



East Sussex County Council

Childcare Sufficiency Assessment

2026



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1.Introduction

Context

The local authority must report each year to elected members on childcare provision in East Sussex and publish clear information for families to show how it is meeting its sufficiency duty.

Publishing this report meets our legal duty under Sections 6 and 7 of the [Childcare Act 2006 \(legislation.gov.uk\)](#). It also follows national guidance in [Early education and childcare - GOV.UK](#).

It covers childcare for children from birth to age 14, and up to 18 for children with disabilities.

The report includes:

- A review of childcare supply and demand across the local area.
- Analysis of cost, access, and quality, including for children with additional needs.
- Gaps in provision and actions to address them.

This year's report links to the Government's Best Start in Life Strategy (2025). The goal is for 75% of children to reach a Good Level of Development by age five by 2028. Local authorities help by:

- Expanding Best Start Family Hubs for joined-up health, education, and childcare support.
- Strengthening the parent pathway from pregnancy through early years.
- Investing in proven parenting and home learning programmes.
- Giving extra help to families with additional needs and improving outreach.

The East Sussex 'Best Start in Life Strategy' will be published in 2026 and will set out an ambitious plan to improve early child development and health outcomes across the county. The sufficiency report meets legal duties and supports the

delivery of national and local strategies. It ensures early years provision is inclusive and aligned with priorities.

Ensuring sufficiency

To understand childcare supply and demand, we compare current places with expected need. We look at birth rates, housing growth, and population changes.

The Childcare Act 2006 gives local authorities a role in shaping the childcare market. We work with private, voluntary, independent, and school-run providers. Our aim is a strong, diverse, and sustainable market that meets family needs and supports learning through the Early Years Foundation Stage (EYFS).

Local authorities must make sure there are enough places. But childcare is optional until the term after a child turns five.

The Act requires local authorities to:

- Support childcare places for children aged 9 months and older, ensuring flexibility and quality.
- Distribute government funding for early education and childcare.
- Secure enough childcare, as far as is reasonably practicable in a free market.
- Give parents clear information.
- Offer training and support to providers.

Eligibility

Childcare is funded by government entitlements or by parents. Local authorities must secure funded places of 570 hours a year over at least 38 weeks, and up to 52 weeks, for every eligible child.

Eligibility depends on a child's age and whether they meet certain funding criteria:

Figure 1: Eligibility Criteria for Funded Children aged 9 months +

Eligibility	Offer	Criteria
All three- and four-year-olds.	15 hours a week x minimum 38 weeks a year. 570 hours a year.	Universal offer open to all age eligible children resident in East Sussex. No financial criteria to be met.
Some eligible three- and four-year-olds.	Extended Entitlement. 30 hours a week x minimum 38 weeks a year. 1,140 hours a year.	For working family's resident in East Sussex where both parents are working, or the sole parent is working in a lone parent family.
Some eligible two-year-olds.	15 hours a week x minimum 38 weeks a year. 570 hours a year.	For family's resident in East Sussex on either low income or a range of benefits, including Universal Credit.
Some eligible two-year-olds.	30 hours a week x minimum 38 weeks a year. 1,140 hours a year.	For working family's resident in East Sussex where both parents are working, or the sole parent is working in a lone parent family.
Some eligible under twos.	30 hours a week x minimum 38 weeks a year. 1,140 hours a year.	For working family's resident in East Sussex where both parents are working, or the sole parent is working in a lone parent family.

30 Hour Extended Entitlement for working parents or carers of children aged 9 months+ - additional criteria:

- Parents or carers must each expect to earn at least £195.36 per week. This is equal to 16 hours at the National Minimum or Living Wage for persons aged 21 and over.
- If parents or carers are on maternity, paternity or adoption leave they may still be eligible. If they are unable to work due to a disability or having caring responsibilities, they may also be eligible.

- If either parent or carer earns more than £100,000, they will not be able to receive 30 hours free childcare but will still receive the universal 15 hours per week over a minimum 38 weeks a year.
- Foster carers may also apply (subject to approval from the child's social worker) if they meet the above financial criteria.

Funded places for eligible two-year-olds on low income or benefits - additional criteria:

- Children we care for, those that have left care through special guardianship or through an adoption or residence order are also eligible.
- Children in receipt of Disability Living Allowance (DLA) or an Education, Health, and Care Plan (EHCP) can also apply for a funded place for a two-year-old.

Non-UK citizens who cannot claim benefits may still get free childcare for their 2 year olds. Further details are available on [Help paying for childcare: Free education and childcare for 2 year olds if you get extra support - GOV.UK](#)

Families can check with their local authority if they are unsure if they qualify for free childcare.¹

Government funding is intended to deliver 15 or 30 hours a week of funded, high quality, flexible childcare. It is not intended to cover:

- the costs of meals
- other consumables
- additional hours
- or additional activities.

Families may be asked to make a voluntary contribution for meals provided alongside the funded entitlement. They may also be asked to pay for consumables

¹ Statutory Guidance for local authorities updated by the Department for Education April 2025

such as nappies or for additional activities, or they can choose to supply their own. However, providers must not impose mandatory charges as a condition for accessing funded places

2.Key findings

The key findings of the East Sussex Sufficiency Assessment 2026 are summarised below. More information on each of the key areas is provided in later sections of this document.

East Sussex is growing and changing

The overall population in East Sussex has grown steadily, rising from 505,000 in 2004 to 560,900 in 2024 (Source: ONS Mid-year estimates). With the population of over 65's rising by 26.6%.

Sufficiency of provision

East Sussex has 704 childcare providers, both funded and non-funded, across the county. Some providers offer more than one type of childcare. For example, a school might run a breakfast club, an after-school club, and a nursery or pre-school with a holiday club. In general, there are enough early years places to meet demand across East Sussex. However, we are forecasting shortages in some areas.

Quality of childcare in East Sussex is high

The quality of early education and childcare in East Sussex is high. The percentage of early years providers in East Sussex judged by Ofsted to be good or outstanding at the end of August 2025 was 98.5%. The national average was 97.7% in August 2024.

In the 2024/25 academic year, 70.4% of children attained a Good Level of Development (GLD) in the EYFS profile assessment at the end of the foundation stage, which is 2.1% above the national average of 68.3%.

The cost of childcare remains around the national average

The average hourly charges by providers for day-care in East Sussex is:

- Private, voluntary or independent sector £7
- Childminders £6.20
- Maintained sector £6.34

The national average hourly charge according to the Family and Childcare Trust is £6.41 for children aged three and four².

Cost of childcare places

Data on the cost of childcare is currently gathered annually, in December, by the Family Childcare Trust. Figures 2, 3 and 4 show the current average cost of 25 hours of childcare a week (part-time place) and 50 hours of childcare a week (full-time place), in England and in the Southeast².

Figure 2: Average cost of 25 hours of childcare for children under three

Cost of 25 hours a week childcare	Nursery under two	Two and over	Childminder under two	Two and over
England	£176.27	£165.85	£149.41	£144.37
Southeast	£174.12	£161.48	£135.56	£134.80

Figure 3: Average cost of 50 hours of childcare for children under 3

Cost of 50 hours a week childcare	Nursery under two	Two and over	Childminder under two	Two and over
England	£238.95	£225.70	£202.09	£198.59
Southeast	£242.16	£227.91	£187.87	£187.20

² [Childcare Survey 2025](#)

Figure 4: Average cost of 25 or 50 hours of childcare for children aged three to five accessing funded hours including the free entitlements

	Cost of 25 hours a week childcare, including universal entitlement for three- and four-year-olds (paying for 10 hours)	50 hours a week, including extended entitlement (paying for 20 hours)
England	£64.09	£126.94
Southeast	£64.21	£128.59

Childcare for younger children often costs more. This is mainly because they need more staff to care for them. Most parents or carers find that their childcare costs reduce as their child grows. All children are entitled to some form of funded nursery education from the funding period following their third birthday, meaning childcare fees for parents or carers should fall.

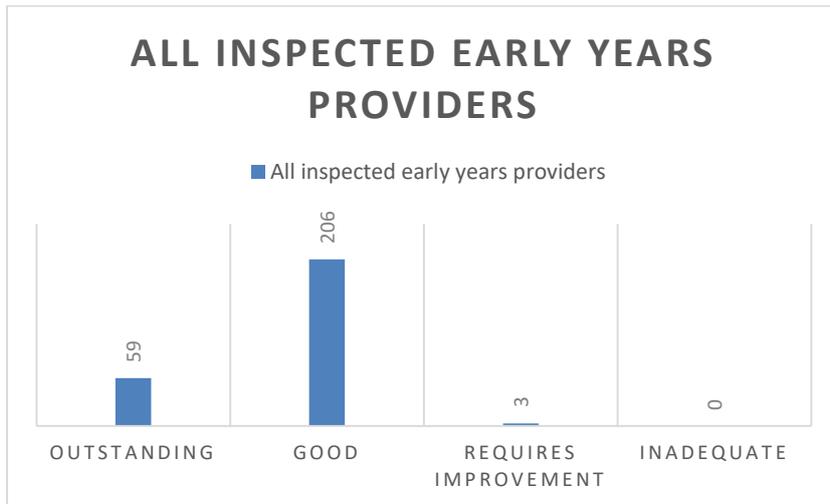
The childcare picture in East Sussex

In the Southeast there has been a higher than national decline in the numbers of childminders since 2015. However, in October 2025 there were 159 registered childminders in East Sussex offering childcare places, an increase of 8.9% on the number in August 2024.

[Childcare providers and inspections as at 31 March 2025 - GOV.UK](#)

In East Sussex, Ofsted report that of 337 early years providers, 268 had been inspected. This is a lower figure than the 704 providers as East Sussex figures includes all types of childcare for example, Nannies and Holiday activity fund providers. Figure 5 shows how many providers fell under each outcome.

Figure 5 Ofsted outcomes



3. Childcare sufficiency - areas for development

To ensure the supply of high-quality early years and childcare provision, the local authority will take the following actions in three key areas:

Data and sufficiency

- Carry out regular checks on childcare capacity using the online provider portal, along with a yearly update of data. This will help identify any gaps in childcare places.
- Track new housing and growing communities to plan for more early years places. Link this with school place planning when needed.
- Monitor all parts of the childcare market to understand why the number of providers might be going down.
- Use the early years forecasting tool to look at supply and demand across all five districts.
- Promote the use of funded places, especially for Families Receiving Additional Support (FRAS), in areas where fewer families are using them.

Family information

- Use social media and the East Sussex Children and Families web pages to widen access to information about early education and educating children at home.

- Help parents or carers (particularly vulnerable families) to understand the benefits of high-quality childcare and early learning for their children.

Special Educational Needs and Disability (SEND)

Enhance the quality of education offered by early years providers to children with SEND by:

- Creating a pre-referral support pathway.
- Provide access to an advice line.
- Offer time with qualified teachers to help providers use the Graduated Approach.
- Review and adapt service offers to help providers meet children's needs, including to help SEND children to attend for their full hours.
- Provide training on early communication development alongside the Children's Integrated Therapy Service (CITES).
- Continue to improve the transition to school support package so that everyone is confident in mainstream education placements.
- Keep service information current and accessible on the Local Offer web page.
- Update and review all training on SEND. Training is provided for free by the local authority.

4.Support for Parents and Carers

Affordability

To remain sustainable, childcare providers must earn enough to cover their running costs. Legislation states local authorities cannot interfere with how providers run their businesses. This includes any fees they charge beyond a child's funded place.

At the same time, childcare needs to be affordable to parents and carers, and local authorities have a legal duty to ensure there is sufficient affordable childcare for families who need it and will identify any gaps in the market.

Help with childcare costs

There are options available to parents and carers to help with childcare costs. Parents and carers must select the option that best suits their personal circumstances. Further information can be found on the [Help paying for childcare: Childcare you can get help paying for \('approved childcare'\) - GOV.UK](#)

From September 2025, eligible working families have been able to access up to 30 hours of funded childcare for children from 9 months old up to school age. Information can be found at [Homepage | Best Start in Life](#)

5. Population Statistics in East Sussex

Population

According to the Office for National Statistics, East Sussex had around 560,900 people in 2024, which is around 1% of England's population.

About three-quarters of people live in urban areas (2021 Census). Most of the population and jobs are in the southern coastal strip, including in Eastbourne, Hastings, St Leonard's, Bexhill, Newhaven, Seaford, and Lewes.

Figure 6: Population Increase (all ages) in the last decade 2014 to 2024³

Area	2014	2024	Percentage change 2014-2024
England	54,370,319	58,620,101	7.8%
East Sussex	537,577	560,882	4.3%
Eastbourne	101,328	104,259	2.9%
Hastings	91,356	91,219	-0.1%
Lewes	99,607	102,363	2.8%
Rother	91,269	96,133	5.3%
Wealden	154,017	166,908	8.4%

Figure 7: Population projections (all ages) from 2023 to 2038

Year	Population 2023	Projected population 2038	Projected change 2023-2038	% Change 2023-2038
East Sussex	555,550	600,300	44,800	8.1%
Aged 0-17	103,600	96,800	6,800	-6.6%

Source: East Sussex County Council 2023-based dwelling-led population projections, April 2025

³ ONS 2014 and 2024 Mid-year estimate data

There are an estimated 104,428 children and young people aged 0-17 in East Sussex (ONS mid-year estimate 2024). Between 2014 and 2024, this age group increased by 0.1%, from 104,364.

In Eastbourne and Hastings (urban areas), there are 119 funded providers. In rural areas like Lewes, Rother, and Wealden, there are 207 funded providers. Across the county, there are 186 unfunded providers, including childminders and holiday clubs. These figures do not include wider types of childcare such as Nannies and holiday activity fund providers.

ESCC’s Dwelling-led population projections (April 2025) suggest that the whole population of the county will increase by 8.1% between 2023 and 2038. The 0-17 population is projected to decline by 6.6% over the same period.

The table in figure 8a below shows the of numbers of children aged 10-17 and figure 8b the number of disabled children aged 0-17, based on the ONS Census 2021 .

Figure 8a: Number of children aged 0-17 and disabled children aged 10-17

	Total population aged 10-17	Number of children with a disability aged 10 to 17	Percentage of children with a disability aged 10 to 17
East Sussex	48,470	5,670	11.7%
Eastbourne	9,140	1,130	12.3%
Hastings	8,280	1,070	12.9%
Lewes	9,100	1,180	12.9%
Rother	7,550	880	11.7%
Wealden	14,410	1,410	9.8%

Source: ONS 2021 Census

Figure 8b: Number of children aged 0-17 and disabled children aged 0-17

	Total population aged 0-17	Number of children with a disability aged 0-17	Percentage of children with a disability	Percentage of children whose activities are significantly limited
East Sussex	102,160	8,670	8.5%	3.3%
Eastbourne	19,380	1,770	9.1%	3.8%
Hastings	18,620	1,660	9.1%	3.6%
Lewes	18,950	1,760	9.3%	3.3%
Rother	15,510	1,360	8.8%	3.2%
Wealden	30,060	2,120	7.1%	2.7%

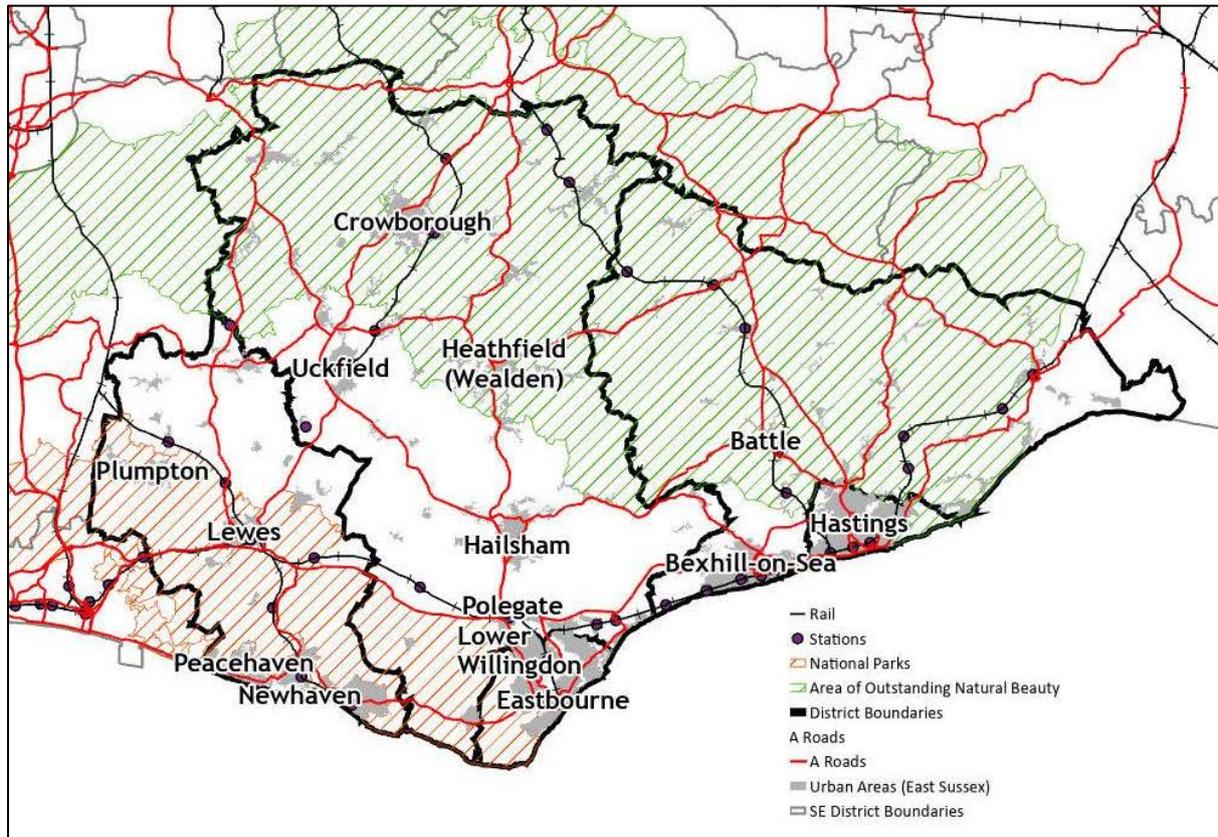
Source: ONS 2021 Census

In the 2021 Census, 8.5% of all children aged 0-17 were classified as disabled under the Equality Act, and 3.3% had a disability which meant that their day to day activities were significantly limited.

Districts and Boroughs

East Sussex comprises five borough and district council areas: Eastbourne, Hastings, Lewes, Rother, and Wealden. Parts of the county are within the South Downs National Park.

Figure 9: Map of the five borough and district council areas, with main transport connections and settlements in East Sussex



Ethnicity

In the 2021 Census, about 512,440 people (93.9%) in East Sussex said they were white. This includes both White British or Northern Irish and other white ethnic groups. The second largest group was Mixed or Multiple ethnic groups, making up 2.3% of the population (12,310 people).

Among children and young people, there is more ethnic diversity. Of those aged 0-17:

- 85.7% were White British (or Northern Irish)
- 5.6% were Mixed or Multiple ethnic groups
- 4.1% were White but not British (or Northern Irish)
- 2.5% were Asian or Asian British

Figure 10(a): Population by ethnic group in 2021

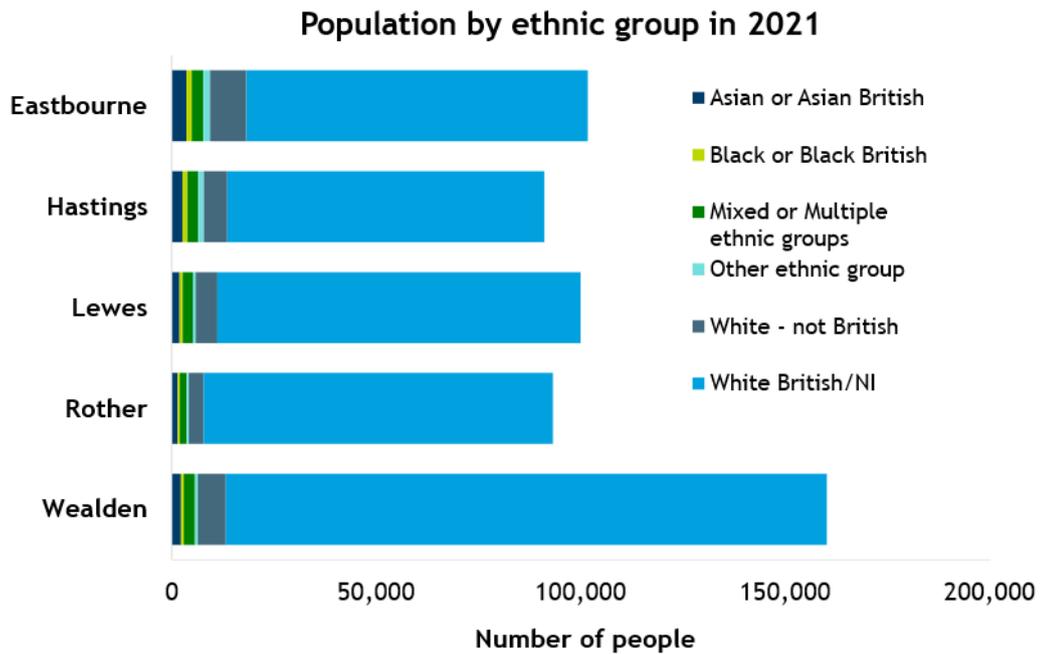
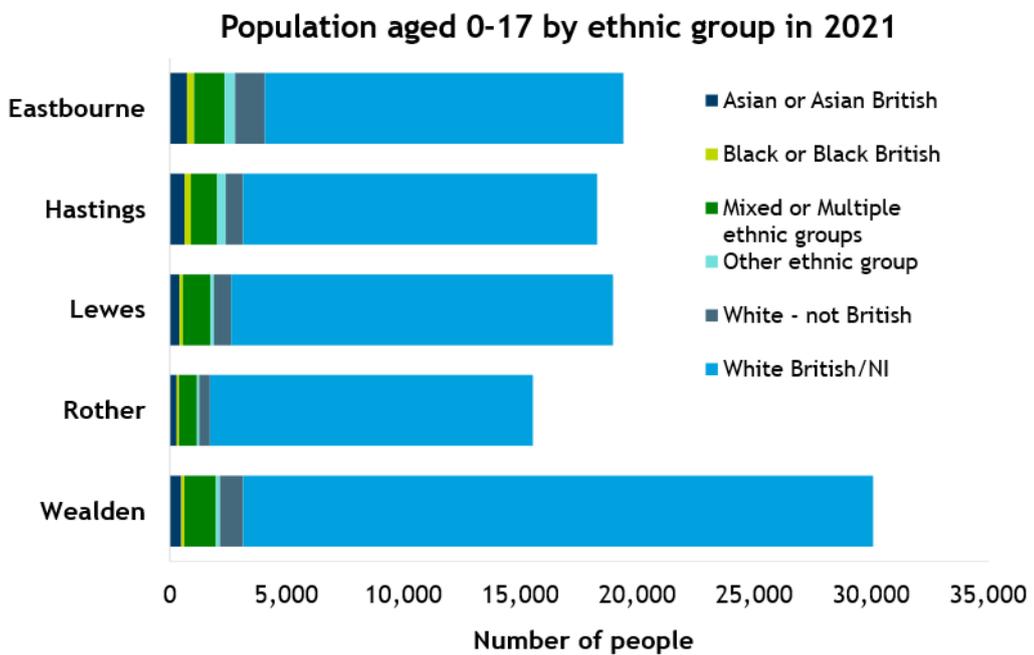


Fig. 10(b) Population aged 0-17 by ethnic group in 2021



Languages

Over 78 languages are spoken in East Sussex. Around 8% of children aged 5-16 speak a language other than English at home. The most common languages in schools, after English, are:

- Polish
- Malayalam
- Arabic
- Romanian
- Ukrainian

Deprivation

The Index of Multiple Deprivation (IMD) 2025 is the official way to measure how deprived small areas in England are.

Figure 11 shows the Income Deprivation Affecting Children Index (IDACI). This measures the share of children aged 0-15 living in families with low income.

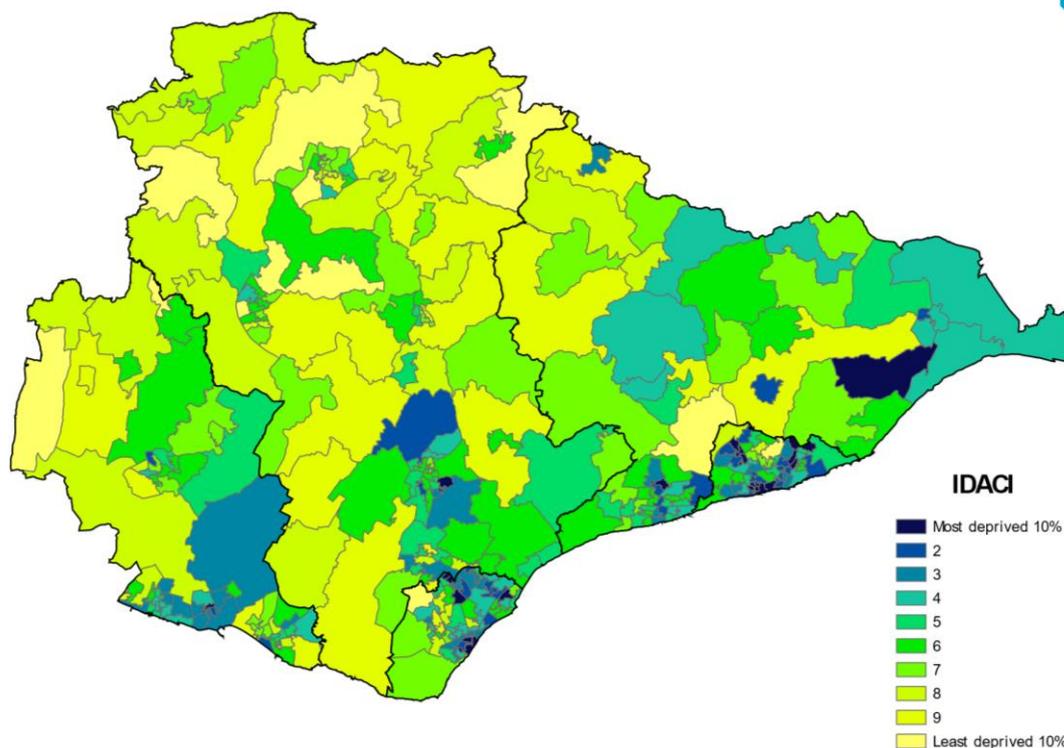
IDACI is part of the IMD. It looks at how many people in an area have low income.

The small areas used are called Lower-layer Super Output Areas (LSOAs). There are 33,755 LSOAs in England. Each one is ranked from 1 (most deprived) to 33,755 (least deprived).

The 10% of areas with the lowest ranks are the most deprived. These are shown in dark blue on the map. The 10% with the highest ranks are the least deprived and shown in yellow.

Figure 11: National deprivation rank in neighbourhoods LSOAs in East Sussex

IoD 2025: Income Deprivation Affecting Children Index (IDACI), East Sussex



Source: MHCLG

In East Sussex there are 332 LSOAs, of which 29 are in the most deprived 10% nationally:

- 18 of these are in Hastings
- 8 are in Eastbourne
- 3 are in Rother.

13 LSOAs are in the least deprived 10%, of which:

- 8 are in Wealden
- 3 are in Lewes
- 2 are in Eastbourne.

In 2024, 20,519 (17.8%) children and young people aged 0-19 lived in families with relative low-income (less than 60% of median income). A quarter of children and young people in Hastings (27%) live in low-income families.

Figure 12: Children living in relative low-income families 2023/2024

	Number			Percentage		
	All children	Aged 0-15	Aged 16-19	All children	Aged 0-15	Aged 16-19
Eastbourne	4,342	3,486	856	19.7%	20.3%	17.6%
Hastings	5,444	4,338	1,106	27.4%	27.4%	27.5%
Lewes	2,887	2,282	604	13.8%	13.7%	14.1%
Rother	3,312	2,639	673	18.4%	18.8%	16.9%
Wealden	4,535	3,580	950	13.1%	13.0%	13.5%
East Sussex	20,519	16,327	4,191	17.8%	17.9%	17.3%
England	2,927,462	2,354,691	572,774	21.6%	21.9%	20.5%

Source: DWP StatXplore website/ONS mid-year estimates

In May 2025, there were 77,067 working age people in the county who were receiving one or more Department for Work and Pensions (DWP) benefits (24.1% of all working age people aged 16-64).

Of these, 48,560 (15.2% of working age) were receiving a benefit because they were not in work (many will receive benefits because they have a disability or are too sick to work, others because they have caring responsibilities).

28,504 benefit claimants were not on an out-of-work benefit. Claimant rates were much higher in Hastings (33.3% on at least one DWP benefit) and Eastbourne (28%), with nearly 22% of working aged people in Hastings on at least one out-of-work benefit.

In September 2025, there were 61,148 people in East Sussex (19% of all working age people) claiming Universal Credit, of whom 19,815 (32%) were in employment.

In August 2025, there were 51,699 households receiving Universal Credit, of whom 23,132 had at least one child dependent, and 16,193 were single parent families.

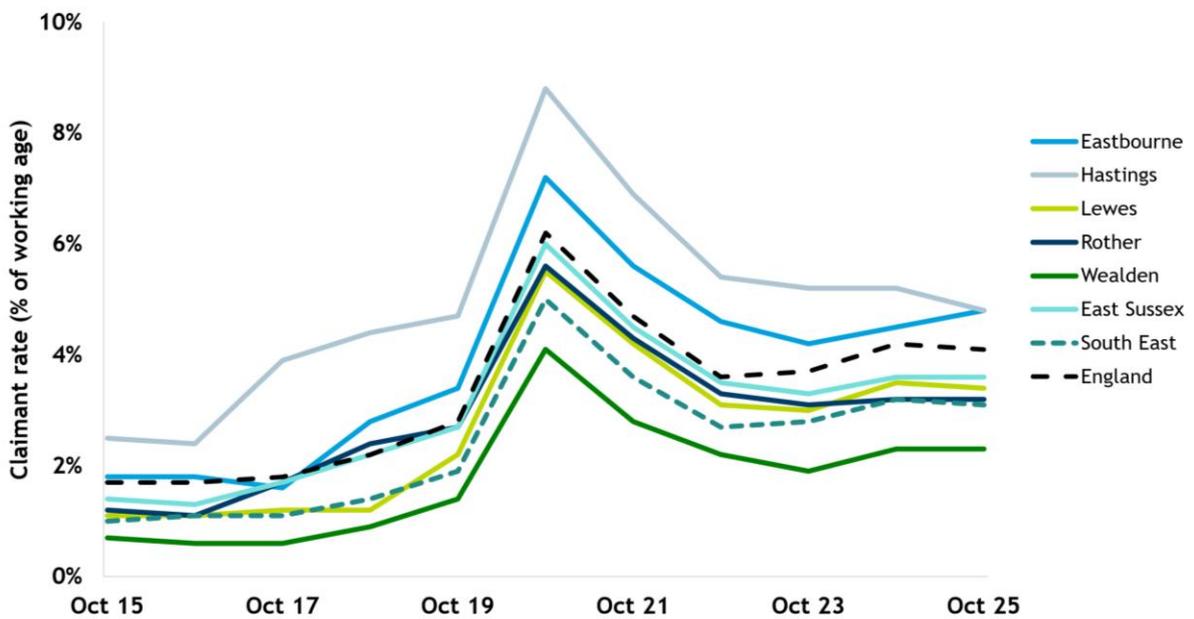
Unemployment

High unemployment affects how many families can use the Extended 30 Hours entitlement, as this offer is only for families in work.

According to the 2021 Census, East Sussex had a 4% unemployment rate for people aged 16-64. This is lower than England overall (4.4%) but slightly higher than the South East region (3.9%).

Figure 13 shows claimant rates from 2014 to 2024. Rates in East Sussex follow the downward trend seen in England and the region since the coronavirus pandemic. However, both local and national rates have been rising again since 2023.

Figure 13: Claimant rate October 2015 - October 2025, districts



Source: ONS Nomis Claimant Count Data

6. Projected housing growth

Local Plans produced by local planning authorities, including the South Downs National Park Authority, show the level and distribution of planned housing growth across the county, see Figure 14.

Figure 14: Number of new dwellings to be built by area⁴

Adopted Local Plans (adoption date) in District and Boroughs	Number of dwellings still to be built over plan period
Lewes and the South Downs National Park Authority (SDNPA) <ul style="list-style-type: none"> • Lewes DC- remaining Local Plan period 2025/26 to 2029/30 • The SDNPA existing Local Plan period 2025/26 to 2032/33 	3,400
Hastings Borough Council Remainder of draft new Local Plan period 2025/26 to 2040/41	2,300
Eastbourne Borough Council Remainder of existing Local Plan period from 2025/26 to 2026/27	500
Rother District Council Remainder of existing Local Plan period 2025/26 to 2027/28	1,800
Wealden: Wealden District Council Remainder of draft new Local Plan period 2025/26 to 2039/40	13,300

⁴ East Sussex School Organisation Plan- 2025 to 2029

In some areas of the county new housing may attract the need for childcare provision which may exceed current levels of supply and require new or expanded provision to meet demand for places.⁷ Sufficiency of childcare places

East Sussex has 704 childcare providers across the county. Several providers operate more than one type of childcare. Schools may have a breakfast and, or after school club as well as a nursery or a pre-school offering a holiday club.

Figure 15: Number of providers (funded or non-funded) by type in East Sussex⁵

Childcare Provider Type	November 2025
Childminder and Childcare on Domestic Premises	155
Nurseries in maintained schools and academies	54
Independent School Nursery	10
PVI Settings	195
Crèche	3
Nanny	73
Out of School Clubs	166
Stand-alone Holiday Play Scheme	48
Total	704

7. Funded early education places

Not all childcare providers offer funded early education places. The table below shows the number of childcare providers by borough or district offering funded early education places in the PVI sector, in local authority-maintained schools and in non-maintained schools, including academies.

⁵ East Sussex Synergy FIS Portal- November 2025

Figure 16(a): Number of Nursery Providers & Childminders Providing Funded Places by Sector in Each District⁶

District	Nursery Private	Nursery Voluntary	Childminder
Eastbourne	25	2	31
Hastings	22	5	12
Lewes	23	6	34
Rother	19	10	12
Wealden	32	18	37
Totals	121	41	126

Figure 16(b): Number of Schools Providing Funded Places by Sector in Each District⁷

District	Non-Maintained (including Academies)	Maintained	Independent
Eastbourne	6	2	2
Hastings	8	1	1
Lewes	3	8	0
Rother	6	3	2
Wealden	6	12	3
Totals	29	26	8

The number and distribution of funded childcare places offered by childcare providers varies between districts. Most places are located within urban areas. For families living in rural areas the choice of type of provision is more limited.

⁶ East Sussex Synergy FIS Portal- October 2025

⁷ East Sussex Synergy FIS Portal- October 2025

Figure 17(a): Number of full time equivalent (FTE) places based on staff capacity 2024/25⁸

Districts	(FTE Places) 2024 to 2025
East Sussex	10,804
Eastbourne	2,221
Hastings	1,682
Lewes	1,904
Rother	1,712
Wealden	3,286

Figure 17(b): Demand for full time equivalent (FTE) places by Provider Address 2024/25

Districts	Demand for FTE Places 2024 to 2025 Onwards
East Sussex	9,273
Eastbourne	1,997
Hastings	1,553
Lewes	1,639
Rother	1,375
Wealden	2,709

FTE demand from all children by provider address, includes all children, irrespective of funding

⁸ Early years forecasting model (Apr 25) 19.09.25 Final

Figure 17(c): Demand for full time equivalent (FTE) places by Home Address 2024/25

Districts	Demand for FTE Places 2024 to 2025 Onwards
East Sussex	8,970
Eastbourne	1,720
Hastings	1,615
Lewes	1,491
Rother	1,317
Wealden	2,826

FTE demand from children living in a specified area, irrespective of where they attend childcare. Includes all children, irrespective of funding.

Take up of funding streams⁹

Whilst take up of the 15-hour universal entitlement for three- and four-year-olds is strong across all areas of the county there has been a decrease since 2024. The percentage of children accessing the 15-hour universal entitlement fell from 96.2% to 93.3%. This is still above the national average of 93.1% which also decreased.

Figure 18 shows the number of three- and four-year-olds accessing their universal 15 hour offer by borough or district.

⁹ DfE Local Authority Interactive Tool - December 2024

Figure 18: Number of three- and four-year-olds accessing a universal funded place in April 2025¹⁰

District	Number of children accessing a Universal 15 hour offer place in April 2025
East Sussex	3,926
Eastbourne	803
Hastings	694
Lewes	684
Rother	540
Wealden	1205

In East Sussex, the number of children taking up some or all of the extended 30-hour working family’s entitlement for the summer claim period in 2025 was:

- 3&4-year-olds = 48.79%
- 2-year-olds = 77.09%
- Under 2’s = 100%

Since September 2025 eligible children from aged 9 months+ can claim up to 30 hours a week of funded childcare, in line with the 3- and 4-year-olds offer.

Analysis shows that take-up of places by eligible funded two-year-olds in families in receipt of additional support is lower than for the universal three- and four-year-old entitlement. Only 40% of the two-year-old population in East Sussex meet the DfE eligibility criteria to access this funding stream. Of these 66.8% of children from families in receipt of additional support accessed a funded two-year-old place in April 2025. The economic and social vulnerability of these families can impact on take-up rates. One key factor is parental preference for wanting to keep very young children at home; this is particularly relevant for two-year-olds.

¹⁰ East Sussex Headcount data - April 2025

Local childcare offers which do not meet parental preferences and the use of informal childcare instead of the more formal options such as a nursery, all contribute to the impact on the pattern of take-up. Figure 19 shows the number of eligible two-year-olds accessing a funded early education place by district.

Figure 19: Number of eligible funded two-year-olds accessing a funded place in April 2025¹¹

District	Number of funded two-year-olds (families receiving additional support (FRAS)) accessing the 15-hour offer - April 2025
East Sussex	671
Eastbourne	154
Hastings	171
Lewes	99
Rother	115
Wealden	189

¹¹ East Sussex Headcount data - April 2025

8. Parental Consultation

Engaging with parents and carers is a vital component in assessing the demand for childcare across East Sussex. The most recent Childcare Sufficiency Assessment Parental Survey was conducted between 30th September and 31st October 2025. The survey was promoted through multiple channels, including social media and direct email communications to parents, carers, and early years providers across the county.

By the close of the consultation period, 944 responses had been received. The responses can be broken down as follows:

- 89% of respondents were female
- 86% of respondents were a couple parent or carer household
- 61% of those that responded had children four years old or younger
- 87.6% of those that responded had school age children (Reception to age 14, or 18 if disabled)
- 18% of respondents had children with a special educational need and or disability
- 56% of those that responded worked more than 30 hours a week and 21% worked part-time (29 hours a week or less)
 - 2% of respondents indicated they were unemployed and looking for work and 3% indicated they were not looking for work
 - 1% of respondents were in education or training and 2% indicated being long term sick and or disabled
 - 2% indicated other

Respondents told us:

- 6% of respondents wanted childcare all year round

Figure 20: The days on which childcare is needed¹²

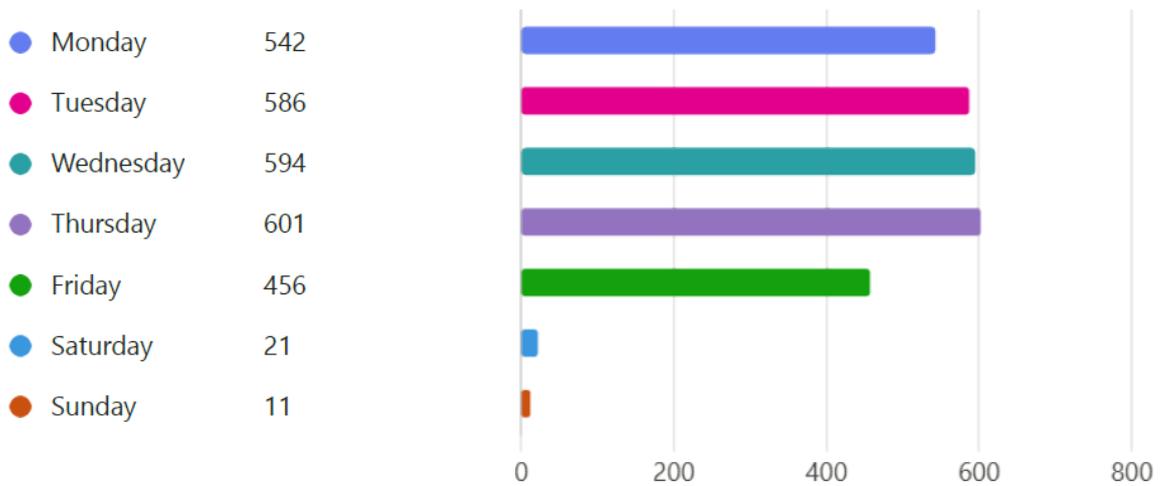
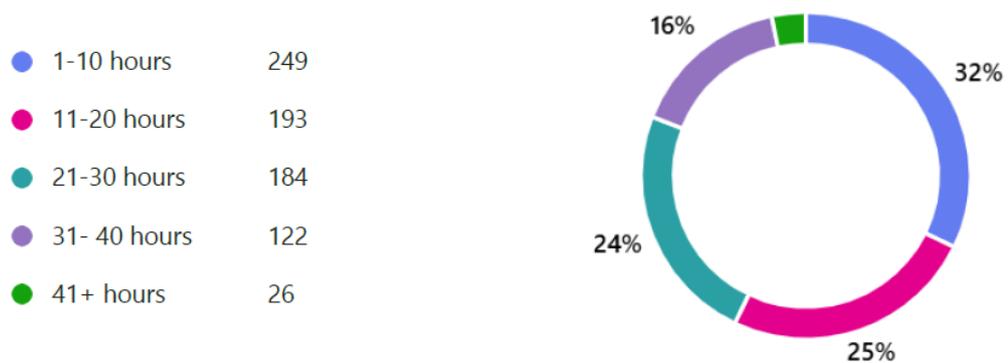


Figure 21: The number of hours for which childcare is needed



- 66% of respondents were willing to use more than one provider
- 59% of respondents needed childcare through the school holidays
- 17% of respondents with school aged children used a breakfast club and 25% used after school provision
- 47% of respondents looking for early years provision found it difficult to afford the childcare they wanted. 31% of families using before and 27% using

¹² Parental Sufficiency Survey 2025

after school care found affordability an issue. When accessing school holiday provision, 63% of parent or carers found affordability difficult

- 54% of respondents used the government's Tax-Free Childcare benefit
- 89% of respondents were aware that funding was available to help with childcare costs
- 47% of respondents were happy with the funded sessions offered
- 49.5% of respondents were happy with where they could access funded hours
- 37% stated they were happy with the choice of childcare available
- respondents indicated that 47% of early years settings and 56% of school-aged childcare were in the right location
- 52% of respondents were happy with the quality of childcare provision on offer
- 34% of respondents found it difficult to access information on childcare provision in their area
- In the last 12 months, respondents to the survey stated they had been unable to access childcare when needed
 - 29% early years
 - 22% breakfast club
 - 33% afterschool club
 - 49% holiday club

The information provided by respondents will be used to inform where there are gaps in provision within the county. This information will be shared with current providers and new providers moving into East Sussex to help meet the needs of families.

The local authority's Customer Relations Team, which includes the Family Information Service, answers questions by email, social media, and phone between 10am and 3pm on weekdays. This service helps parents, especially those in vulnerable situations, understand and access good-quality childcare and early education for their children.

For the period 1 September 2024 to 31 July 2025, the Customer Relations Team responded to 1,068 enquiries, a 12% decrease from the previous year. The enquiry data shows that childcare and early years funding enquiries increased.

The helpline now receives the more complex enquiries regarding eligibility to additional available funding streams from professionals working with vulnerable families.

The Customer Relations Team uses social media to promote the Early Years Education Entitlement, 30 hours funded childcare and tax-free childcare. Users who liked the page ('fans') have increased from 4,320 in the period 1 September 2023 to 31 July 2024 to 4,436 in the period 1 September 2024 to 31 July 2025.

In the period from 1 September 2024 to 31 July 2025, the number of 'entrances' where visitors entered our website through our 'How to get free childcare' page about funded childcare (formerly 'How to get funded childcare') was 5,325. The bounce rate, where a user enters the site and leaves instantly without spending any time in the site, was 55%. The page has information about funded early education and tax-free childcare.

^[1] East Sussex customer management system - Fresh Desk and Google Analytics

9.Provider consultation

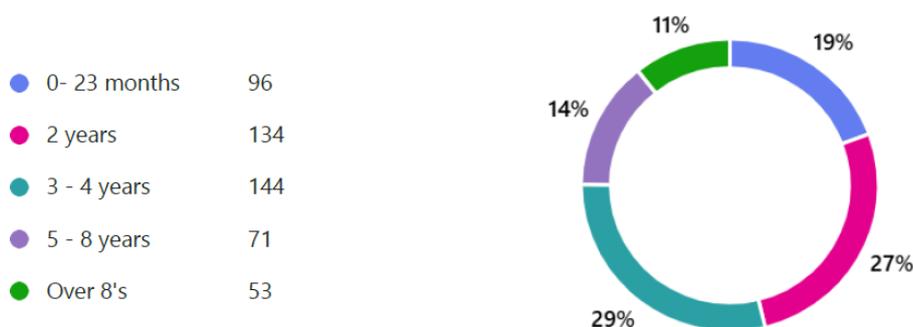
Consultation with early years providers plays a key role in identifying and understanding the demand for childcare across East Sussex. The most recent Childcare Sufficiency Assessment Provider Survey was conducted to gather insights directly from providers regarding current capacity, challenges, and emerging trends in the sector. It ran from 30th September to 31st October 2025. The survey was advertised to early years providers in East Sussex via social media and via direct email communication.

By the close of the consultation period, 168 responses had been received. The responses can be broken down as follows:

Figure 22: Ofsted registrations categories of responding providers¹³



Figure 23: The ages of children providers cared for



- 42% of providers offer full year care
- 44% of providers offer term time only care with 7% offering some additional days in school holidays
- 45% of providers operate for more than 40 hours per week with the remaining percentages working less than this but generally more than 15 hours per week
- 56% of providers offer all funding options to parents
- 81% of providers stated that are not thinking of expanding.
- 23% of providers stated they had staff vacancies
- 64% of providers had children with SEND attending
- 86% of providers had seen an increase of numbers of children with SEND

¹³ Provider Sufficiency Survey 2025

Providers say that space and staffing are the biggest barriers to expansion. The local authority will keep promoting the government’s ‘Do Something Big’ early years careers campaign.

We have run campaigns to attract more childminders. Skills Boot Camps are being offered to prepare people for jobs in childminding, early years, and schools. These are delivered with DWP, local colleges, and local authority teams.

The local authority will continue to support the growth of the government’s school-based nursery programme and work with the PVI sector to help meet the shortfall in places. More detail in section 11.

The local authority continues to develop its support to providers to ensure providers are well supported and that the needs of children and their families are met.

10.Demand for childcare

Data taken from the local authority’s early years forecasting model, updated in April 2025, indicates that across the county there are some areas that have insufficient capacity due to the introduction of funding streams to support working families. Countywide, GP data is showing that the number of children aged under five is likely to fall in the short term. However, pressures on the early years sector may start to increase in the next few years if the birth rates start to rise. The new funding streams for working families have increased demand for places.

Figure 24: Shows the towns in East Sussex where there is expected to be a shortfall of early years childcare places in 2026/27 onwards:

Town	Capacity	Solution to sufficiency gaps
Hastings South-Western	Comprising West St Leonards, Central St Leonards, Maze Hill, Gensing, and Braybrooke Wards. Insufficient	Explore capacity of existing provision and support opening new provision. Working with schools to identify eligibility to

Town	Capacity	Solution to sufficiency gaps
	capacity from 2025/26 onwards.	apply for DfE's School Based Nursery programme
Hastings South-Eastern	Comprising Castle, Old Hastings, Tressell, Baird and St Helens Wards. Insufficient capacity from 2025/26 onwards	Working with schools to identify eligibility to apply for DfE's School Based Nursery programme
Laughton	Insufficient capacity in 2025/26	Explore capacity of existing provision.
Battle	Insufficient capacity by 2028/29	Explore capacity of existing provision. Support opening of new provision if required
Hailsham	Insufficient capacity from 2025/26 onwards	Working with schools to identify eligibility to apply for DfE's School Based Nursery programme
Heathfield	Insufficient capacity from 2025/26	Explore capacity of existing provision. Support opening of new provision if required
Uckfield	Insufficient capacity to meet current demand. Demand increasing 2025/26 onwards	Explore capacity of existing provision. Support opening of new provision if required
Hankham and Stone Cross	Insufficient capacity from 2025/26 demand increasing	Explore capacity of existing provision. Support opening of new provision if required
Newick	Insufficient capacity from 2025/26	Explore capacity of existing provision. Working with school to identify eligibility to apply for DfE's School Based Nursery programme

Town	Capacity	Solution to sufficiency gaps
Wivelsfield	Potential insufficient capacity from 2025/26	Additional Early Years provision in West Sussex. Recruitment drive for registering new Childminders
Forest Row	Potential insufficient capacity from 2025/26	Working with the school to expand provision under the DfE School Based Nursery Programme
Stonegate	Potential insufficient capacity from 2026/27	Recruitment drive for registering new Childminders in the area
Framfield	Potential insufficient capacity from 2026/27	Recruitment drive for registering new Childminders in the area

Figure 25: Shows rural areas in East Sussex with currently no early years provision:¹⁴

Area	Demand
<ul style="list-style-type: none"> • Firle • Burwash • Hadlow down • Frant • Winchelsea • Fletching • Park Mead Primary School, Upper Dicker Area • St Michaels Primary School, Withyham area 	<p>These areas currently do not have enough demand to enable sustainable early years provision to be in place. Future demand will be monitored.</p>

¹⁴ Local early years area boundaries are based on primary school place planning areas which are largely determined by the school's admissions areas for the local primary school

11.School based nursery capital grant

The DfE's school-based nursery (SBN) capital grant is available for eligible state-funded primary-phase schools and maintained nursery schools. Eligible schools can apply for up to £150,000 of capital funding. This is to create or expand a school-based nursery. The following schools applied successfully in Phase 1 of the programme:

- Pevensey and Westham CE Primary School - provision opened in September 2025
- Chyngton School - provision due to open Spring 2026
- Little Common School - provision opened in September 2025
- Pashley Down Infant School - provision due to open September 2026

Phase 2 applications opened in September 2025. The DfE will publish the successful bids in early 2026.

12.Quality of provision and workforce development in East Sussex

Registered early years providers and childminders in East Sussex receive support from a team of Early Years Officers. This includes a management and safeguarding audit and observations of practice. The aim is to help providers deliver the Statutory Framework for the EYFS with confidence. As a result, all new providers have achieved a good or outstanding grade at their first Ofsted inspection.

All providers are invited to take part in this support on a rolling basis. This depends on their last Ofsted inspection. Each provider is contacted at least once a year, either by phone or through a one-off visit to discuss current provision.

The local authority has a legal duty to provide childcare training. Its training programme helps improve outcomes for children by building a skilled workforce. Training is available to practitioners in any registered setting. Fully funded bespoke training can be offered to whole teams. This may be part of a support package or a traded service. Feedback shows training is needed and improves

outcomes. Providers with a 'needs attention' or 'urgent improvement' Ofsted grade, or a 'not met' for safeguarding, get priority access.

Recruiting qualified and experienced practitioners' remains a challenge across the county, reflecting a national issue. The local authority offers a recruitment website where providers can advertise vacancies for a fee. They can also use the government's free "Do Something Big" campaign site.

The local authority set up Early Years Hubs for Excellence over ten years ago. These hubs help EYFS practitioners work together for sustained improvement. They are led by reception teachers and pre-school leads. Networking and training opportunities are tailored to local needs. There are 14 hubs linked to school Education Improvement Partnerships.

The local authority continues to focus on improving provision for children aged 0 to 4. After reviewing baby rooms in 2024, a review of provision for two-year-olds will take place in 2025-26. This includes training for new two-year leads and audits of provision. The work will identify gaps and guide further training to meet the Government's target for increased GLD by 2028. Other training will cover maths for two-year-olds, schematic play, physical development, and mark making. There will also be a focus on helping 3- to 4-year-olds become confident mathematicians.

The Integrated Progress Review has been updated to make it easier for those using online journals to share outcomes of the two-year review. Joint work with health visitors continues to support early identification of emerging needs.

The Early Years Team and Family Hubs promote "50 Things to Do Before You're 5." This supports the Best Start in Life objectives for school readiness and home learning. Activities are low or no cost so all families can join in. They are promoted by childcare settings, primary schools, and Family Hub groups. In 2025/26, joint work will extend the use of "50 Things" to promote home learning activities that help meet GLD goals. The next phase for ages 5-11 is gaining momentum, with resources provided to all primary schools.

In July 2025, the “Moving the Box” programme launched with 26 schools taking part. This year-long programme helps schools identify and support children at risk of not achieving a good level of development by the end of reception. The programme delivers training and develops practical strategies to help children learn with the aim to help EYFS educators close the gap in attainment between different groups of children.

13.Special Educational Needs and Disability (SEND)

The local authority must:

- Promote equal opportunities for children with Special Educational Needs and Disabilities (SEND).
- Ensure early education providers meet these needs.

The local authority supports providers to be inclusive environments for children. We ensure that providers meet their statutory requirements. The local authority is supporting an increasing number of children with SEND.

All providers must ensure they are compliant with:

- [Early Years Foundation Stage](#) (EYFS)
- [the Equality Act 2010](#)
- [SEND Code of Practice \(2015\)](#)

The local authority supports them to do this with training and guidance.

The local authority expects most children with SEND to be supported within high-quality settings. When they have difficulties doing this, they can refer cases to these services for help:

- SEND Early Years Service
- The Children’s Integrated Therapy Service (CITES)
- The Child Development Clinic

Information on childcare and SEND resources is available here: [East Sussex Local Offer](#).

The local authority provides:

- Training and resources to guide providers on universal and targeted strategies.
- An Inclusion Advice Line.
- Home support for children who are not yet in an education setting.
- Help with transitions into education.

Most children with SEND are supported within mainstream settings. Some can be supported by one of three specialist nurseries.

The local authority will also organise:

- Training and equipment for children with medical needs if needed.
- Training for early years providers on SEND.
- Access to financial, housing and transport when needed.
- Funding for early years providers to help SEND children.

In 2024-2025, 328 children with SEND were funded. This was approximately a 34.4% increase compared to 2023-2024 when 244 children were funded.

14.Children We Care For

Children We Care For are less likely than their peers to access early education.

In East Sussex 65% of children in the care of the local authority and eligible to access a funded place with childcare providers did so during the 2025 summer funding period.

The local authority tracks Children We Care For to identify access to early years provision. It is acknowledged that childcare provision may not be suitable for all looked after young children.

Several foster carers are also entitled to claim the extended 30-hour entitlement if they have paid employment outside their fostering commitments. In East Sussex,

less than five children were funded under this criterion within the summer 2025 funding period.

The local authority also tracks ‘hidden children’ (pre-school aged children who could be at a setting but are not attending). Over the last year, the local authority has looked at ways to remove the barriers to children accessing an Early Years provision. These have included:

- increasing awareness and accessibility of funding
- providing additional support for families with special needs children
- providing alternative flexible and tailored support for families
- advocating for policy changes

15. Childcare for children over five

Out-of-school childcare includes breakfast clubs, after-school clubs, and holiday play schemes. These services may operate either on school premises or at external locations and can be delivered by schools or providers in the private, voluntary, and independent (PVI) sector.

Many schools also offer extra-curricular activities such as sports, gardening, or film clubs. While these are not formally classified as childcare, they still offer a safe and structured environment for children during times when parents or carers may be working or studying. These clubs often run for short durations—typically around an hour—and may not be available consistently throughout the school year, with offerings varying by term.

Wraparound provision refers specifically to childcare provided before and after the school day.

Dependent upon specific criteria, not all wraparound provision is Ofsted registered and there is no legal need to inform the local authority of operation. Ofsted provide clear exemption guidance. A setting may choose to join the voluntary part of the childcare register to allow parents to claim childcare vouchers. If the care is

only before or after school, or during holidays, for children who usually go to reception class or older, there must be enough staff for 30 children.

The table below summarises the main source of wraparound provision at primary schools as of October 2025. Some schools may also be served by PVIs off-site, including childminders, who take pupils from multiple schools.

Figure 26: main source of wraparound provision October 2025

Provision type	Number of schools with BSC provision	% of schools	Number of schools with ASC provision	% of schools
School-run	106	68%	77	50%
PVI on site	23	15%	27	17%
PVI off site	13	8%	29	19%
Childminders	0	0%	4	2%
None	14	9%	19	12%
Total	156	100%	156	100%

Figure 27: Number of holiday clubs and play schemes across East Sussex¹⁵

	Number of holiday clubs or play schemes
Total in PVI Sector	47
Total in Maintained Sector	4

Currently, only one school is registered with the Family Information Service to run a holiday club or play scheme in the maintained sector in East Sussex.

In the Spring budget of 2023, the government announced £289m for a national wraparound programme to achieve the ambition of supporting all families of

¹⁵ Extract from Synergy FIS Provider Portal - October 2025

primary aged children who need it to access wraparound childcare from 8am to 6pm. The local authority was allocated a revenue grant of £1.67m and a capital grant of £164k to create new or expand existing provision for primary aged children between September 2024 to March 2026.

A survey was sent to all East Sussex primary schools and known existing wraparound providers in March 2024 to obtain current supply information. From the responses received, and follow-up calls to schools, there were:

- 3,473 Breakfast Club places available
- 3,360 After School Club places available
- 1,278 ‘full’ wraparound places available. A ‘full’ place meets the definition of 8am to 6pm

The local authority mapped the supply and demand for provision and is in the process of distributing the grant to schools and private, voluntary and independent providers. As of November 2025, East Sussex County Council has expanded the number of wraparound places by 1471, this equates to 82% of the target places reached of 1789 (Delivery Plan, September 2024).

The demand for childcare lowers for young people of secondary school age (11 years and over) as many parents and carers feel their children are independent enough not to need childcare outside of school hours. This age group of children are more likely to access activities run by leisure centres or other organisations or providers.

The DfE has announced additional capacity funding for all local authorities for 2026/27 to support with the sustainability of wraparound provision, to link with the Holiday Activities and Food Programme (HAF) and support the roll out of free breakfast club places.

Figure 28a: Current costs of breakfast club care in East Sussex¹⁶

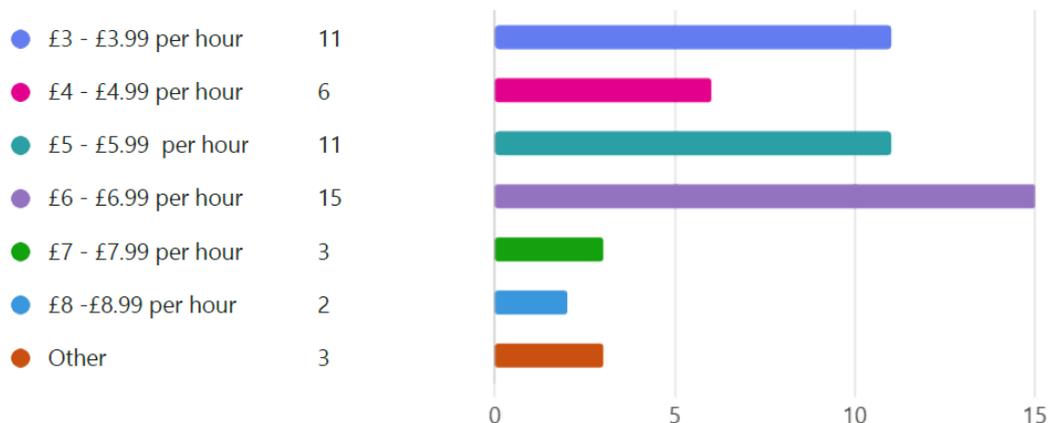


Figure 28b: Current costs of afterschool club care in East Sussex¹⁷

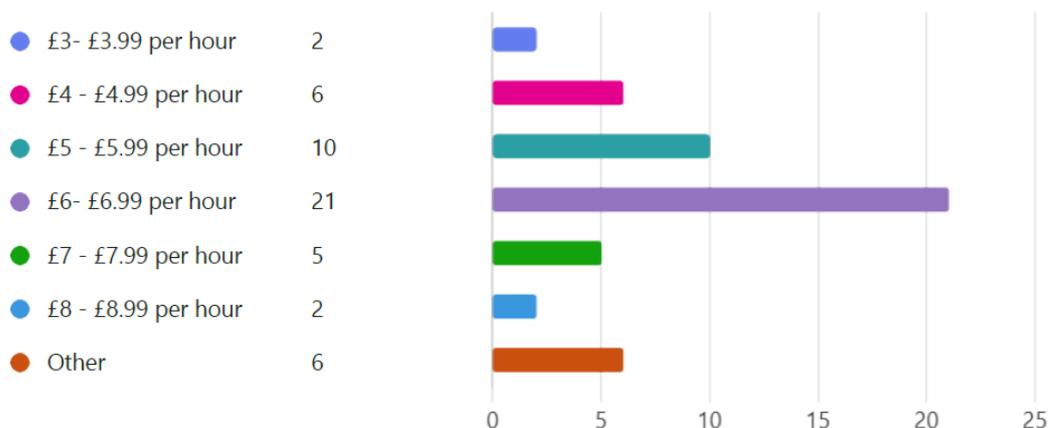


Figure 29: Average costs of holiday care per week¹⁸

Nation or region	Holiday clubs	Childminders
England	£178.47	£232.61
South East	£196.23	£263.28

¹⁶ ESCC Provider sufficiency Survey 2025

¹⁷ ESCC Provider sufficiency Survey 2025

¹⁸ [Coram holiday childcare survey 2025](#)

Free Breakfast Clubs - April 2026 rollout

The DfE announced £80 million of funding to roll out free breakfast clubs in state primary schools from April 2026. The plan builds a programme of early adopters launched in April 2025 when 750 primary schools participated in the scheme. Two primary schools in East Sussex were selected as early adopters: Seaford Primary School and Torfield School.

Results show better attendance, punctuality, and readiness.

Aim of the scheme:

- Every child starts the day strong.
- Help working parents.
- Cut child poverty.

Funding criteria:

- Free and open to all pupils.
- At least 30 minutes before school.
- Food meets School Standards.
- On or near school site.

16.The Holiday Activity and Food (HAF) programme

This DfE-funded initiative has been running in East Sussex since April 2021 and has confirmed funding until March 2029. It funds places at clubs during Easter, summer, and winter school holidays. Children and young people receiving free school meals can take up funded places. Local authorities can use up to 15% of the funding to also provide an offer for other priority groups. These clubs provide enriching activities and a balanced meal.

We partner with a variety of local organisations to deliver the programme. The local authority continues to focus resources on areas with the highest levels of poverty. However, it also ensures there is a geographical spread of provision in all parts of East Sussex.

We know that the HAF programme offers valuable support to our low-income families. In summer 2025, 89 providers delivered activities across 132 locations in East Sussex. Around 4,000 children attended sessions at these clubs. The programme aims to be inclusive. Young people with declared SEND attended 45% of the total summer sessions attended.

Feedback from attendees is positive. 95% of responders said they had fun at a HAF club. 96% said they felt safe at the club.

Families can view and book places at the available clubs using the [online booking platform](#). This provides a central resource for families to select a suitable club. It also allows the local authority to collect accurate data on attendance.

You can see a map showing the [Location of HAF providers in East Sussex for 2025](#).

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