



**ISLINGTON**

**For a more equal future**

# Childcare Sufficiency Assessment Summer 2023

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# 1. Assessment and summary

Local authorities have a duty to secure, so far as is reasonably practicable, sufficient childcare and early education places to meet the needs of working and studying parents. Ensuring that there is sufficient, high-quality and affordable childcare supports Islington parents and carers to take up and sustain work which has a lasting positive impact on children and families, particularly those who are most disadvantaged. In Islington we are committed to creating a more equal future for our residents, giving children the best start, through our Bright Start services for families, from pregnancy to a child's fifth birthday.

This childcare sufficiency report compares childcare capacity and vacancy rates in summer 2023 with the same period the previous year, summer 2022. It also considers Islington's childcare sufficiency in the context of the government's expanding free childcare offer, which will be rolled out in stages from April 2024. The report outlines that there is sufficient early years childcare to meet current demand in Islington and early indications are that there will be sufficient capacity to meet the demand arising from the expanded free childcare scheme.

While the costs of childcare in England, and particularly inner London, are among the highest in the world, Islington continues to provide a significant number of subsidised nursery places aimed at keeping prices as low as possible for low-income households. Despite this subsidised offer, there are vacancies in our funded nurseries indicating sufficient and, in some areas, over capacity. However, there has been significant improvement in the vacancy rate at LBI maintained nurseries - falling from a 14% vacancy rate in 2022 to 8% vacancies in 2023 - indicating an increased demand for places at nurseries directly managed by the local authority. A review of Islington's childcare offer at subsidised nurseries is currently under way to ensure maximum take up within a financially sustainable model.

The supply of childcare places in Islington currently outstrips demand in all planning areas, although some localities are showing significantly more over supply than others. Vacancy rates across all providers in private and voluntary nurseries, schools and LBI maintained settings, have increased slightly from 19% in summer 2022 to 20% in summer 2023. The vacancy rate at school nurseries is particularly notable at 28%, up by 10% since last year, with some schools showing very low take up.

The vacancy rates across the childcare sector are partly a reflection of the decreasing birth rate in Islington - a picture seen across the country. The number of live births in 2022 was the lowest seen since 2002. In Islington the population of early years children is expected to fall by 5% in the next five years, driven by falling birth rates and cost-of-living issues leading to families moving to outer London boroughs, or out of London, where rental costs are lower.

There is an encouraging picture for take up of free early education entitlements (FEEE) for the most disadvantaged two year olds. There is sufficient capacity for 100% of eligible two year olds to access a 15-hour a week free place. Take up of these places was at 75% in January 2023, compared with 70% in January 2022. For the first time, Islington's take up figure was above the national average (74%).

More providers (both nationally and locally) are reporting ongoing and increasingly serious issues with recruitment and retention of quality early years staff. Islington's Early Years and Childcare service continues to support all our early years providers through training, monitoring and support visits, knowledge and information sharing at forums, and through regular newsletters and online resources.

The supply and demand for wraparound childcare (before and after school and during holidays) is harder to quantify, due to the varied requirements of days and hours and the range of options used by parents. The Family Information Service (FIS) reports being able to meet most childcare brokerage requests for school-age childcare. However, the FIS has reported increasing difficulties with finding suitable, affordable wraparound childcare for children with Special Educational Needs and Disabilities (SEND). The government's spring budget announcement of support for wraparound childcare may go some way to addressing this issue, but information on the detail of funding was not available at the time of writing this report.

## Summary findings

- There is sufficient childcare in Islington to meet current demand. However, until the expanded childcare scheme is rolled out and becomes embedded, it is extremely difficult to predict the impact on vacancy rates over the next few years.
- The vacancy rate across all nurseries has increased from 19% in summer 2022 to 20% in summer 2023, with a marked increase in school nurseries.
- Vacancy rates have improved significantly in LBI maintained nurseries.
- Take up of Free Early Education Entitlements for 2 year olds has increased from 70% in January 2021 to 75% in 2022 and is above the national average for the first time.
- Islington's population of under 5s is expected to fall by 9% in the next ten years.
- Staffing recruitment and retention issues continue to present challenges for early years providers both locally and nationally.
- Access to wraparound childcare for children with SEND continues to be challenging without sufficient funding from government.

## Priorities and actions

- Continue to review Islington's childcare subsidy model in the light of the national expansion of free childcare and the reducing population of under 5s.
- Drive forward our strategic approach to increasing take up of FEEE by vulnerable children, while ensuring sufficient expanded free childcare places.
- Continue to support providers with recruitment and retention issues.
- Support with the recruitment and retention of childminders.
- Build on partnership working developed within Islington's Lunch Bunch programme (Holiday Activities and Food, HAF) to improve access to wraparound childcare for children with SEND.

## 2. Supply and demand for childcare

### Number and types of early years providers and places

In summer 2023 there were 239 early years settings providing childcare in Islington. This included 123 childminders on the Early Years Register and 116 group and school-based nurseries (with one Hackney nursery funded to provide some Islington childcare places). A further 7 childminders on the Childcare Register only, are not included in these figures. Following the summer holidays however, two term-time only nurseries and one primary school did not reopen. This report, therefore, outlines capacity and vacancy figures for 113 nurseries still operating in autumn 2023. Since the last report, three small term-time only nurseries have closed, one private nursery has moved into a neighbouring borough and two new private nurseries have opened.

The following table shows the breakdown of the maximum number of early years places available across the sectors.

#### Capacity by sector, summer 2023

Type of provision	Number of providers	Number of places
Childminders	123	not calculated
School-based children's centre	5	402
Voluntary sector children's centre	3	146
LBI maintained children's centres	8	541
LBI nursery schools	3	259
School nurseries	33	1194
Private nurseries	42	2501
Voluntary sector nurseries	19	654
<b>All Early Years Providers</b>	<b>236</b>	<b>5697</b>

## Capacity by age, summer 2023 compared with summer 2022

Capacity by age (all nurseries)	0-2 year olds	2-3 year olds	3&4 year olds	All ages
Summer 2023	1048	1635	3014	5697
Summer 2022	1055	1628	3142	5825
Difference	-7	7	-128	-128

Childminders play a vital role in enabling parents to work, particularly where parents are working extended or atypical hours. Places are not included here in capacity figures as these can only ever be estimates. This summer, there were eight fewer childminders working in Islington since last summer 2022. This reflects a national downward trend which has seen a 50% reduction of registered childminders from 2013 to 2023. [[Ofsted focus on childminders](#), September 2023]. The FIS are reporting that this reduction is challenging its ability to fulfil all childcare brokerage requests.

## Early years vacancies

Total vacancy rates in summer 2023 were at 20% compared with 19% in summer 2022. This slight increase in the overall vacancy rate is driven largely by the significant vacancies seen in primary school nurseries, with 28% of places vacant, compared with 18% last year. There has, however, been significant improvement in the number of vacancies seen at Islington's managed nurseries with 8% of places vacant, compared with 14% last year. The summer 2023 vacancy rates across all ages for the private sector is 22% (24% summer 22), the voluntary sector is 16% (12% summer 2022), and the voluntary sector children's centres is 17% (12% summer 2022).

Despite reports of overcapacity in the last CSA report and a falling 0-5 population, the number of places in the private sector continues to expand with one new provider proposing to open in the autumn term. Some schools on the other hand, are considering the long-term sustainability of their nursery provision with several schools moving to a single nursery class where they had previously operated two classes.

Vacancy rates are highest in Planning Area 5, with an increase from 16% to 27% since last year. There are several schools in this area with large numbers of vacancies in the nursery class for 3 and 4 year olds.

**Vacancy rates shown as a percentage of capacity, within age ranges and provision types, [compared with summer 2022]**

Setting type	Places available (capacity)			Vacancy numbers	% Vacancy rates by age			Total % vac
	0-2s	2-3s	3&4s		All ages	0-2s	2-3s	
School based CC (children's centre)	48	118	236	46	14%	19%	7%	<b>11%</b> <b>[14%]</b>
Voluntary sector CC	30	54	62	25	20%	13%	19%	<b>17%</b> <b>[12%]</b>
LBI maintained CC	87	182	272	41	14%	7%	6%	<b>8%</b> <b>[14%]</b>
LBI Nursery School	39	78	142	13	8%	3%	6%	<b>5%</b> <b>[6%]</b>
Private nursery	752	824	925	559	25%	19%	23%	<b>22%</b> <b>[24%]</b>
School nursery classes	0	112	1082	336	n/a	28%	28%	<b>28%</b> <b>[18%]</b>
Voluntary nursery	92	267	295	107	7%	20%	16%	<b>16%</b> <b>[12%]</b>
<b>TOTAL</b>	<b>1048</b>	<b>1635</b>	<b>3014</b>	<b>1127</b>	<b>21%</b>	<b>18%</b>	<b>21%</b>	<b>20%</b> <b>[19%]</b>

**Vacancy rates shown as a percentage of capacity [compared with summer 2022], by planning area (see Appendix 2 for planning areas)**

PA	Cap 0-2s	Cap 2-3s	Cap 3&4s	Vac all ages	% Vac 0-2s	% Vac 2-3s	% Vac 3&4s	Total % Vac
PA 1	250	353	678	274	24%	20%	21%	<b>21%</b> <b>[16%]</b>
PA 2	149	295	552	183	8%	19%	21%	<b>18%</b> <b>[19%]</b>
PA 3	237	366	550	189	15%	13%	19%	<b>16%</b> <b>[15%]</b>
PA 4	93	154	294	127	29%	23%	22%	<b>24%</b> <b>[34%]</b>
PA 5	183	290	578	280	43%	24%	23%	<b>27%</b> <b>[16%]</b>
PA 6	136	177	362	74	7%	4%	16%	<b>11%</b> <b>[22%]</b>
<b>All PAs</b>	<b>1048</b>	<b>1635</b>	<b>3014</b>	<b>1127</b>	<b>21%</b>	<b>18%</b>	<b>21%</b>	<b>20%</b> <b>[19%]</b>

## Sustainability of early year providers

Reducing demand for childcare means that providers are questioning their long-term sustainability. The falling birth rate is one of the contributing factors in increasing numbers of childcare vacancies, in addition to cost-of-living issues resulting in people moving away from Islington to outer London areas with lower rental costs. Changing work patterns introduced during Covid - more home working - and Brexit are also mentioned by providers as contributing factors. Nursery managers across all sector types commented in the summer-term sufficiency questionnaire that they are struggling to fill places:

School nursery: *Our nursery numbers are very low for this time of year, and we do not think we will fill them. This is very concerning as currently we are at less than 50% of capacity. It will be difficult to continue this provision with our current numbers.*

Private nursery: *We have experienced more leavers as a result of a fee increase than we typically would expect.*

Voluntary sector nursery: *We are getting applications in for funded hours only and no paid hours.*

This summer, two voluntary sector term-time only providers decided that their provision was no longer sustainable due to the high percentage of vacant places. An increasing number of providers are seeking advice from the Early Years and Childcare Service about how to market their places to attract parents.

The recruitment and retention of staff is also highlighted by providers as a major challenge to sustainability. 70% of providers in Islington are reporting this as a major issue with the majority saying that the situation is worse than it was last year.

*Recruiting and retaining qualified staff remains the single biggest threat we face.*

*We are having difficulties with recruitment of qualified staff. Agency rates are eating into our reserves and the nursery is currently operating at a loss.*

Inflation is also, not surprisingly, having an impact on provider sustainability. Running costs are rising, while squeezed households are struggling to meet rising childcare fees. Providers report that parents are reducing their childcare hours by turning to family where they can, and parents are finding that childcare costs make returning to or starting work unaffordable.

## School age providers and places

### **Wraparound childcare**

Wraparound childcare, also known as 'extended day', is available at most of the primary schools in Islington. Out of 45 primary schools, all but one has a breakfast club, and all but four have after-school childcare. After-school childcare is available either on site or at local voluntary sector providers for most primary age children, although three schools are not providing clubs beyond enrichment activities which typically end at 4.30pm.

Many schools report an increase in demand for wraparound childcare, particularly for the younger age groups. Some schools have introduced wraparound childcare for their nursery age children for the first time in response to demand.

### **Holiday childcare**

Holiday childcare playschemes run in community settings and in schools each holiday, apart from during the Christmas period. 10 primary schools have onsite provision, run either by

voluntary sector organisations or directly by the school. A further five schemes are available in community settings run by the voluntary sector. We know that parents also use holiday clubs as childcare. If these clubs are included, then there are approximately 27 holiday clubs providing free (adventure playgrounds) and paid for childcare. Childminders are often able to take additional children during the holidays, depending on the ages and numbers of children already attending their setting.

Demand and supply of holiday childcare is extremely difficult to quantify, due to the varied requirements of days and hours and the range of options used by parents. The Family Information Service (FIS) has reported increased interest in holiday activities and childcare since the introduction of the Holiday Activities and Food (HAF) programme – called Lunch Bunch in Islington. Some parents are using free activities in combination with other chargeable childcare options. The FIS reported being able to meet most holiday childcare brokerage requests but, as reported last year, there are insufficient options for younger children (3-5 years) and for children with special educational needs and disabilities.

### **After-school and holiday childcare for children with SEND**

The Family Information Service reports increasing difficulties in finding after-school and holiday childcare which supports the needs of the child and the childcare requirements of working and studying parents of children with SEND.

The Early Years and Childcare service continues to work with colleagues in the Short Breaks team and wider SEND services to understand and scope the capacity requirements for working and studying families of children with SEND. Like many local authorities, Islington has contributed to government consultations, highlighting the huge challenges for working parents of children with SEND. Announcements from the DfE about the details of funding for wraparound childcare were pending at the time of this report.

## **3. Government-funded and council-funded early education and childcare**

### **Free Early Education Entitlements (FEEE)**

The proportion of 2 year olds taking up their government-funded places has increased from 70% in January 2022 to 75% in 2023.

Islington's take up of free places for 2 year olds continues to compare well with inner London averages and statistical neighbours and was for the first time above the national average of 74%. The year-on-year improvement in take up of 2-year-old free entitlements is mirrored in many inner London local authorities and nationally. Nevertheless, the significant improvement in Islington, from a low of 61% in 2021, during the Covid pandemic, indicates that Islington's strategic approach as outlined in Islington's Education Plan, is making a sustained difference. Islington's Bright Start early childhood partnership, with its Start for Life framework, enables

practitioners to work together with the aim of reaching the 25% of families not yet accessing their free entitlements.

The FEEE take up for funded 2 year olds showed 22% of children from White British ethnicities (compared to an estimated 30% across the early years Islington population overall) followed by Mixed Other with 15% (estimated to be 14% for Islington under 5s). Take up of children from Black African, excluding Somali ethnic groups, is also high at 15% (estimated to be 8% for Islington under-5s).

Across all providers, there are sufficient nursery and childminder places to meet the current rates of 2-year-old FEEE take up. Based on recent figures showing the number of eligible 2 year olds for FEEE, capacity is sufficient to provide places for approximately 105% of eligible families, compared with 99% in summer 2022. However, there is a slight shortfall in PA3 if that area were to see a significant increased rate of take up.

### **FEEE percentage take up, January 2018-January 2023, DfE published summary**

Child age	2018	2019	2020	2021	2022	2023
2	64%	61%	67%	61%	70%	75%
3	85%	83%	83%	80%	79%	77%
4	82%	83%	82%	79%	79%	77%
3&4	83%	83%	83%	80%	79%	77%

The DfE 3 and 4-year-old take-up rates need to be treated with caution. The population estimates that the DfE take up figures are based on are over 300 children higher than the actual latest Office for National Statistics (ONS) mid-year estimates for 3 and 4 year olds. We have calculated that if the DfE had used the latest mid-year estimates, which were revised downwards after the 2021 Census, the take up figures for Islington would be 91% for the 3-year-old take-up and 92% for the 4-year-old take-up, which is significantly higher than the 2023 published figures. Population estimates for 3 and 4 year olds from 2013 onwards are likely overestimates to some extent, and therefore the derived take-up rates are likely underestimates. The population estimates and take-up rates back to 2013 will be revised in the 2024 DfE data release, following ONS publication of a full and consistent timeseries based on Census 2021 population data.

## Estimated 3- and 4-year-old FEEE take up percentages, based on the latest mid-year population numbers

Age	Population, actual and estimated numbers and percentages	2018	2019	2020	2021	2022	2023
3-year-olds	Number of registered children	2,164	2,151	2,187	2,052	1,952	1,883
	Estimate of eligible children	2,228	2,215	2,240	2,192	2,130	2,070
	Estimated percentage of eligible children registered	97.1%	97.1%	97.6%	93.6%	91.6%	91.0%
4-year-olds	Number of registered children	2,066	2,089	2,097	2,060	2,012	1,876
	Estimate of eligible children	2,189	2,141	2,090	2,135	2,092	2,037
	Estimated percentage of eligible children registered	94.4%	97.6%	100.3%	96.5%	96.2%	92.1%
3- and 4-year-olds	Number of registered children	4,230	4,240	4,284	4,112	3,964	3,759
	Estimate of eligible children	4,417	4,356	4,331	4,327	4,222	4,107
	Estimated percentage of eligible children registered	95.8%	97.3%	98.9%	95.0%	93.9%	91.5%

## Expanded free childcare from April 2024

The childcare landscape in Islington and across England is set to change significantly with the introduction of the government's expanded free childcare scheme which is being rolled out in stages. From April 2024, eligible working parents of 2 year olds, will get 15 hours a week (570 hours a year) free childcare. From September 2024 the age range will extend from 9 months to 2 years and from September 2025 eligible families will get 30 hours free (1140 hours a year) for children from 9 months until they start school.

The government has acknowledged that estimating parental demand and take up of these free childcare places is extremely challenging. A parental survey for Islington parents during the summer term asked whether parents would consider starting work or increasing their hours of work once the free childcare becomes available. Out of 90 parents responding, 25% said yes or maybe, but this is too small a sample to be meaningful in determining future demand. Until national and local marketing is rolled out, it will be hard to get a sense of parental demand.

At this early stage, government and local estimates indicate that there will be sufficient places to meet demand. However, there are a number of concerns expressed by providers, which means that confidence and sustainability will need careful monitoring over the coming months:

- Until the funding rates are made available, providers are unsure about whether they will provide the expanded free childcare hours, as they are unable at this stage to calculate the financial viability of the scheme.

*The funding gap is absolutely huge, and increasing funding hours will shut down a lot of nurseries.*

- Staffing recruitment and retention issues mean that some providers are already operating at reduced capacity.

*The practitioners' role is becoming more and more demanding, so to retain good, caring qualified staff is proving extra challenging, plus with funding budgets, paying wages is also challenging - no staff no playgroup and the impact on our local community would be devastating.*

- Term-time only providers which have typically made up a funding shortfall through their chargeable hours, will have a reduced number of hours to make up the shortfall. It is yet to be seen whether the increased funding rate will mitigate a potential reduction in chargeable revenue.

*Our costs are high mostly due to the rent and utilities; the funding doesn't allow us much margin.*

## Priority Early Learning places

Islington's Bright Start Priority Early Learning (PEL) places are for children who are in need and referred for priority access to a nursery place by professionals across Islington Children's Services, Whittington Health, early education providers and other health and early help practitioners. Children in these places are fully integrated with their peers in a range of settings, including children's centres, nursery schools, primary schools, early years centres, with childminders and with grant-aided community nurseries.

There are 291 full-time equivalent PEL places in nursery settings. In summer 2023, 85% of these places were taken up. In autumn 2023, 71% of these places were taken up. The autumn take up is slightly lower than last year, although there is a significant improvement in the take up of places for under 2s, with 83% full compared with 57% last year. The take up of places for 3 and 4 year olds is significantly lower than this time last year, which is likely a reflection of rising vacancy rates for this age group across all places and nursery types. We also need to take into account vacant places which are 'saved' spaces for 2 to 5 year olds for the children who will be transitioning up. These places will fill as the academic year continues.

## 4. Costs of childcare

Parents in Islington, and throughout inner London, struggle to meet the high costs of childcare and it is often mothers who are most impacted, citing this as one of the key factors in determining their ability to return or start work. A recent survey run by a [London business group](#) (BusinessLDN/Central District Alliance Survey) found that that on average, Londoners are spending more than a third (36%) of their monthly personal income on childcare, with 53% rating it as unaffordable, and nearly half (49%) saying the cost had pushed them into debt. With the introduction of the national expanded free childcare scheme from 2024, it is hoped that parents in Islington will start to see improvements in the affordability of childcare.

### Islington Council's childcare offer

Recognising the value of affordable childcare in enabling families to work, Islington has for many years subsidised the costs of childcare for its residents in the council's early years, school and commissioned children's centre nurseries and in some voluntary sector community nurseries. This is in addition to government funding and initiatives. Families pay a fee on a sliding scale depending on household income.

The fees at [council-funded children's centres and community nurseries](#), which are reviewed annually, are outlined in [Islington's Early Years Charging Policy](#). Islington also subsidises some after-school and holiday childcare playschemes to reduce the fees for working and studying families.

Average fees at private nurseries in Islington are reported annually to [Coram Family and Childcare](#). Average fees in Islington's private nurseries are above inner London averages. Average childminder fees in Islington are also higher than inner London averages.

#### Private nursery, 50 hours per week

Age of child	Islington	Inner London
0-2	£523	£394.58
2	£472	£373.40
3&4*	£300	£160.37

### Childminder, 50 hours per week

Age of child	Islington	Inner London
0-2	£450	£355
2	£450	£353
3&4*	£240	£140

\*3- and 4-year-old figure is the cost of a place for 50 hours a week where parents receive the 30-hour free entitlement and pay for 20 hours

## 5. Quality of childcare

As at the end of June 2023, 96.3% of settings on the early years register that had been inspected by Ofsted had received a good or outstanding inspection outcome. This puts Islington above Inner London's overall performance, which was 95.3% at the same point. Islington was level with the overall national average, whereas generally inspection outcomes for London boroughs have tended to be just below the national average in recent years. 100% of LBI (London Borough of Islington) managed centres have received a good or better outcome, with five out of the nine judged to be outstanding.

Of the six settings that had not had a good or outstanding inspection outcome, only one was judged to be inadequate. However, since Ofsted have published their statistics, this nursery was re-inspected with a requires improvement outcome. Therefore, there were no settings judged inadequate.

Three of the six settings judged as requiring improvement are childminders. Since these inspections, the childminders have no longer had any children on roll. 'No Child On Roll' inspections only judge whether the childminder has met the requirements of registration or not and are not reported in Ofsted statistics. In effect, there are only three Islington early years settings that are looking after children, that are judged below good.

# Appendix 1: Islington child population

## Population of early years children

Our population estimates are based on the most recent population modelling we have from the GLA's 2023 School Roll Projections. In total, there are an estimated 10,670 children under the age of five living in Islington.

### Numbers of children under 5, Islington

Age	Number of children
Age 0	2,397
Age 1	2,252
Age 2	2,097
Age 3	1,951
Age 4*	1,973
Total	10,670

\*THIS INCLUDES SOME FOUR-YEAR-OLDS WHO WILL HAVE STARTED RECEPTION

SOURCE: 2023 SCHOOL ROLL PROJECTIONS FOR 2023/24 ACADEMIC YEAR (5 YEAR CONSTRAINED 1:1 MODEL)

## Numbers of children under 5, by Ward

Number of children	Age 0	Age 1	Age 2	Age 3	Age 4	Total
Arsenal	200	190	175	164	147	876
Barnsbury	140	130	124	109	117	620
Bunhill	127	118	106	107	101	558
Caledonian	107	97	93	87	89	474
Canonbury	159	143	131	115	132	680
Clerkenwell	97	87	89	84	86	442
Finsbury Park	148	137	133	124	126	669
Highbury	175	169	145	142	128	760
Hillrise	167	166	154	149	155	791
Holloway	119	110	101	86	96	512
Junction	120	118	106	103	89	537
Laycock	120	112	115	103	128	577
Mildmay	186	165	165	132	131	778
St Mary's & St James'	131	120	104	91	94	540
St Peter's & Canalside	134	127	119	107	109	596
Tollington	150	146	138	136	134	705
Tufnell Park	118	118	99	110	110	555
<b>Islington total</b>	<b>2397</b>	<b>2252</b>	<b>2097</b>	<b>1951</b>	<b>1973</b>	<b>10670</b>

## Numbers of children under 5, by Planning Areas (PA)

Number of children	Age 0	Age 1	Age 2	Age 3	Age 4	Total
PA1	343	324	296	273	275	1512
PA2	634	613	573	553	551	2924
PA3	365	338	318	281	274	1575
PA4	343	318	297	271	283	1512
PA5	416	385	354	319	341	1815
PA6	297	274	260	253	250	1334
<b>Islington total</b>	<b>2397</b>	<b>2252</b>	<b>2097</b>	<b>1951</b>	<b>1973</b>	<b>10670</b>

## Number of children with special educational needs and disabilities

A small number of children had Education Care and Health Plans (EHCP) in summer 2023. Early years provision enables practitioners to identify and assess emerging needs, but it is generally too early to do a full assessment through EHCPs at this stage. So, the clearest indication of the numbers of under 5s with special educational needs is given by the number of children funded by Islington for Priority Early Learning SEND (PELSEND) places and through the SEND funding panel which supports children in other early years settings. In 2022/23, 34 children took up PELSEND places and a further 283 children were funded through the SEND funding panel.

## School roll pupil numbers

In total there were 20,271 pupils in Islington schools (aged 4-15), this includes 12,357 primary pupils and 7,383 secondary pupils, as of January 2023. These children may require childcare before and after school, and/or during the school holidays.

## Numbers of children by National Curriculum year group and age (start of academic year)

Age at start of academic year	NC year group	Number of children
Age 4	Reception	1,748
Age 5	Year 1	1,829

Age at start of academic year	NC year group	Number of children
Age 6	Year 2	1,784
Age 7	Year 3	1,738
Age 8	Year 4	1,721
Age 9	Year 5	1,751
Age 10	Year 6	1,779
Age 11	Year 7	1,538
Age 12	Year 8	1,521
Age 13	Year 9	1,530
Age 14	Year 10	1,517
Age 15	Year 11	1,584

## Characteristics of children in Islington

Islington is the second smallest borough in London in terms of area (after the City of London) and has the second highest population density after Tower Hamlets. The population profile is on average younger than those for London and England, with 43% being young adults aged between 20 and 39 years. There are approximately 41,500 children and young people aged 0-19 estimated to be living in Islington, and around 65,000, 0- to 25-year-olds. [ONS mid-year estimates, 2021]

The proportion of children from an ethnic minority background (i.e. not White-British) is relatively high at 74% and a significant proportion of children live in households where English is not the first language. [January 2023 School Census]

The borough is one of stark contrasts. In the 2019 Indices of Multiple Deprivation (IMD), Islington was found to have the highest rate of child poverty in London, and it has England's 10th highest level of income deprivation affecting children. The IDACI (Income Deprivation Affecting Children Index) score shows that 27.5% of children are living in income-deprived households.

18.5% of Islington children aged under 16 live in relative low-income families, based on benefits and tax credits data for 2021/22, and 14.3% live in absolute low-income families based on 2021/22 population estimates.

## Changes to the population of Islington children

The number of births in an area will have a direct impact on the demand for childcare. Many areas of the country have seen a recent fall in births. Nationally, Office for National Statistics (ONS) data shows the number of live births in 2022 was lower than the number of live births in 2019 and remains in line with the recent trend of decreasing live births observed before the coronavirus (COVID-19) pandemic. The number of live births in 2022 was the lowest number seen since 2002.

In Islington there was originally a dip in births in 2013, before recovering to the longer-term average of just under 3,000 births to Islington mothers the following year. However, since 2017, there has been a drop in the number of births each year, and while in 2021, the births had gone up again, the recently published statistics show the 2022 births at 2,443, down by 215 compared to 2021.

While there is no 2022 data available yet, the 2021 figures show fewer mothers under the age of 30 are having children. In 2017, almost 850 children were born to Islington mothers under the age of 30, but in 2021 there were just under 620 births to mothers in this age group. Over 30-year-old mothers still account for the majority of births and have seen an increase in 2021. Nationally and locally, lower fertility rates are expected to be an ongoing trend which is already starting to have an impact on occupancy for all childcare providers.

The population projections by academic years below are based on the most recent population modelling we have, which is the GLA's 2023 School Roll Projections. These were based on a GLA (Greater London Authority) model created in late 2022, before the 2022 births data was available, which predicted around 2,550 births in the 2022/23 – about 100 more compared to the ONS published data. This suggests we can expect next year's population projections to be lower than the 2023 projections. The School Roll Projections are updated annually, allowing us to regularly refresh the estimates to build in the latest available data.

### Population projections for each year of age for 2023 and then every five years up to 2040

Age	2023	2028	2033	2038	2040
Age 0	2397	2400	2331	2375	2418
Age 1	2252	2158	2077	2099	2134
Age 2	2097	1982	1885	1887	1914
Age 3	1951	1853	1744	1730	1748
Age 4	1973	1739	1640	1611	1620

Age	2023	2028	2033	2038	2040
Age 5	1967	1641	1579	1543	1547
Age 6	1982	1658	1531	1482	1482
Age 7	1994	1632	1517	1457	1454
Age 8	1927	1646	1519	1451	1443
Age 9	1970	1732	1499	1438	1426
Age 10	1978	1775	1462	1426	1411
Age 11	2001	1820	1506	1416	1397
Age 12	2015	1840	1474	1399	1376
Age 13	2023	1793	1507	1410	1386
Age 14	1956	1825	1580	1401	1388

SOURCE: 2023 SCHOOL ROLL PROJECTIONS FOR 2023/24, 2028/29, 2033/34, 2038/39 AND 2040/41 ACADEMIC YEARS

Across the entire 0-14 age group, the population is expected to decline by 10% by 2028. The population is expected to drop by nearly a further 10% by 2032, equivalent to a 18% decline in 10 years. The projections suggest the Islington 0-14 population will reach its lowest point in 2038/39 and very slightly increase thereafter.

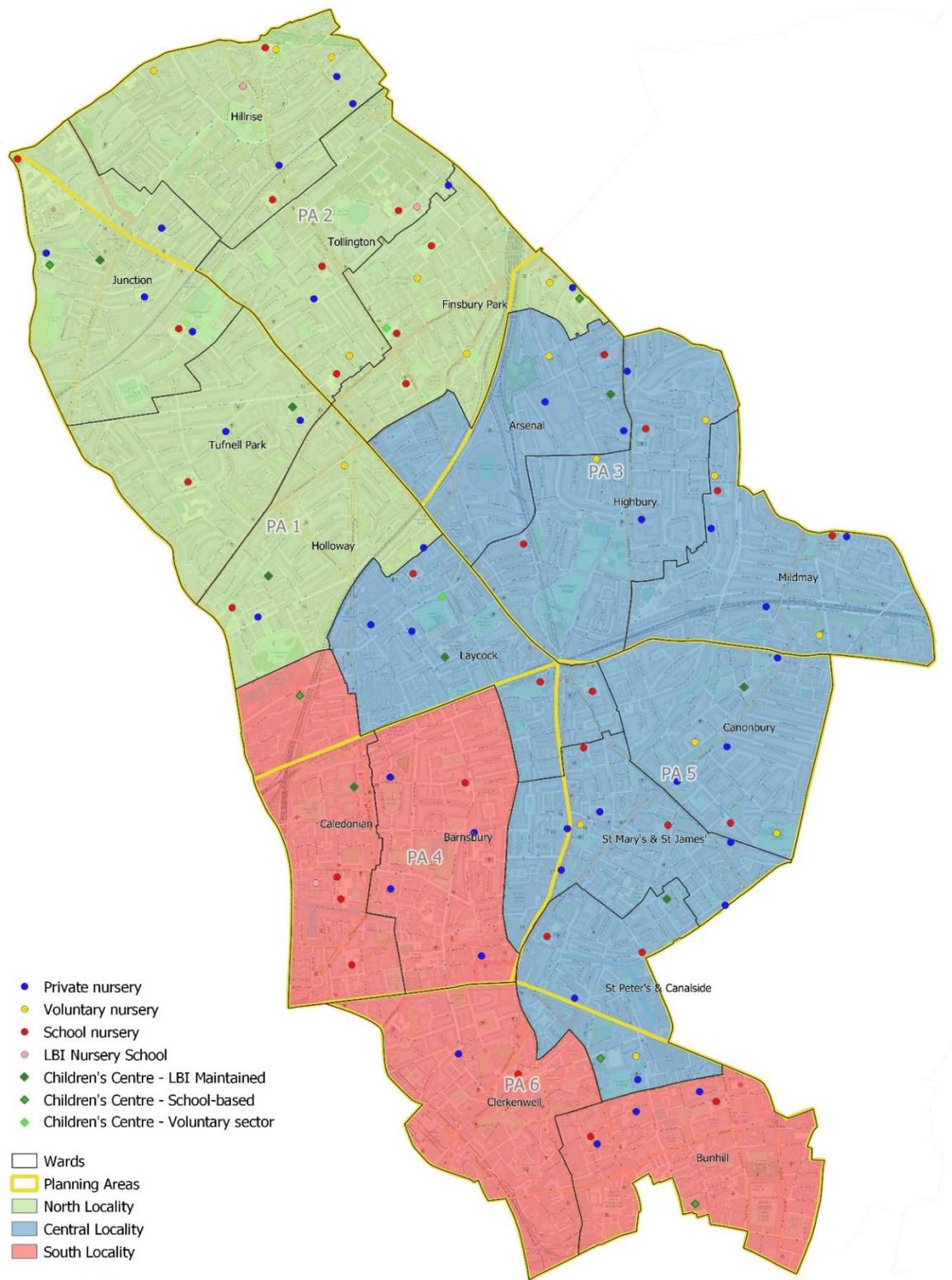
The roll projections modelling predicts a rise in births in the next two years, before they fall again. Breaking this down into different age groups, the population of early years children is currently expected to fall by 5% in 5 years. A further 4% drop is expected by 2033 after which the population is expected to increase and so the overall drop by 2038 is expected to be of 9%. The population of primary school aged children (5 to 10 year olds) is expected to decline 15% by 2028, and a further 12% between 2028 and 2038. The population of children aged 11 to 14 is expected to decline 24% by 2028, and a further 7% by 2033 with continual reductions into 2040.

The 2021 Census showed Islington's population to be about 30,000 lower than expected for all ages. We believe that the changes at the time of the Census, which took place during phase 1 of the UK's route out of lockdown during the Covid-19 pandemic, were due to movement out of the borough by families who could afford to relocate.

However, population figures appear to be continuing to drop, whilst some outer London boroughs have seen increases in their population of children and young people. We believe this could be due to the end of furlough and cost of living issues, with the families affected being those not able to afford Inner London rents. This theory is supported by the changes in our social care caseloads, which have been dropping over the last couple of years. If this is the case, we might expect further drops as cost-of-living issues continue but it is an emerging picture which makes population projections very challenging. We will continue to monitor the situation as new data is made available.

More than a quarter (29%) of Islington resident children aged 0-4 registered at Islington Early Years providers in January 2023 were White British. They were followed by children from White Other ethnic group with 16% and Mixed Other by 15%. Both groups cover a wide range of ethnicities.

## Appendix 2: Map of Islington providers



## Appendix 3: Map of Islington planning areas

