

MAYOR OF LONDON

London Education Report

Early years

COPYRIGHT

**Greater London Authority
August 2021**

Published by
Greater London Authority
City Hall
The Queen's Walk
More London
London SE1 2AA

www.london.gov.uk

enquiries 020 7983 4000

minicom 020 7983 4458

ISBN

Photographs ©

Copies of this report are available
from www.london.gov.uk

CONTENTS

1. Introduction	4
2. Early years indicators	5
Ofsted outstanding or good	5
Early Years Foundation Stage Profile (EYFSP)	7
Free Early Education Entitlement (FEEE) two-year-old uptake	8
Mothers' employment rate	9
3. Cost of childcare	10
4. Registered childcare providers and places	11

1. Introduction

London has a lot to be proud of when it comes to early education and childcare. Children in the city are now consistently amongst the highest performers in the country, but there are still challenges that need to be addressed. Take up of funded early education amongst 2-year-olds remains lower than the national average and fewer mothers take up paid employment opportunities in London than across the country. The breakout of the global pandemic will have deepened these issues, widened inequalities and put nurseries and childminders at risk of permanent closures. That's why the Mayor is working with partners across the city to explore ways to best support London's early years sector, including funding activities such as his [Early Years Hubs](#), [Early Years Leaders Programme](#), [London Early Years Campaign](#) and sector-specific business support via [London Growth Hub](#). You can find out more about the Mayor's work to support high quality early years education at www.london.gov.uk/early-years and his [Coronavirus Guidance Hub](#).

This section of the London Education Report provides detailed and up-to-date information regarding early years education. Other sections cover primary, secondary and 16-19 education. You can read the full report at www.london.gov.uk/London-Education-Report

This report is based on the latest available data and will be updated as new data is released. For information on updates please see the version log below:

Version number	Date of release	Updates
1.1	July 2019	All latest available data
1.2	June 2020	Early years indicators and cost of childcare
1.3	September 2020	Free early years entitlement
1.4	August 2021	Mothers' employment rate, free early years entitlement, and childcare costs

2. Early years indicators

In March 2018, the GLA published its first addition of the Early Years in London Report¹. This report identifies four key indicators for London to help find out whether access to and quality of early years provision is improving. The four key outcome indicators are:

- Ofsted outstanding or good: the proportion of Ofsted inspection ratings for early education providers that are outstanding or good, by number of children and places
- Early Years Foundation Stage Profile (EYFSP) good: the proportion of children who have a 'good level of development' at age 5 as measured by the Early Years Foundation Stage Profile
- Free Early Education Entitlement (FEEE) two-year-old uptake: the proportion of two-year-olds who are entitled to 15 hours of free early education a week who take up this entitlement
- Mothers' employment rate: the proportion of mothers who are in paid employment (either full time or part time)

You can find the latest updates on these indicators below.

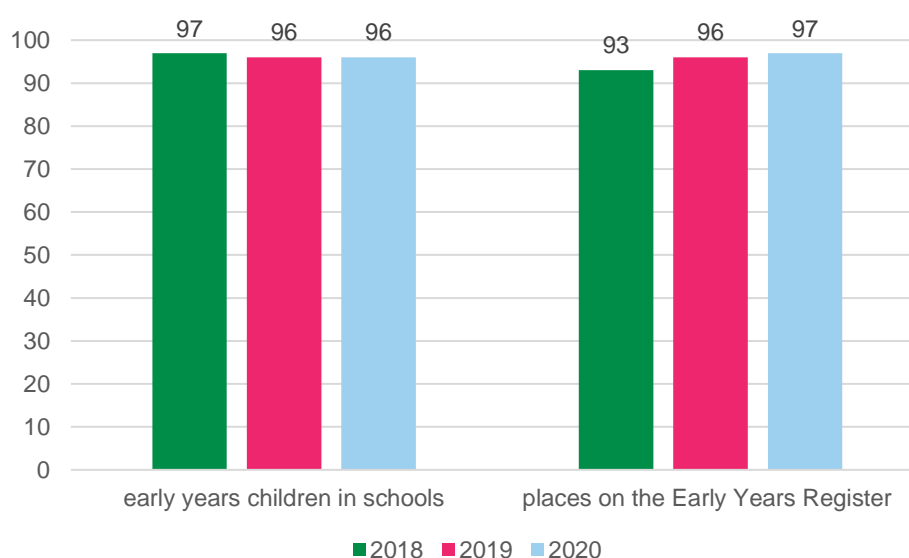
This data will be published in an updated Early Years in London Report.

¹ London.gov.uk, Early Years in London, March 2019

2.1 Ofsted outstanding or good

In London, 96% of early years children in schools attend a setting which is ‘good’ or ‘outstanding’² and 97% of places registered on the Early Years Register are in ‘good’ or ‘outstanding’ settings³. Since 2019, the number of early years children in a school which is rated ‘good’ or ‘outstanding’ has not changed. However, the number of places at a provider which is rated ‘good’ or ‘outstanding’ has increased by 1%. Places within Early Years registered providers are as likely to be in a good or outstanding setting as in the rest of England (97%).

Figure 1.1: Percentage of children/places in good or outstanding settings in London (2018-2020)⁴



² Combined provider level data from DfE ‘Schools, pupils and their characteristics: January 2019’, June 2019, with Ofsted, ‘State-funded schools inspections and outcomes as at 31 December 2019, March 2020’

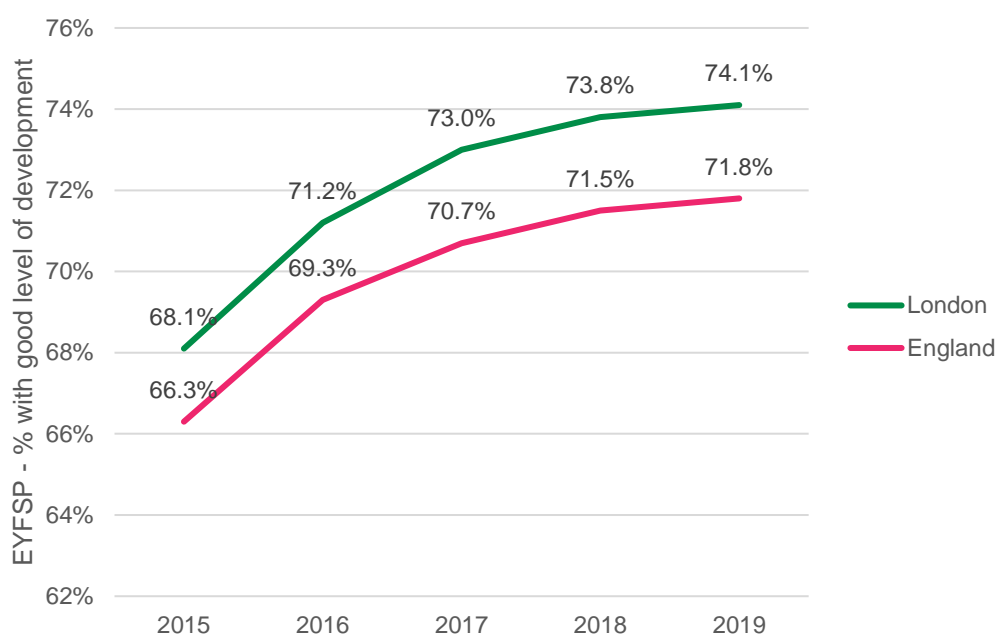
³ Ofsted, ‘Childcare providers and inspections as at 31 December 2019, as at March 2020’

⁴ London.gov.uk, Early Years in London, March 2019 and London.gov.uk, Early Years in London, March 2018

2.2. Early Years Foundation Stage Profile (EYFSP)

The EYFSP⁵ measure shows that **74% of children in London have a good level of development at age five**. London is above the national average of 72%.⁶ The proportion of children achieving a good level of development in London increased by 6 percentage points between 2015 and 2019.⁷

Figure 1.2: Percentage of children with a good level of development at age five (2015-2019)⁸



The proportion of five-year olds with a good level of development in London differs by gender, economic circumstances and ethnicity:

- The percentage of girls with a 'good' level of development is 12 points higher than boys, the same as in 2018
- There is a gap of 13 percentage points between the highest achieving ethnic group (Chinese) and the lowest achieving ethnic group (Black/Black British), up from 12 percentage points in 2018
- There is a gap of 12 percentage points between children eligible for free school meals and those that are not, up from 11 percentage points in 2018
- There is a gap of 13 percentage points between children living in the most and least deprived areas of London, up from 12 percentage points in 2018.⁹

⁵ The Early Years Foundation Stage Profile (EYFSP) is an assessment of a child's level of development at the age of five. It is conducted by teachers in school based on their observations of the child

⁶ Department for Education, 'Early years foundation stage profile results: 2018 to 2019, October 2019'

⁷ Ibid.

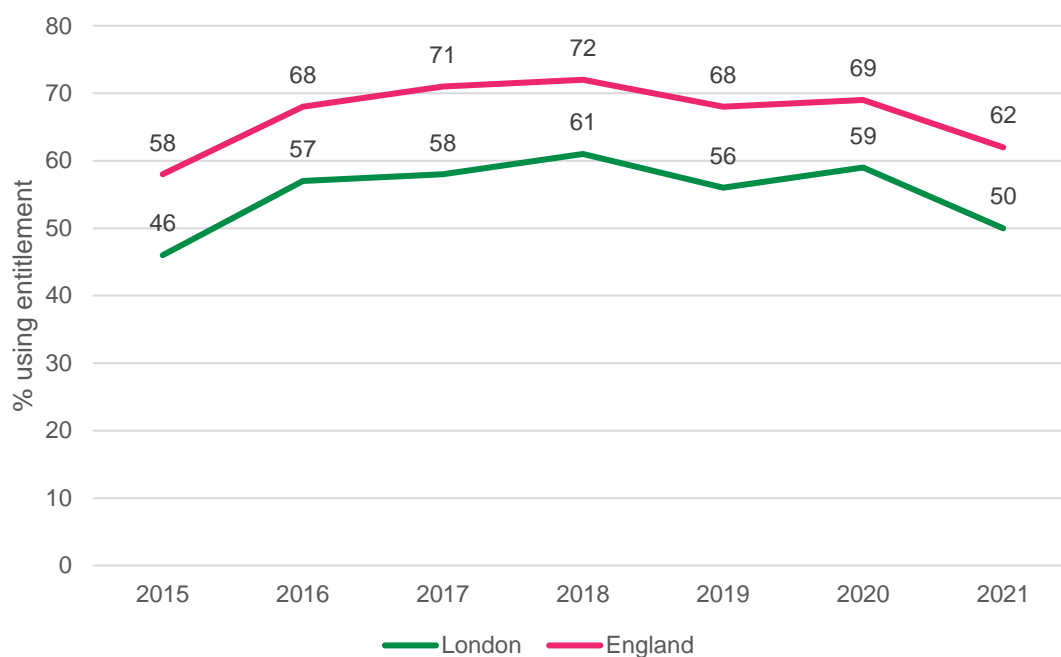
⁸ Ibid.

⁹ Ibid.

2.3 Free Early Education Entitlement (FEEE) two-year-old uptake

The FEEE measure shows the percentage of eligible children who use at least part of their free early education entitlement for two-year-olds.¹⁰ 50% of eligible two-year-olds in London use their free early education entitlement, this is 12% less than the national average.¹¹ However, in London the uptake of FEEE for two-year-olds has risen by four percentage points since 2015.

Figure 1.3: Percentage of eligible children using at least part of their FEEE (2015-2021)¹²



¹⁰ <https://www.gov.uk/help-with-childcare-costs/free-childcare-2-year-olds>

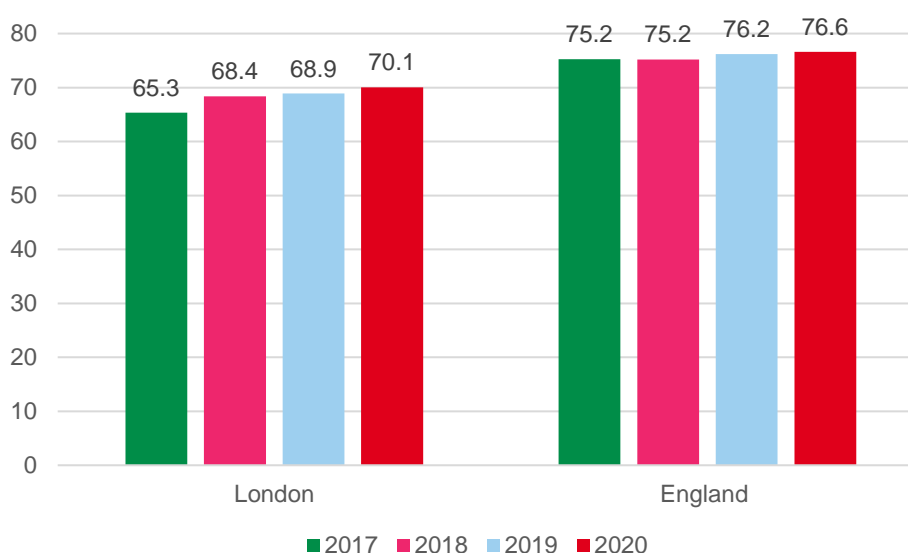
¹¹ Department for Education, Education provision: children under 5 years of age, July 2021

¹² Ibid.

2.4 Mothers' employment rate

This indicator measures the proportion of women with dependent children in paid employment.¹³ Data published by the Office of National Statistics from the Labour Force Survey, shows that **70.1% of mothers with dependent children in London are in paid work**¹⁴. This is less than the national average of 76.6%. However, the proportion of mothers in paid work has risen by thirteen percentage points since 2012. Furthermore, the gap between the proportion of mothers in paid work in London and the rest of the UK has closed from 9.9% in 2017 to 6.5% in 2020.

Figure 1.4: Percentage of mothers with dependent children in London who are in paid work (2018-2021)¹⁵



¹³ We present data about maternal employment rather than paternal employment because there are currently more non-working mothers than non-working fathers in London, making this a more robust impact measurement.

¹⁴ [Employment in London and UK by parental status, sex and ethnicity, 2012 to 2020 - Office for National Statistics \(ons.gov.uk\)](https://www.ons.gov.uk/peopleinwork/employmentandunemployment/bulletins/employmentinlondonandukbyparentalstatussexandethnicity/2012to2020)

¹⁵ London.gov.uk, Early Years in London, March 2019 and London.gov.uk, Early Years in London, March 2018

3. Cost of childcare

Childcare costs are considerably higher in London than in any other English region.¹⁶ The table below shows the average price of full-time (50 hours a week) childcare for children under three in **nurseries and childminders**:

	Under 2	2 and over
England	£268.06	£258.08
Inner London	£321.75	£310.45
Outer London	£306.60	£292.96

Full-time childcare costs in nursery for children under two in outer London are 14% above the England average and 20% higher within inner London. Full-time childcare costs in nursery for children two and over in outer London are 14% above the England average and 20% higher within inner London.

¹⁶ Childcare Survey 2021, Family and Childcare Trust, 2021

4. Registered childcare providers and places

Ofsted publish information on the number of childcare providers and places.¹⁷

The table below shows data for Ofsted registered providers and places in London, as of the end of December 2019¹⁸ and the number of providers who are not on the EYR.¹⁹

	EYR providers	EYR places	Providers not on EYR
Childminder	6,323	38,071	667
Childcare on non-domestic premises	4,034	183,282	1,004
Childcare on domestic premises	58	1,145	3
Home childcarer	-	-	4,244
All provision	10,415	222,498	5,918

In March 2018, the GLA published [Demand for childcare in London - drivers and projections](#).²⁰ The demand for any childcare has risen both in London and nationally between 2004/5 and 2017. In London, 14% more children aged 0-14 used childcare in 2017 (61%), compared with 2004/5 (47%). For both years it was eight percentage points lower than the national rate. The main reason for this difference is much lower use of informal childcare in London. This reflects demographic factors, including the size of migrant population in the capital. As such, there are more limited opportunities for informal childcare provided by family members than in other parts of the country. That said informal childcare use has risen slightly in the last few years in London following improving labour market conditions.

The numbers of 0-14 year olds in London attending formal childcare is expected to grow from 0.9m in 2016 to 1.0m in 2041, an increase of 100,000 childcare places, at a compound annual growth rate of 0.4%. This equates to an extra 4,000 places per year. Children over five are expected to account for three quarters of the increase in childcare demand.

¹⁷ Data is released three times per year

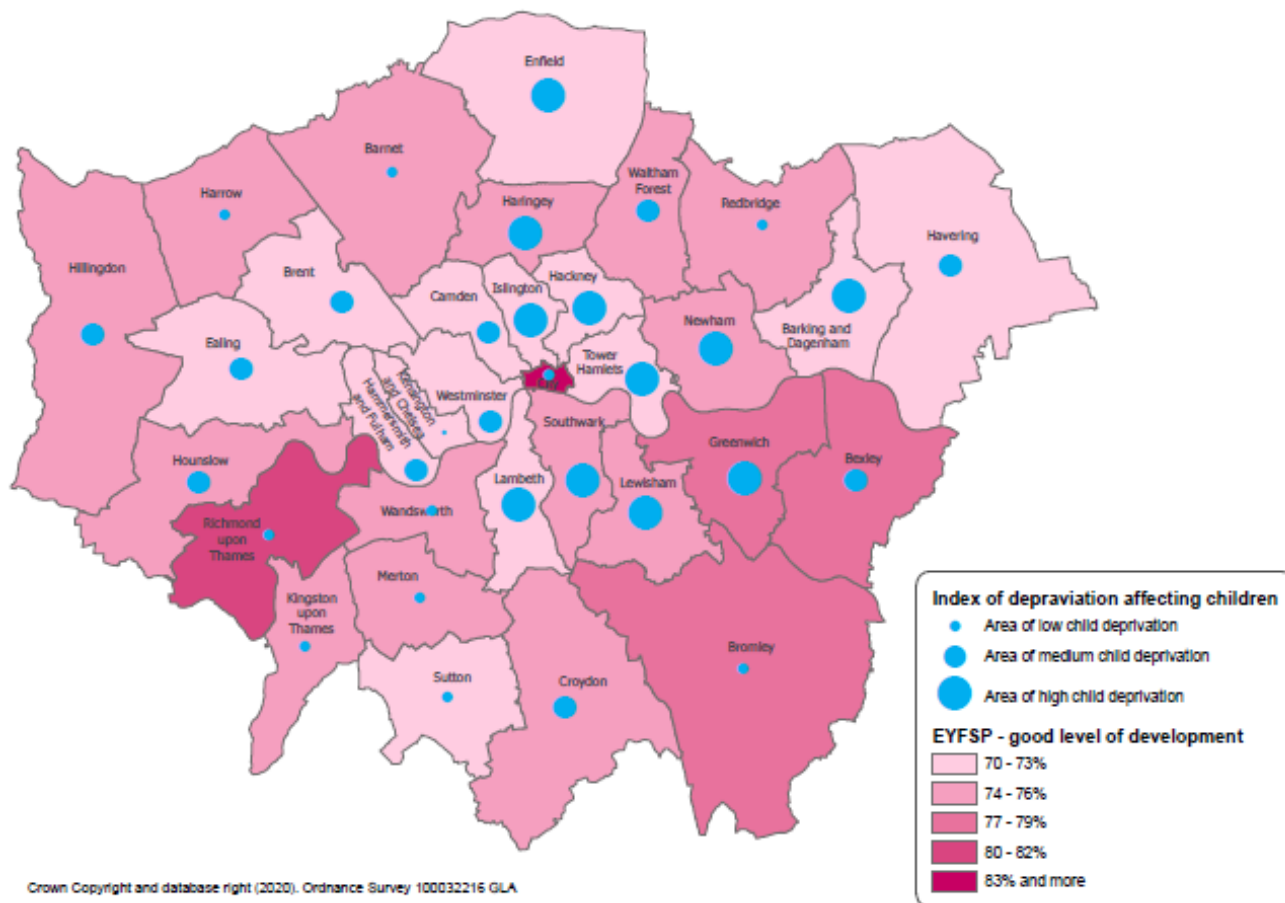
¹⁸ Ofsted, 'Childcare providers and inspections as at 31 December 2019', March 2020

¹⁹ As they are not on the EYR, data is not held on the number of places

²⁰ Demand for childcare in London – drivers and projections, GLA Economics March 2018

Appendix

Figure 1.5: Percentage of children with a good level of development at age 5 and childhood deprivation (IDACI)



Other formats and languages

For a large print, Braille, disc, sign language video or audio-tape version of this document, please contact us at the address below:

Greater London Authority
City Hall
The Queen's Walk
More London
London SE1 2AA

Telephone **020 7983 4100**
www.london.gov.uk

You will need to supply your name, your postal address and state the format and title of the publication you require.

If you would like a summary of this document in your language, please phone the number or contact us at the address above.