



Portsmouth
CITY COUNCIL

Childcare Sufficiency Duty Report 2025



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 have a statutory duty to secure sufficient childcare to enable parents to work, or to undertake education and training leading to work. To fulfil this duty, local authorities need to facilitate and shape the local childcare market, ensuring childcare places are available, accessible and affordable and are delivered flexibly in a range of high-quality settings.

The Portsmouth Childcare Sufficiency Duty Report 2025 serves a crucial role in ensuring that the city meets the statutory requirements of the childcare sufficiency duty. Primarily, it aims to provide a comprehensive overview of the current state of childcare provision, identify areas where demand outpaces supply, and outline strategies to enhance the accessibility, affordability, and quality of childcare services.

This report is instrumental in supporting working parents, promoting economic growth, and ensuring that all children have access to early education that lays the foundation for lifelong learning and development. By regularly evaluating the childcare landscape, the council can respond effectively to demographic changes, shifts in parental employment patterns, and evolving policy frameworks. Moreover, this annual report serves as a valuable resource for policymakers, service providers, and stakeholders, offering data-driven insights and recommendations to guide future investments and interventions in our childcare sector.

2 Executive Summary

Since January 2023, there has been a significant decrease in the number of childcare providers and the availability of childcare places. Portsmouth has experienced a net reduction in childminders (-14) and PVI settings operating (-17). This reduction is occurring amidst potentially increasing demand, as the government aims to enhance access to funded and more affordable childcare through various initiatives to stimulate employment and drive economic growth.

The decrease in childcare provision can be attributed to COVID-19 and the ongoing challenges faced by childcare providers in recruiting and retaining a sustainable workforce. Despite these challenges, the Portsmouth Early Years and Childcare Team continues efforts to enhance provision and stimulate the childcare market through a range of activities, including:

- Ensuring the inclusion of new or additional Early Years places in all large-scale building developments and smaller projects where there is a clearly documented need.
- Offering new business support for individuals, schools, or organisations interested in starting a childcare business.
- Providing support to existing childcare providers for where there are business concerns affecting sustainability, including support for providers who wish to expand.
- Supporting providers in forming partnerships within areas to meet future demands.
- Hosting local networks and events addressing regional issues to support high-quality, sustainable Early Years and Childcare provision.

- Developing and directing providers to business tools for both new and existing enterprises.
- Identifying suitable available premises in areas recognised as having potential childcare sufficiency issues.
- Developing and issuing regular bulletins to childcare settings, providing support and updates.
- Referring childcare providers to relevant funding opportunities to aid in the development of new childcare places.
- Offering opportunities to subscribe to a flexible Early Years training programme, including both in-person and online sessions.

This report will highlight notable disparities in childcare availability across different wards. Some areas, such as Cosham and Hilsea, have a surplus of places, while others, like Central Southsea and Fratton, face substantial shortfalls. With expanded early years entitlements and other government initiatives expected to significantly impact the childcare market from September 2025, immediate action is needed to address shortfalls in high-demand wards.

Key recommendations (or next steps) outlined later in the report include:

- Addressing shortfalls in childcare provision in specific wards.
- Enhancing accessibility and flexibility of childcare services.
- Supporting providers with expansion plans.
- Improving provision for children with Special Educational Needs and Disabilities (SEND).
- Regular monitoring and evaluation of the childcare landscape.

By implementing these recommendations, the council can work towards creating a more equitable and efficient childcare system that meets the needs of all families and supports our city's long-term growth and development.

3 Context and Data Representations

3.1 Expanded Early Years Entitlements and Other Government Initiatives

The expanded early years entitlements, set to take full effect by September 2025, have, and will continue to impact the childcare market significantly. From April 2024, eligible working parents of 2-year-olds have been able to access up to 15 hours of free early education per week, and this was extended to children aged 9 months and older from September 2024. By September 2025, this entitlement will increase to 30 hours per week for eligible working parents of children aged 9 months and above until they start school.

Additionally, since September 2024, local authorities and schools have been playing a crucial role in the delivery of the national wraparound programme to support working families by providing childcare that extends beyond the conventional school day, from 8am to 6pm.

Furthermore, the government's school-based nurseries plan aims to create 3,000 new or expanded nurseries within primary schools to provide accessible, high-quality early education. This initiative aims to address local needs and support the expanded childcare entitlements.

Lastly, the government is committed to offering free breakfast clubs in every state-funded primary school, with 750 early adopter schools set to launch these clubs from April 2025, ensuring children have a supportive start to their school day.

Although all these initiatives will eventually affect the childcare market, this report will focus on the expanded entitlements from September 2025, as this is expected to have the most significant and imminent impact on sufficiency.

Further detail about these and emerging government initiatives can be found on the government's [Childcare Choices](#) website.

3.2 Geographic and Demographic Overview of the City of Portsmouth

Portsmouth, a vibrant city on the southern coast of England, is unique for being primarily situated on Portsea Island. With a diverse population of approximately 215,000 residents, it is the UK's most densely populated city after London.

The city's demographics include young professionals, families, and an increasing number of older adults. 81.9% of the working age population were economically active (from Oct 2023 – Sep 2024) compared with the national figure of 78.4%¹ highlighting a reliance on accessible and affordable childcare. The University of Portsmouth also contributes to a transient student population, influencing local demographics and economic activities.

3.3 Focus on Childcare and Working Parents

Although there are a range of childcare providers, including nurseries, preschools, childminders, and wraparound care services, specific challenges exist in Portsmouth related to childcare accessibility due to geographic divisions, such as the M275 motorway, which splits the city and can lead to disparities in childcare availability. As a result, parents in different parts of the city may face varying degrees of difficulty in accessing childcare options.

On Portsea Island, the southern part of the city, the densely populated urban environment presents unique challenges. The high concentration of residents often leads to increased demand for childcare services, and the compact nature of the island can limit the space available for new childcare facilities, further exacerbating accessibility issues.

In contrast, the northern part of Portsmouth, which includes areas such as Cosham and Drayton, tends to have more space for new developments. However, the residents in these areas may still face difficulties due to limited public transportation options connecting them to central childcare facilities on Portsea Island. This can be particularly challenging for families without access to personal vehicles, leading to increased travel times and logistical challenges.

¹ ONS annual population survey

Employment in Portsmouth encompasses sectors like education, healthcare, retail, and public administration. Notably, HMNB Portsmouth (Her Majesty's Naval Base), one of the UK's largest naval bases, is a significant employer, with many parents working in defence and related industries. This influences the demand for flexible and reliable childcare services to accommodate military families' unique schedules and needs.

3.3.1 Wraparound Childcare

While the focus of this report will be on early years provision, it is important to acknowledge the significance of wraparound care in fostering an environment that supports working parents and promotes a thriving economy.

The government's wraparound programme aims to extend childcare provision beyond traditional school hours, and seeks to provide childcare from 8am to 6pm, during term time, enabling parents to manage their work commitments more effectively. By offering extended care, parents who work non-standard hours, such as those employed at HMNB Portsmouth, where shifts can vary greatly, will have access to reliable childcare, alleviating some of the logistical challenges they face.

Furthermore, the wraparound programme will be instrumental in addressing the accessibility issues caused by Portsmouth's geographic divisions. By integrating care services within local schools across both Portsea Island and the northern areas of the city, the programme will help to balance the provision of childcare, ensuring that families in all parts of Portsmouth benefit equally. This will contribute to reducing travel times and easing the burden on parents who currently struggle with inadequate public transportation options.

Wraparound care provision in Portsmouth, similar to many other local authorities, is delivered through various providers operating in different capacities. Delivery patterns typically fall into the following categories:

- Care is directly provided by the school, on school premises.
- Care is provided by a Private, Voluntary, Independent (PVI) setting or another organization on school premises.
- Care is provided by a PVI setting or another organization off school site.

Additionally, the times at which wraparound care is available can vary significantly:

- Before and after school (ideally from 8 am to 6 pm from a governmental perspective, though availability may differ)
- Before school only
- After school only
- Care during school holidays

The National Wraparound Programme aims to ensure parents have access to wraparound care when and where needed. The initiative has largely encouraged and funded providers and schools to open or expand provision irrespective of demand, following a 'build it and they will come' approach. This supply-driven initiative means that conducting a comprehensive gap analysis or demand and supply analysis for this type of childcare is not pertinent.

All local authorities, including Portsmouth, are required to submit updates and delivery plans to the Department for Education (DfE), identifying potential providers for the wraparound programme, and managing funding to enable providers to establish new provisions or expand existing ones. This means that continuous efforts are being made to identify gaps in wraparound provision and to take necessary actions to address those gaps. Currently, across Portsmouth, there are 51 primary schools, four of which do not have any wraparound provision available. All four of these schools provide specialist provision. To date, in Portsmouth, a further 36 wraparound grants have been awarded to expand or extend provision, at existing settings. This figure includes 11 childminders, 4 PVI's and 9 schools at settings covering both the North and South of the city.

3.4 Presentation of Information and Data

This report will display information about childcare provision, including childcare demand, supply, and gap analysis in either of four ways depending on the nature of the information be 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 2025). This approach aimed to thoroughly analyse the supply and delivery of various childcare components. 138 responses were received giving a response rate for the questionnaire of 93%, and the results are detailed as follows:

Figure 3-Overall returns

PROVIDER TYPE	Total Number of Providers	Number of Returns	Percentage Return Rate
Childminder	59	53	90%
Other	7	7	100%
PVI Group Setting	66	62	94%
School Based Setting	17	16	94%
All Provider Types	149	138	93%

Unless otherwise stated, data tables, infographics and insights are based on 138 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 district

DISTRICT	Childminder	Other	PVI Group Setting (Day Nursery/ Playgroup etc.)	School Based Setting	Grand Total
North	10	1	23	4	38
South	49	6	43	13	111
LA Total	59	7	66	17	149

Based on 138 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 5-Number of providers by ward

WARD	Childminder	Other	PVI Group Setting (Day Nursery/ Playgroup etc.)	School Based Setting	Grand Total
Baffins	7		5	1	13
Central Southsea	9	1	2		12
Charles Dickens	3		4	4	11
Copnor	6	1	3		10
Cosham	5		10	2	17
Drayton and Farlington	4	1	8		13
Eastney and Craneswater	4		2		6
Fratton	2		3	2	7
Hilsea	2	1	9		12
Milton	10	1	5	1	17
Nelson	5	1	4	1	11
Paulsgrove	1		5	2	8
St Jude	1		2	3	6
St Thomas		1	4	1	6
All Wards	59	7	66	17	149

Based on 138 returns and locally held data regarding childcare provision.

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

Figure 6-Childcare market percentage distribution by provider type

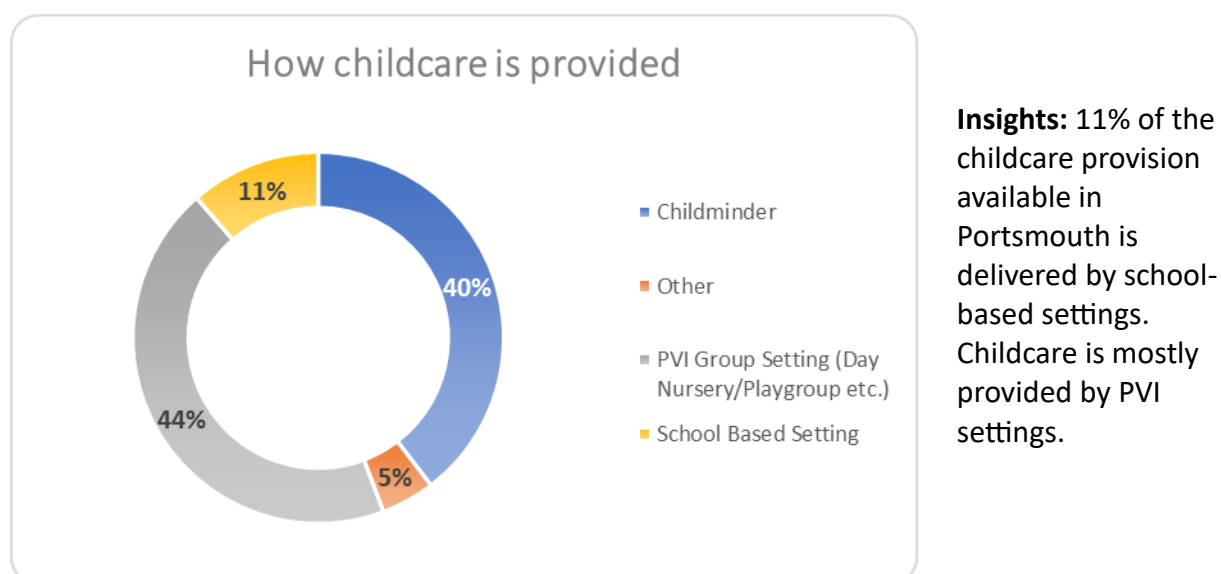
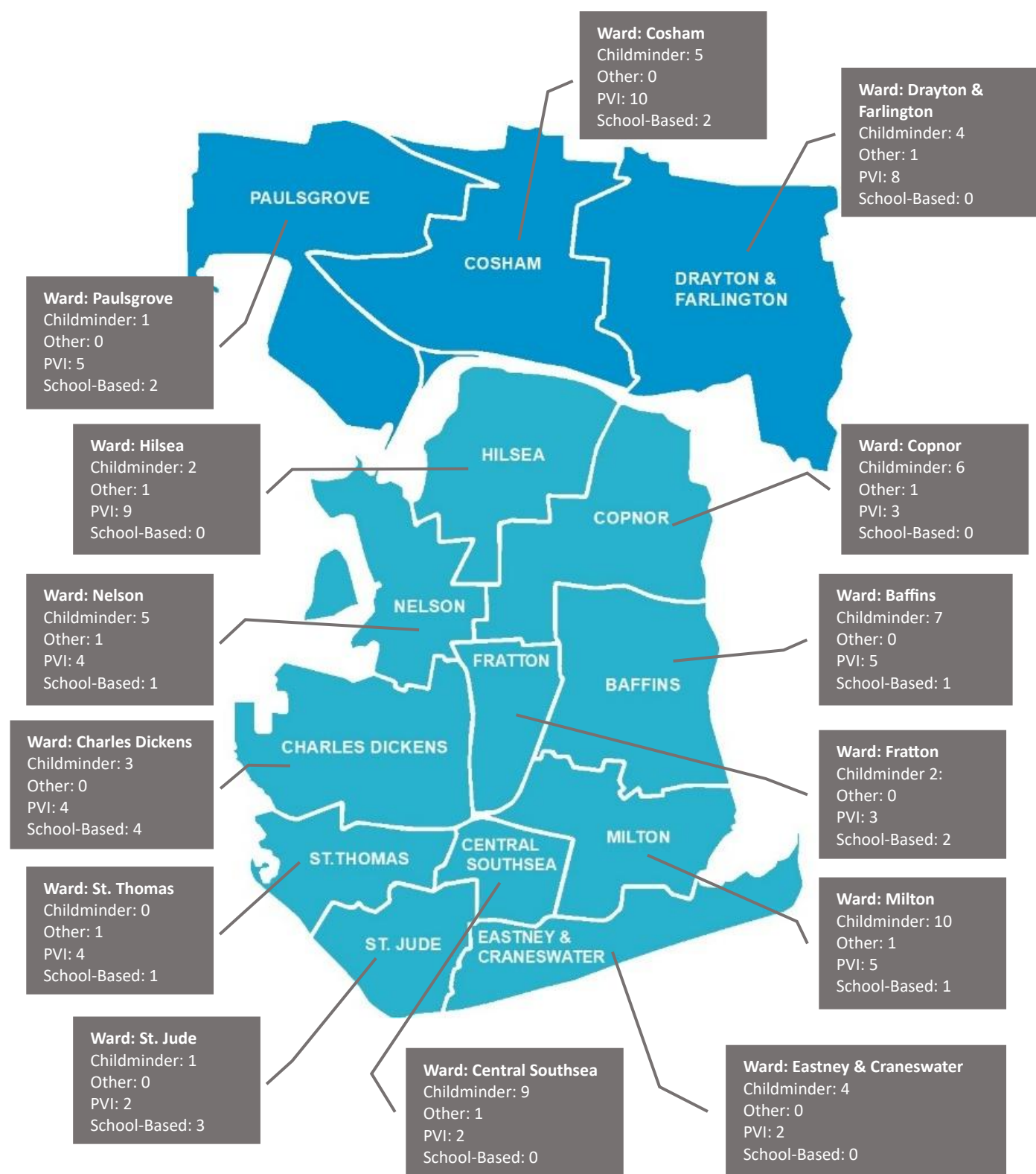


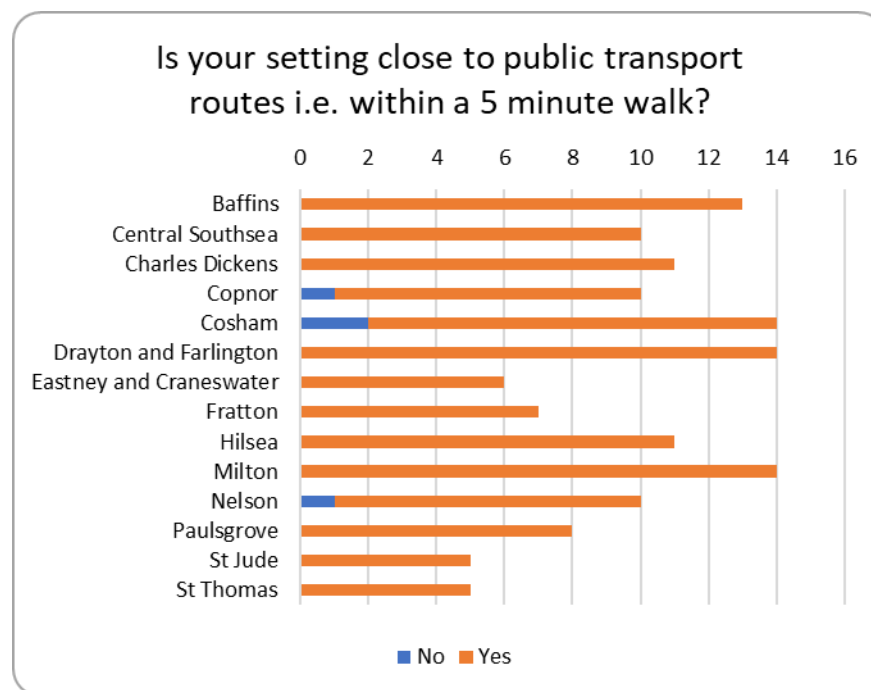
Figure 7-Map of provision by Ward



4.3 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.

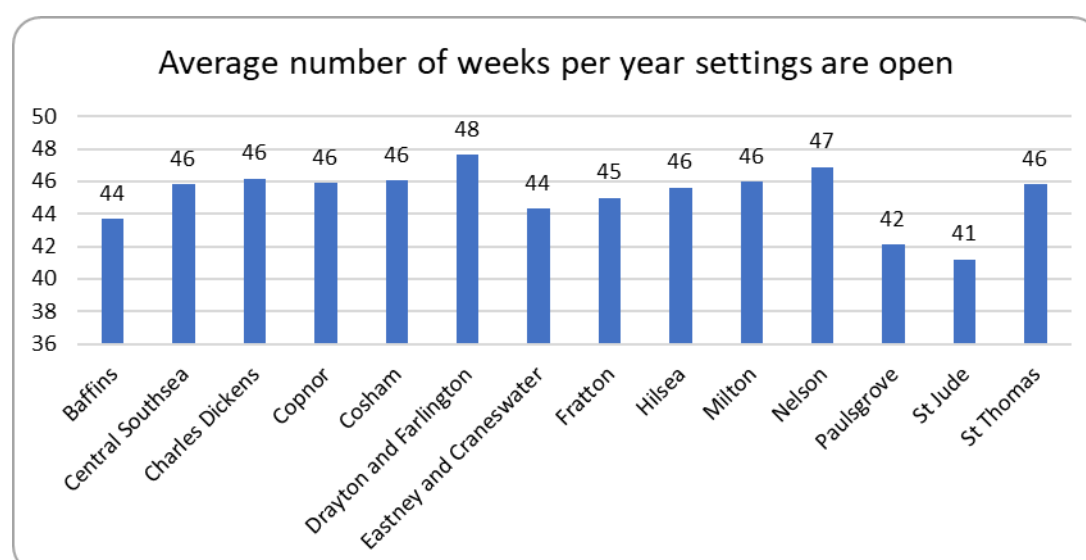
Figure 8-Provider proximity to public transport



Insights: 97% of providers are located near to public transport routes. Out of 138 returns, only 4 providers indicated they were not, this includes a PVI setting in Copnor, a PVI setting and a Childminder in Cosham, and a PVI setting in Nelson.

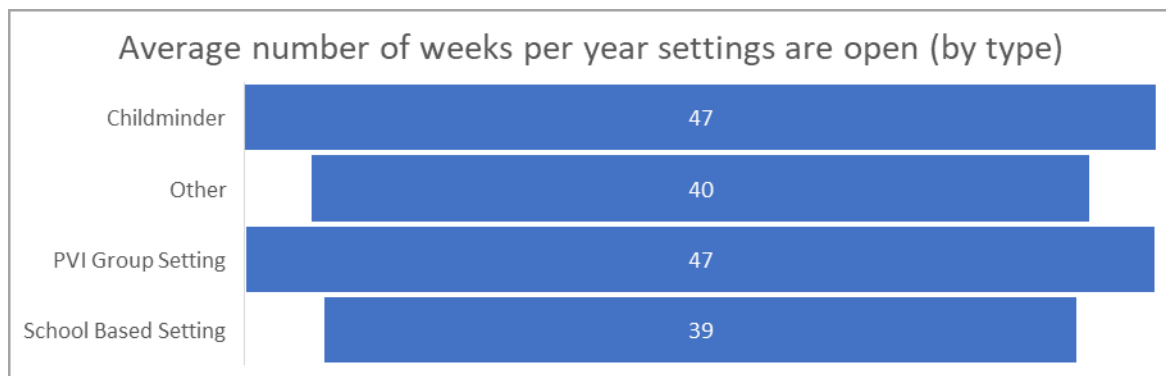
Providers were asked how many weeks per year they were open.

Figure 9-Number of weeks provision is open by ward



Insights: In Drayton and Farlington ward, settings are open an average of 48 weeks per year, whereas in St Jude they are only open for 41 weeks per year on average.

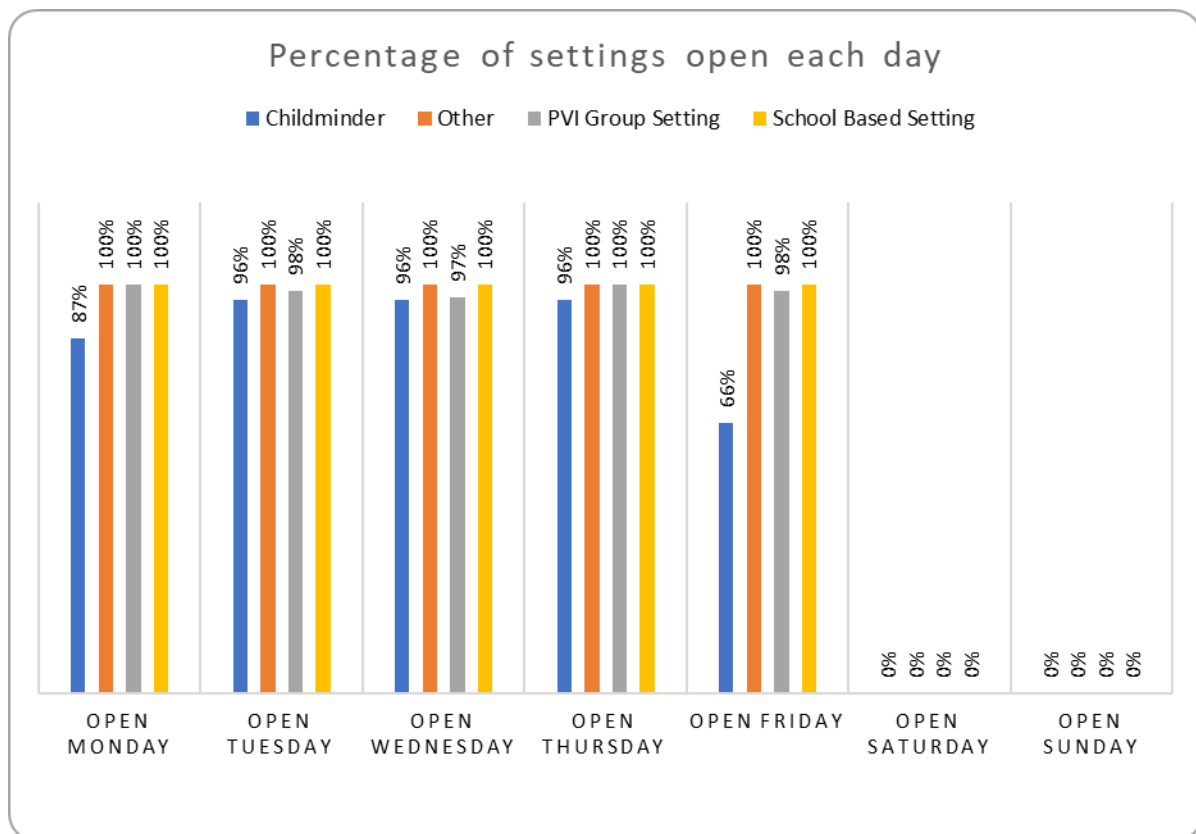
Figure 10-Number of weeks provision is open by provider type



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.

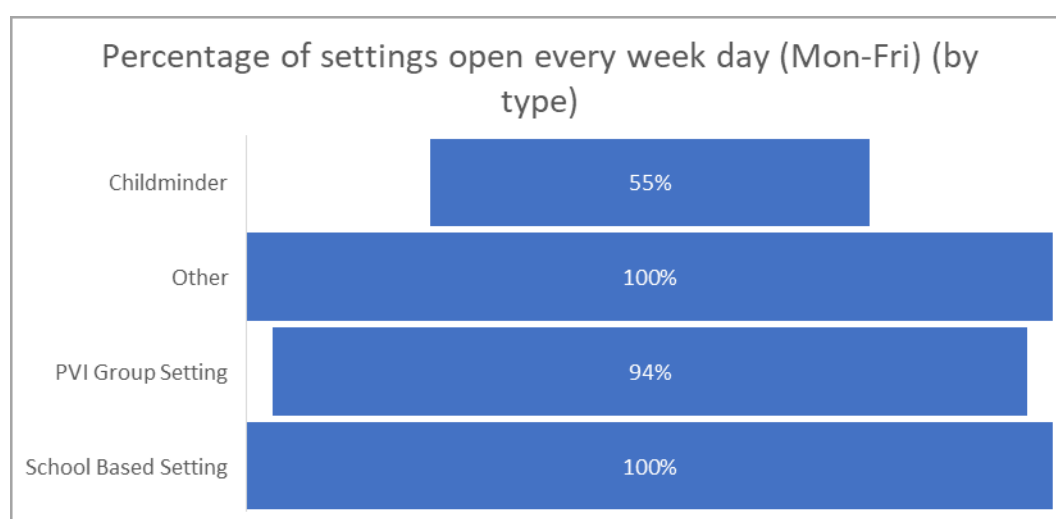
Providers were asked which days of the week they operated.

Figure 11-Percentage of providers open each day by provider type



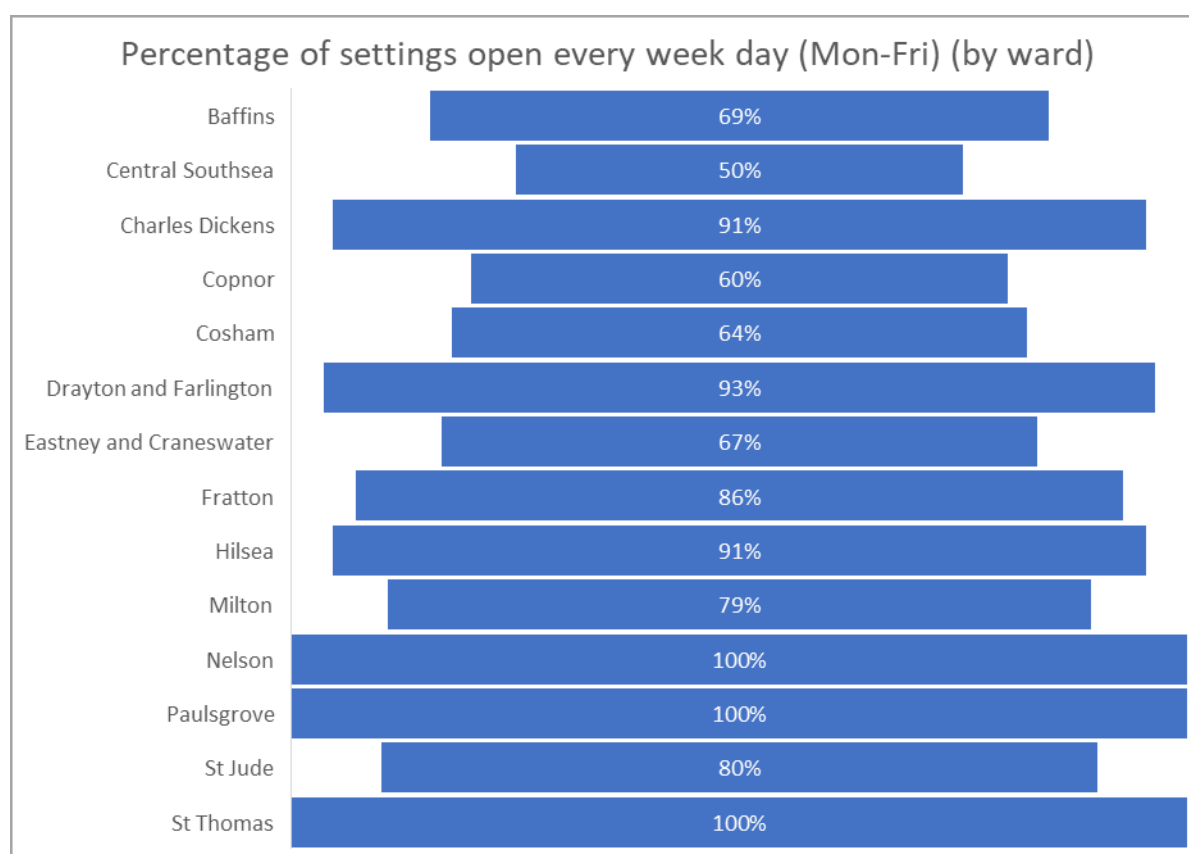
Insights: Most providers (80%) operate every weekday - Monday to Friday. However, no providers indicated that they open on weekends – Saturday and Sunday. This may affect the availability of childcare for parents who work irregular hours. Availability and flexibility of childcare could also be impacted by the fact that only 66% of childminders operate on Fridays.

Figure 12-Percentage of providers open every weekday by provider type



Insights: Most types of childcare are available from Monday to Friday, while only 55% of childminders operate on each 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 13-Percentage of providers open each weekday by ward



Insights: Only 50% of providers in Central Southsea are open each weekday.

Providers were asked about their opening times.

Figure 14-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	06:00 AM	07:00 PM	8:00	13:00
Other	07:15 AM	06:00 PM	6:45	10:45
PVI Group Setting	06:00 AM	08:00 PM	5:00	14:00
School Based Setting	07:30 AM	06:00 PM	6:25	10:30
All Provider Types	06:00 AM	08:00 PM	5:00	14:00

Figure 15-Average opening and closing times rounded to nearest 15 mins by ward

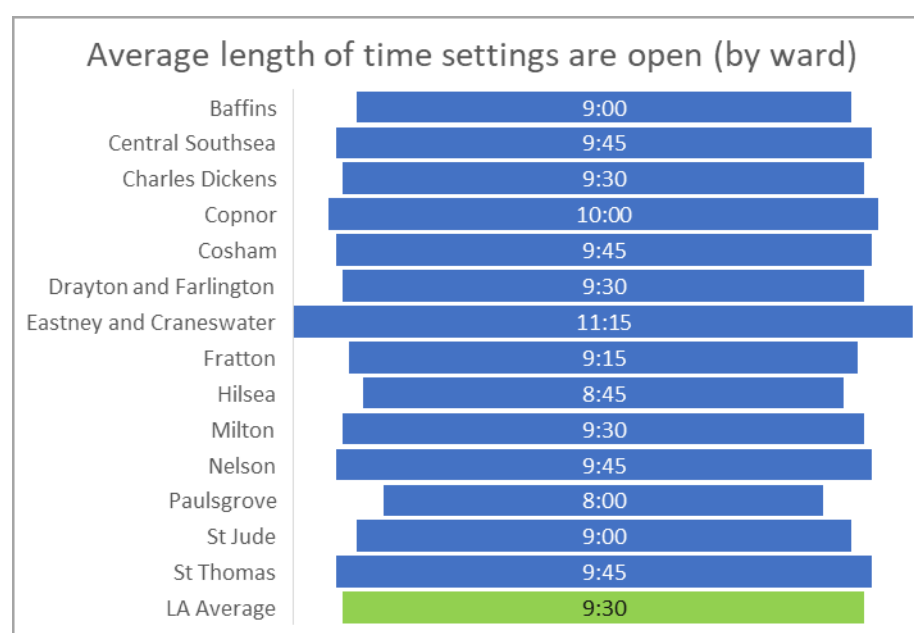
WARD	Average Opening Time	Average Closing Time
Baffins	07:45 AM	04:45 PM
Central Southsea	07:45 AM	05:30 PM
Charles Dickens	07:45 AM	05:00 PM
Copnor	07:30 AM	05:30 PM
Cosham	07:45 AM	05:30 PM
Drayton and Farlington	07:45 AM	05:15 PM
Eastney and Craneswater	07:15 AM	06:15 PM
Fratton	07:45 AM	05:00 PM
Hilsea	08:00 AM	04:45 PM
Milton	07:45 AM	05:15 PM
Nelson	07:30 AM	05:30 PM
Paulsgrove	08:15 AM	04:15 PM
St Jude	08:00 AM	05:15 PM
St Thomas	07:45 AM	05:30 PM
LA Average	07:45 AM	05:15 PM

Figure 16-Average opening and closing times rounded to nearest 15 mins by provider type

PROVIDER TYPE	Average Opening Time	Average Closing Time
Childminder	07:30 AM	05:45 PM
Other	08:00 AM	04:30 PM
PVI Group Setting	07:45 AM	05:15 PM
School Based Setting	08:15 AM	04:00 PM
LA Average	07:45 AM	05:15 PM

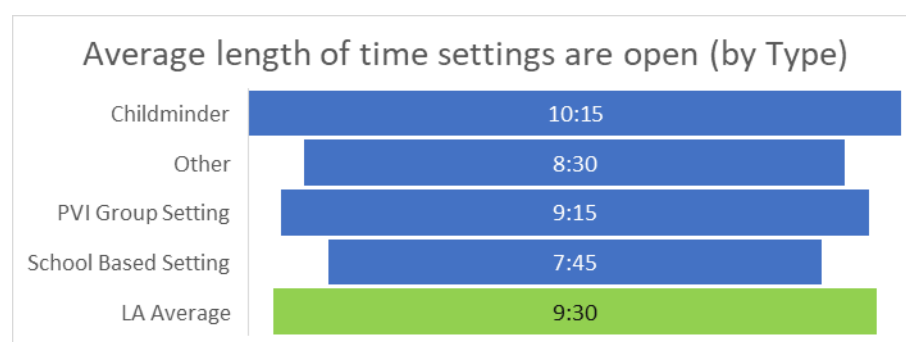
Insights: Settings are generally open from 7:45am until 5:15pm with the earliest setting(s) open at 6:00am until the latest time of 8:00pm.

Figure 17-Average length of time settings are open to nearest 15 mins by ward



Insights: Settings in Paulsgrove operate for the shortest duration each day, whereas settings in Eastney & Craneswater operate for the longest hours. In general, across the LA, settings are typically open for an average of 9.5 hours per day.

Figure 18-Average length of time settings are open to nearest 15 mins by provider type

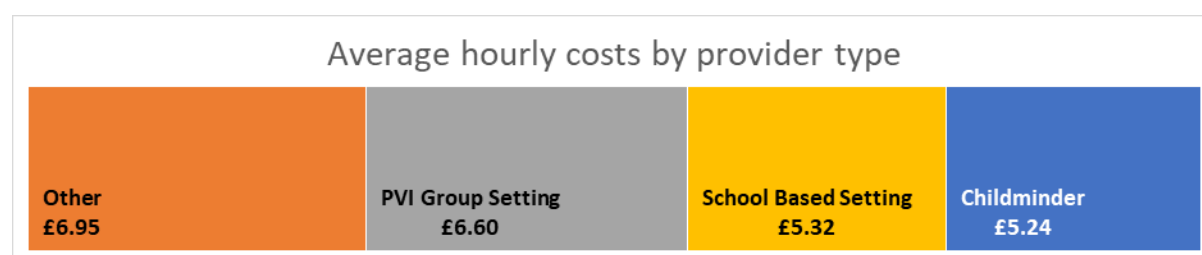


Insights: School-based settings have the shortest operating hours each day, while childminders have the longest operating hours, beginning the earliest and closing the latest.

4.4 Cost of Childcare

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. A total of 127 providers completed this section of the questionnaire accurately.

Figure 19-Average hourly costs by provider type



Insights: Childminders have the lowest average cost per hour at £5.24

Figure 20-Average hourly costs by ward

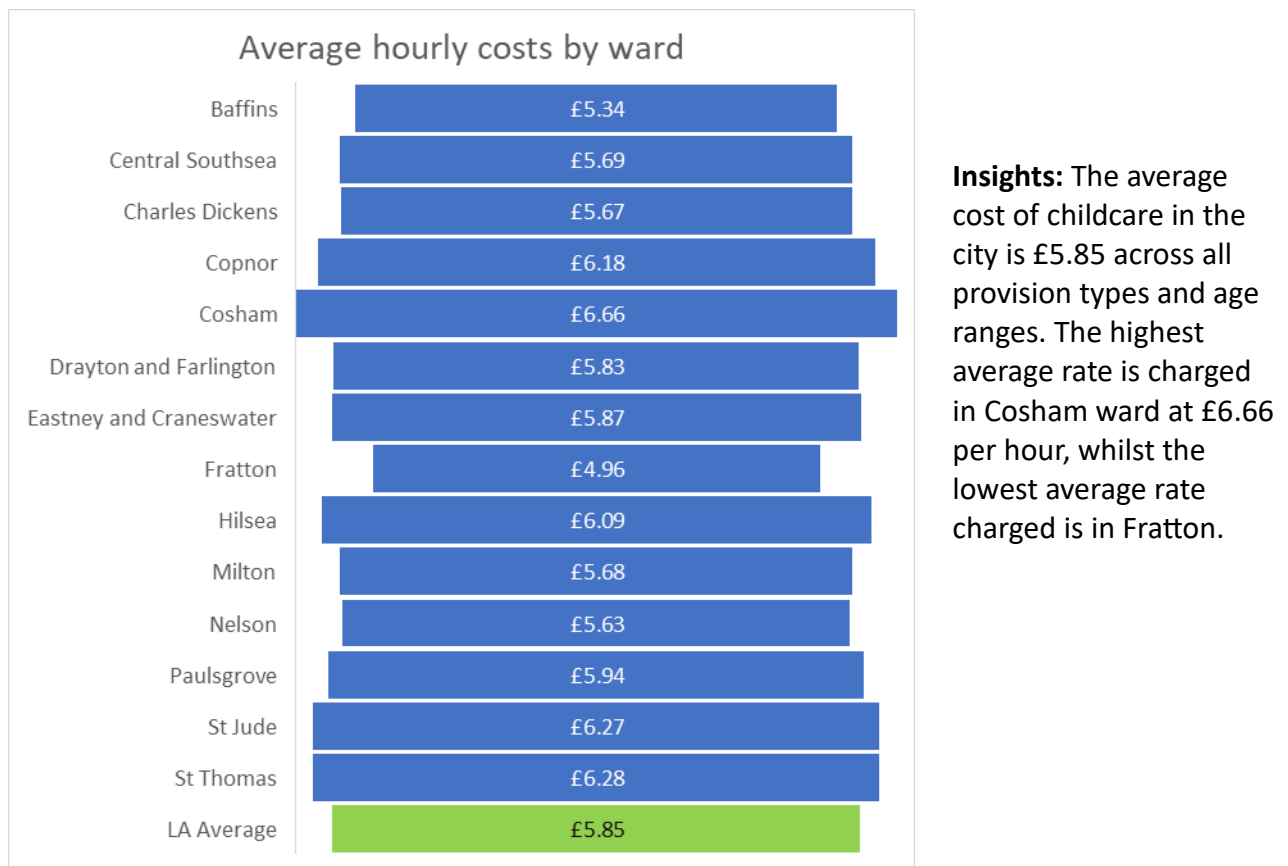
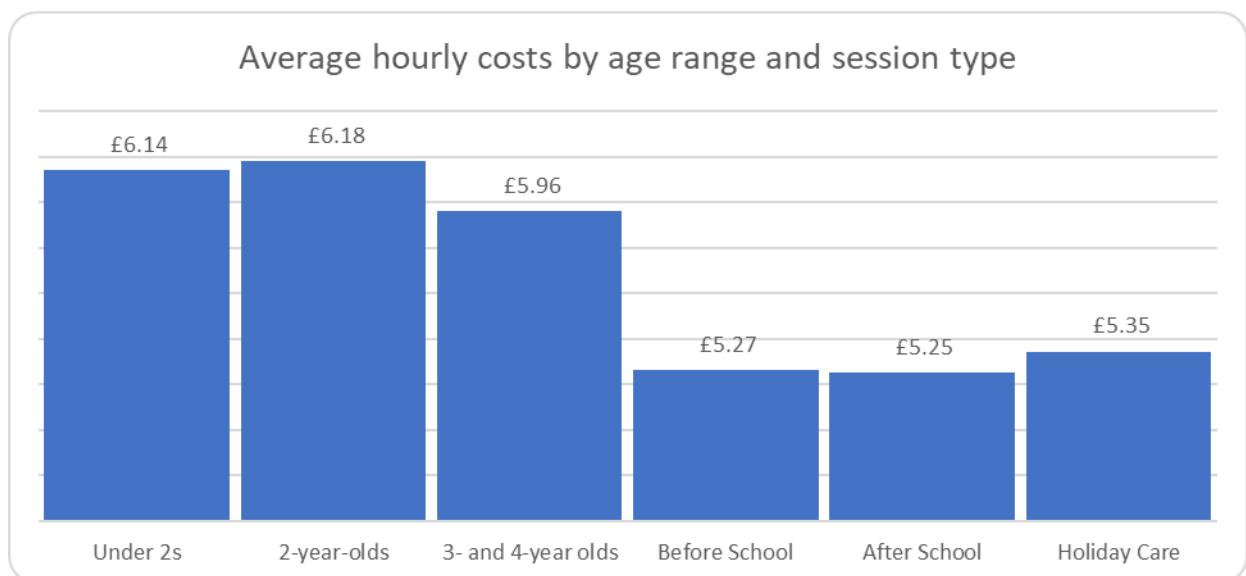


Figure 21-Average hourly costs by age range and session type

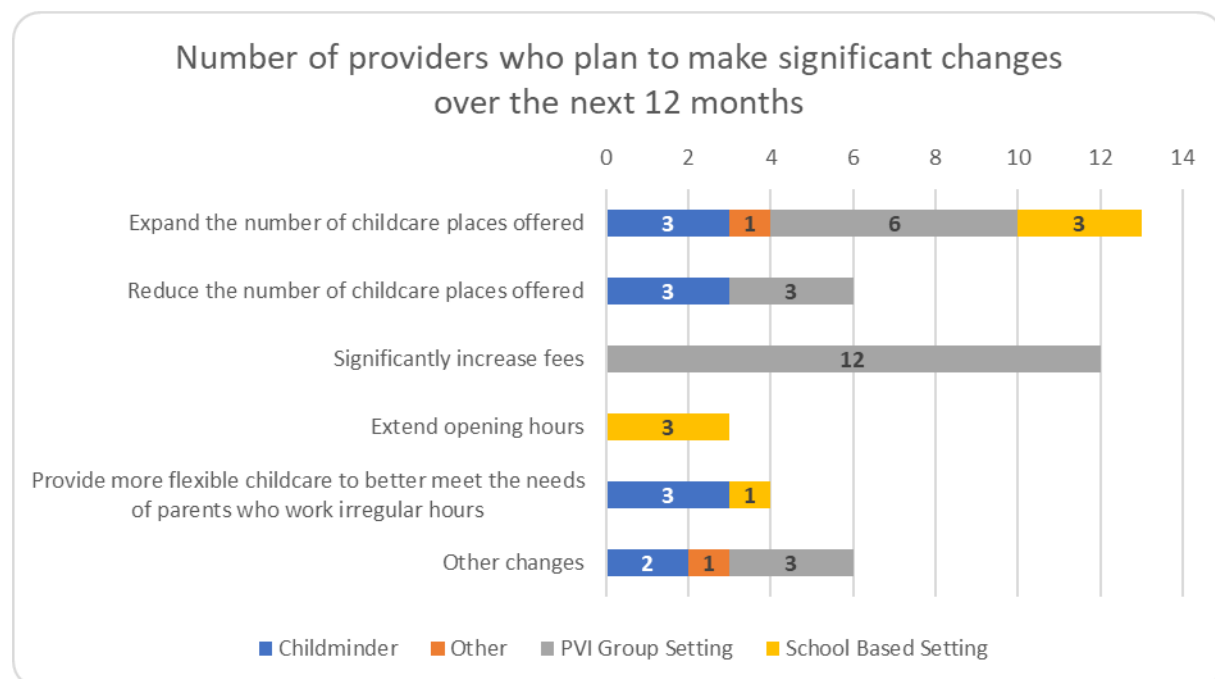


Insights: The average hourly cost of caring for a 2-year-old is the highest across the different age ranges and delivery types, which is slightly unexpected since caring for under 2's is usually more costly given the required staff to child ratios.

4.5 Provider Changes and Expansion

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

Figure 22-Significant changes planned over the next 12 months



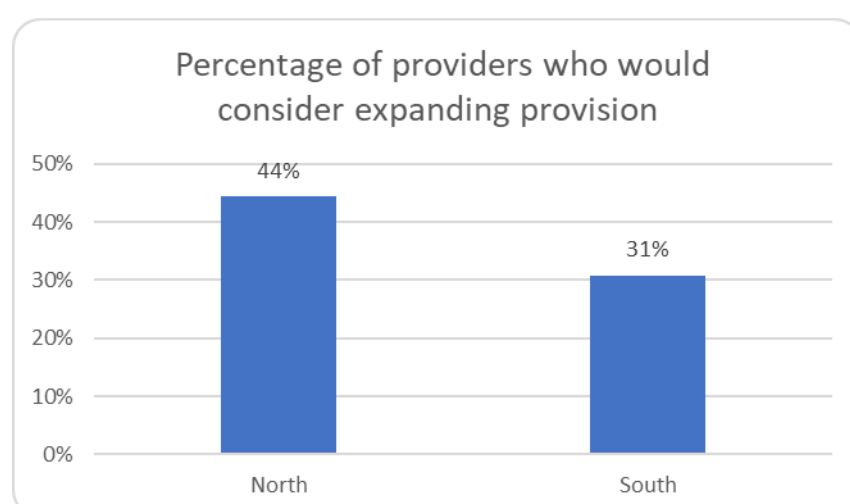
Insights: Out of 138 returns, 13 providers indicated that they were planning to expand the number of childcare places offered and 12 indicated that they were planning to significantly increase fees. It is important to note that the questionnaire was issued following government announcements about changes to employer national insurance contributions and national minimum wage increases, which may have prompted providers to anticipate and plan for higher costs. Subsequently, early education funding rates announced by government accounted for these increases, meaning the planned fee increases by providers may not occur.

Where providers indicated that they planned to implement 'other changes', these included potential increases in fees, but no firm decisions made, and internal changes due to altering working patterns or changes in ownership.

Providers were asked if they had **definitive** plans to expand provision from September 2025. Those who indicated they **did** have definitive plans to expand were further asked how many additional funded early education places they may be able to offer from September 2025, and these answers are included in Childcare Places.

Providers who indicated that they **did not** have definitive plans to expand, were asked if they would **consider** expansion (if there were sufficient demand).

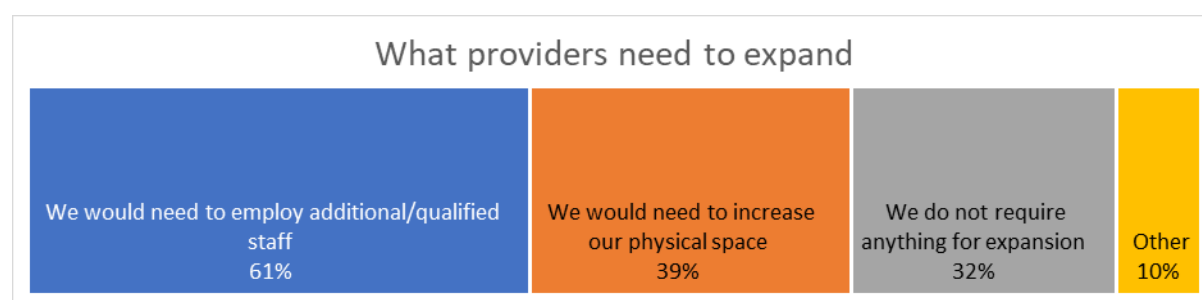
Figure 23-Percentage of providers who would consider expansion by district



Insights: Based on 108 returns overall. Out of all providers responding in the North, 44% of them (12 providers out of 27) indicated that they would consider expansion, compared to 31% in the South (25 providers out of 81).

Providers indicating that they had definitive plans to expand or that they would consider expansion, were subsequently asked what they would need to do this.

Figure 24-Provider requirements for expansion



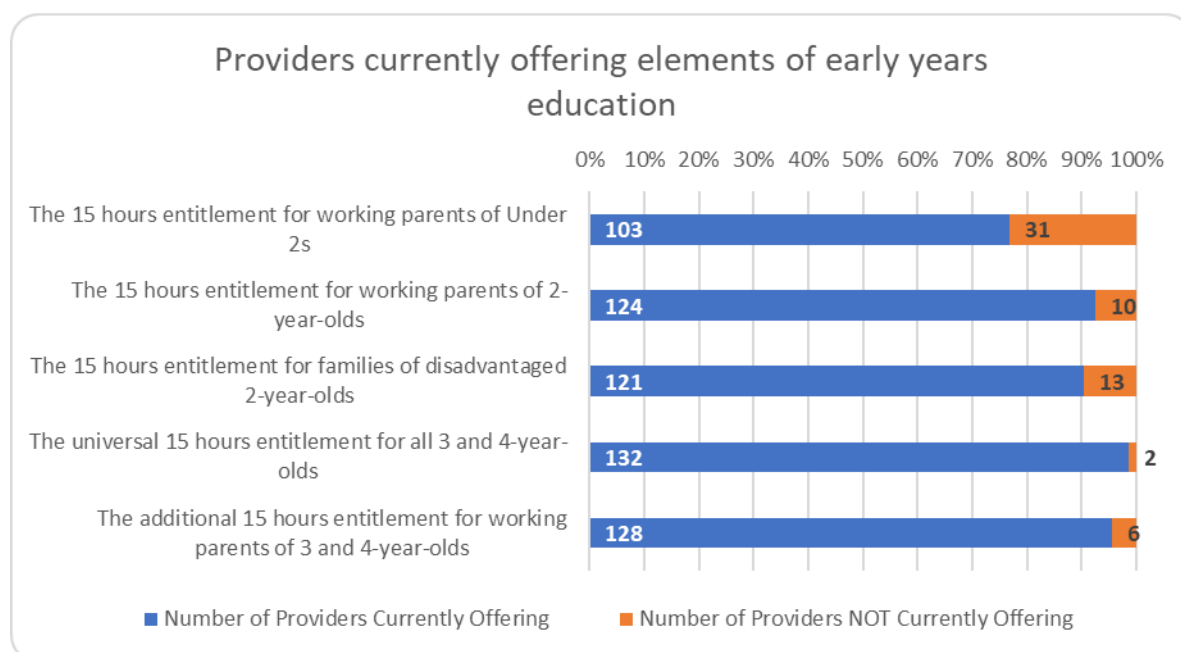
Insights: Out of 59 responses, 61% of providers indicated that they would require additional staff. This reflects a national trend regarding shortages in the early years workforce.

Where providers have indicated 'Other' needs for expansion, these generally pertain to financial requirements to either expand the setting or acquire additional resources. Additionally, there were mentions of increased funding or higher funding rates to enable settings to recruit and retain more qualified staff, again reflecting the nationwide challenges faced by the sector in terms of recruitment and retention within the childcare workforce.

4.6 Delivery of Early Years Education

Providers were asked to indicate which elements of early years education they currently offered and which elements they were planning to offer from September 2025. Analysis is based on 134 returns from providers indicating that they offered early education (4 providers indicated they did not).

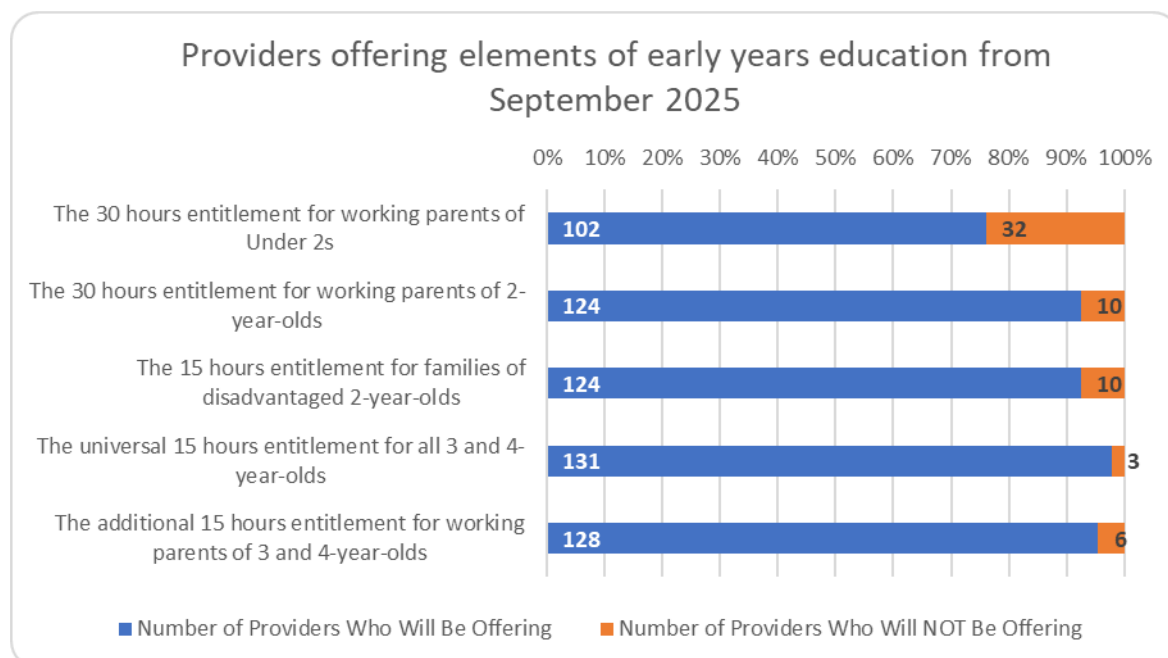
Figure 25-Elements of early years education **currently** offered by providers



Insights: 31 providers indicated that they did not currently offer the 15 hours entitlement for working parents of under 2s. 14 of these were PVI providers, and a further 11 were school-based settings. Only 2 childminders stated they did not offer this element.

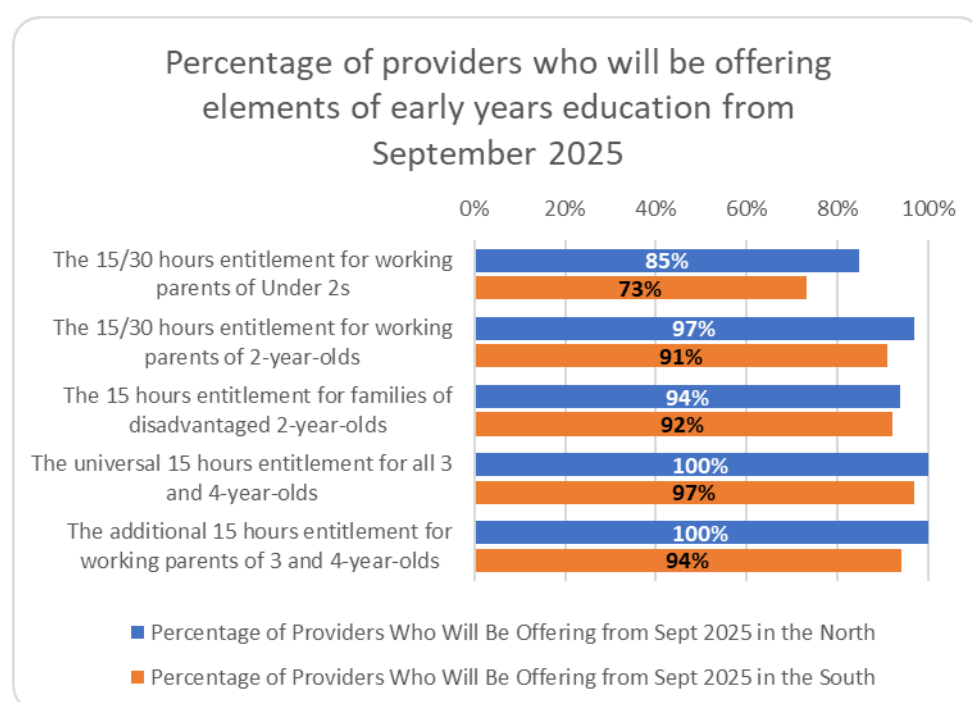
10 settings indicated they did not currently offer the 15 hours entitlement for working parents of 2-year-olds and the majority of these (6) were school-based providers.

Figure 26-Elements of early years education that providers have indicated they **will** offer from September 2025



Insights: Provision of early years educations looks likely to be largely unchanged from September 2025, although there is slight decrease in the offer for under 2s.

Figure 27-Percentage of providers who will offer various elements of early years education (as a proportion of respondents)



Insights: Of the 134 responses analysed, 33 providers were based in the North and 101 were based in the South. Percentages are calculated as a proportion of those responses in each district. Overall, providers in the North have reported that they will provide more elements of early years education than providers in the South.

4.7 Childcare Quality

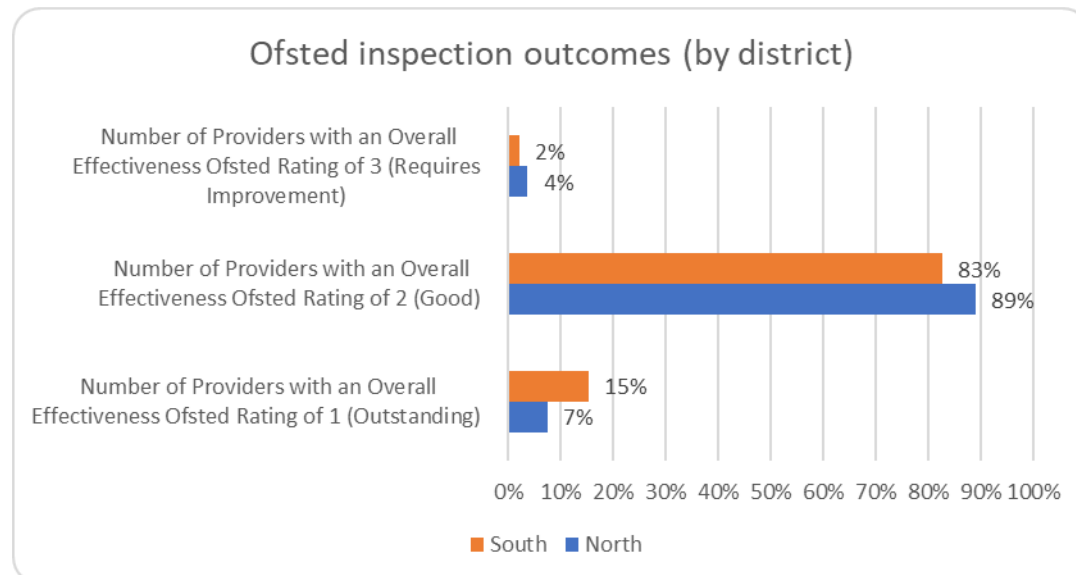
An Ofsted data extract of Latest Inspections of all registered providers as of 31 December 2024, indicates that provision in Portsmouth is generally either 'Good' or 'Outstanding':

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

Ward	Providers with an Ofsted Rating of 1 (Outstanding)	Providers with an Ofsted Rating of 2 (Good)	Providers with an Ofsted Rating of 3 (Requires Improvement)	Total Inspections
Baffins	2	10		12
Central Southsea	2	10		12
Charles Dickens	1	6		7
Copnor		8		8
Cosham	1	11		12
Drayton & Farlington	1	9		10
Eastney & Craneswater	1	5		6
Fratton	1	1	2	4
Hilsea	2	8		10
Milton	1	12		13
Nelson		13		13
Paulsgrove		4	1	5
St Jude	2	1		3
St Thomas	2	2		4
All Wards	16	100	3	119

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 04/03/2016 to 14/11/2024.

Figure 29-Ofsted ratings by district

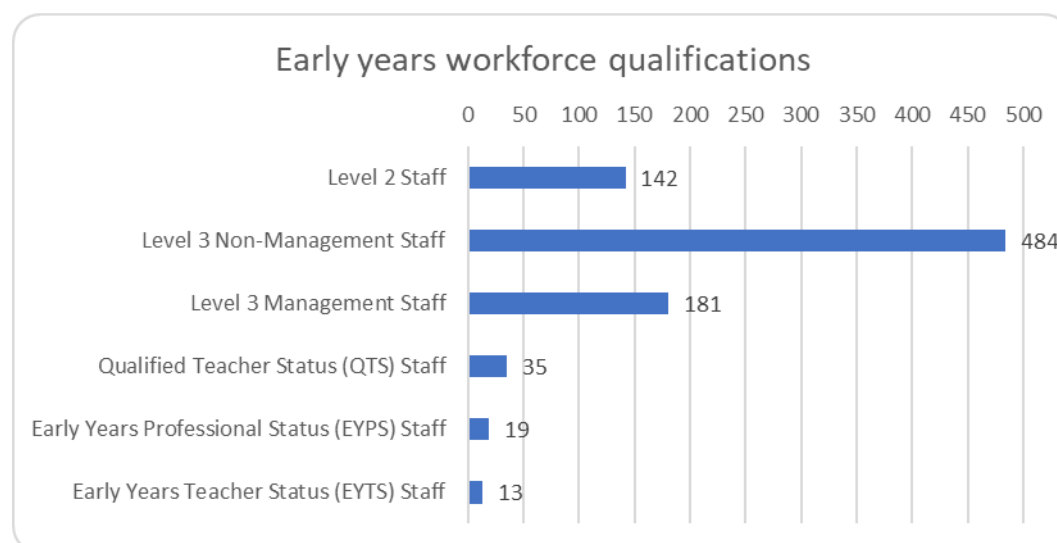


Insights: In terms of quality, providers perform comparatively across both districts. Although the South does have more settings (14) which have been rated as Outstanding, compared to only 2 settings in the North.

4.8 Childcare Workforce

According to the Early Years Census 2025, there are a total of 1063 staff working across early years establishments in Portsmouth. 874 of these staff (82%) have a recognised relevant early years qualification as follows:

Figure 30-Number of staff with recognised early years qualifications



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

Across the early years sector, there has been a significant shift in focus towards enhancing provision for children with Special Educational Needs and Disabilities (SEND). This shift is indicative of a broader trend observed in local authorities (LAs) across the country, as they grapple with the increasing demand and varying needs of this particular group of children. The analysis highlights the efforts undertaken to ensure that quality, inclusivity, and accessibility of early years education are maintained, despite the challenges posed by the growing SEND population.

The findings presented in this section will delve into the current state of provision for children with SEND, examining various metrics such as occupancy levels, expertise, and training among providers. Through detailed figures and insights, this section aims to provide a comprehensive overview of the current landscape and the ongoing efforts to accommodate and support children with SEND within the early years education framework.

Firstly, providers were asked how many children with SEND were enrolled at their setting. 132 providers provided responses to this question:

Figure 31-Children with SEND enrolled by district

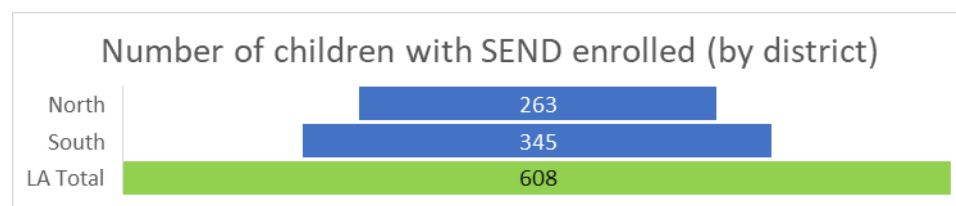
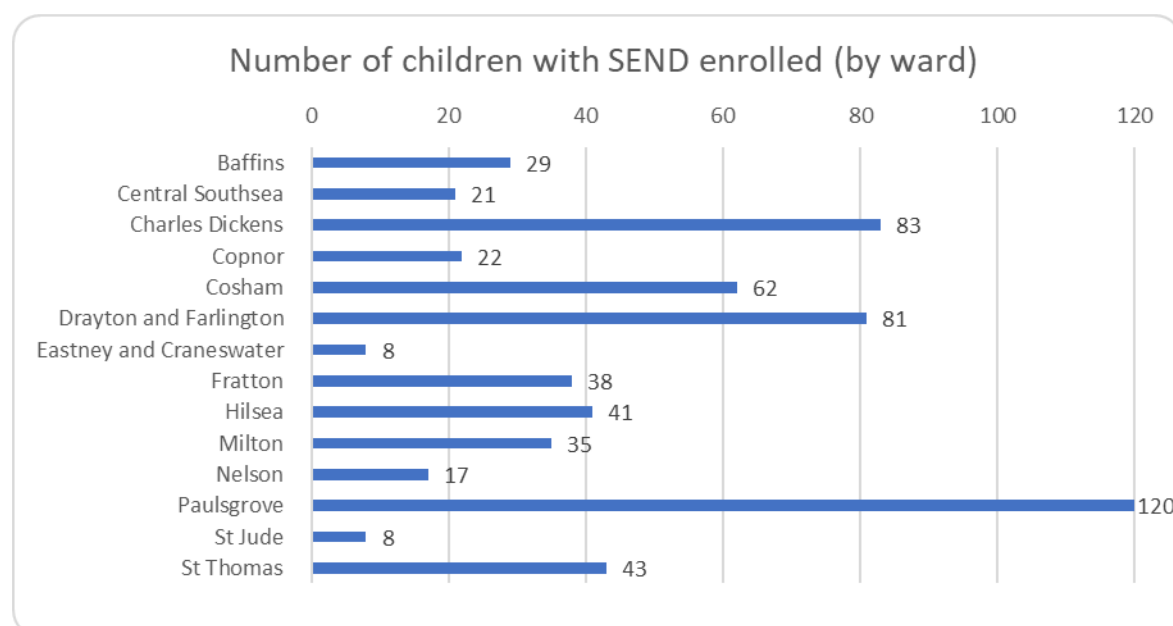
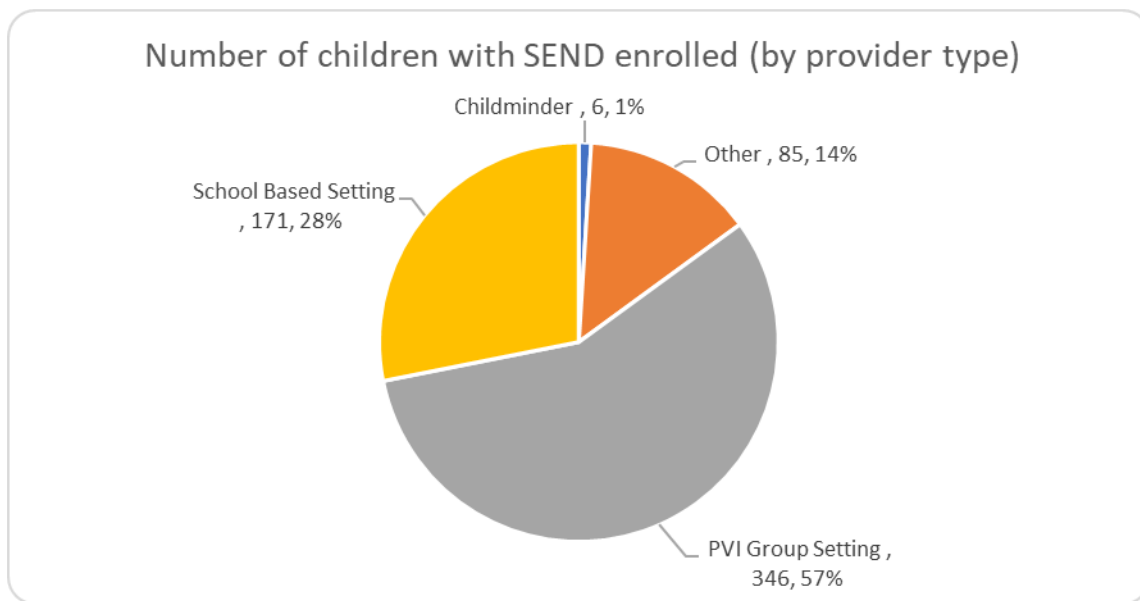


Figure 32-Children with SEND enrolled at providers by ward



Insights: Eastney and Craneswater, and St Jude equally have the least number of children with SEND enrolled (8 children each).

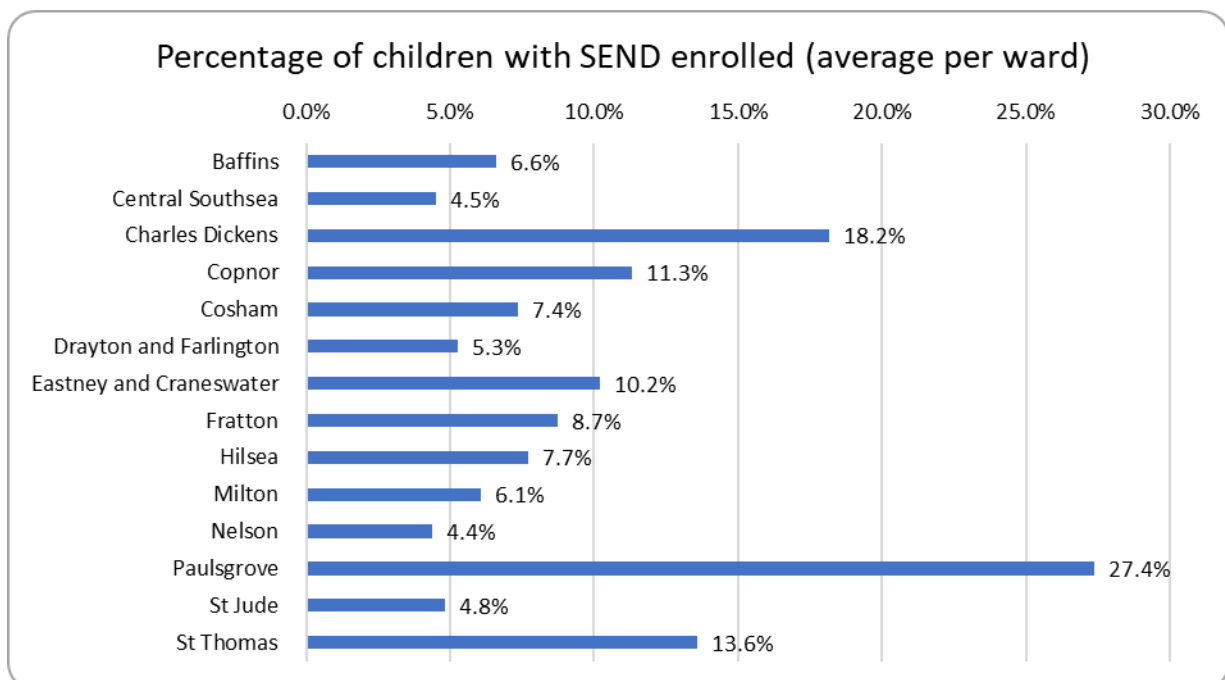
Figure 33-Children with SEND enrolled by provider type



Insights: Out of 608 children enrolled at settings across the local authority (according to provider responses), 346 (or 57%) are enrolled at PVI Group settings, whereas only 6 (or 1%) are enrolled with childminders.

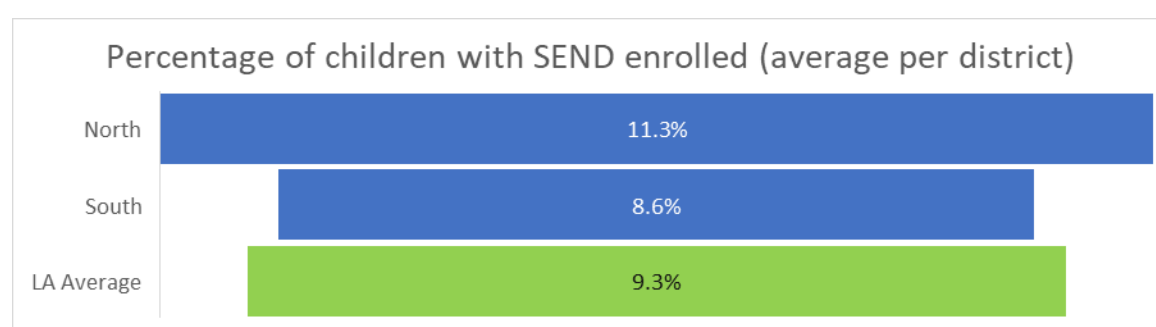
Providers were then asked; approximately what proportion of places are occupied by children with SEND each day? This question received 130 responses.

Figure 34-Percentage of children with SEND enrolled at settings as indicated by providers by ward



Insights: Providers in Paulsgrove indicated that 27.4% of the children enrolled had SEND, which is the highest across the local authority. Whereas the settings with the lowest proportion of children with SEND were based in Nelson at 4.4%.

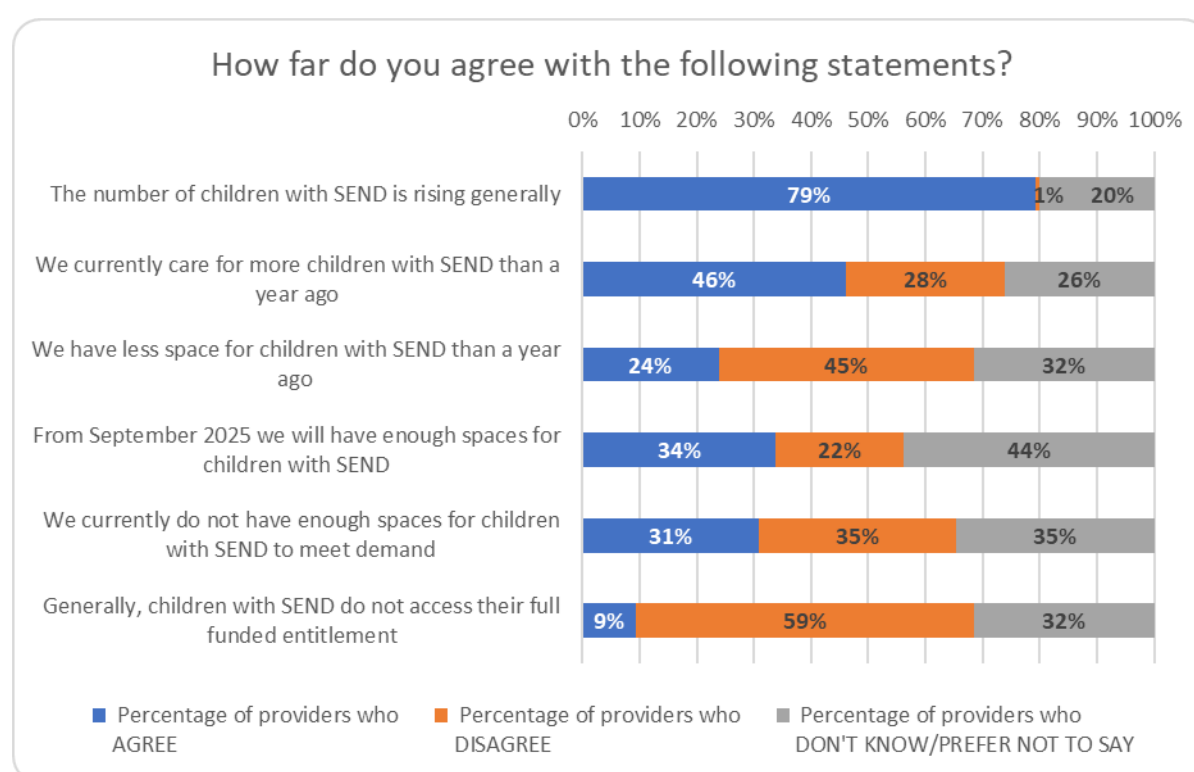
Figure 35-Average number of children with SEND enrolled by district



Insights: According to the 130 providers who responded to the SEND based questions, 9.3% of the children enrolled across the local authority have SEND.

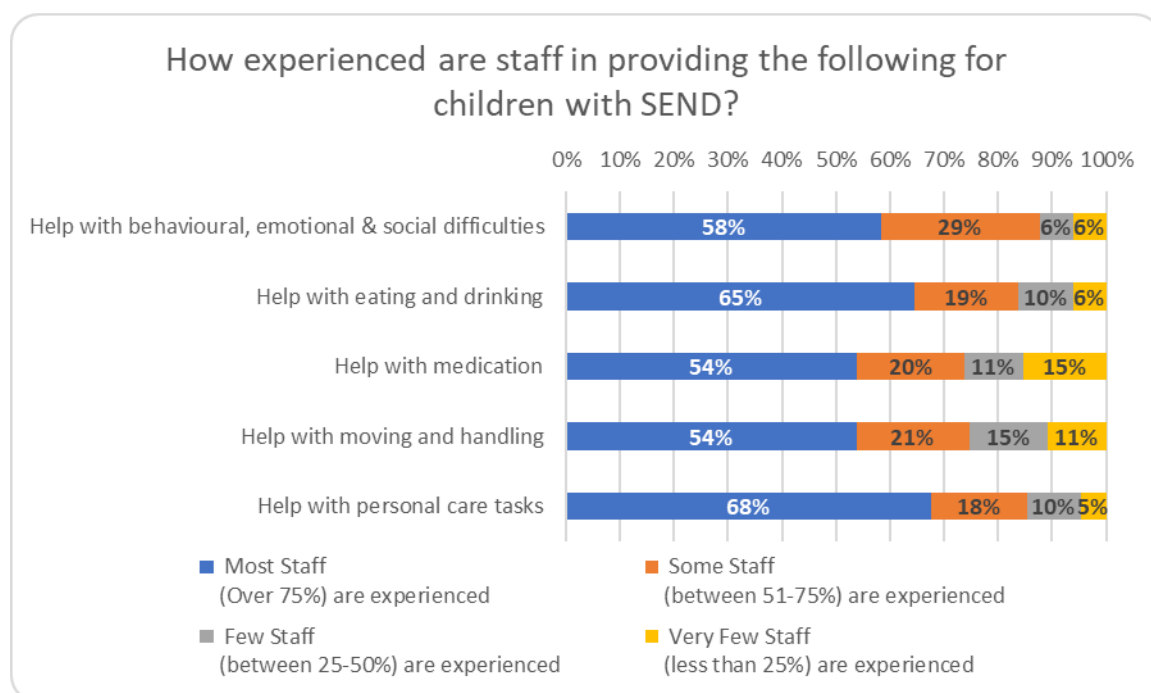
Providers were asked for their thoughts around various aspects of childcare delivery for children with SEND and if they had any plans to improve this provision. 130 providers responded to these questions.

Figure 36-Providers observations on caring for children with SEND



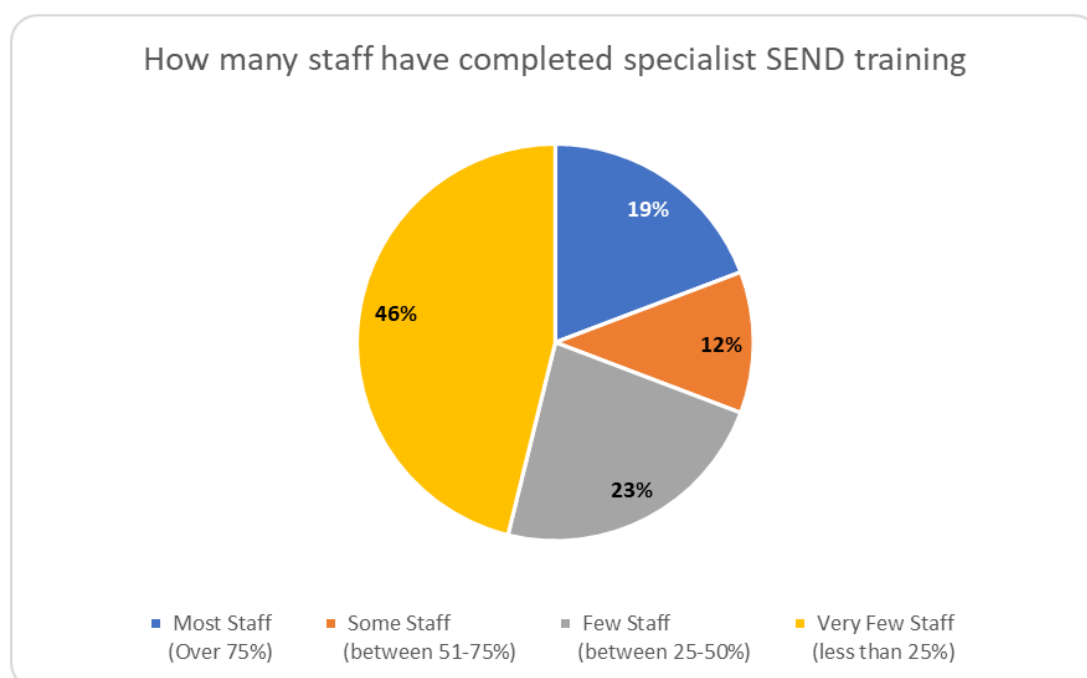
Insights: 79% of providers believe the number of children with Special Educational Needs and Disabilities (SEND) is increasing overall, which aligns with the national trend. Additionally, 46% of providers reported that they are currently caring for more children with SEND than they were a year ago.

Figure 37-Staff experience in caring for children with SEND



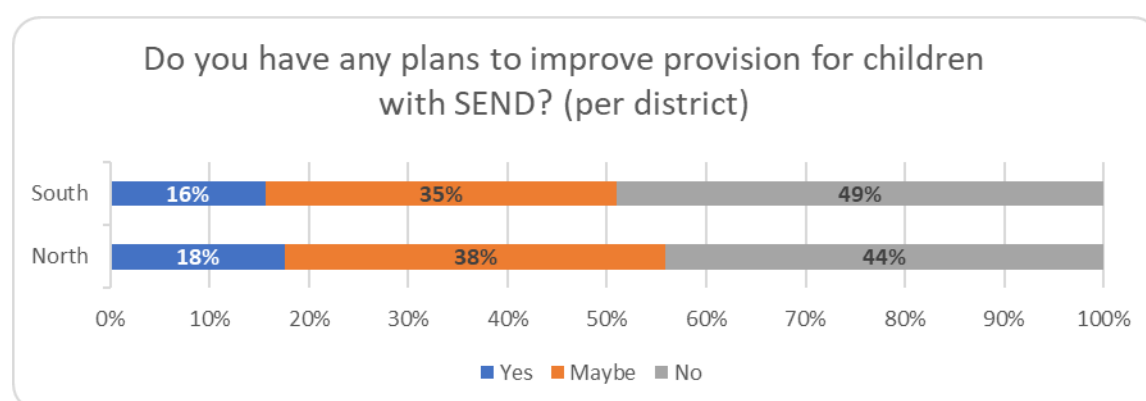
Insights: 29% of providers who responded indicated that some staff (between 51-75% of their staff) have experience helping children with behavioural, emotional and social difficulties. 68% of providers indicated that over 75% of their staff (most staff) are experienced helping with personal care tasks.

Figure 38-Specialist SEND training - staff completion rates



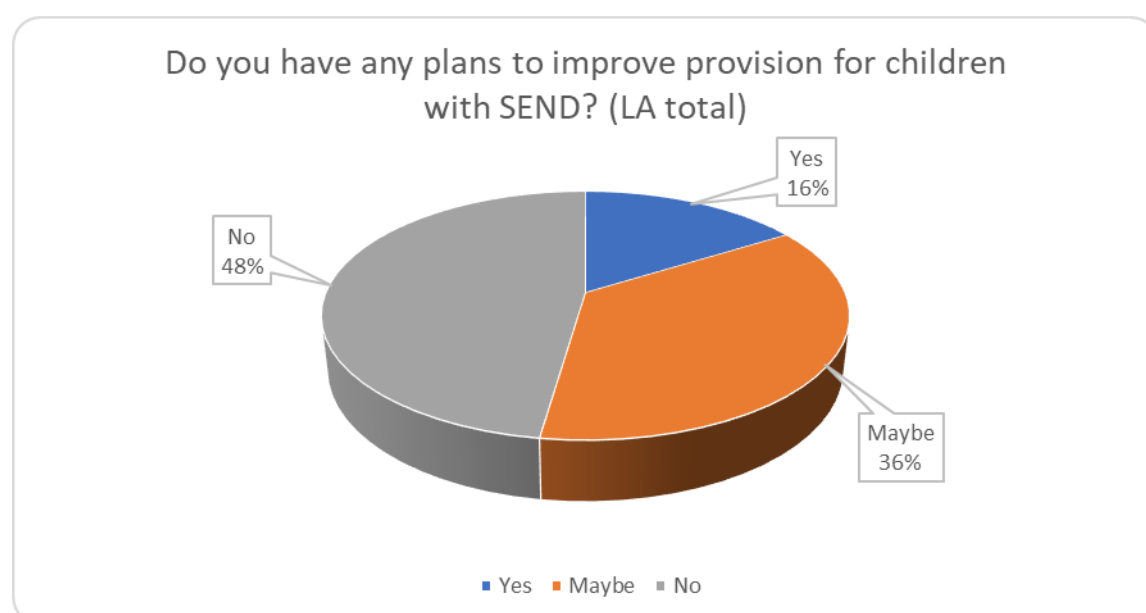
Insights: 46% of providers have indicated that very few staff (less than 25% of their staff) have completed specialist SEND training, whilst only 19% of providers indicated that over 75% of their staff have completed specialist SEND training.

Figure 39-Percentage of providers with/without plans to improve provision for children with SEND by district



Insights: The ratio of providers planning to improve provision for children with SEND is similar in both the North and South of the City.

Figure 40-Percentage of providers with/without plans to improve provision for children with SEND (LA total)

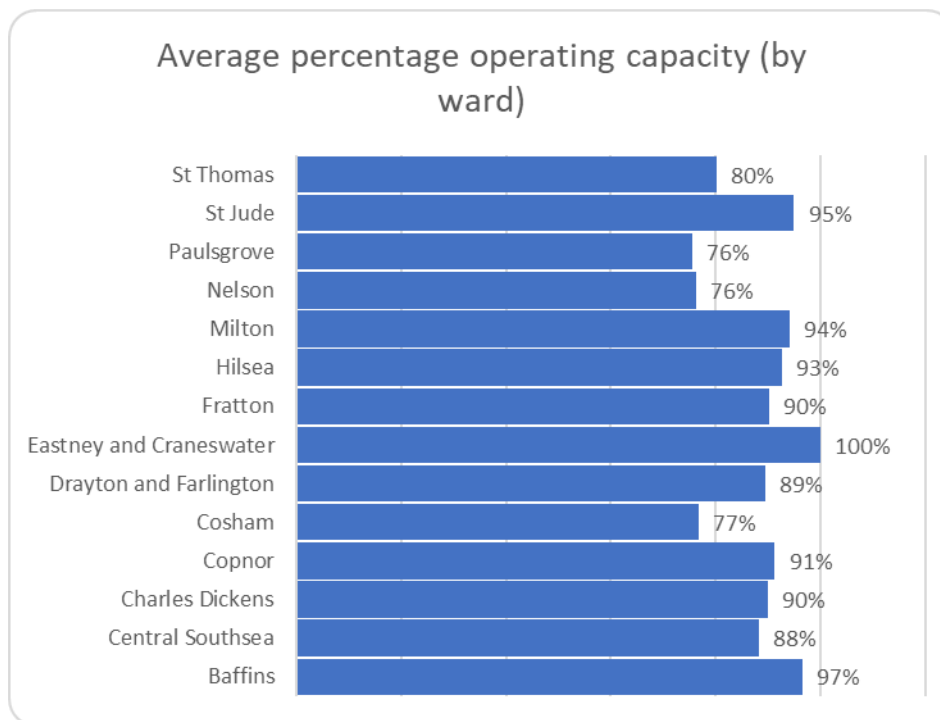


Insights: Almost half of all providers indicated that they had **no plans** to improve provision for children with SEND.

4.10 Provider Operating Capacity

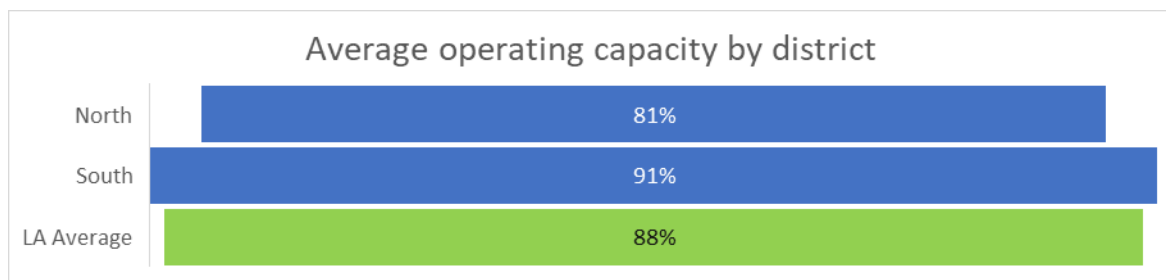
Providers were asked a range of questions to determine and confirm their maximum operating capacity. Many providers do not operate at their Ofsted registered capacity, meaning they often do not offer the full number of places for which they are registered. This is usually due to limited space or challenges in recruiting the required number of staff to maintain the legal ratio of staff to children.

Figure 41-Average operating capacity as a proportion of Ofsted registered places by ward



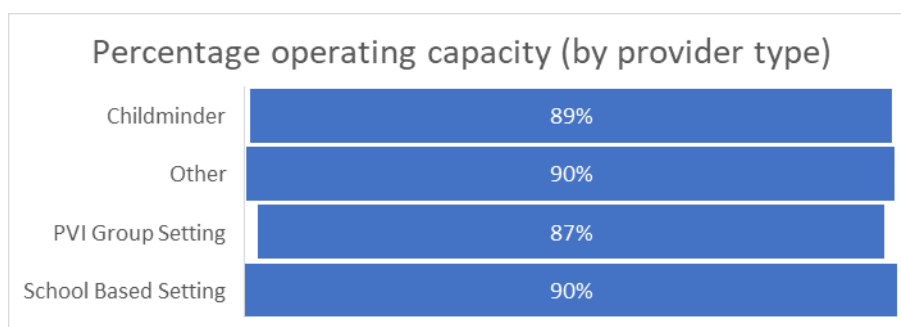
Insights: The wards of Paulsgrove and Nelson have the lowest operating capacity of 76%, whilst the average for the Eastney and Craneswater is the highest at 100%.

Figure 42-Average operating capacity as a proportion of Ofsted registered places by district



Insights: The average capacity of settings in the North is lower than that of the South. The average operating capacity for settings across the local authority overall is 88%, which is slightly higher than the Department for Education calculations within LA Readiness Data² that indicate an average of 85%.

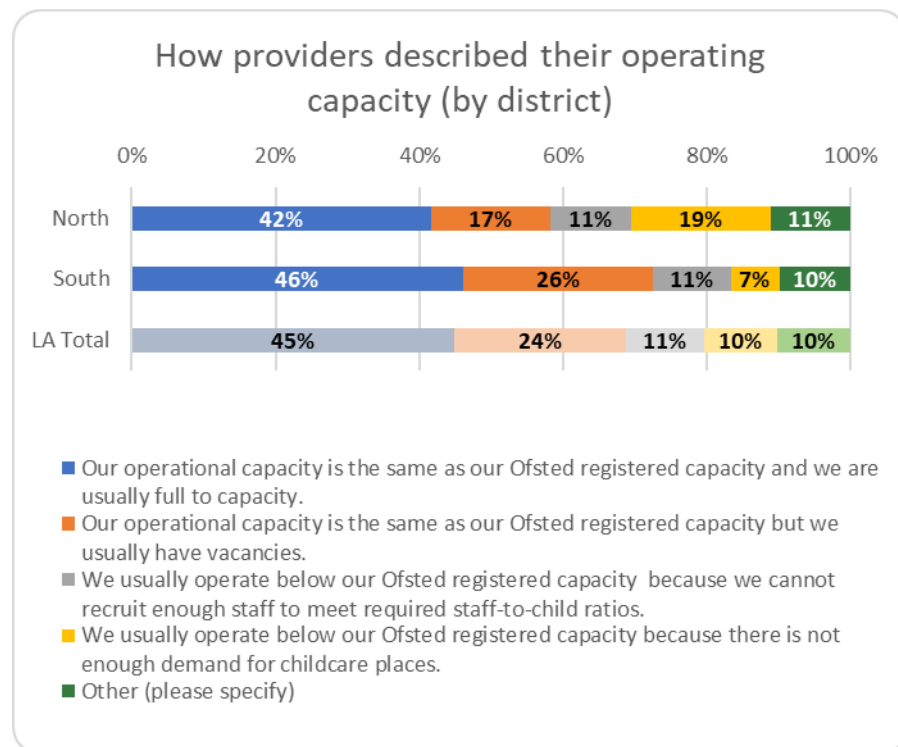
Figure 43-Average operating capacity as a proportion of Ofsted registered places by provider type



Insights: Childminders generally operate at 89% of their registered Ofsted capacity whilst PVI settings on average operate at 87%.

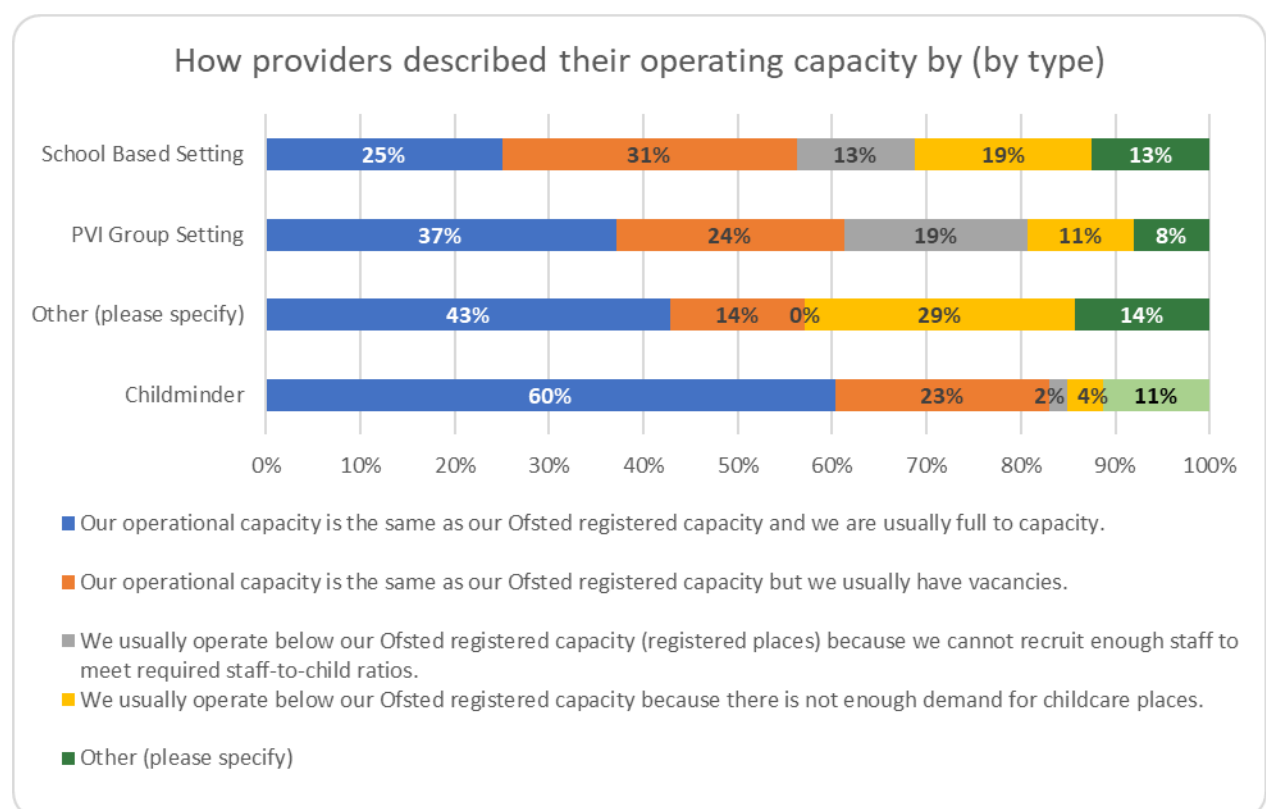
² Data from the Department for Education (DfE) provided to each local authority to facilitate preparation for the expanded entitlements.

Figure 44-Provider descriptions of operating capacity by district and LA level



Insights: 45% of providers indicated that their operational capacity matches their Ofsted registered capacity, and they typically operate at full capacity. This percentage is consistent across both the North and South regions. Conversely, 10% of providers reported operating below their Ofsted registered capacity due to insufficient demand for childcare, with a higher incidence in the North at 19%.

Figure 45-Provider descriptions of operating capacity by provider type



Insights: 60% of childminders are operating at their Ofsted registered capacity and are generally full. Overall, most settings, irrespective of type, reported that their operational capacity matched their Ofsted registered capacity.

Providers who categorised their operational capacity under 'Other' offered explanations that typically aligned with one of the following themes:

- New settings operating below capacity as child enrolment numbers grow.
- Settings (typically childminders) operating below capacity through choice.
- Variability in capacity, with some settings operating below Ofsted registered numbers in the morning but reaching full capacity in the afternoon, or vice versa.

4.11 Childcare Places

4.11.1 Current Capacity (Places)

Providers were asked to indicate the maximum number of places they currently had available for children aged 9 months to 4 years. They were instructed to consider their 'maximum operational capacity,' which refers to how many children they could accommodate given their existing staff quota and physical space available. If providers did not complete a survey, did not fully complete this section, or entered incorrect information (i.e., their answers did not correlate to other responses in the survey or locally held data), information was derived from a combination of other survey answers, locally held data, Ofsted registration data, and/or the average operating capacity rate for the local authority (88%).

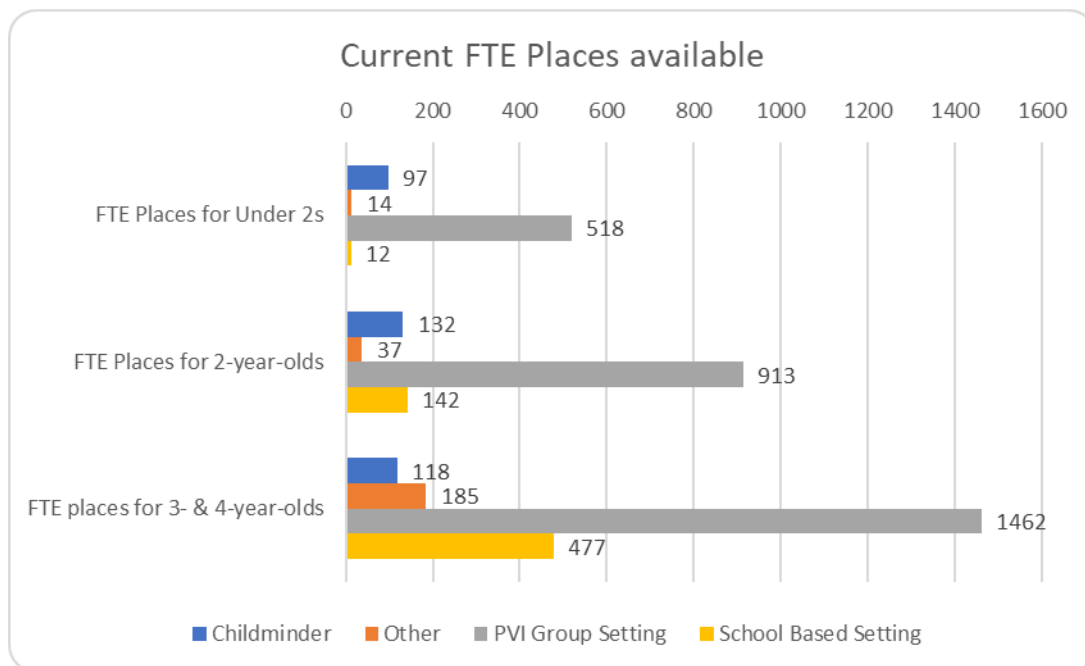
For the purposes of analysis, places available have been converted into Full-Time Equivalent (FTE) places (=30 hours per week).

Table 1-Current 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	Grand Total
Baffins	24	79	168	271
Central Southsea	26	48	91	165
Charles Dickens	40	96	247	383
Copnor	43	64	132	240
Cosham	138	198	276	613
Drayton and Farlington	69	91	168	328
Eastney and Craneswater	29	85	22	136
Fratton	25	92	124	241
Hilsea	70	120	217	408
Milton	43	93	184	320
Nelson	42	71	183	296
Paulsgrove	25	60	115	201
St Jude	21	48	145	214
St Thomas	46	78	170	294
All Wards	641	1224	2242	4107

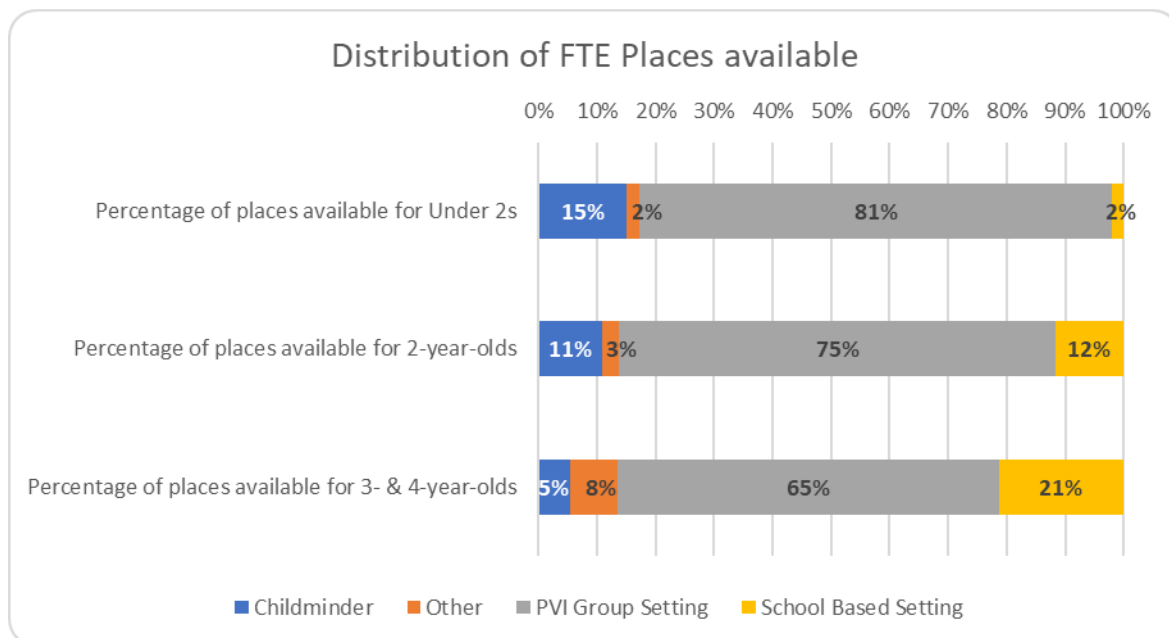
Places available at all (149) settings: Places are based on operational capacity rather than Ofsted registered places.

Figure 46-Number of current FTE places available by age range and provider type



Insights: As anticipated, the majority of childcare spaces are provided by Private, Voluntary and Independent (PVI) settings. Additionally, as expected, school-based settings offer limited spaces for children under two years of age.

Figure 47-Percentage distribution of current FTE places available



Insights: The majority of provision for 3- and 4-year-olds is currently delivered by Private, Voluntary, and Independent (PVI) settings at 65%, while school-based settings provide only 21% of places for this age range.

4.11.2 Additional Capacity (Places)

In addition to stating their current maximum operational capacity, providers were queried about any definitive plans to expand by September 2025 to offer new or additional places. If applicable, they were also asked to estimate the number of additional childcare places they would be able to provide starting from September 2025.

Out of 138 responses, 23 providers indicated that they had plans to expand provision from September 2025 and that they were planning to offer the following additional places:

Table 2-Additional places from September 2025 by ward

Ward	Additional places for Under 2s	Additional places for 2-year-olds	Additional places for 3- & 4-year-olds	Total additional places
Baffins	3	3	11	17
Central Southsea	8	5	4	17
Charles Dickens				0
Copnor	1	1	1	3
Cosham	24	36	46	106
Drayton and Farlington	12	2	2	16
Eastney and Craneswater	8	8	24	40
Fratton	1	1	31	33
Hilsea	30	20	31	81
Milton	3	8	1	12
Nelson				0
Paulsgrove	1			1
St Jude			8	8
St Thomas				0
All Wards	91	84	159	334

Table 3-Additional places from September 2025 by provider type

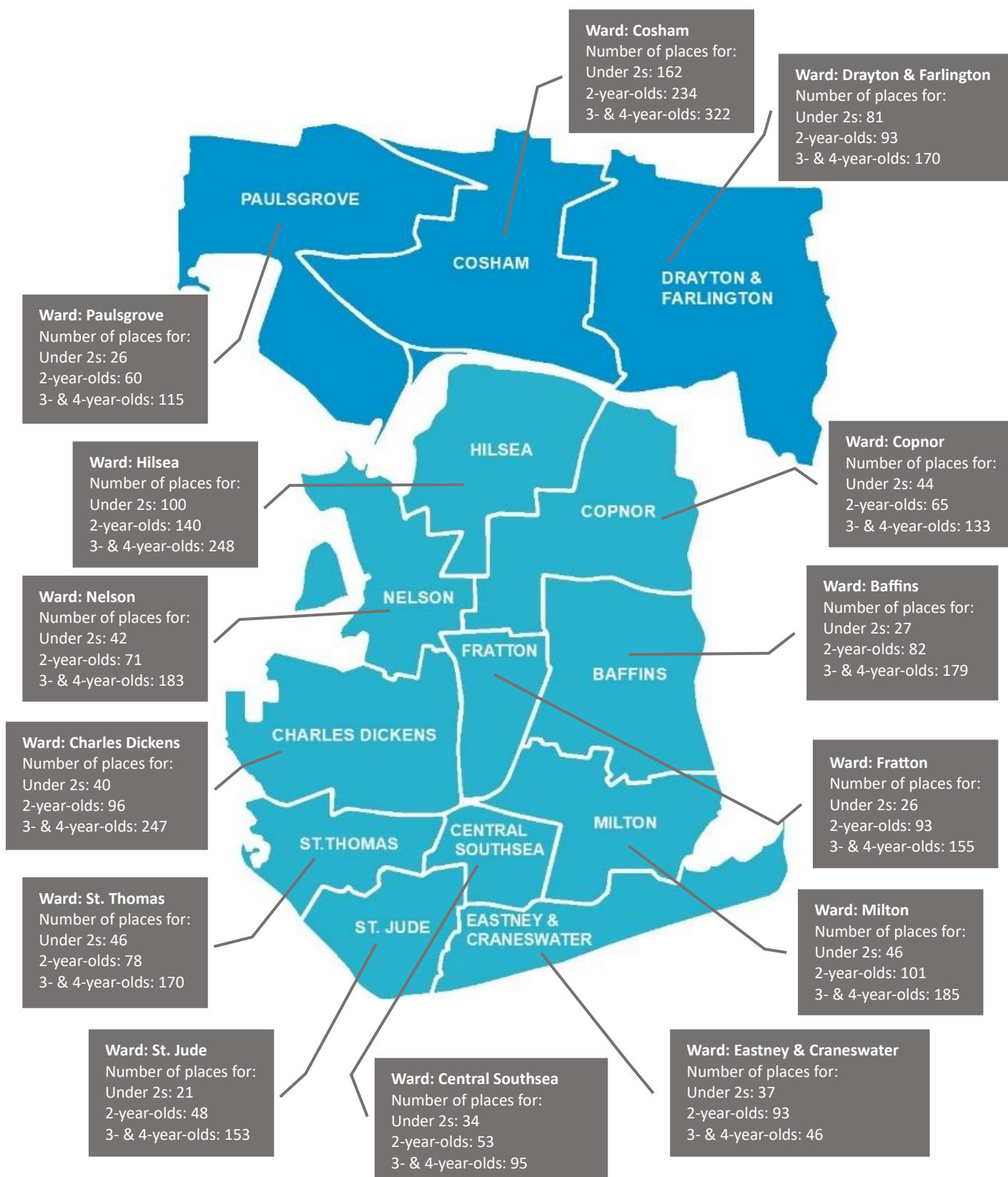
PROVIDER TYPE	Additional places for Under 2s	Additional places for 2-year-olds	Additional places for 3- & 4-year-olds	Total additional places
Childminder	15	8	8	31
Other				0
PVI Group Setting	73	76	105	254
School Based Setting	3		46	49
All Provider Types	91	84	159	334

When these additional places are incorporated into current FTE places available, we have an indication of the number of places that will be available across the different age ranges from September 2025:

Table 4-FTE places available from September 2025 (adjusted to include indicated additional places) by ward

WARD	Supply for Under 2s from Sept 2025	Supply for 2-year-olds from Sept 2025	Supply for 3- & 4-year-olds	Total supply for Early Years (Under 5s) from Sept 2025
Baffins	27	82	179	288
Central Southsea	34	53	95	182
Charles Dickens	40	96	247	383
Copnor	44	65	133	243
Cosham	162	234	322	719
Drayton and Farlington	81	93	170	344
Eastney and Craneswater	37	93	46	176
Fratton	26	93	155	274
Hilsea	100	140	248	489
Milton	46	101	185	332
Nelson	42	71	183	296
Paulsgrove	26	60	115	202
St Jude	21	48	153	222
St Thomas	46	78	170	294
Grand Total	732	1308	2401	4441

Figure 48-Map of places available from September 2025



5 Demand for Childcare

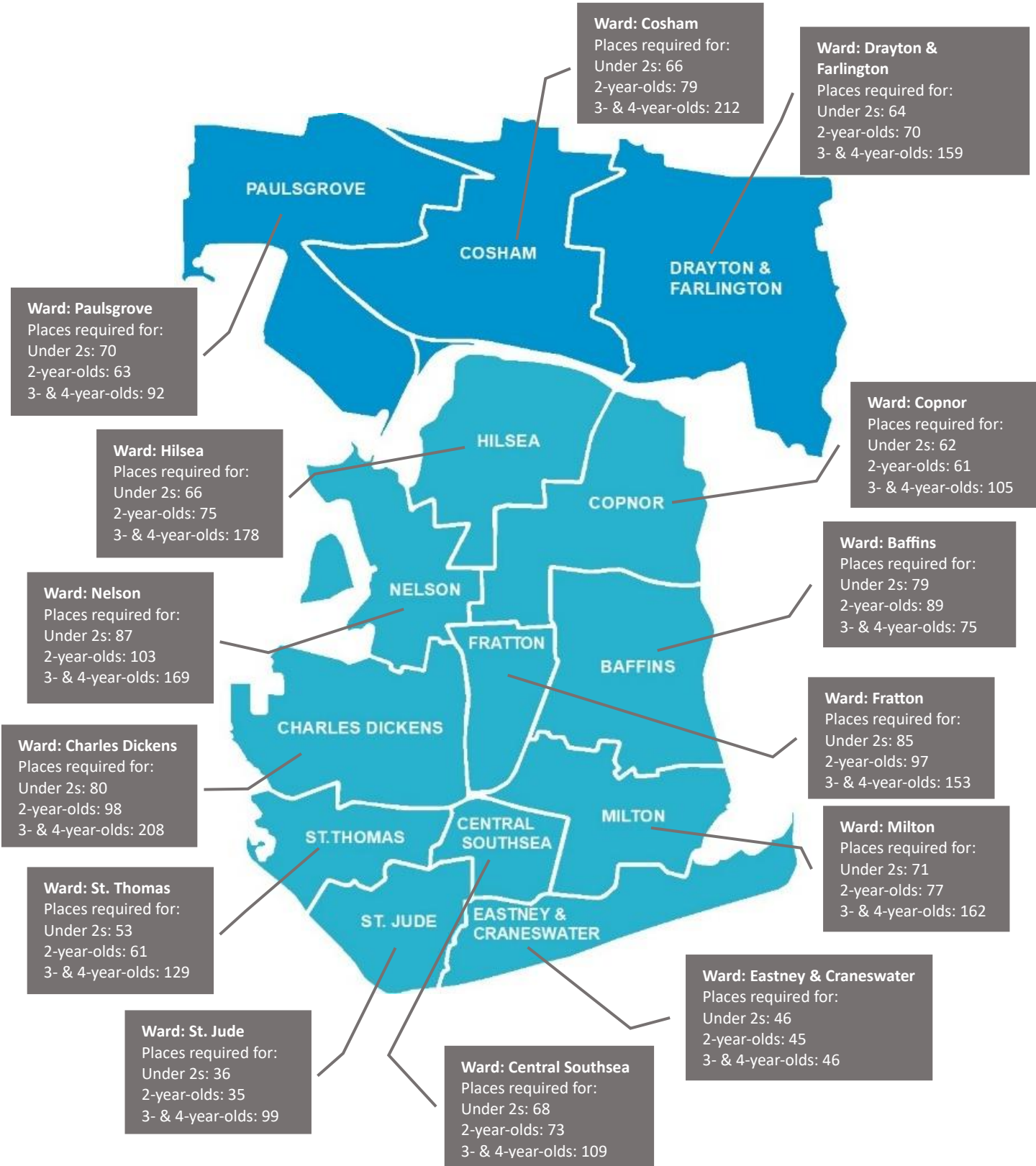
Childcare demand has been assessed using data from the Department for Education (DfE) provided to each local authority to facilitate preparation for the expanded entitlements. The data indicates the expected demand for childcare from September 2025 for children under the age of 2 and for 2-year-olds. This demand is quantified by the DfE in total hours required per week, per ward.

To determine the number of **places** needed, Portsmouth City Council divided the figures by 30 hours to calculate Full-Time Equivalent (FTE) places demanded across these two age groups (1 FTE = 30 hours per week). For children aged 3 and 4 years old, these calculations are unnecessary as no changes in policy or expansion are anticipated for this cohort from September 2025. Thus, the demand for this age group simply reflects the current uptake of funded hours/places (in the Summer Term 2024).

Table 5-FTE places required/demanded from September 2025 by ward

WARD	Demand for Under 2s from Sept 2025	Demand for 2-year-olds from Sept 2025	Demand for 3- & 4-year-olds	Total Demand for Early Years (Under 5s) from Sept 2025
Baffins	79	89	75	243
Central Southsea	68	73	109	249
Charles Dickens	80	98	208	386
Copnor	62	61	105	228
Cosham	66	79	212	358
Drayton and Farlington	64	70	159	292
Eastney and Craneswater	46	45	46	137
Fratton	85	97	153	335
Hilsea	66	75	178	318
Milton	71	77	162	309
Nelson	87	103	169	358
Paulsgrove	70	63	92	224
St Jude	36	35	99	170
St Thomas	53	61	129	243
Grand Total	931	1025	1895	3851

Figure 49-Map of places required (demand) for September 2025



6 Gap analysis

To identify any surplus and, more importantly, any shortfalls in childcare provision, demand needs to be mapped against supply. This analysis will provide evidence to enable corrective actions to be taken in managing the childcare market to ensure there is sufficient childcare across the local authority area for the children who need (or demand) it.

WARD	Shortfall/ Surplus for Under 2s from Sept 2025	Shortfall/ Surplus for 2- year-olds from Sept 2025	Shortfall/ Surplus for 3- & 4-year-olds	Total Shortfall/ Surplus for Early Years (Under 5s) from Sept 2025
Baffins	-52	-7	+104	+45
Central Southsea	-33	-19	-14	-67
Charles Dickens	-40	-2	+39	-3
Copnor	-18	+4	+29	+15
Cosham	+96	+154	+110	+361
Drayton and Farlington	+17	+23	+11	+52
Eastney and Craneswater	-9	+48	-0	+39
Fratton	-59	-4	+2	-61
Hilsea	+35	+65	+70	+170
Milton	-25	+24	+23	+22
Nelson	-45	-31	+14	-62
Paulsgrove	-44	-2	+23	-23
St Jude	-15	+13	+54	+52
St Thomas	-7	+17	+41	+51
LA Shortfall/Surplus	-199	+283	+507	+590

Figure 50-Map of shortfall and surplus in places for September 2025

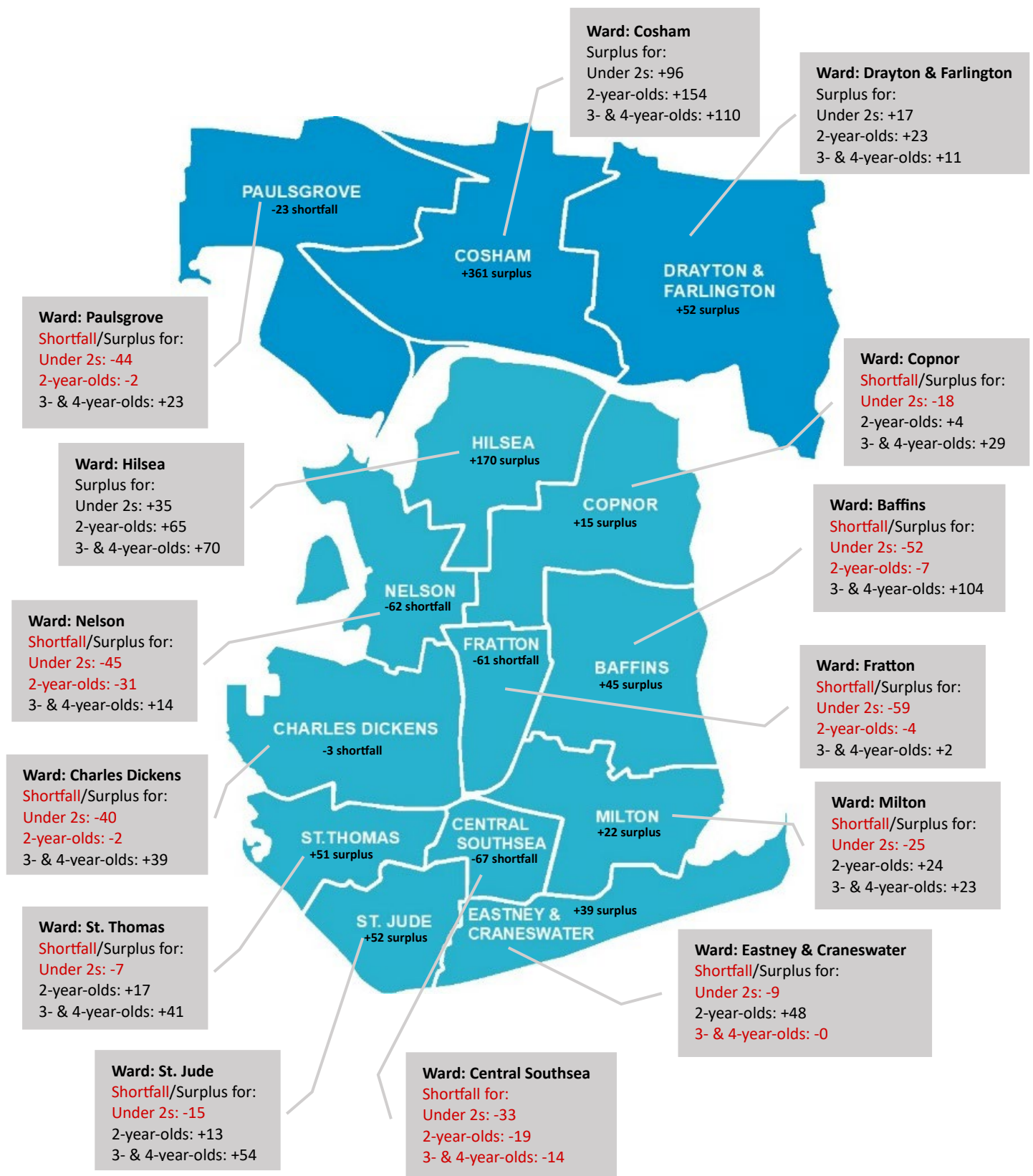
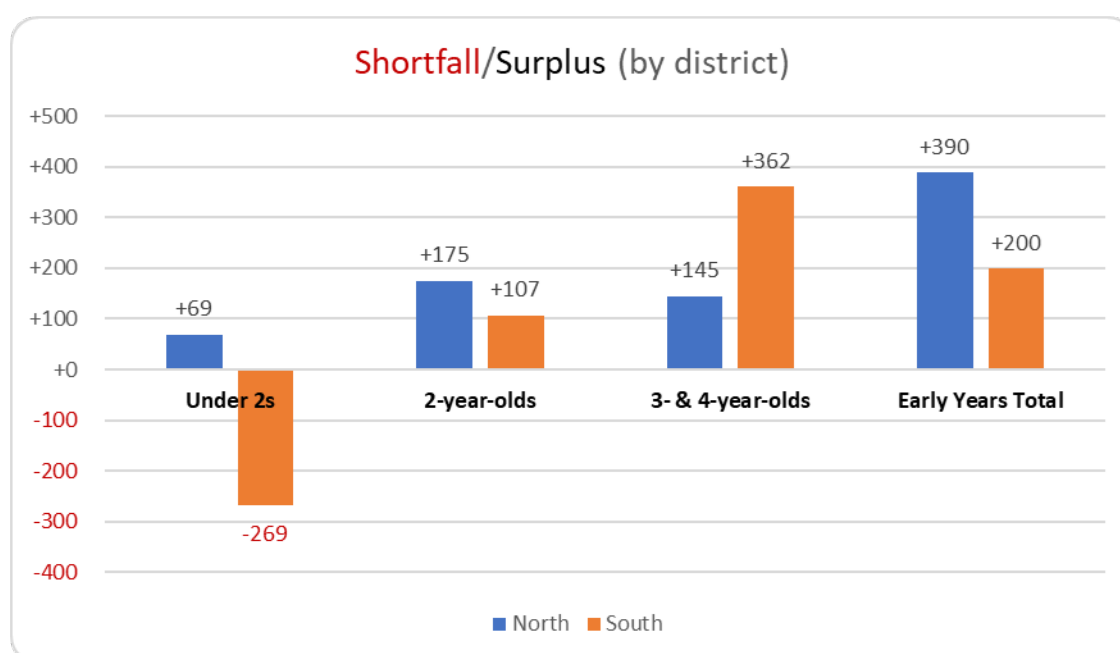


Figure 51-Gap analysis by district



Insights: When all age ranges are combined, there are sufficient places available in the market, provided there is flexibility across provision to shift capacity from older children to younger children. There is a central column of shortfall in the South of the city, where the wards of Nelson, Fratton and Central Southsea have significant shortfalls in provision particularly for the under 2s. Whilst Central Southsea has a shortfall across all age ranges, it is surrounded by wards which do have surplus available, although not particularly in the Under 2s age range.

6.1 Knowledge Update

Since the collection and analysis of this data, the local authority has become aware of additional changes to provision that will or could impact supply as follows:

6.1.1 Changes that will or could reduce the amount of childcare provision

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

6.1.2 Changes that will or could increase the amount of childcare provision.

Portsmouth City Council Early Years Team is actively working to expand nursery provision across the city to support the implementation of the extended 30-hour working entitlements. As of this document's publication, there is potential for 155 new spaces to be established in the South of the city, contingent on securing planning permissions and lease agreements. Efforts to increase nursery provision in the South of the city remain ongoing, with collaboration across all council departments to make these developments a reality.

6.1.3 Changes that could impact demand for childcare

The local authority is not aware of any significant changes that will impact demand (such as major housing developments or employment growth initiatives) before September 2025.

7 Conclusion and Next Steps

7.1 Conclusion

This Portsmouth Childcare Sufficiency Duty Report 2025 provides a comprehensive overview of the current state of childcare provision in our region. Significant disparities in childcare availability across different wards have been identified, with some areas experiencing a surplus of places while others face substantial shortfalls. The expanded early years entitlements and other government initiatives are expected to significantly impact the childcare market, particularly from September 2025. Recognising the importance of accessible, affordable, and high-quality childcare services to support working parents, promote economic growth, and ensure that all eligible children have access to early education, the council will seek to undertake the following next steps:

7.2 Next Steps

1. **Addressing Shortfalls in Childcare Provision:** We must take immediate action to address the shortfalls in childcare provision in wards such as Central Southsea, Fratton, and Nelson. This should include targeted interventions to increase the number of childcare places in these areas, including incentivising providers to expand their services and exploring opportunities for new childcare facilities.
2. **Enhancing Accessibility and Flexibility:** We aim to improve the accessibility and flexibility of childcare services across Portsmouth. This includes ensuring childcare settings are located near public transport routes (as most are) and extending operating hours to accommodate parents who work irregular hours. The council will work with providers to increase the availability of weekend childcare options to better meet the needs of families with non-traditional work schedules.
3. **Supporting Providers with Expansion Plans:** We are committed to supporting providers who have indicated plans to expand their services. The council will work with them to source the necessary resources, including additional staff and financial assistance where available, ensuring their expansion plans align with local childcare demand.
4. **Improving Provision for Children with SEND:** With the growing number of children with Special Educational Needs and Disabilities (SEND), we must enhance the quality and inclusivity of early years education. The council will encourage providers to undertake specialist SEND training and implement effective strategies to support children with SEND. Additionally, we will consider allocating extra funding to help providers recruit and retain qualified staff.
5. **Regular Monitoring and Evaluation:** Continuous monitoring and evaluation of the childcare landscape will be crucial. The council will regularly update the Childcare Sufficiency Duty Report to reflect the latest data and insights, ensuring policymakers, service providers, and stakeholders have access to accurate and current information.

By acting on these recommendations, the council can work towards creating a fairer and more efficient childcare system that meets the needs of all families and supports Portsmouth's long-term growth and development.

8 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.

Portsmouth City Council
Childcare Sufficiency Assessment 2025

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Portsmouth
CITY COUNCIL

