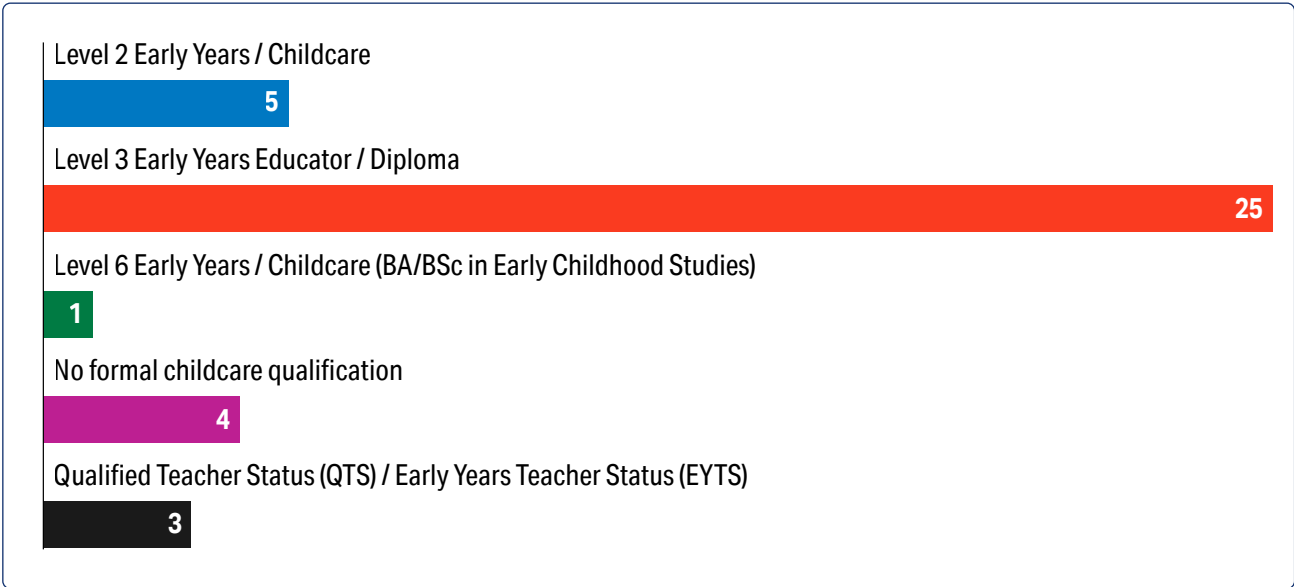
Based on 77 responses



Insights: Only 27 of the 77 settings responding to the survey reported employing staff with EYTS or QTS to work with children under five, indicating that qualified teacher expertise is present in just over a third of participating providers. Most of these settings are located in the South of the city, where there is already a higher concentration of early years provision, while the North accounts for a smaller share. This pattern reflects both the underlying distribution of settings and the survey-based nature of the data, meaning the figures should be interpreted as indicative rather than a complete picture of qualified teacher deployment.

The childminders not employing assistants were asked to indicate the highest level of childcare/early years qualification they currently hold.

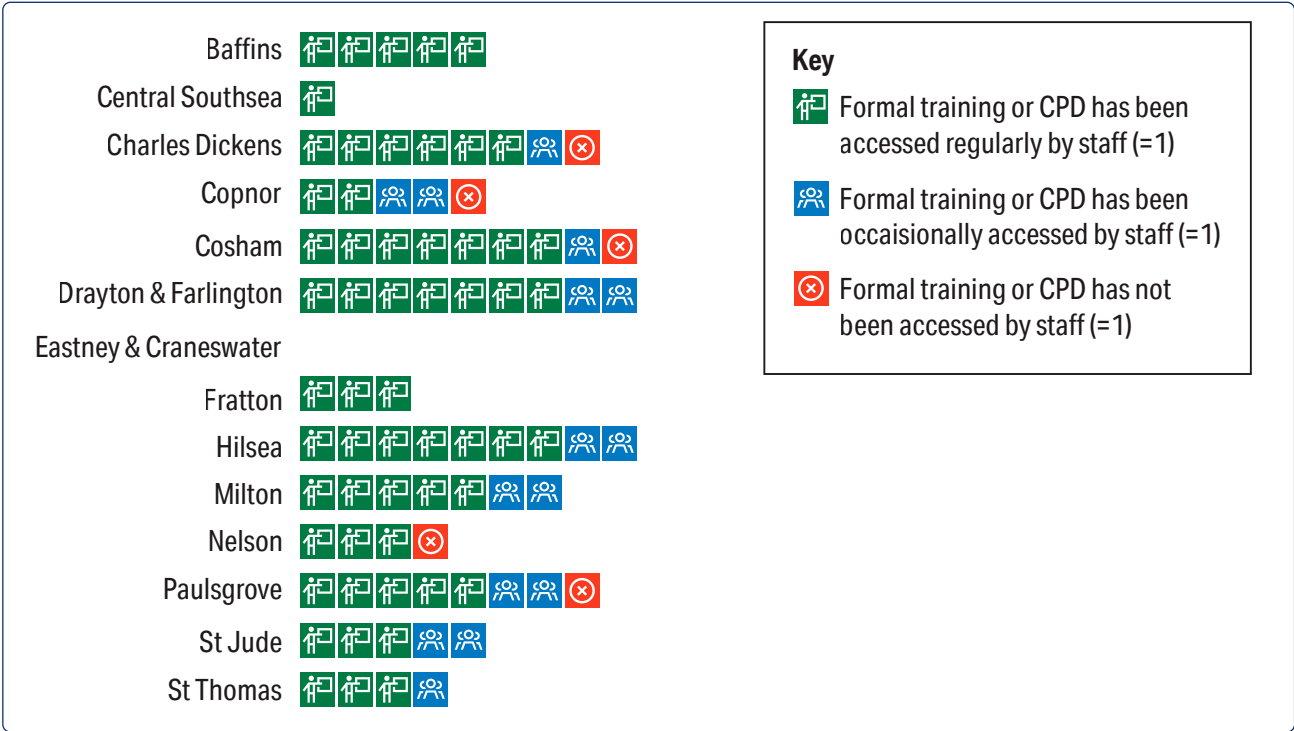
Figure 36 - Highest level of childcare/EY qualification held by childminders



Based on 38 responses (childminders operating alone i.e. no assistants)

Insights: The survey responses show that the vast majority of childminders who do not employ assistants hold a recognised childcare or early years qualification. Of the 38 respondents, 25 reported holding a Level 3 qualification and a further 5 hold Level 2, meaning 30 childminders (79%) are formally qualified at Level 2 or above. Higher-level qualifications are present, though less common, with 1 childminder holding a Level 6 early years degree and 3 holding QTS or EYTS. Only 4 respondents reported having no formal childcare qualification. Overall, the data indicates a predominantly qualified childminder workforce with a strong core of Level 3 practitioners.

Figure 37 - How staff at settings have accessed training over the past 12 months by ward

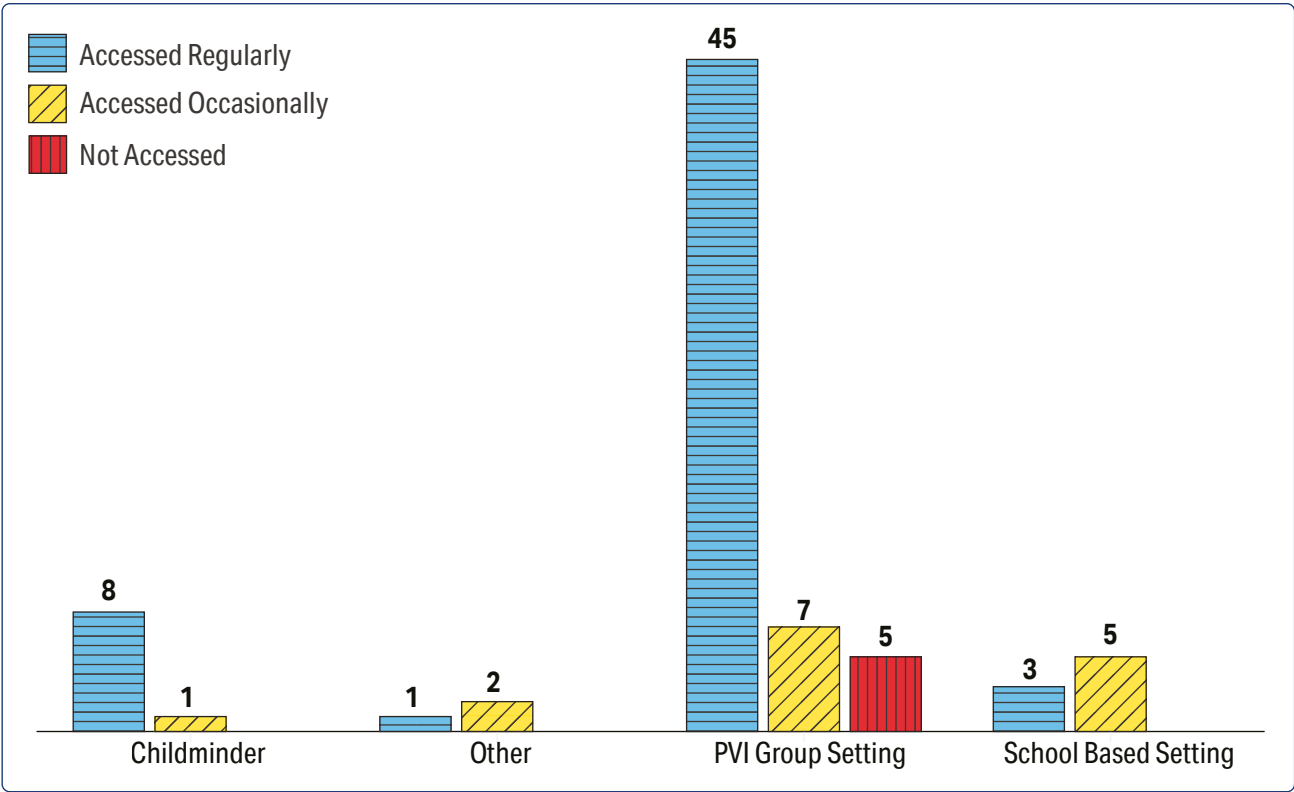


Based on 77 responses

Insights: Across the city, survey responses indicate strong engagement with formal training and Continuing Professional Development (CPD) over the past 12 months. All 5 settings responding in Baffins reported that staff accessed training regularly, and most other wards show a similar pattern of regular participation. In Copnor, responses were more mixed, with 2 settings reporting regular access, 2 occasional access, and 1 reporting no training. Overall, 57 settings reported regular CPD access, compared with 15 occasional and only 5 reporting none.

Childminders operating without assistants also demonstrated a positive commitment to professional development. Of the 38 respondents, 15 accessed CPD regularly, 20 occasionally, and only 3 reported no formal training in the past year. This suggests that, despite working independently, the majority of childminders remain actively engaged in maintaining and developing their professional skills.

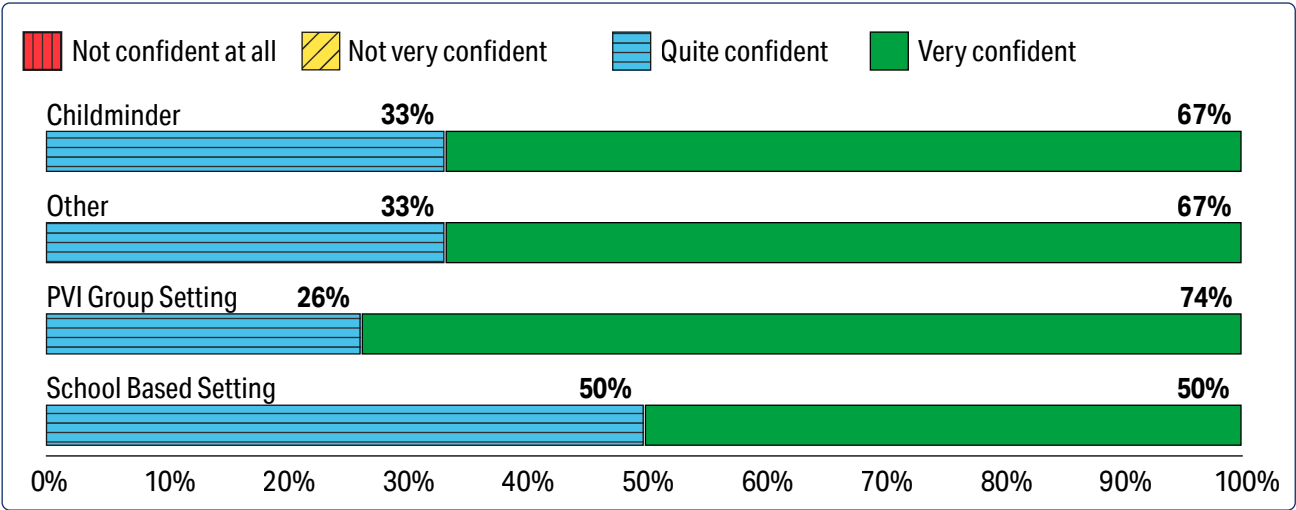
Figure 38 - How staff at settings have accessed training over the past 12 months by provider type



Based on 77 responses

Insights: Across provider types, PVI group settings show the strongest engagement with formal training and CPD, with 45 reporting regular access and a further 7 accessing training occasionally. School-based settings also demonstrate consistent participation, with 5 accessing training occasionally and 3 regularly. Overall, the data suggests that regular CPD engagement is most embedded within PVI settings, with other provider types showing smaller but still positive levels of participation.

Figure 39 - Confidence that staff have the skills and training needed to deliver high-quality EY provision



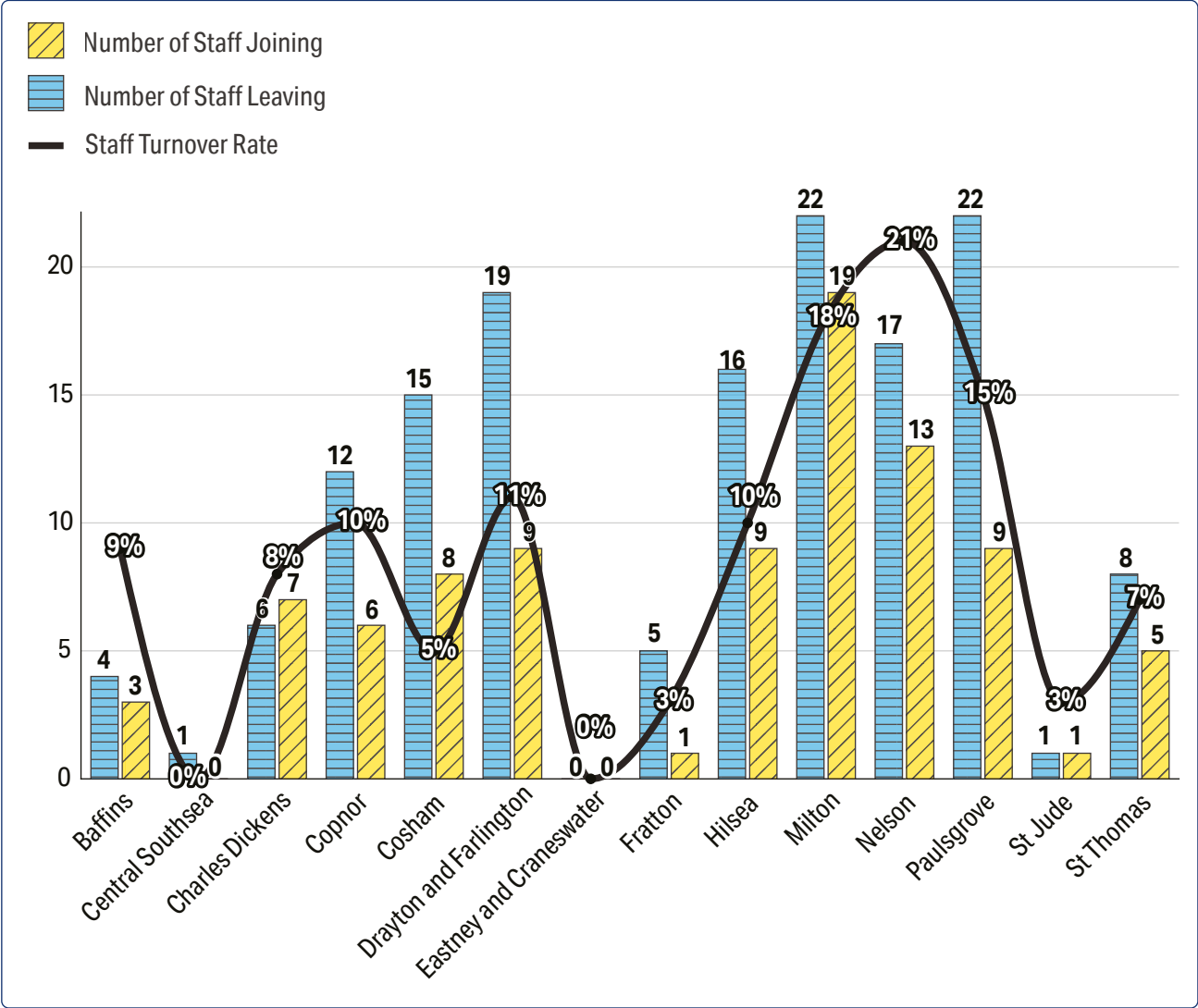
Based on 77 responses

Insights: Overall, the data suggests a strong sense of confidence in workforce capability across the sector, with all responding providers indicating at least a moderate level of assurance in their staff’s ability to deliver high-quality early years provision.

4.8.2 Recruitment and Retention

Analysis of workforce movement over the past 12 months shows a turnover rate of 10.2%, with 90 staff leaving their roles during the period. Recruitment activity has been higher, with 148 joiners, equating to a joiner rate of 16.8%. This pattern suggests ongoing churn within the workforce, with providers actively recruiting to maintain staffing levels or expand capacity. The estimated workforce stability index stands at 83.2%, indicating that the majority of staff have at least 12 months' service, although the volume of joiners highlights continued pressure on recruitment pipelines.

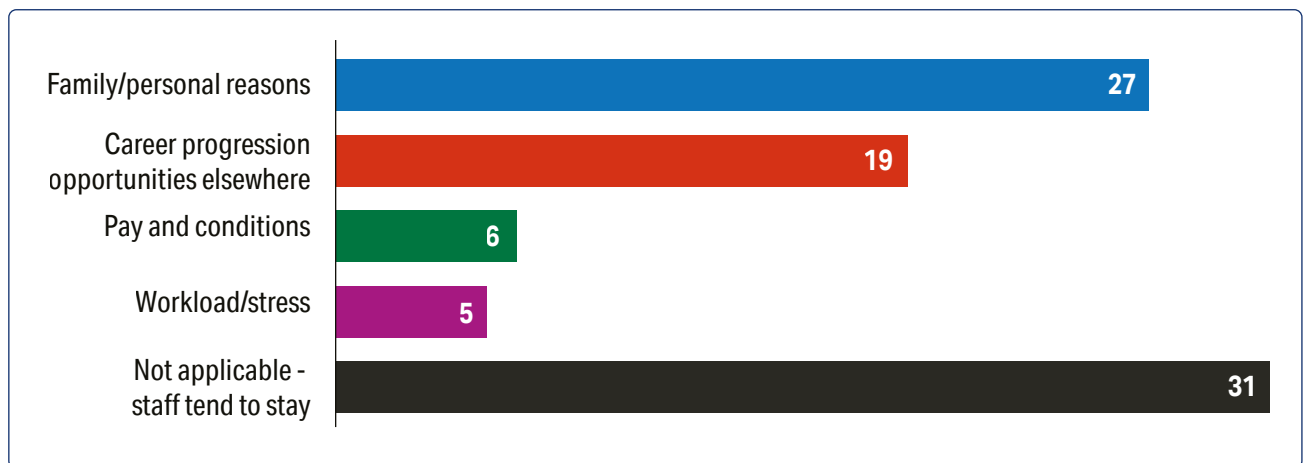
Figure 40 - Staff turnover for the past 12 months by ward



Based on 77 responses

Insights: Turnover rates vary across wards, with some areas showing relatively stable staffing and others experiencing much higher movement. For example, Nelson reports one of the highest turnover rates at 21%, while Fratton sits much lower at 3%. In most wards, the number of staff joining meets or exceeds the number leaving, suggesting active recruitment efforts even where turnover is higher. Overall, the data highlights a mixed picture of workforce stability, with a few localised pressure points that may warrant closer monitoring.

Figure 41 - How providers indicated the main reasons for staff leaving

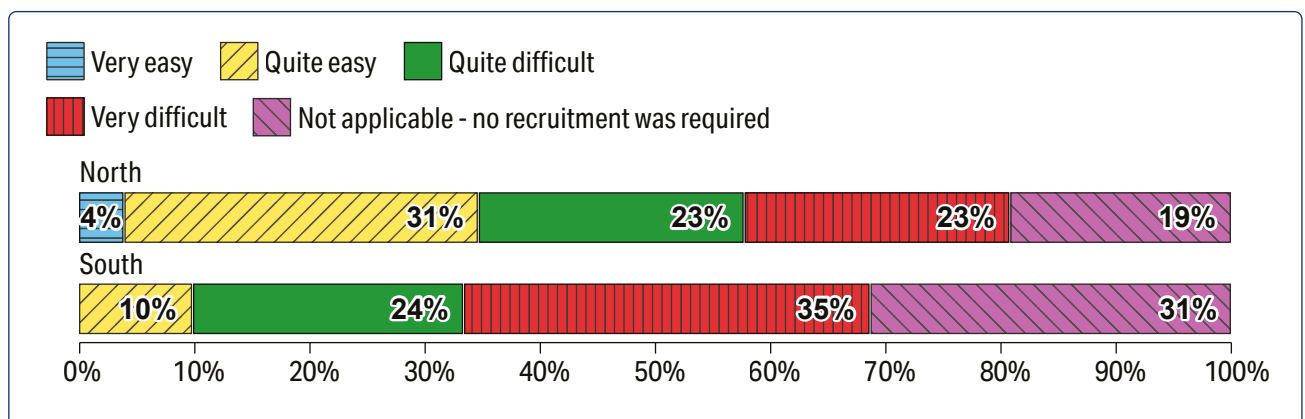


Based on 77 responses

Insights: The most commonly reported reasons for staff leaving relate to family or personal circumstances (27 responses) and career progression opportunities elsewhere (19 responses), suggesting that many departures are driven by factors beyond the immediate control of settings. Far fewer providers cited pay and conditions (6) or workload and stress (5) as primary reasons. Notably, 31 settings indicated that this question was not applicable because staff tend to stay, highlighting a degree of stability across a significant proportion of the workforce.

Providers were asked how easy or difficult it had been to recruit suitable staff over the past 12 months, and what were the main barriers to recruitment.

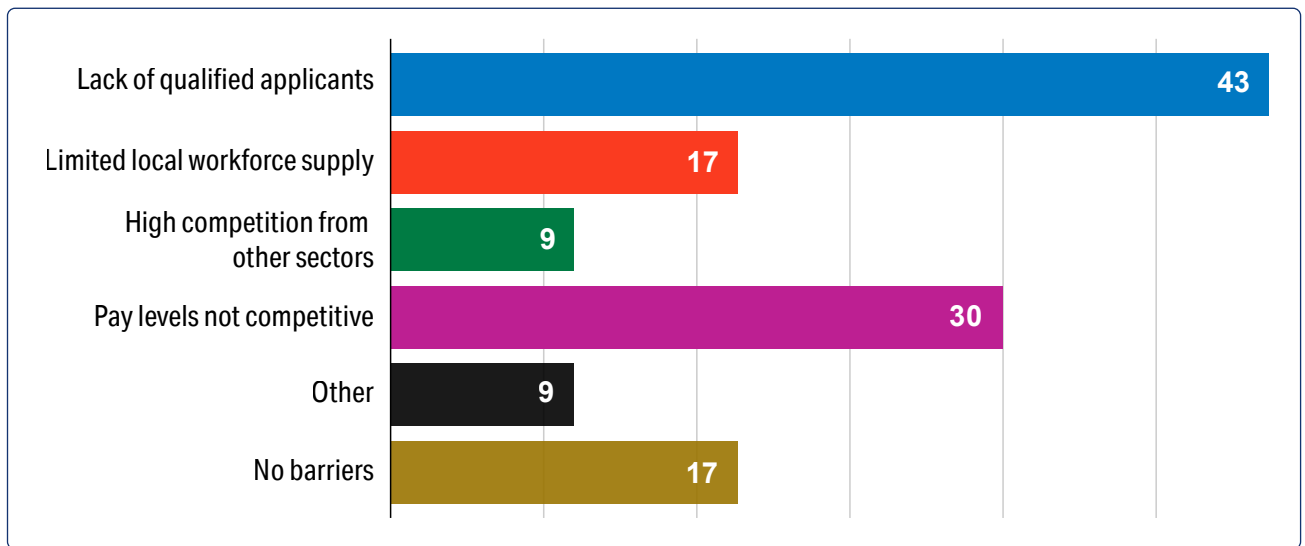
Figure 42 - Percentage of providers finding recruitment easy/difficult



Based on 77 responses

Insights: Recruitment has been significantly more challenging in the South, where 35% of providers described it as very difficult compared with 23% in the North. Only 4% of providers in the North, and none in the South, found recruitment very easy. A sizeable proportion of providers, particularly in the South (31%), did not need to recruit at all over the past year. Overall, the data highlights a tougher recruitment climate in the South, with the North showing a more mixed picture.

Figure 43 - How providers indicated the main barriers to recruitment

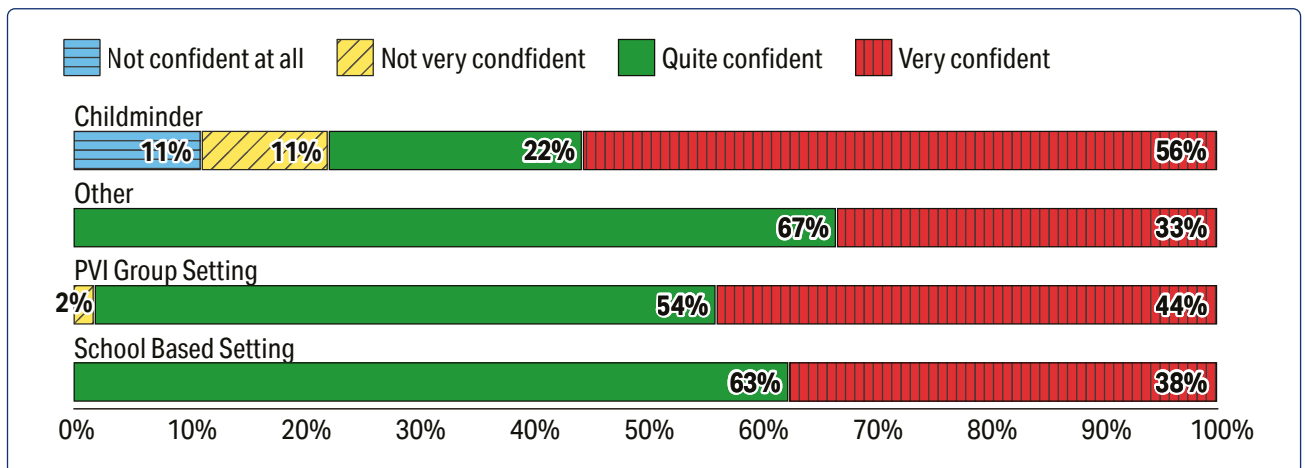


Based on 77 responses

Insights: The most frequently cited barrier to recruitment was a lack of qualified applicants, reported by 43 providers (56%), followed by pay levels not being competitive, highlighted by 30 providers (39%). Around 22% pointed to limited local workforce supply, and smaller proportions referenced high competition from other sectors or other miscellaneous factors (both 9 responses, 12%). Notably, 17 providers (22%) reported no barriers, indicating that recruitment challenges are not universal across the sector.

Providers were asked about confidence in staff retention and what might help to recruit and retain staff.

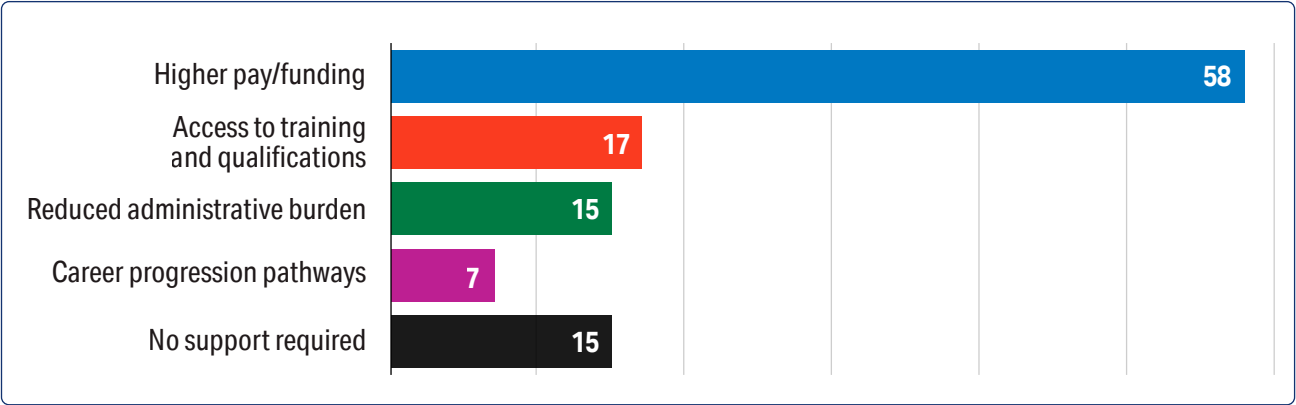
Figure 44 - Provider confidence in staff retention over the next 12 months by provider type



Based on 77 responses

Insights: Across the sector, confidence in retaining staff is strong, with over 90% of PVI and school-based settings feeling quite or very confident. Childminders show a similar pattern, though with a small minority expressing lower confidence. Overall, the data suggests a broadly stable workforce outlook for the coming year.

Figure 45 - How providers indicated the types of support that would help most to recruit and retain staff



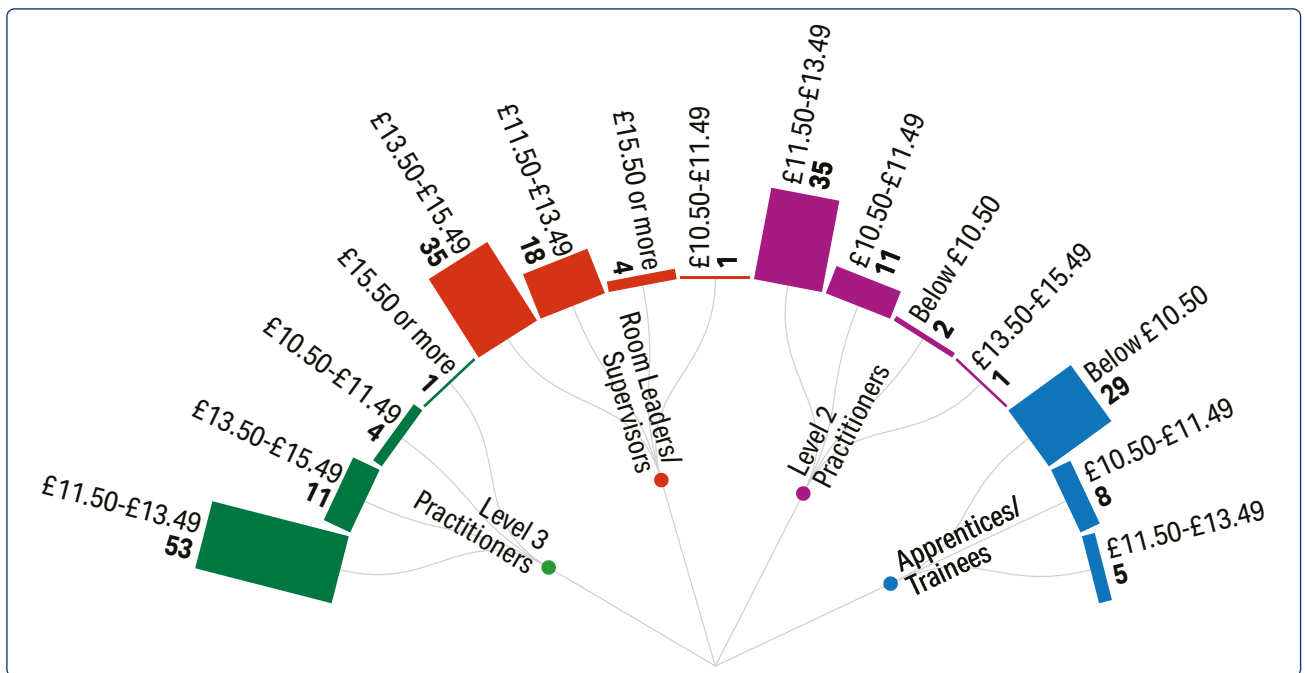
Based on 77 responses

Insights: Three-quarters of providers (75%) said higher pay or funding would make the biggest difference to recruiting and retaining staff.

4.8.3 Staff Remuneration

Understanding local pay structures is essential for assessing the competitiveness and stability of the early years workforce. As part of this year’s survey, providers were asked to report hourly pay for non-managerial roles and annual salaries for managerial staff using defined pay brackets. This information provides insight into how remuneration varies by qualification level and responsibility and helps identify whether pay levels may be contributing to recruitment and retention challenges across the sector. The following infographics summarise the distribution of pay across key roles, followed by an analysis of the emerging patterns.

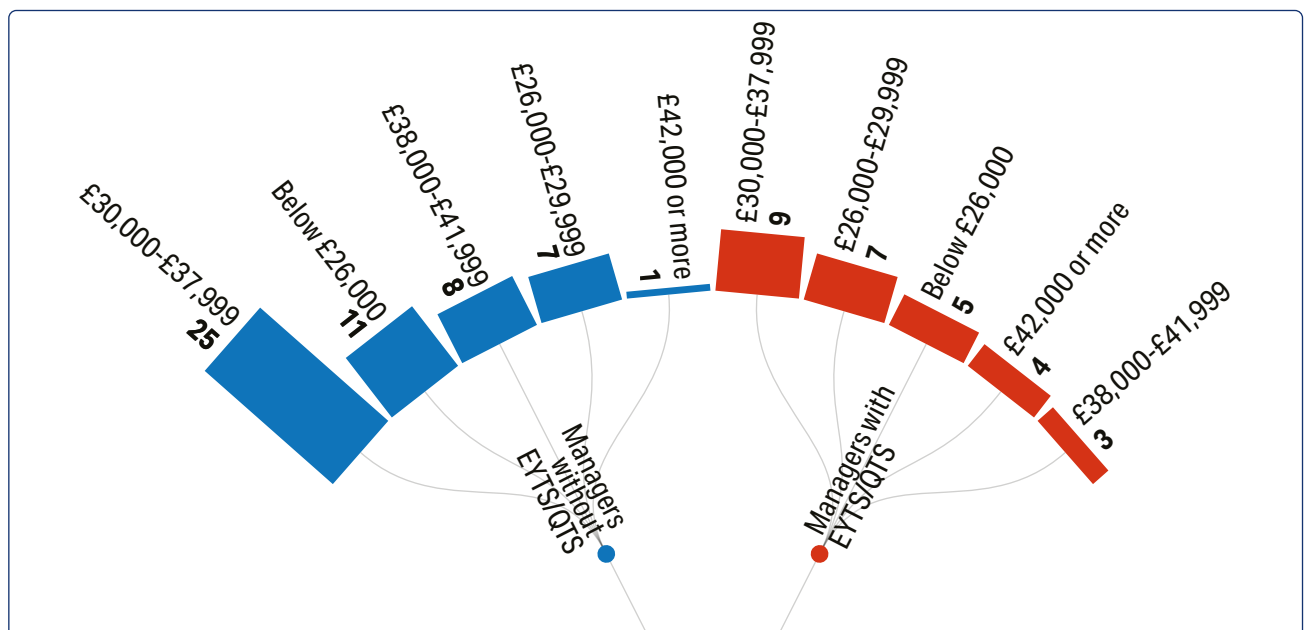
Figure 46 - Average hourly rate of pay for non-managerial staff



Based on 70 responses (some settings excluded due to missing information)

Insights: Pay for non-managerial roles is concentrated in the lower and mid-range brackets, with most Level 2 practitioners (35) and Level 3 practitioners (53) earning between £11.50 and £13.49 per hour. Apprentices are predominantly paid below £10.50, while room leaders show a wider spread across the mid-range bands. Overall, the data suggests limited pay progression between qualification levels, which may be contributing to recruitment and retention challenges.

Figure 47 - Average salary for managerial staff



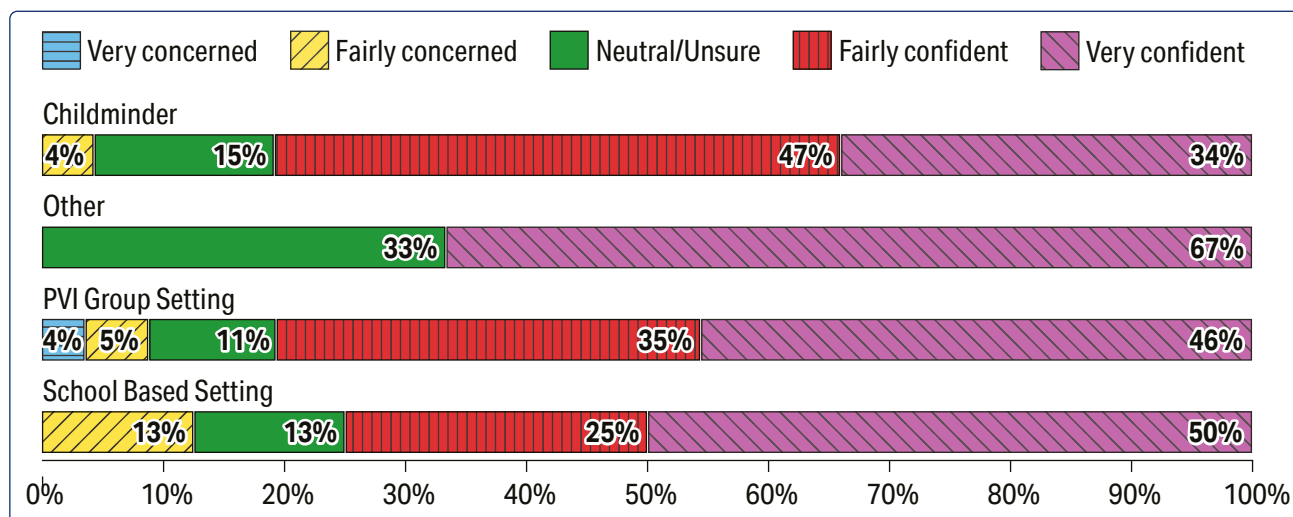
Based on 65 responses (some settings excluded due to missing information)

Insights: Managerial salaries show clearer differentiation, particularly between managers with and without EYTS/QTS. Most managers without EYTS/QTS fall within the £30,000–£37,999 range, while those with EYTS/QTS are more evenly distributed across the mid and higher salary brackets. Although qualification appears to support higher pay, the overall salary levels may still limit competitiveness with the wider labour market.

4.9 Provider Sustainability

Providers were asked about the sustainability of their setting over the next 12 months, a key indicator of future sufficiency, as financial resilience and workforce stability directly affect the availability of early years places.

Figure 48 - Provider confidence in the sustainability of their setting by provider type

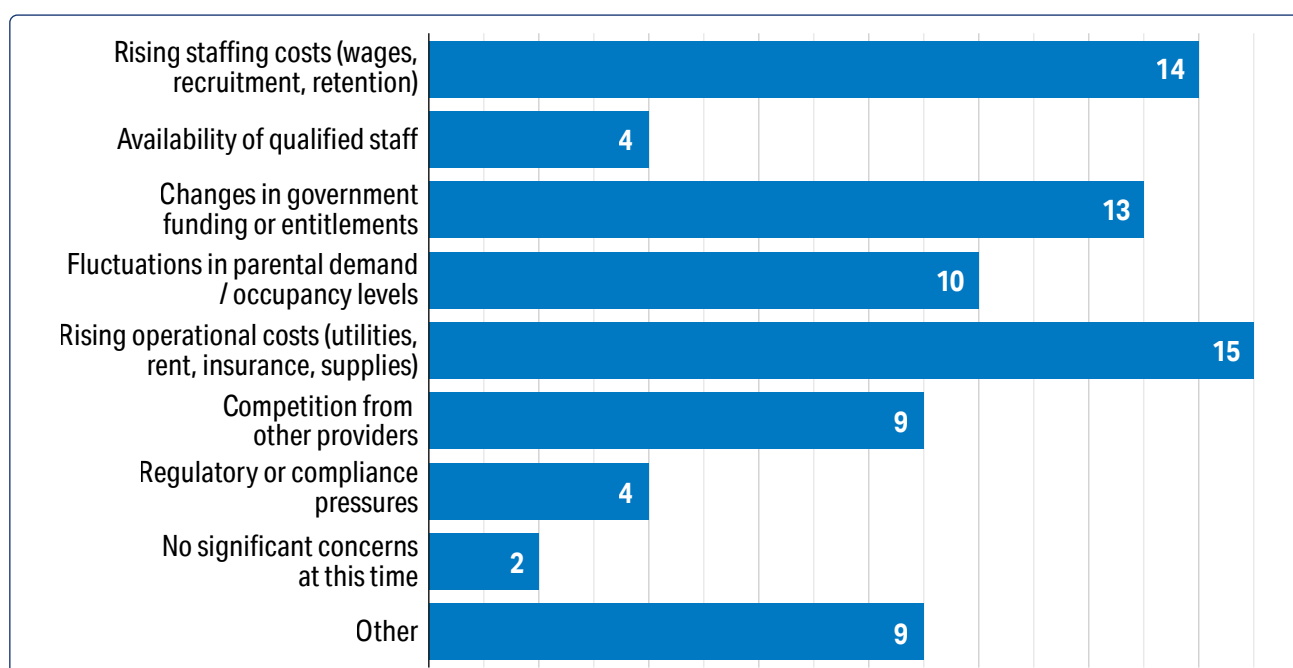


Based on 115 responses

Insights: Overall, confidence levels are broadly positive across all provider types, with most childminders, PVI settings and school-based providers feeling fairly or very confident about their sustainability. Only a very small number, such as two PVI settings, reported being very concerned.

Where providers have indicated there are concerns, the following factors were highlighted:

Figure 49 - Factors affecting sustainability



Based on 21 responses (from providers raising concerns about sustainability).

Insights: Among the 21 providers who did raise concerns, the most common issues related to rising operational and staffing costs, alongside uncertainty around future government funding. A smaller number highlighted fluctuating occupancy or local competition as additional pressures.

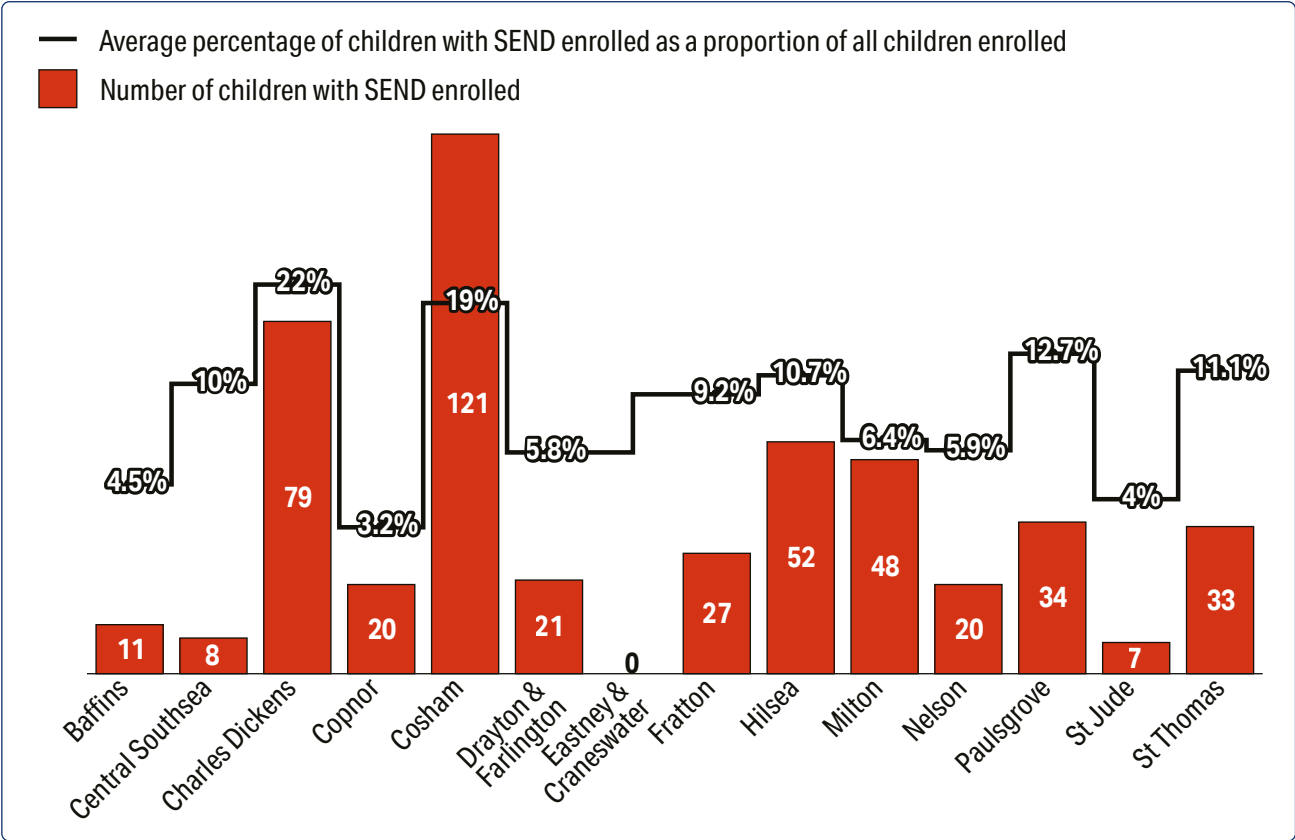
4.10 Provision for Children with Special Educational Needs and Disabilities (SEND)

Across the early years sector, there is an increasing emphasis on strengthening provision for children with Special Educational Needs and Disabilities (SEND). This reflects a national trend, with local authorities experiencing rising demand, greater complexity of need and growing expectations around inclusion. Locally, providers continue to adapt their practice, staffing and environments to ensure that early years provision remains accessible, high-quality, and responsive to the needs of children with SEND.

The analysis that follows examines the current position of SEND provision within the early years market, drawing on provider-reported data relating to occupancy, staff expertise, training, and the capacity to meet individual needs. Together, these insights offer a clear picture of the strengths and pressures within the system, and the ongoing work required to support inclusive, sustainable provision.

Providers were first asked about the number of children with SEND enrolled in their setting, as well as what percentage of their total enrolment this represented. This information allowed for the calculation of the average proportion of children with SEND attending each ward.

Figure 50 - Number and percentage of children with SEND enrolled



Based on 115 responses (some providers misinterpreted the percentage ratio questions – in this instance the percentage take-up by children with SEND has been manually calculated). Providers indicated that a total of 481 children with SEND were registered at early years settings across the city.

Insights: The data shows a clear concentration of SEND need in a small number of wards, with Charles Dickens (22%), Cosham (19%) and Paulsgrove (12.7%) recording the highest proportions of places occupied by children with SEND each day, alongside some of the largest absolute numbers of enrolled children such as Cosham’s 121 and Charles Dickens’ 79. These areas represent the most significant pressure points in the city, where settings are likely to require enhanced support and capacity.

Lower proportions in Baffins (4.5%), Copnor (3.2%), St Jude (4.0%) and Drayton & Farlington (5.8%) may reflect genuinely lower levels of need or potential under-identification, while Eastney & Craneswater’s 0% suggests a need to explore whether this reflects local demographics, capacity constraints, or gaps in reporting. Overall, the pattern highlights the importance of aligning resources with the wards experiencing the greatest pressure, while maintaining oversight of areas where SEND representation appears unusually low.

Figure 51 - Distribution of children with SEND enrolled by provider type

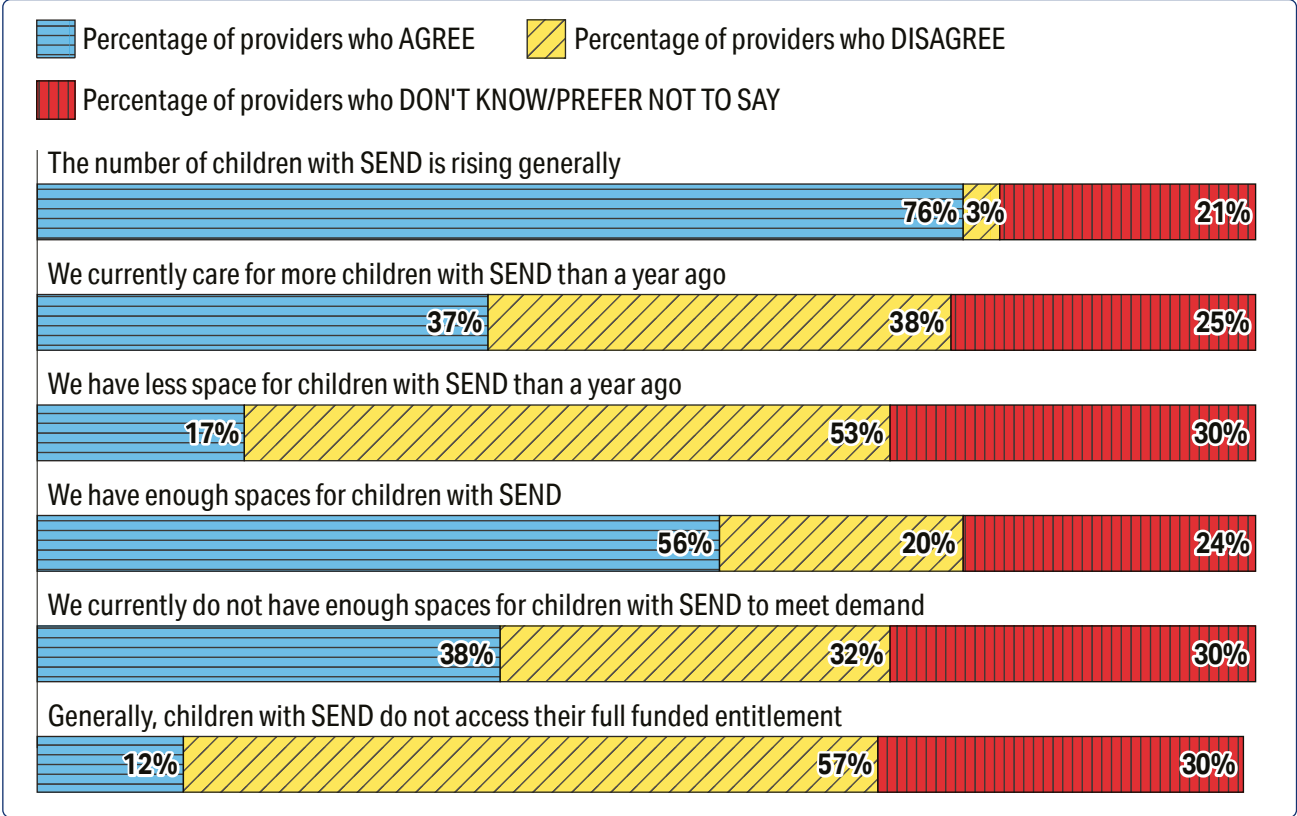


Based on 115 responses

Insights: Most children with SEND are enrolled in PVI group settings (85%), with much smaller proportions attending school-based provision (12%) or childminders and other providers (around 1% each), reflecting the overall distribution of early years places across the sector.

Providers were asked for their thoughts around various aspects of childcare delivery for children with SEND, the challenges faced and if they had any plans to improve this provision.

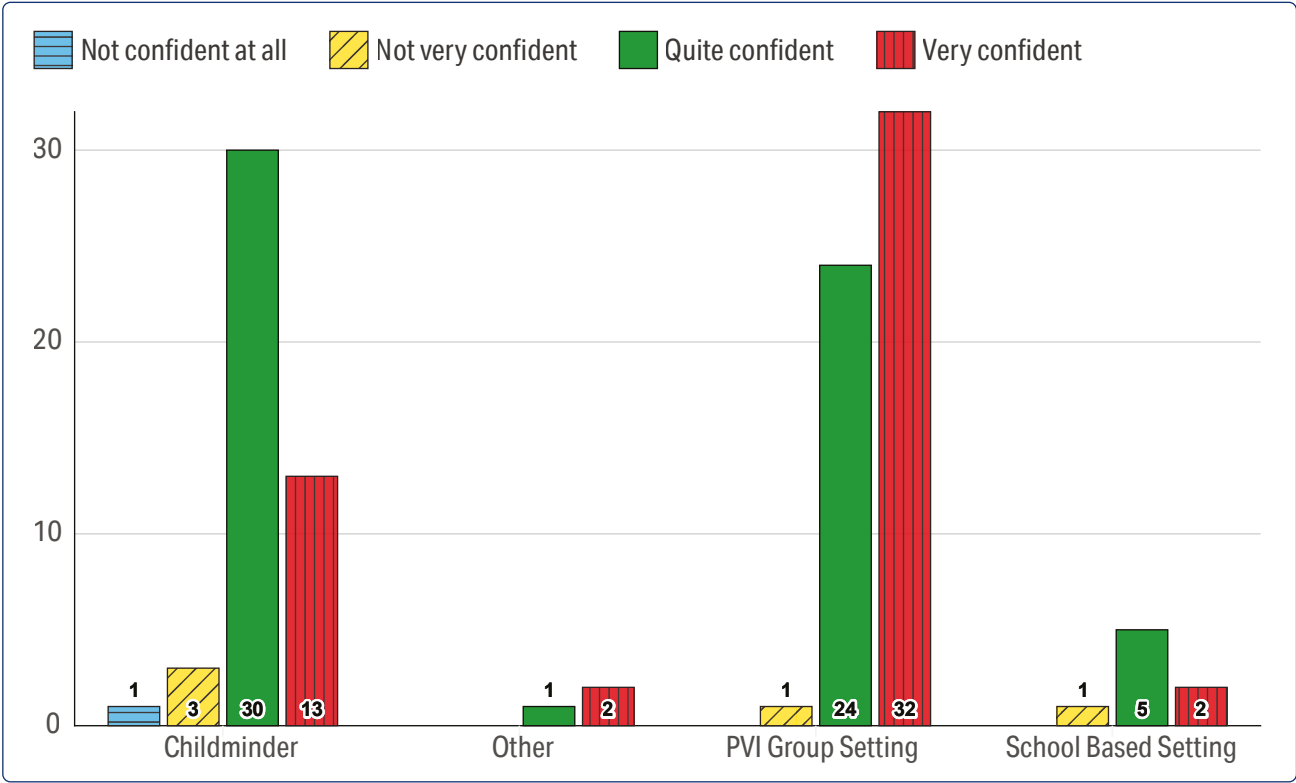
Figure 52 - Providers observations on caring for children with SEND



Based on 115 responses

Insights: Most providers agree that the number of children with SEND is rising (76%), though views are more mixed on whether they are caring for more children than a year ago. Over half (56%) feel they currently have enough spaces for children with SEND, while a notable minority (38%) believe demand exceeds capacity. Only a small proportion (12%) agree that children with SEND generally do not access their full funded entitlement, suggesting this is not a widespread concern for the sector.

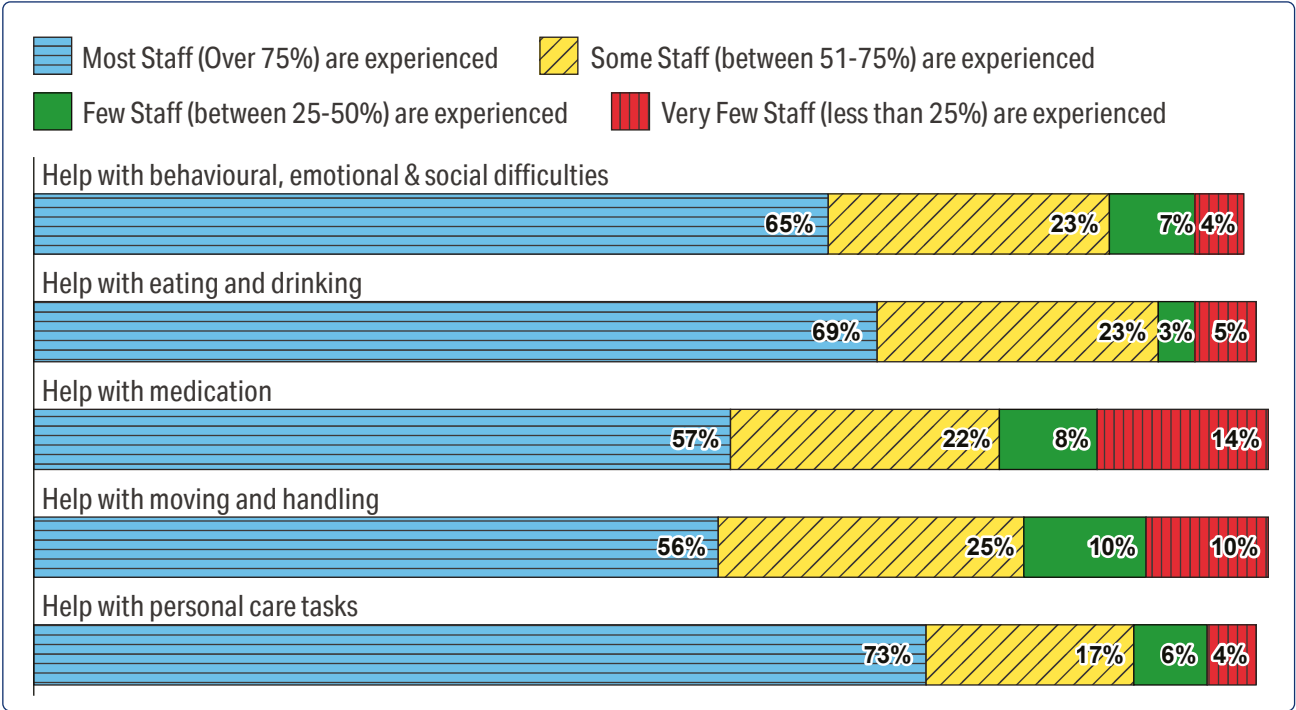
Figure 53 - Provider confidence in meeting the needs of children with SEND



Based on 115 responses

Insights: Most providers feel well-equipped to meet the needs of children with SEND, with confidence levels particularly strong among PVI group settings and childminders. Very few providers reported low confidence, for example, only one childminder and one school-based setting said they were not confident at all. Overall, the pattern suggests a sector that feels broadly capable and prepared, with only isolated pockets of uncertainty.

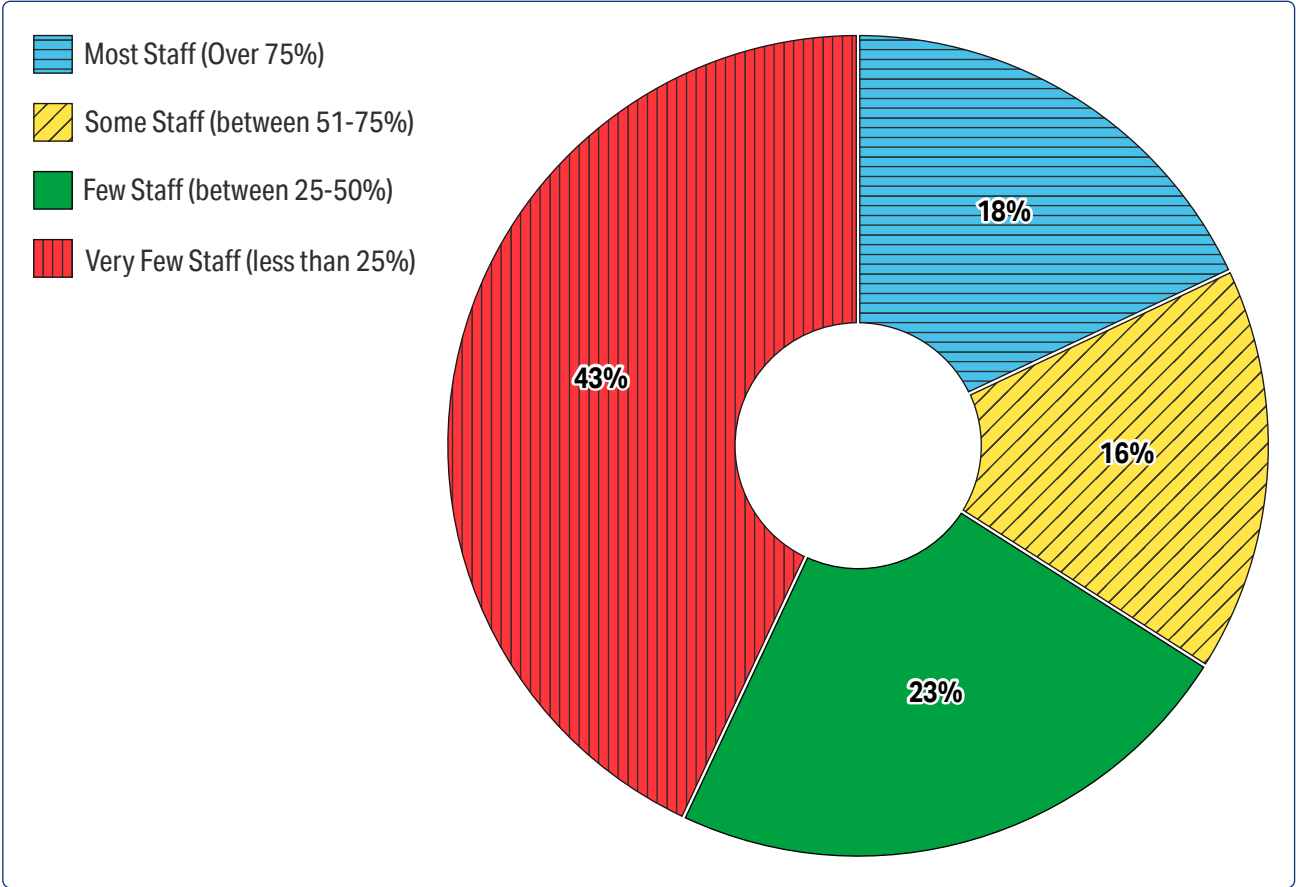
Figure 54 - Staff experience in caring for children with SEND



Based on 115 responses

Insights: Most providers report that the majority of their staff are experienced in supporting children with SEND across a range of needs.

Figure 55 - Specialist SEND training - staff completion rates



Based on 115 responses

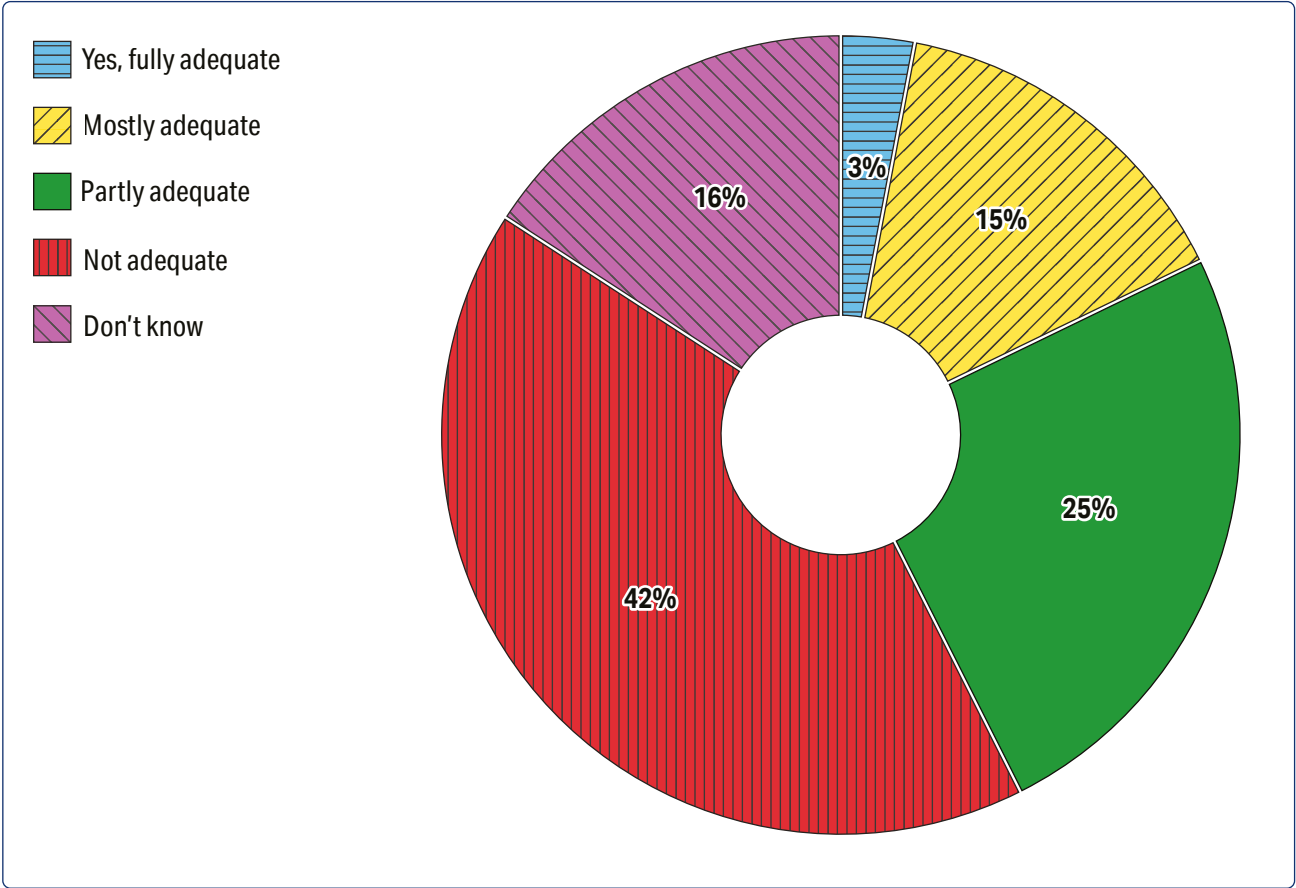
Insights: Most providers report relatively low completion rates for specialist SEND training. Only 18% say that most of their staff (over 75%) have completed this training, while the largest share (43%) report that very few staff (less than 25%) have done so. This suggests that while general SEND experience is strong, specialist training is far less widespread, highlighting a clear development gap across the workforce.

Figure 56 - Main challenges faced by providers in delivering care for children with SEND by whole LA



Insights: Funding and resource pressures are the most significant challenge for providers, followed closely by limitations in the physical environment and the administrative demands linked to SEND support.

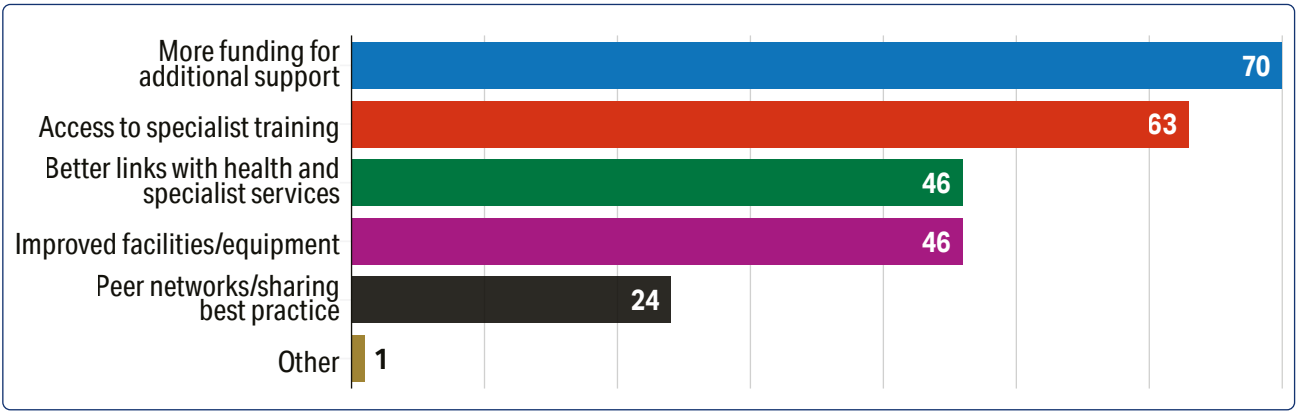
Figure 57 - Provider thoughts on whether there is adequate provision locally to meet the needs of children with SEND by whole LA



Insights: Providers express mixed views on whether local SEND provision is sufficient, with only a very small proportion describing it as fully adequate. The largest share feel provision is not adequate, and a further quarter say it is only partly meeting children’s needs, indicating clear pressure points in the local system.

Based on 115 responses

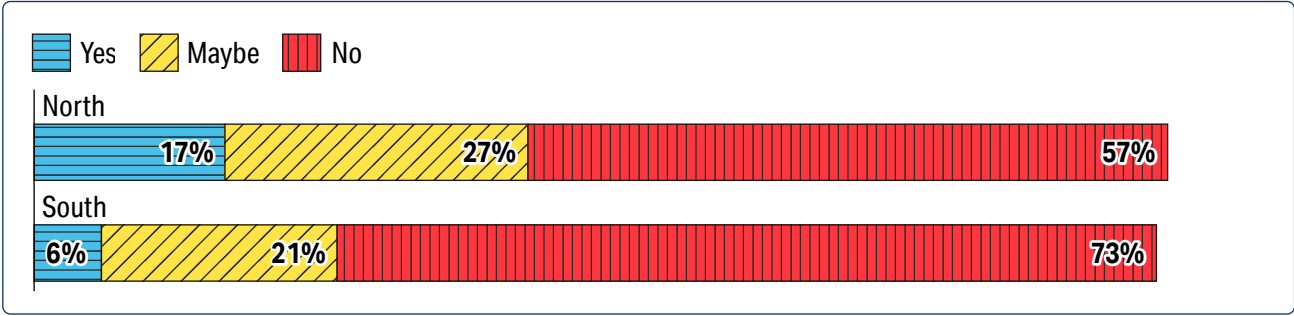
Figure 58 - Support that providers felt would help most to improve provision for children with SEND by whole LA



Based on 115 responses

Insights: Providers say the most impactful improvements would come from increased funding for additional support, wider access to specialist training, and stronger links with health and specialist services, alongside better facilities, and equipment.

Figure 59 - Whether or not providers have any plans to improve provision for children with SEND by district



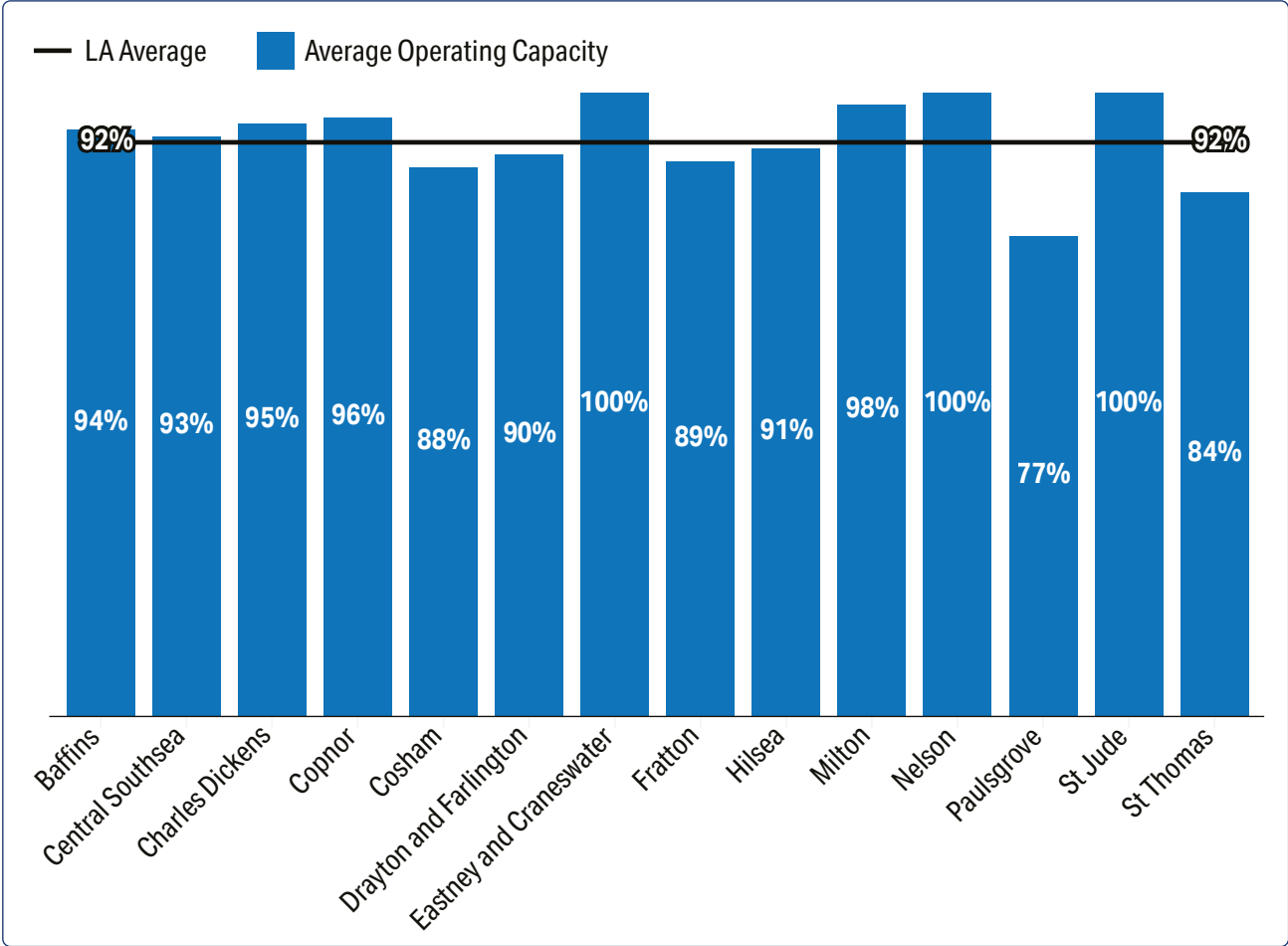
Based on 115 responses

Insights: Plans to improve SEND provision differ noticeably across the city: in the North, around one in six providers (17%) say they intend to make improvements, compared with just 6% in the South, where nearly three-quarters (73%) report no plans at all.

4.11 Provider Operating Capacity and Age Distribution

Providers were surveyed using a range of questions to assess and verify their maximum operational capacity. It is common for many providers not to operate at their Ofsted registered capacity, as they may not offer the full number of places for which they are registered. This typically results from space constraints or difficulties in recruiting sufficient staff to maintain the legally required staff-to-child ratios.

Figure 60 - Average operating capacity as a proportion of Ofsted registered places by ward

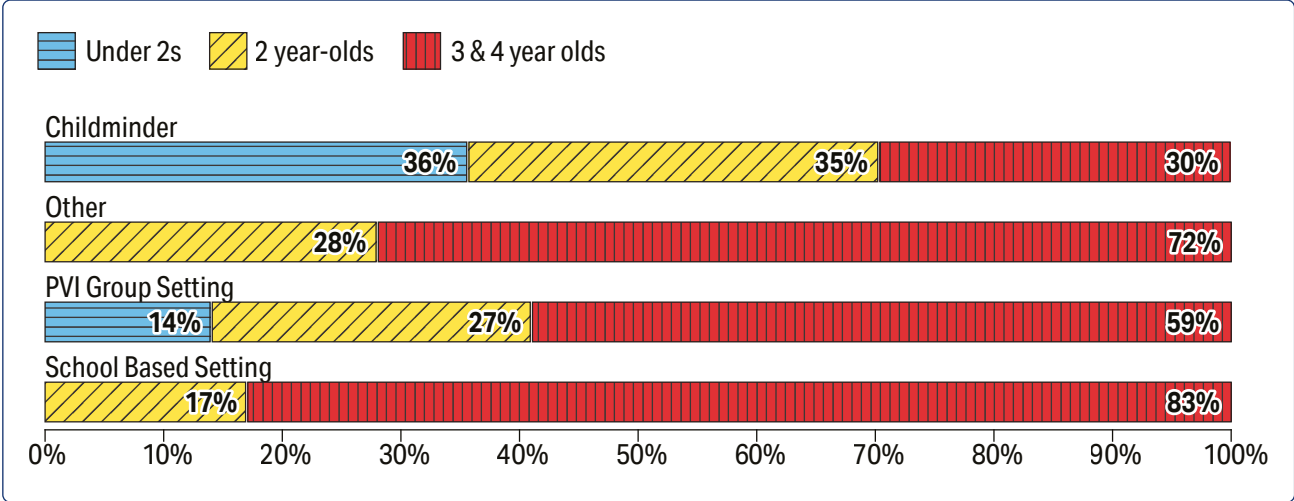


Based on 115 responses

Insights: While the LA-wide maximum operating capacity averages 92%, wards vary significantly once actual usable space and staffing are taken into account, with several areas operating at their full registered capacity (such as Eastney & Craneswater, Nelson and St Jude at 100%), while others, like Paulsgrove at 77%, are operating well below their registered place numbers.

This measure reflects the proportion of registered places that settings can actually operate, based on available space and staffing, and should not be confused with occupancy.

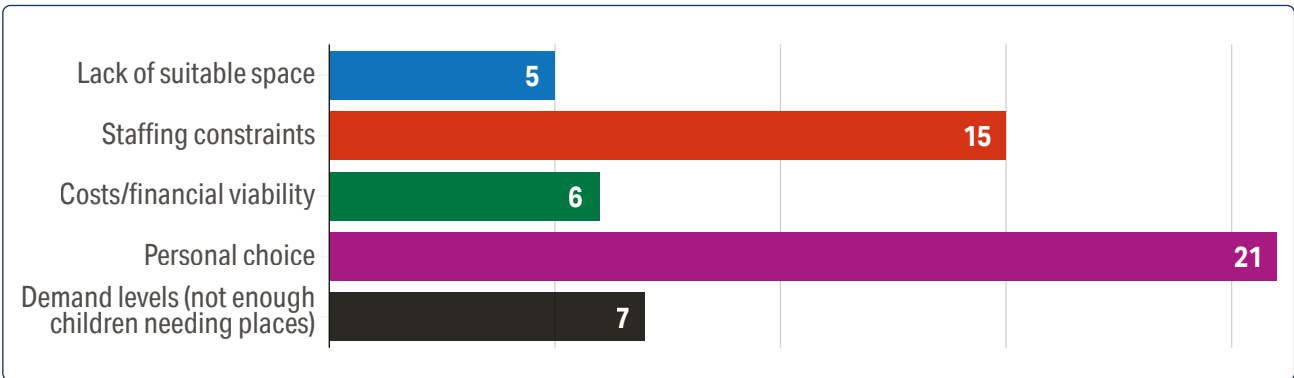
Figure 61 - Average age distribution by provider type



Based on 115 responses

Insights: Childminders typically offer an even spread of places across age groups, with around a third allocated to under-2s (36%), a third to 2-year-olds (35%) and the remainder to 3- and 4-year-olds (30%). Other provider types show a more skewed pattern: PVI group settings offer a smaller proportion of places for under-2s (14%) and a majority for 3- and 4-year-olds (59%), while school-based settings and 'Other' providers do not offer any under-2 places at all, instead focusing overwhelmingly on 3- and 4-year-olds (83% and 72% respectively).

Figure 62 - Factors providers have indicated as limiting the number of places they are able to offer (compared to Ofsted registration) by whole LA



Based on 115 responses

Insights: The factors most commonly limiting the number of places providers can offer are personal choice (mainly childminders) and staffing constraints, with smaller numbers citing financial viability, demand levels or lack of suitable space as reasons for operating below their registered capacity.

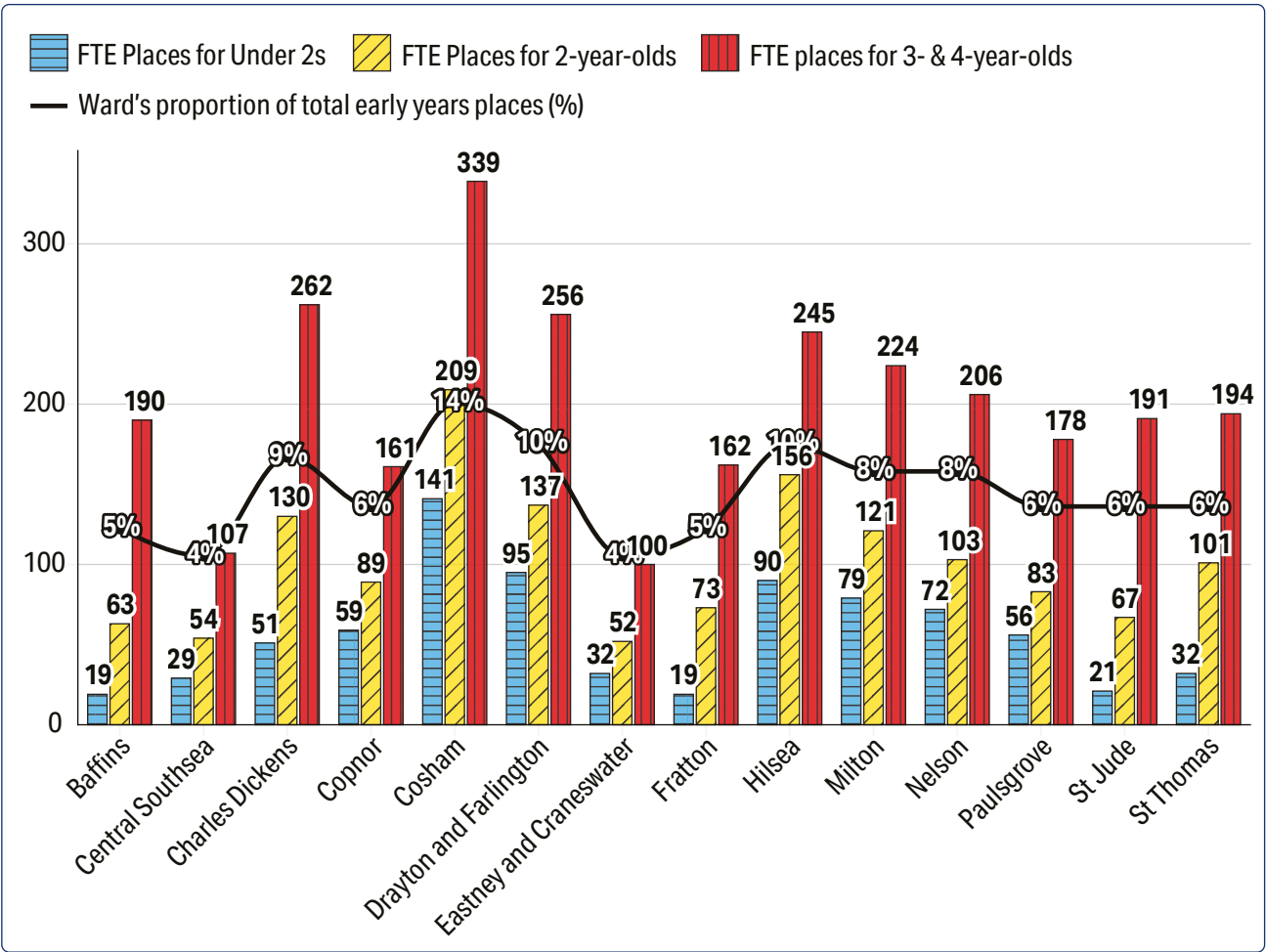
4.12 Childcare Places

4.12.1 Current Capacity (Places)

Capacity estimates are based on each setting’s maximum operating capacity for children aged 0–4, adjusted where necessary using ward-level averages. Age-range distributions and typical opening hours for each provider type are then applied to convert these capacities into the number of full-time equivalent (FTE) early years places available. A full explanation of all assumptions and calculations is provided in the Appendix (Section 8.2).

The methodology resulted in the following calculations for the number of places available across the different wards and provider types:

Figure 63 - FTE Early Years places available by ward



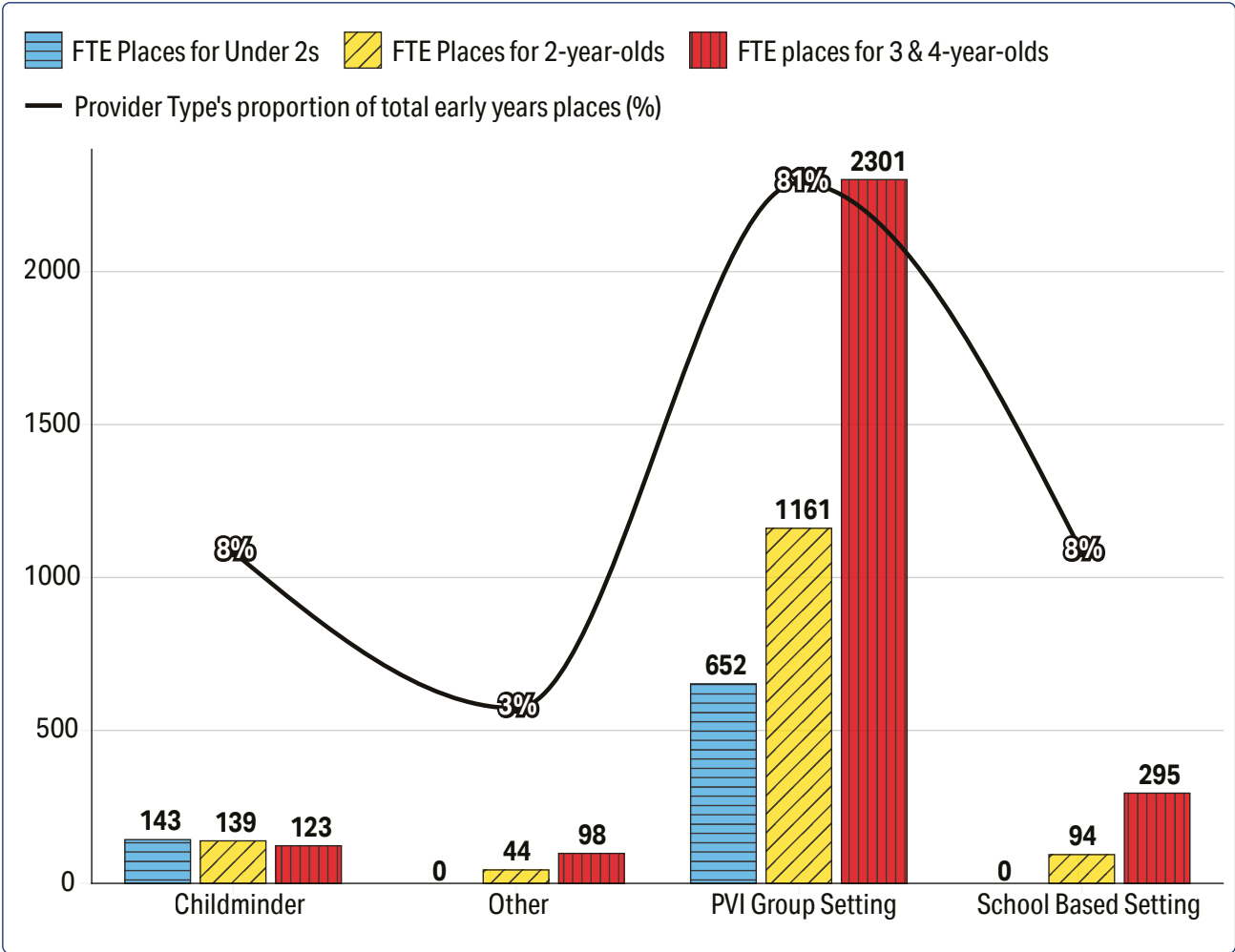
Based on all provision (148 providers)

Insights: The distribution of early years places varies noticeably across wards. For example, Baffins accounts for 5% of all places city-wide, offering 19 under-2 places, 63 places for 2-year-olds and 190 places for 3- and 4-year-olds. This pattern, a small proportion of total places and a strong weighting towards older age groups, is typical of several smaller wards.

A small number of wards provide a much larger share of the city’s capacity. Cosham, Drayton & Farlington, Hilsea and Charles Dickens together account for over 40% of all early years places, making them the main hubs of provision. In contrast, wards such as Baffins, Fratton, Eastney & Craneswater and Central Southsea each contribute only 4-5%.

Across every ward, the majority of places are for 3- and 4-year-olds, with far fewer available for under-2s. This reinforces the structural pattern seen throughout the sufficiency analysis: provision is concentrated in a handful of wards and heavily weighted towards older age groups, with limited under-2 capacity everywhere.

Figure 64 - FTE Early Years places by provider type



Based on all provision (148 providers)

Insights: The distribution of early years places varies sharply by provider type. For example, childminders account for 8% of all places city-wide, offering 143 under-2 places, 139 places for 2-year-olds and 123 places for 3- and 4-year-olds. This relatively balanced spread across age groups contrasts with the much more specialised patterns seen in other provider types.

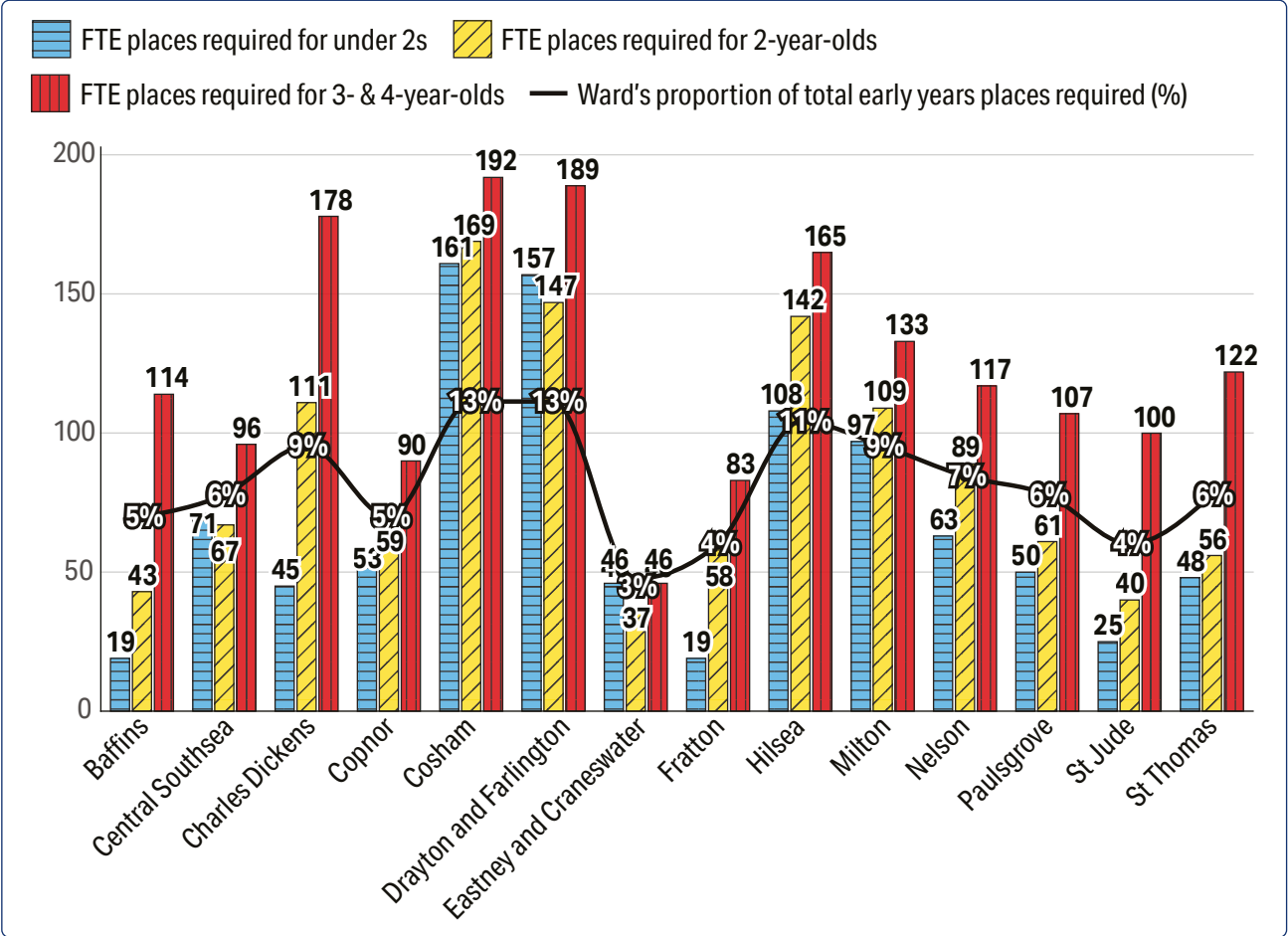
Provision is dominated by PVI group settings, which supply 81% of all early years places and the vast majority of capacity for every age group. In comparison, school-based settings, and 'Other' providers each contribute only 3-8% of total places and offer no under-2 provision at all.

Across the system, the data shows a heavy reliance on PVIs to meet demand, particularly for 3- and 4-year-olds, while childminders remain the only provider type offering meaningful under-2 capacity at scale.

5 Demand for Childcare

Demand for early years places has been estimated using the most recent verified take-up data (Autumn 2025) as a baseline. To forecast likely demand for Summer 2026, a 20% uplift has been applied across all age groups. This reflects typical seasonal increases in participation between the Autumn and Summer terms and provides a consistent, transparent basis for projecting future need. A full explanation of the assumptions and evidence underpinning this approach is provided in the Appendix (Section 8.3).

Figure 65 - FTE Early Years places anticipated to be required by ward



Insights: The pattern of demand for early years places shows an uneven distribution across the city, with some wards accounting for a much larger share of required places than others. For example, Baffins represents 5% of total demand, with 19 under-2 places, 43 places for 2-year-olds and 114 places for 3- and 4-year-olds required. This balanced but relatively modest share of city-wide demand is typical of several smaller wards.

A small number of wards carry a significantly greater proportion of overall need. Cosham and Drayton & Farlington each account for 13% of all places required, while Hilsea and Charles Dickens together add a further 20%, making these areas the principal demand centres. In contrast, wards such as Fratton, St Jude, and Eastney & Craneswater each account for only 3–4% of total demand.

Across every ward, the majority of required places are for 3- and 4-year-olds, with under-2 demand forming the smallest share of need. This mirrors the structural pattern seen in the supply analysis: demand is concentrated in a handful of wards and is consistently weighted towards older age groups, with under-2 requirements comparatively low but still significant for sufficiency planning.

Overall, the distribution of demand reinforces the importance of understanding localised pressures. While many wards show proportional alignment between their share of supply and demand, the concentration of need in a few key areas highlights where the childcare system must remain particularly responsive to ensure equitable access for families.

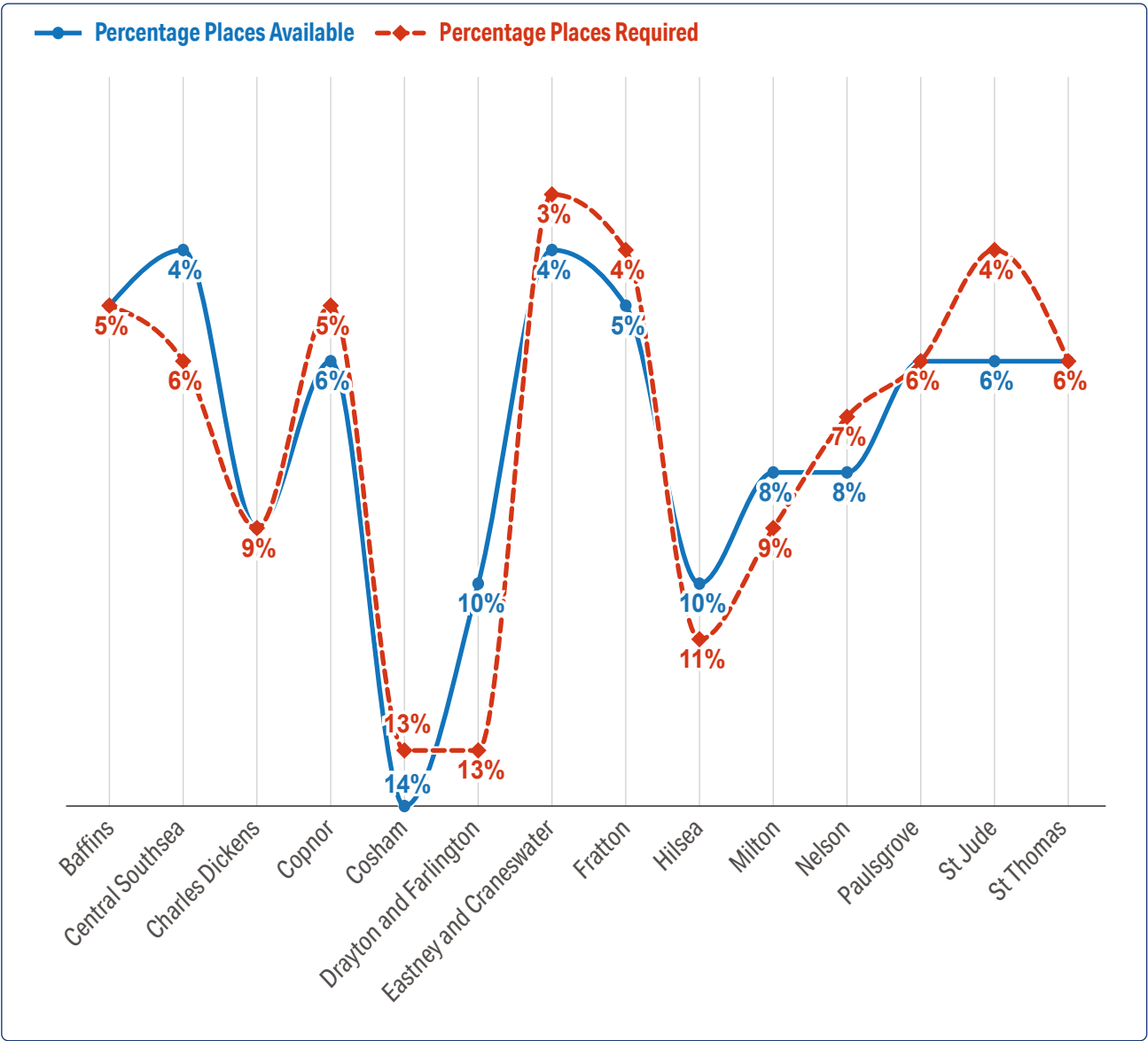
6 Gap analysis

Understanding whether the childcare market is operating with sufficient capacity requires comparing the level of demand for places with the supply available across each ward. Mapping these two elements together highlights where provision is broadly in balance and where pressures are emerging, including any areas showing a surplus of places and, more importantly, those where shortfalls may be limiting access for families. This analysis provides the evidence base needed to support targeted action, ensuring the local authority can maintain a sustainable and responsive childcare market that meets the needs of children and families across the area.

6.1 Proportional Split of Supply and Demand

To understand not just how many places are available or required, but whether provision is distributed in the right places, it is useful to compare each ward's share of total supply with its share of total demand. This proportional view highlights whether a ward is carrying more or less of the city's childcare burden than its population of children would suggest.

Figure 66 - Per ward share of total supply Vs total demand



Insights: The proportional split shows a broad alignment between where places are located and where demand arises. For example, Baffins accounts for 5% of all early years places and also represents 5% of total demand, indicating a balanced relationship between supply and need. Most wards follow a similar pattern, with only modest variances between their share of places and their share of demand.

Where differences do occur, such as Central Southsea (4% of supply vs 6% of demand) or Drayton & Farlington (10% of supply vs 13% of demand), they point to areas where demand slightly outstrips the ward's share of provision. Conversely, a small number of wards have a marginally higher proportion of supply than demand.

Overall, the proportional analysis suggests that the distribution of provision across the city is broadly in line with the distribution of need, with only small mismatches that help explain the localised shortfalls and surpluses identified in the following section.

6.2 Shortfalls and Surplus in Supply

The following tables illustrate the number of FTE places available, the number of places required, and the shortfall or surplus in supply when both are compared.

Table 1 - Number of FTE places available for each age range by ward

WARD	FTE places for Under 2s	FTE places for 2-year-olds	FTE places for 3- & 4-year-olds	Total FTE places available
Baffins	19	63	190	272
Central Southsea	29	54	107	191
Charles Dickens	51	130	262	442
Copnor	59	89	161	308
Cosham	141	209	339	689
Drayton and Farlington	95	137	256	488
Eastney and Craneswater	32	52	100	184
Fratton	19	73	162	254
Hilsea	90	156	245	492
Milton	79	121	224	424
Nelson	72	103	206	381
Paulsgrove	56	83	178	317
St Jude	21	67	191	280
St Thomas	32	101	194	327
All Wards	795	1437	2817	5049

Places available at all (148) settings: Places are based on operational capacity rather than Ofsted registered places. Places calculated using the methodology described.

Table 2 - FTE places (all entitlements) anticipated to be required for Summer 2026

WARD	Demand for Under 2s from Summer 2026	Demand for 2-year-olds from Summer 2026	Demand for 3- & 4-year-olds from Summer 2026	Total Demand for Early Years (Under 5s) from Summer 2026
Baffins	19	43	114	176
Central Southsea	71	67	96	234
Charles Dickens	45	111	178	334
Copnor	53	59	90	202
Cosham	161	169	192	522
Drayton and Farlington	157	147	189	493
Eastney and Craneswater	46	37	46	129
Fratton	19	58	83	159
Hilsea	108	142	165	415
Milton	97	109	133	339
Nelson	63	89	117	268
Paulsgrove	50	61	107	219
St Jude	25	40	100	164
St Thomas	48	56	122	226
Grand Total	961	1186	1733	3880

Figure 67 - Shortfall/Surplus by ward and age range

WARD	Shortfall/Surplus for Under 2s from Summer 2026	Shortfall/Surplus for 2-year-olds from Summer 2026	Shortfall/Surplus for 3- & 4-year-olds from Summer 2026	Total Shortfall/Surplus for Early Years (Under 5s) from Summer 2026
Baffins	+0	+20	+76	+96
Central Southsea	-42	-12	+11	-43
Charles Dickens	+6	+19	+84	+109
Copnor	+6	+30	+71	+107
Cosham	-20	+40	+146	+166
Drayton and Farlington	-62	-10	+68	-4
Eastney and Craneswater	-14	+15	+54	+55
Fratton	+1	+15	+79	+95
Hilsea	-17	+14	+80	+77
Milton	-18	+12	+91	+85
Nelson	+9	+14	+89	+113
Paulsgrove	+5	+22	+71	+99
St Jude	-4	+28	+91	+115
St Thomas	-17	+45	+72	+101
LA Shortfall/Surplus	-166	+251	+1084	+1169

Shortfall is indicated with a minus (-) and red cell shading, surplus is indicated with a plus (+)

The map on the following pages illustrates the information contained in the preceding supply, demand, and gap analysis tables spatially. Presenting the data in this way helps to show the geographical distribution of shortfalls and surpluses in early years childcare places across wards, and the relative distance between areas of pressure and areas with available capacity. This spatial view supports consideration of whether shortfalls in one ward could potentially be mitigated by surplus provision in neighbouring wards, taking into account travel patterns, parental choice, and the practical accessibility of provision across ward boundaries.

Figure 68 - Map of shortfall and surplus in places for Summer 2026

Paulsgrove

Shortfall/Surplus for	
Under 2s:	+5
2-year-olds:	+22
3 & 4-year olds:	+71
+99 Surplus	

Cosham

Shortfall/Surplus for	
Under 2s:	-20
2-year-olds:	+40
3 & 4-year olds:	+146
+166 Surplus	

Drayton & Farlington

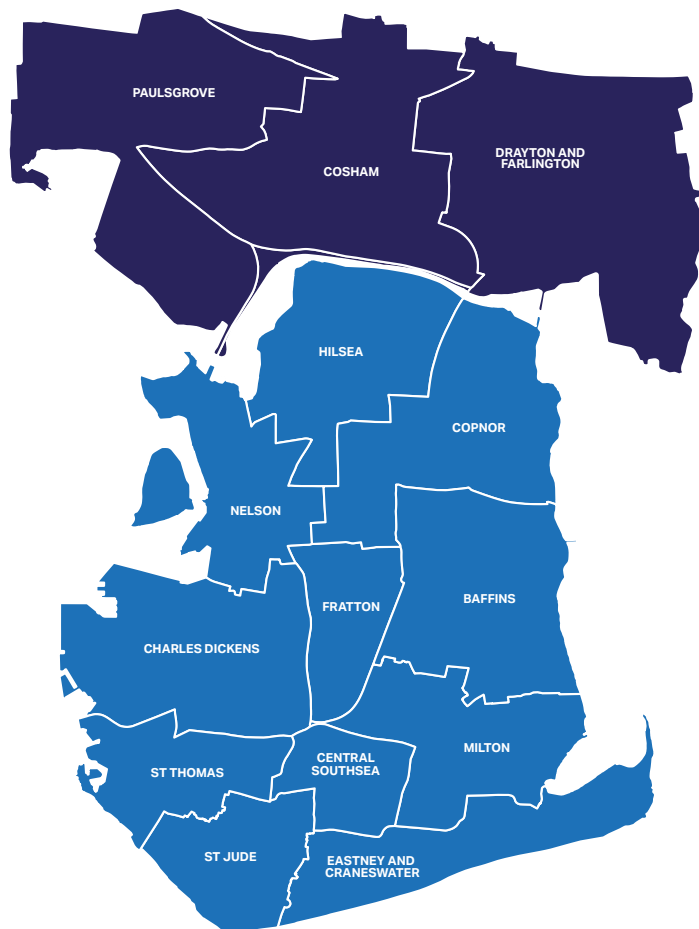
Shortfall/Surplus for	
Under 2s:	-62
2-year-olds:	-10
3 & 4-year olds:	+68
-4 Shortfall	

Copnor

Shortfall/Surplus for	
Under 2s:	+6
2-year-olds:	+30
3 & 4-year olds:	+71
+107 Surplus	

Hilsea

Shortfall/Surplus for	
Under 2s:	-17
2-year-olds:	+14
3 & 4-year olds:	+80
+77 Surplus	



Baffins

Shortfall/Surplus for	
Under 2s:	+0
2-year-olds:	+20
3 & 4-year olds:	+76
+96 Surplus	

Nelson

Shortfall/Surplus for	
Under 2s:	+9
2-year-olds:	+14
3 & 4-year olds:	+89
+133 Surplus	

Fratton

Shortfall/Surplus for	
Under 2s:	+1
2-year-olds:	+15
3 & 4-year olds:	+79
+95 Surplus	

Charles Dickens

Shortfall/Surplus for	
Under 2s:	+6
2-year-olds:	+19
3 & 4-year olds:	+84
+109 Surplus	

Milton

Shortfall/Surplus for	
Under 2s:	-18
2-year-olds:	+12
3 & 4-year olds:	+91
+85 Surplus	

St. Thomas

Shortfall/Surplus for	
Under 2s:	-17
2-year-olds:	+45
3 & 4-year olds:	+72
+101 Surplus	

St. Jude

Shortfall/Surplus for	
Under 2s:	-4
2-year-olds:	+28
3 & 4-year olds:	+91
+115 Surplus	

Central Southsea

Shortfall/Surplus for	
Under 2s:	-42
2-year-olds:	-12
3 & 4-year olds:	+11
-43 Shortfall	

Eastney & Craneswater

Shortfall/Surplus for	
Under 2s:	-14
2-year-olds:	+15
3 & 4-year olds:	+54
+55 Surplus	

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Figure 69 - Gap analysis by ward

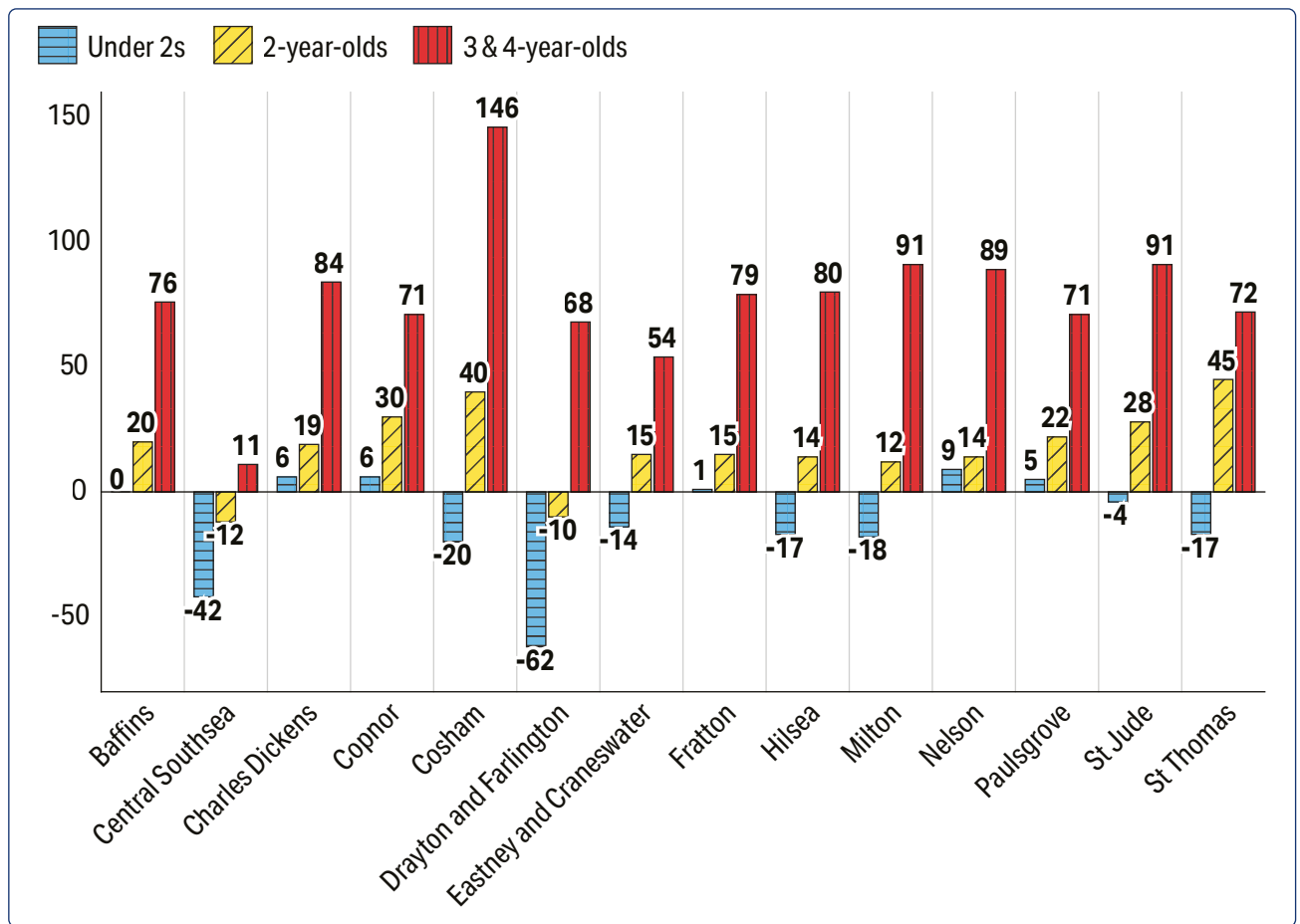
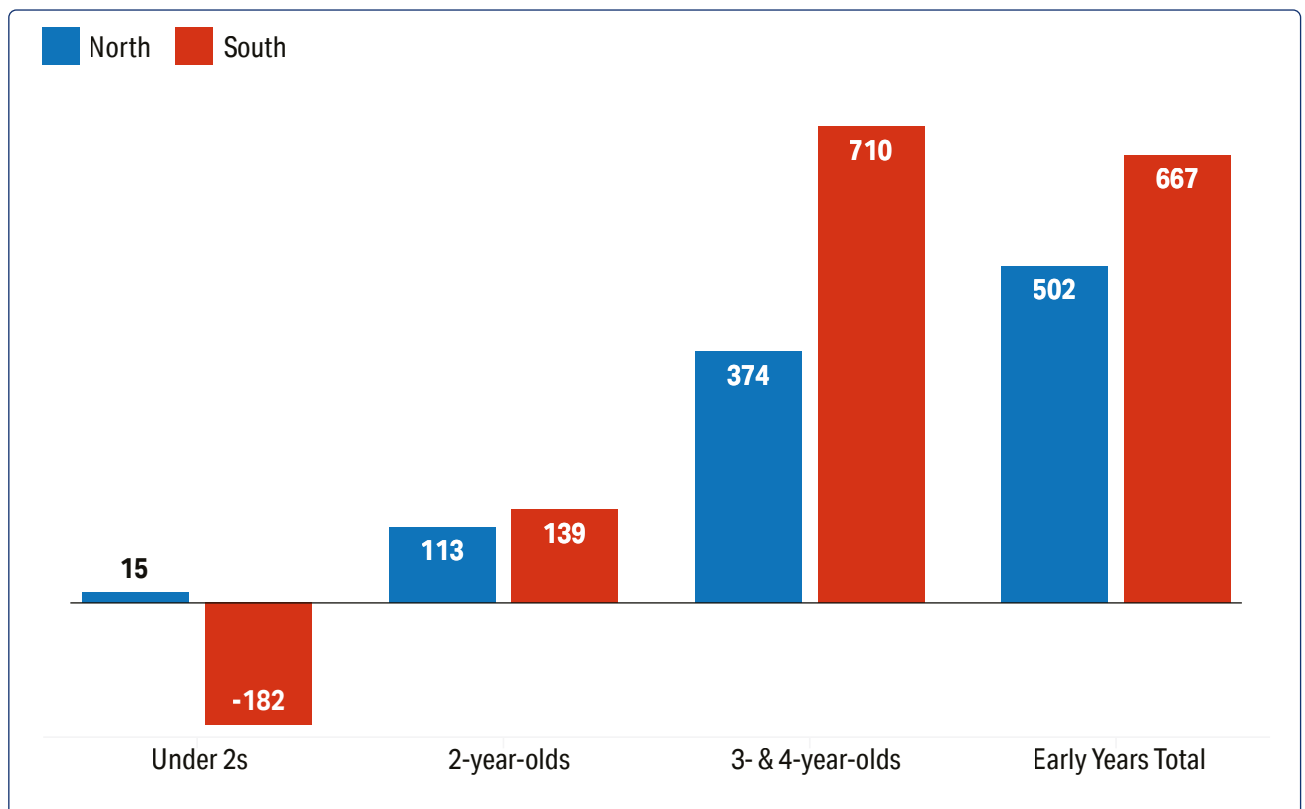


Figure 70 - Gap analysis by district



Insights: The analysis shows a clear and consistent pattern across the city: significant shortfalls for under-2s, modest variation for 2-year-olds, and substantial surpluses for 3- and 4-year-olds. When combined, these dynamics produce an overall city-wide surplus, but one that masks critical age-specific pressures.

Under-2s face the most acute pressure, with a city-wide shortfall of 166 places. Several wards show notable deficits, including Drayton & Farlington (-62), Central Southsea (-42), and Cosham (-20). Only a handful of wards show small surpluses, and none are large enough to offset the scale of unmet need.

For 2-year-olds, the picture is more mixed, with a modest overall surplus of +251 places. Some wards show strong positive capacity (e.g., St Thomas +45, Cosham +40), while others remain in deficit (e.g., Central Southsea -12, Drayton & Farlington -10).

Provision for 3- and 4-year-olds is comfortably sufficient, with a substantial city-wide surplus of +1,084 places. Every ward reports a surplus for this age group, reflecting the stronger market provision and statutory entitlements that drive supply.

Overall Early Years capacity (Under 5s) shows a city-wide surplus of +1,169 places, but this headline figure is heavily skewed by the large surpluses for 3- and 4-year-olds. It does not resolve the structural shortage of places for the youngest children.

In short, the city has more than enough provision for 3- and 4-year-olds, reasonable capacity for 2-year-olds, but a significant and widespread shortfall for under-2s, the age group where provision is most costly and staffing ratios are highest. While this is the part of the market where supply is least flexible, the extent to which providers can or are willing to repurpose surplus capacity in older age ranges will be a key determinant of whether these shortfalls can be mitigated over time.

6.3 Knowledge Update

Since the collection and analysis of this data, the local authority has reviewed any new information that might affect childcare supply and demand:

6.3.1 Potential reductions in provision

The local authority is not currently aware of any significant changes that could reduce the amount of childcare provision.

6.3.2 Potential increases in provision.

The local authority is not currently aware of any significant changes that could increase the amount of childcare provision.

6.3.3 Potential changes in demand for childcare

The local authority is not aware of any factors that would significantly affect demand for childcare, such as major housing developments, demographic shifts, or changes in employment opportunities.

7 Conclusion and Next Steps

7.1 Conclusion

The 2026 Childcare Sufficiency Duty Report shows that Portsmouth's early years market is broadly meeting current levels of demand, with supply and need largely aligned at a city-wide level. However, this balance masks important localised pressures and structural dependencies that could affect long-term sufficiency if not actively managed.

Under-2s provision remains the most constrained part of the market, with every ward offering significantly fewer places for this age group compared with older children. The city's reliance on PVI group settings, and, for under-2s, on childminders, creates a vulnerability should market conditions shift, particularly given ongoing financial and workforce pressures across the sector.

Geographically, a small number of wards carry a disproportionate share of both supply and demand. While most wards show proportional alignment, the concentration of need in Cosham, Drayton & Farlington, Hilsea and Charles Dickens means that any reduction in capacity in these areas would have a significant impact on the city's overall sufficiency position. Smaller wards with limited provision may struggle to absorb even modest increases in demand.

School-aged childcare adds an important dimension to the sufficiency picture. All mainstream schools in Portsmouth now offer some form of wraparound provision, with the exception of the city's four special schools. However, the survey highlights a clear disparity across childcare types: many PVI providers do not offer wraparound care at all. This gap has practical consequences for families. Parents often need childcare that covers different age groups and aligns with varied school finish times. Where PVIs do not provide wraparound options, families with siblings in different settings have fewer flexible choices and may struggle to coordinate drop-offs, pick-ups, or consistent hours of care. As a result, some wards rely almost entirely on school-based provision, leading to an uneven distribution of wraparound places across the city.

Taken together, the evidence points to a system that is currently stable but requires careful stewardship. Maintaining sufficiency will depend on supporting provider sustainability, strengthening under-2 capacity, monitoring localised pressures, and ensuring that both early years and school-aged provision remain aligned with the evolving needs of Portsmouth's families.

7.2 Next Steps

1. Strengthen under-2s provision

- Work with PVIs and childminders to understand barriers to expanding under-2s capacity.
- Explore targeted incentives, workforce support, or capital investment to increase infant places in wards with emerging shortfalls.

2. Monitor high-pressure wards closely

- Prioritise Cosham, Drayton & Farlington, Hilsea and Charles Dickens for ongoing sufficiency monitoring.
- Develop contingency plans for potential provider exits or capacity reductions in these areas.

3. Support provider sustainability

- Continue engagement with PVIs to understand financial pressures, workforce challenges, and the impact of national funding reforms.
- Provide business support, workforce development opportunities, and guidance on sustainable delivery models.

4. Strengthen the childminder market

- Promote recruitment and retention initiatives, recognising their critical role in under-2 provision.
- Explore opportunities for networks, shared resources, or hybrid delivery models to support viability.

5. Maintain proportionality analysis as a core monitoring tool

- Use proportional supply-vs-demand mapping to identify early signs of mismatch.
- Integrate this approach into quarterly sufficiency reviews to ensure timely intervention.

6. Communicate findings with partners

- Share insights with schools, PVIs, childminders and wider stakeholders to support collaborative planning.
- Use the data to inform strategic decisions on capital investment, workforce planning, and targeted support.

7. Build a complete picture of school-aged/wraparound provision

- Continue combining provider-side survey data with school-side wraparound programme returns.
- Work with schools to validate capacity, session availability, and future expansion plans.

8. Support PVIs with no or minimal wraparound provision

- Engage the PVIs currently without wraparound care to understand barriers and opportunities.
- Explore partnership models with PVIs or childminders to establish linked provision.

9. Expand flexible childcare options

- Identify wards with limited or no flexible/extended-hours provision.
- Work with childminders and PVIs to explore opportunities for early starts, late finishes and weekend/overnight care, particularly for families with military or shift-based working patterns.

8 Appendix

8.1 Glossary and Useful Links

Term	Description/Link
<u>Childcare Sufficiency Duty</u>	A statutory duty for local authorities to secure sufficient childcare to enable parents to work, or to undertake education and training leading to work.
<u>(Expanded) Early Years Entitlements</u>	Government-funded hours of early education and childcare available to eligible parents.
<u>Wraparound Childcare</u>	Childcare that extends beyond the conventional school day, typically from 8am to 6pm, to support working families.
Ofsted	The Office for Standards in Education, Children's Services and Skills. It inspects and regulates services that care for children and young people, and those providing education and skills for learners of all ages.
Early Years Setting (or Provider)	Childminder, PVI, School-Based Setting, or Other organisation providing Early Years Education to children from 9 months to school-age
Childminder	A person who looks after children in their own home for more than two hours a day. They must be registered with Ofsted and follow the Early Years Foundation Stage (EYFS) framework.
PVI (Private, Voluntary, and Independent) Group Setting	These include day nurseries, pre-school playgroups, and other non-school-based childcare providers. They offer early education and care for children from birth to school age.
School-Based Setting	These include maintained nursery schools and nursery classes within primary schools. They provide early education and care for children from birth to school age.

8.2 Methodology for Calculating Places Available

1. Establish maximum operating capacity

Each setting's maximum operating capacity for children aged 0–4 is used as the baseline.

- Where providers did not supply this information, the average operating capacity for their ward is applied to their Ofsted-registered places.
- Providers not registered with Ofsted are assumed to be operating at 100% capacity.

2. Apply age-range distribution

The average age distribution for each provider type (e.g., childminder, PVI, school-based) is applied to the maximum operating capacity to estimate the number of places available for each age group.

3. Aggregate places

The number of places is then summed by ward, provider type, and district to give total available places across the area.

4. Convert places into daily hours available

The average number of hours settings are open (adjusted for time dedicated to out-of-school care) is applied to the number of places to calculate total daily EY hours available:

- Childminders: open 10 hours; 8 hours available for EY
- "Other" providers: open 10.25 hours; 8.25 hours available for EY
- PVIs: open 9 hours; 7 hours available for EY
- School-based settings: assumed to offer 6 hours per day of EY provision

5. Convert daily hours into FTE places

Total daily EY hours per ward are divided by 6 hours (30 hours per week/5 days) to calculate the number of full-time equivalent (FTE) places available.

8.3 Methodology for Calculating Demand for Childcare Places

1. Establishing the Baseline

The starting point for demand modelling is the actual take-up of early years places in Autumn 2025 across all age cohorts (under-2s, 2-year-olds, and 3- & 4-year-olds). This provides a reliable, observed measure of participation before any adjustments or forecasting are applied.

2. Applying a Seasonal Uplift

To estimate likely demand for Summer 2026, a 20% uplift has been applied to the Autumn 2025 take-up figures.

This uplift is based on:

- Historic national patterns, where participation typically rises steadily through the academic year as more children become eligible and families choose to start later.
- Observed Autumn-to-Summer increases, which generally fall within a 10–25% range.
- The need to reflect the ongoing impact of expanded early years entitlements, which may further increase participation.

Using a 20% uplift provides a balanced midpoint within the historic range: high enough to reflect normal seasonal growth, but not so high as to overstate likely demand.

3. Consistency Across Age Cohorts

The same uplift has been applied to all age groups to ensure:

- Transparency in the forecasting approach
- Comparability between age ranges
- Avoidance of artificial distortions that could arise from applying different assumptions to different cohorts

4. Output

The resulting figures represent the anticipated number of children likely to require a place in Summer 2026, forming the demand side of the sufficiency assessment.

8.4 Acknowledgements

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9 Data

This section contains the data used in the figures.

Figure 4

WARD	Setting Type	Number of settings
Baffins	PVI Group Setting	6
Baffins	Childminder	6
Central Southsea	PVI Group Setting	3
Central Southsea	Childminder	11
Charles Dickens	School Based Setting	4
Charles Dickens	PVI Group Setting	4
Charles Dickens	Childminder	3
Copnor	PVI Group Setting	4
Copnor	Childminder	5
Cosham	School Based Setting	1
Cosham	PVI Group Setting	10
Cosham	Childminder	4
Drayton and Farlington	PVI Group Setting	9
Drayton and Farlington	Childminder	5
Eastney and Craneswater	PVI Group Setting	2
Eastney and Craneswater	Childminder	5
Fratton	School Based Setting	1
Fratton	PVI Group Setting	3
Fratton	Childminder	2
Hilsea	PVI Group Setting	8
Hilsea	Childminder	3
Milton	PVI Group Setting	7
Milton	Childminder	10
Nelson	School Based Setting	1
Nelson	PVI Group Setting	5
Nelson	Childminder	5
Paulsgrove	School Based Setting	2
Paulsgrove	PVI Group Setting	6
Paulsgrove	Childminder	1
St Jude	Other	2
St Jude	PVI Group Setting	3
St Jude	Childminder	1
St Thomas	Other	1
St Thomas	School Based Setting	1
St Thomas	PVI Group Setting	4

Figure 5

DISTRICT	Childminder	Other	PVI Group Setting (Day Nursery/ Playgroup etc.)	School Based Setting
North	10	1	23	4
South	49	6	43	13

Figure 6

Provider Type	Settings
PVI Group Setting	50
Childminder	41
School Based Setting	7
Other	2

Figure 8

PROVIDER TYPE	Type of Care	Number of Providers
Childminder	Overnight/Weekend	4
Childminder	Before School	25
Childminder	After School	29
Childminder	Holiday Care	27
Childminder	None	14
Other	Overnight/Weekend	0
Other	Before School	3
Other	After School	3
Other	Holiday Care	1
Other	None	0
PVI Group Setting	Overnight/Weekend	0
PVI Group Setting	Before School	17
PVI Group Setting	After School	14
PVI Group Setting	Holiday Care	9
PVI Group Setting	None	35
School Based Setting	Overnight/Weekend	0
School Based Setting	Before School	6
School Based Setting	After School	5
School Based Setting	Holiday Care	0
School Based Setting	None	2

Figure 9

WARD	Before School	After School	Holiday Care	Overnight/ Weekend
Baffins	4	4	3	
Central Southsea	6	7	6	1
Charles Dickens	5	5	2	
Copnor	4	4	4	1
Cosham	3	3	3	
Drayton and Farlington	4	3	3	1
Eastney and Craneswater	3	3	1	1
Fratton	1	2	2	
Hilsea	3	2	2	
Milton	7	7	5	
Nelson	2	2	2	
Paulsgrove	4	4	1	
St Jude	4	4	2	
St Thomas	1	1	1	

Figure 10

WARD	Number of Schools	Number of Schools with Provision (on site or off-site)	Number of Wraparound Places Available
Baffins	5	5	236
Central Southsea	3	3	72
Charles Dickens	5	5	152
Copnor	4	4	145
Cosham	6	5	231
Drayton and Farlington	2	2	156
Eastney and Craneswater	1	1	33
Fratton	3	3	40
Hilsea	4	3	60
Milton	6	5	163
Nelson	5	4	93
Paulsgrove	3	3	93
St Jude	2	2	95
St Thomas	2	2	80

Figure 11

WARD	Variable	Number of Providers
Baffins	Close to public transport route	8
Central Southsea	Close to public transport route	12
Charles Dickens	Close to public transport route	10
Copnor	Close to public transport route	8
Cosham	Close to public transport route	11
Drayton and Farlington	Close to public transport route	11
Eastney and Craneswater	Close to public transport route	4
Fratton	Close to public transport route	5
Hilsea	Close to public transport route	9
Milton	Close to public transport route	14
Nelson	Close to public transport route	6
Paulsgrove	Close to public transport route	7
St Jude	Close to public transport route	5
St Thomas	Close to public transport route	4
Baffins	Not close to public transport route	0
Central Southsea	Not close to public transport route	0
Charles Dickens	Not close to public transport route	0
Copnor	Not close to public transport route	0
Cosham	Not close to public transport route	0
Drayton and Farlington	Not close to public transport route	0
Eastney and Craneswater	Not close to public transport route	0
Fratton	Not close to public transport route	0
Hilsea	Not close to public transport route	0
Milton	Not close to public transport route	0
Nelson	Not close to public transport route	0
Paulsgrove	Not close to public transport route	1
St Jude	Not close to public transport route	0
St Thomas	Not close to public transport route	0

Figure 12

WARD	Average number of weeks per year settings are open	Maximum number of weeks per year settings are open	Minimum number of weeks per year settings are open
Baffins	42	48	38
Central Southsea	44	49	38
Charles Dickens	46	51	38
Copnor	46	52	38
Cosham	46	52	38
Drayton and Farlington	47	51	38
Eastney and Craneswater	46	48	39
Fratton	46	51	39
Hilsea	46	51	38
Milton	46	52	38
Nelson	47	51	35
Paulsgrove	43	51	38
St Jude	42	48	38
St Thomas	45	51	38

Figure 13

PROVIDER TYPE	Average number of weeks per year settings are open	Maximum number of weeks per year settings are open	Minimum number of weeks per year settings are open
Childminder	47	52	35
Other	41	48	38
PVI Group Setting	45	52	38
School Based Setting	38	39	38

Figure 14

PROVIDER TYPE	Open Monday	Open Tuesday	Open Wednesday	Open Thursday	Open Friday	Open Saturday	Open Sunday
Childminder	91%	98%	98%	100%	64%	0%	0%
Other	100%	100%	100%	100%	100%	0%	0%
PVI Group Setting	100%	100%	98%	100%	98%	0%	0%
School Based Setting	100%	100%	100%	100%	100%	0%	0%

Figure 15

PROVIDER TYPE	% of Settings Open Monday to Friday
Childminder	57%
Other	100%
PVI Group Setting	96%
School Based Setting	100%
All Provider Types	81%

Figure 16

WARD	% of Settings Open Monday to Friday
Baffins	88%
Central Southsea	42%
Charles Dickens	100%
Copnor	88%
Cosham	64%
Drayton and Farlington	82%
Eastney and Craneswater	100%
Fratton	100%
Hilsea	89%
Milton	71%
Nelson	83%
Paulsgrove	100%
St Jude	80%
St Thomas	100%

Figure 20

WARD	Average Length of Time Settings are Open for (Hrs:Mins)
Baffins	8.15
Central Southsea	9.45
Charles Dickens	9.45
Copnor	10
Cosham	9.45
Drayton and Farlington	9.15
Eastney and Craneswater	11
Fratton	9.3
Hilsea	9.45
Milton	9.3
Nelson	10
Paulsgrove	9.15
St Jude	9
St Thomas	9.3

Figure 21

Type of Childcare	Average Hourly Cost
Early Years	£6.71
School-Aged	£5.77
Overall	£6.42

Figure 22

Ward	Average Overall Costs	Average EY Costs	Average School-Aged Costs
Baffins	£5.94	£6.21	£5.29
Central Southsea	£5.95	£6.36	£5.33
Charles Dickens	£6.81	£6.81	£6.80
Copnor	£6.22	£6.56	£5.56
Cosham	£6.59	£6.86	£5.83
Drayton and Farlington	£6.59	£6.83	£5.77
Eastney and Craneswater	£4.82	£5.00	£4.50
Fratton	£5.89	£6.20	£5.09
Hilsea	£6.92	£7.07	£6.53
Milton	£6.09	£6.50	£5.41
Nelson	£7.33	£7.41	£7.10
Paulsgrove	£7.31	£7.48	£6.92
St Jude	£6.32	£7.01	£5.56
St Thomas	£7.85	£7.83	£7.90

Figure 23

PROVIDER TYPE	Average Hourly Costs
Childminder	£5.71
Other	£7.63
PVI Group Setting	£7.12
School Based Setting	£6.40
All Provider Types	£6.42

Figure 24

WARD	Variable	Number of Providers
Baffins	Registered for Tax Free Childcare & Offering Funded Early Education	8
Central Southsea	Registered for Tax Free Childcare & Offering Funded Early Education	12
Charles Dickens	Registered for Tax Free Childcare & Offering Funded Early Education	9
Copnor	Registered for Tax Free Childcare & Offering Funded Early Education	8
Cosham	Registered for Tax Free Childcare & Offering Funded Early Education	11
Drayton and Farlington	Registered for Tax Free Childcare & Offering Funded Early Education	11
Eastney and Craneswater	Registered for Tax Free Childcare & Offering Funded Early Education	3
Fratton	Registered for Tax Free Childcare & Offering Funded Early Education	5
Hilsea	Registered for Tax Free Childcare & Offering Funded Early Education	9
Milton	Registered for Tax Free Childcare & Offering Funded Early Education	14
Nelson	Registered for Tax Free Childcare & Offering Funded Early Education	6
Paulsgrove	Registered for Tax Free Childcare & Offering Funded Early Education	7
St Jude	Registered for Tax Free Childcare & Offering Funded Early Education	5
St Thomas	Registered for Tax Free Childcare & Offering Funded Early Education	3
Eastney and Craneswater	Registered for Tax Free Childcare but Not Offering Free Early Education	1
Baffins	Not registered for Tax Free Childcare but Offering Funded Early Education	
Central Southsea	Not registered for Tax Free Childcare but Offering Funded Early Education	
Charles Dickens	Not registered for Tax Free Childcare but Offering Funded Early Education	1
Copnor	Not registered for Tax Free Childcare but Offering Funded Early Education	
Cosham	Not registered for Tax Free Childcare but Offering Funded Early Education	
Drayton and Farlington	Not registered for Tax Free Childcare but Offering Funded Early Education	
Fratton	Not registered for Tax Free Childcare but Offering Funded Early Education	
Hilsea	Not registered for Tax Free Childcare but Offering Funded Early Education	
Milton	Not registered for Tax Free Childcare but Offering Funded Early Education	
Nelson	Not registered for Tax Free Childcare but Offering Funded Early Education	
Paulsgrove	Not registered for Tax Free Childcare but Offering Funded Early Education	1
St Jude	Not registered for Tax Free Childcare but Offering Funded Early Education	
St Thomas	Not registered for Tax Free Childcare but Offering Funded Early Education	1

Figure 25

PROVIDER TYPE	Expand the number of childcare places offered	Reduce the number of childcare places offered	Increase fees	Extend opening hours	Provide more flexible childcare to better meet the needs of parents who work irregular hours	Other changes
Baffins	1		3			
Central Southsea	2		3			
Charles Dickens			2			1
Copnor			3			
Cosham	3		3			
Drayton and Farlington	3	1	4	1		
Eastney and Craneswater	1				1	
Fratton	1	1	2	1		
Hilsea		1	2			1
Milton			6			1
Nelson			3			
Paulsgrove			2		1	
St Jude	1	1				
St Thomas			3		1	

Figure 26

DISTRICT	Percentage of providers who would consider expanding provision/opening new setting
North	39%
South	25%

Figure 27

Required to Expand	Percent
We would need to employ additional/qualified staff	49%
We would need to increase our physical space	38%
We do not require anything for expansion	33%

Figure 28

WARD	Rating	Number of Providers
Baffins	1 - Outstanding	1
Central Southsea	1 - Outstanding	2
Charles Dickens	1 - Outstanding	
Copnor	1 - Outstanding	
Cosham	1 - Outstanding	1
Drayton & Farlington	1 - Outstanding	1
Eastney & Craneswater	1 - Outstanding	1
Fratton	1 - Outstanding	1
Hilsea	1 - Outstanding	2
Milton	1 - Outstanding	1
Nelson	1 - Outstanding	
Paulsgrove	1 - Outstanding	
St Jude's	1 - Outstanding	2
St Thomas	1 - Outstanding	1
Baffins	2 - Good	9
Central Southsea	2 - Good	9
Charles Dickens	2 - Good	6
Copnor	2 - Good	7
Cosham	2 - Good	13
Drayton & Farlington	2 - Good	8
Eastney & Craneswater	2 - Good	5
Fratton	2 - Good	2
Hilsea	2 - Good	7
Milton	2 - Good	12
Nelson	2 - Good	10
Paulsgrove	2 - Good	2
St Jude's	2 - Good	1
St Thomas	2 - Good	3
Baffins	3 - Requires Improvement	
Central Southsea	3 - Requires Improvement	
Charles Dickens	3 - Requires Improvement	1
Copnor	3 - Requires Improvement	1
Cosham	3 - Requires Improvement	
Drayton & Farlington	3 - Requires Improvement	
Eastney & Craneswater	3 - Requires Improvement	
Fratton	3 - Requires Improvement	
Hilsea	3 - Requires Improvement	
Milton	3 - Requires Improvement	
Nelson	3 - Requires Improvement	
Paulsgrove	3 - Requires Improvement	

WARD	Rating	Number of Providers
St Jude's	3 - Requires Improvement	
St Thomas	3 - Requires Improvement	
Baffins	4 - Inadequate	1
Central Southsea	4 - Inadequate	
Charles Dickens	4 - Inadequate	
Copnor	4 - Inadequate	
Cosham	4 - Inadequate	
Drayton & Farlington	4 - Inadequate	
Eastney & Craneswater	4 - Inadequate	
Fratton	4 - Inadequate	
Hilsea	4 - Inadequate	
Milton	4 - Inadequate	
Nelson	4 - Inadequate	
Paulsgrove	4 - Inadequate	
St Jude's	4 - Inadequate	
St Thomas	4 - Inadequate	

Figure 29

DISTRICT	Percentage of Providers with a Rating of 1 (Outstanding)	Percentage of Providers with a Rating of 2 (Good)	Percentage of Providers with a Rating of 3 (Requires Improvement)	Percentage of Providers with a Rating of 4 (Inadequate)
North	8%	92%	0%	0%
South	13%	84%	2%	1%

Figure 30

Ofsted Outcome	Childminder	PVI Group Setting
Number of Providers with a Rating of 1 (Outstanding)	5	8
Number of Providers with a Rating of 2 (Good)	43	51
Number of Providers with a Rating of 3 (Requires Improvement)	1	1
Number of Providers with a Rating of 4 (Inadequate)	1	0

Figure 31

Provider Type	Percentage of Providers with an Overall Effectiveness Ofsted Rating of 1 (Outstanding)	Percentage of Providers with an Overall Effectiveness Ofsted Rating of 2 (Good)	Percentage of Providers with an Overall Effectiveness Ofsted Rating of 3 (Requires Improvement)	Percentage of Providers with an Overall Effectiveness Ofsted Rating of 4 (Inadequate)
Childminder	10%	86%	2%	2%
PVI Group Setting	13%	85%	2%	0%

Figure 35

DISTRICT	Childminder	Other	PVI Group Setting (Day Nursery/ Playgroup etc.)	School Based Setting
North	0	0	4	2
South	1	3	13	4

Figure 36

Highest Level of childcare/EY qualification held by Childminder	Number of Responses
Level 2 Early Years / Childcare	5
Level 3 Early Years Educator / Diploma	25
Level 6 Early Years / Childcare (BA/BSc in Early Childhood Studies)	1
No formal childcare qualification	4
Qualified Teacher Status (QTS) / Early Years Teacher Status (EYTS)	3

Figure 37

WARD	Variable	Number of Settings
Baffins	Formal training or CPD has been accessed regularly by staff	5
Central Southsea	Formal training or CPD has been accessed regularly by staff	1
Charles Dickens	Formal training or CPD has been accessed regularly by staff	6
Copnor	Formal training or CPD has been accessed regularly by staff	2
Cosham	Formal training or CPD has been accessed regularly by staff	7
Drayton & Farlington	Formal training or CPD has been accessed regularly by staff	7
Eastney & Craneswater	Formal training or CPD has been accessed regularly by staff	
Fratton	Formal training or CPD has been accessed regularly by staff	3
Hilsea	Formal training or CPD has been accessed regularly by staff	7
Milton	Formal training or CPD has been accessed regularly by staff	5
Nelson	Formal training or CPD has been accessed regularly by staff	3
Paulsgrove	Formal training or CPD has been accessed regularly by staff	5
St Judes	Formal training or CPD has been accessed regularly by staff	3
St Thomas	Formal training or CPD has been accessed regularly by staff	3
Baffins	Formal training or CPD has been occasionally accessed by staff	
Central Southsea	Formal training or CPD has been occasionally accessed by staff	
Charles Dickens	Formal training or CPD has been occasionally accessed by staff	1
Copnor	Formal training or CPD has been occasionally accessed by staff	2
Cosham	Formal training or CPD has been occasionally accessed by staff	1
Drayton & Farlington	Formal training or CPD has been occasionally accessed by staff	2
Eastney & Craneswater	Formal training or CPD has been occasionally accessed by staff	
Fratton	Formal training or CPD has been occasionally accessed by staff	
Hilsea	Formal training or CPD has been occasionally accessed by staff	2
Milton	Formal training or CPD has been occasionally accessed by staff	2
Nelson	Formal training or CPD has been occasionally accessed by staff	
Paulsgrove	Formal training or CPD has been occasionally accessed by staff	2
St Judes	Formal training or CPD has been occasionally accessed by staff	2
St Thomas	Formal training or CPD has been occasionally accessed by staff	1
Baffins	Formal training or CPD has not been accessed by staff	
Central Southsea	Formal training or CPD has not been accessed by staff	
Charles Dickens	Formal training or CPD has not been accessed by staff	1
Copnor	Formal training or CPD has not been accessed by staff	1
Cosham	Formal training or CPD has not been accessed by staff	1
Drayton & Farlington	Formal training or CPD has not been accessed by staff	
Eastney & Craneswater	Formal training or CPD has not been accessed by staff	
Fratton	Formal training or CPD has not been accessed by staff	
Hilsea	Formal training or CPD has not been accessed by staff	
Milton	Formal training or CPD has not been accessed by staff	
Nelson	Formal training or CPD has not been accessed by staff	1

WARD	Variable	Number of Settings
Paulsgrove	Formal training or CPD has not been accessed by staff	1
St Jude's	Formal training or CPD has not been accessed by staff	
St Thomas	Formal training or CPD has not been accessed by staff	

Figure 38

PROVIDER TYPE	Accessed Regularly	Accessed Occasionally	Not Accessed
Childminder	8	1	
Other	1	2	
PVI Group Setting	45	7	5
School Based Setting	3	5	

Figure 39

PROVIDER TYPE	Not confident at all	Not very confident	Quite confident	Very confident
Childminder	0	0	3	6
Other	0	0	1	2
PVI Group Setting	0	0	15	42
School Based Setting	0	0	4	4

Figure 40

WARD	Staff Turnover Rate	Number of Staff Joining	Number of Staff Leaving
Baffins	9%	4	3
Central Southsea	0%	1	0
Charles Dickens	8%	6	7
Copnor	10%	12	6
Cosham	5%	15	8
Drayton and Farlington	11%	19	9
Eastney and Craneswater	0%	0	0
Fratton	3%	5	1
Hilsea	10%	16	9
Milton	18%	22	19
Nelson	21%	17	13
Paulsgrove	15%	22	9
St Jude	3%	1	1
St Thomas	7%	8	5

Figure 41

Main reasons staff leave	Number of Responses
Family/personal reasons	27
Career progression opportunities elsewhere	19
Pay and conditions	6
Workload/stress	5
Not applicable - staff tend to stay	31

Figure 42

Answer	Very easy	Quite easy	Quite difficult	Very difficult	Not applicable - no recruitment was required
North	1	8	6	6	5
South		5	12	18	16

Figure 43

Main barriers to recruitment	Number of Responses
Lack of qualified applicants	43
Limited local workforce supply	17
High competition from other sectors	9
Pay levels not competitive	30
Other	9
No barriers	17

Figure 44

PROVIDER TYPE	Not confident at all	Not very confident	Quite confident	Very confident
Childminder	1	1	2	5
Other			2	1
PVI Group Setting		1	31	25
School Based Setting			5	3

Figure 45

Support that would help most to recruit and retain staff	Number of Responses
Higher pay/funding	58
Access to training and qualifications	17
Reduced administrative burden	15
Career progression pathways	7
No support required	15

Figure 46

Staff Level	Hourly Pay Range	Number of Staff
Apprentices/ Trainees	£10.50-£11.49	8
Apprentices/ Trainees	Below £10.50	29
Apprentices/ Trainees	£11.50-£13.49	5
Level 2 Practitioners	£10.50-£11.49	11
Level 2 Practitioners	Below £10.50	2
Level 2 Practitioners	£13.50-£15.49	1
Level 2 Practitioners	£11.50-£13.49	35
Level 3 Practitioners	£15.50 or more	1
Level 3 Practitioners	£10.50-£11.49	4
Level 3 Practitioners	£13.50-£15.49	11
Level 3 Practitioners	£11.50-£13.49	53
Room Leaders/ Supervisors	£15.50 or more	4
Room Leaders/ Supervisors	£10.50-£11.49	1
Room Leaders/ Supervisors	£13.50-£15.49	35
Room Leaders/ Supervisors	£11.50-£13.49	18

Figure 47

Staff Level	Salary Range	Number of Staff
Managers without EYTS/QTS	Below £26,000	11
Managers without EYTS/QTS	£26,000-£29,999	7
Managers without EYTS/QTS	£30,000-£37,999	25
Managers without EYTS/QTS	£38,000-£41,999	8
Managers without EYTS/QTS	£42,000 or more	1
Managers with EYTS/QTS	Below £26,000	5
Managers with EYTS/QTS	£26,000-£29,999	7
Managers with EYTS/QTS	£30,000-£37,999	9
Managers with EYTS/QTS	£38,000-£41,999	3
Managers with EYTS/QTS	£42,000 or more	4

Figure 48

PROVIDER TYPE	Very concerned	Fairly concerned	Neutral / unsure	Fairly confident	Very confident
Childminder		2	7	22	16
Other			1		2
PVI Group Setting	2	3	6	20	26
School Based Setting		1	1	2	4

Figure 49

Main concerns for sustainability	Number of Responses
Rising staffing costs (wages, recruitment, retention)	14
Availability of qualified staff	4
Changes in government funding or entitlements	13
Fluctuations in parental demand / occupancy levels	10
Rising operational costs (utilities, rent, insurance, supplies)	15
Competition from other providers	9
Regulatory or compliance pressures	4
No significant concerns at this time	2
Other	9

Figure 50

Ward	Average percentage of children with SEND enrolled as a proportion of all children enrolled	Number of children with SEND enrolled
Baffins	4.50%	11
Central Southsea	10.00%	8
Charles Dickens	22.00%	79
Copnor	3.20%	20
Cosham	19.00%	121
Drayton and Farlington	5.80%	21
Eastney and Craneswater		0
Fratton	9.20%	27
Hilsea	10.70%	52
Milton	6.40%	48
Nelson	5.90%	20
Paulsgrove	12.70%	34
St Jude	4.00%	7
St Thomas	11.10%	33

Figure 51

PROVIDER TYPE	Distribution of Children with SEND enrolled at EY Settings
Childminder	1%
Other	1%
PVI Group Setting	85%
School Based Setting	12%

Figure 52

Provider Observations on caring for children with SEND	Percentage of providers who AGREE	Percentage of providers who DISAGREE	Percentage of providers who DON'T KNOW/ PREFER NOT TO SAY
The number of children with SEND is rising generally	76%	3%	21%
We currently care for more children with SEND than a year ago	37%	38%	25%
We have less space for children with SEND than a year ago	17%	53%	30%
We have enough spaces for children with SEND	56%	20%	24%
We currently do not have enough spaces for children with SEND to meet demand	38%	32%	30%
Generally, children with SEND do not access their full funded entitlement	12%	57%	30%

Figure 53

PROVIDER TYPE	Not confident at all	Not very confident	Quite confident	Very confident
Childminder	1	3	30	13
Other			1	2
PVI Group Setting		1	24	32
School Based Setting		1	5	2

Figure 54

Experience	Most Staff (Over 75%) are experienced	Some Staff (between 51-75%) are experienced	Few Staff (between 25-50%) are experienced	Very Few Staff (less than 25%) are experienced
Help with behavioural, emotional & social difficulties	65%	23%	7%	4%
Help with eating and drinking	69%	23%	3%	5%
Help with medication	57%	22%	8%	14%
Help with moving and handling	56%	25%	10%	10%
Help with personal care tasks	73%	17%	6%	4%

Figure 55

Amount of Staff Trained	Percentage of staff
" Most Staff (Over 75%) "	18
" Some Staff (between 51-75%) "	16
" Few Staff (between 25-50%) "	23
" Very Few Staff (less than 25%) "	43

Figure 56

Challenges	Number of Responses
Funding/Resources to provide additional support	56
Physical environment limitations (e.g. accessibility, sensory space)	51
Administrative burden (e.g. EHCP processes, paperwork)	46
Access to specialist services (e.g. speech and language, occupational therapy)	35
Access to specialist training for staff	31
Recruiting/retaining staff with relevant skills	30

Figure 57

Thoughts of adequate provision	Percentage of providers
Yes, fully adequate	3%
Mostly adequate	15%
Partly adequate	25%
Not adequate	42%
Don't know	16%

Figure 58

Support that would help most improve provision for children with SEND	Number of Responses
More funding for additional support	70
Access to specialist training	63
Better links with health and specialist services	46
Improved facilities/equipment	46
Peer networks/sharing best practice	24
Other	1

Figure 59

District	Yes	Maybe	No
North	17%	27%	57%
South	6%	21%	73%

Figure 60

Ward	LA Average	Average Operating Capacity
Baffins	92%	94%
Central Southsea		93%
Charles Dickens		95%
Copnor		96%
Cosham		88%
Drayton and Farlington		90%
Eastney and Craneswater		100%
Fratton		89%
Hilsea		91%
Milton		98%
Nelson		100%
Paulsgrove		77%
St Jude		100%
St Thomas	92%	84%

Figure 61

PROVIDER TYPE	Under 2s	2-year-olds	3- & 4-year-olds
Childminder	36%	35%	30%
Other	0%	28%	72%
PVI Group Setting	14%	27%	59%
School Based Setting	0%	17%	83%

Figure 62

Limiting Factors	Number of Responses
Lack of suitable space	5
Staffing constraints	15
Costs/financial viability	6
Personal choice	21
Demand levels (not enough children needing places)	7

Figure 63

WARD	Ward's proportion of total early years places (%)	FTE Places for Under 2s	FTE Places for 2-year-olds	FTE places for 3- & 4-year-olds
Baffins	5%	19	63	190
Central Southsea	4%	29	54	107
Charles Dickens	9%	51	130	262
Copnor	6%	59	89	161
Cosham	14%	141	209	339
Drayton and Farlington	10%	95	137	256
Eastney and Craneswater	4%	32	52	100
Fratton	5%	19	73	162
Hilsea	10%	90	156	245
Milton	8%	79	121	224
Nelson	8%	72	103	206
Paulsgrove	6%	56	83	178
St Jude	6%	21	67	191
St Thomas	6%	32	101	194

Figure 64

PROVIDER TYPE	Provider Type's proportion of total early years places (%)	FTE Places for Under 2s	FTE Places for 2-year-olds	FTE places for 3- & 4-year-olds
Childminder	8%	143	139	123
Other	3%	0	44	98
PVI Group Setting	81%	652	1161	2301
School Based Setting	8%	0	94	295

Figure 65

WARD	Ward's proportion of total early years places required (%)	FTE places required for under 2s	FTE places required for 2-year-olds	FTE places required for 3- & 4-year-olds
Baffins	5%	19	43	114
Central Southsea	6%	71	67	96
Charles Dickens	9%	45	111	178
Copnor	5%	53	59	90
Cosham	13%	161	169	192
Drayton and Farlington	13%	157	147	189
Eastney and Craneswater	3%	46	37	46
Fratton	4%	19	58	83
Hilsea	11%	108	142	165
Milton	9%	97	109	133
Nelson	7%	63	89	117
Paulsgrove	6%	50	61	107
St Jude	4%	25	40	100
St Thomas	6%	48	56	122

Figure 66

WARD	Percentage Places Available	Percentage Places Required
Baffins	5%	5%
Central Southsea	4%	6%
Charles Dickens	9%	9%
Copnor	6%	5%
Cosham	14%	13%
Drayton and Farlington	10%	13%
Eastney and Craneswater	4%	3%
Fratton	5%	4%
Hilsea	10%	11%
Milton	8%	9%
Nelson	8%	7%
Paulsgrove	6%	6%
St Jude	6%	4%
St Thomas	6%	6%

Figure 69

WARD	Under 2s	2-year-olds	3- & 4-year-olds
Baffins	0	20	76
Central Southsea	-42	-12	11
Charles Dickens	6	19	84
Copnor	6	30	71
Cosham	-20	40	146
Drayton and Farlington	-62	-10	68
Eastney and Craneswater	-14	15	54
Fratton	1	15	79
Hilsea	-17	14	80
Milton	-18	12	91
Nelson	9	14	89
Paulsgrove	5	22	71
St Jude	-4	28	91
St Thomas	-17	45	72

Figure 70

DISTRICT	North	South
Under 2s	15	-182
2-year-olds	113	139
3- & 4-year-olds	374	710
Early Years Total	502	667

Portsmouth City Council
Childcare Sufficiency Assessment 2026

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