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Research and analysis

Commentary: Changes in access to childcare in England

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Applies to England

Contents

Main findings

Average access to childcare in England has declined since 2020.

The change in childcare access has not been evenly spread across the country.

Some parts of the country experience persistently low access to childcare. These areas are disproportionately deprived and have lower than average incomes.

Other parts of the country experience consistently high access to childcare. These tend to be in advantaged areas with higher household incomes.

This analysis only includes Ofsted-registered childcare places at nurseries and other group settings, and childminders. Around 300,000 (19%) of places are school-based, and are not considered in this analysis. [footnote 1]

Accessible childcare is essential for promoting child development and supporting working families.

To achieve these benefits, it is vital to ensure that all families have access to childcare close to where they live, whether by car, public transport or walking.

While affordability is also a crucial factor in influencing parents' choices of whether to use childcare, we have not covered this in this analysis as we are just focusing on accessibility.

In the past decade, the number of childcare providers in England has fallen by a third. This is concerning for parents as well as policymakers because a reduction in childcare accessibility will hinder early childhood development in the areas affected. Parents, and mothers especially, will also find it more difficult to work when they cannot easily access childcare.

We recently published work in collaboration with the Office for National Statistics to investigate how access to childcare differs across local areas.

Using the same methodology, we have looked further back in time to see how childcare accessibility has changed across the past 4 years.

We have also developed interactive visualisations to enable users to explore changes to childcare access by area since March 2020.
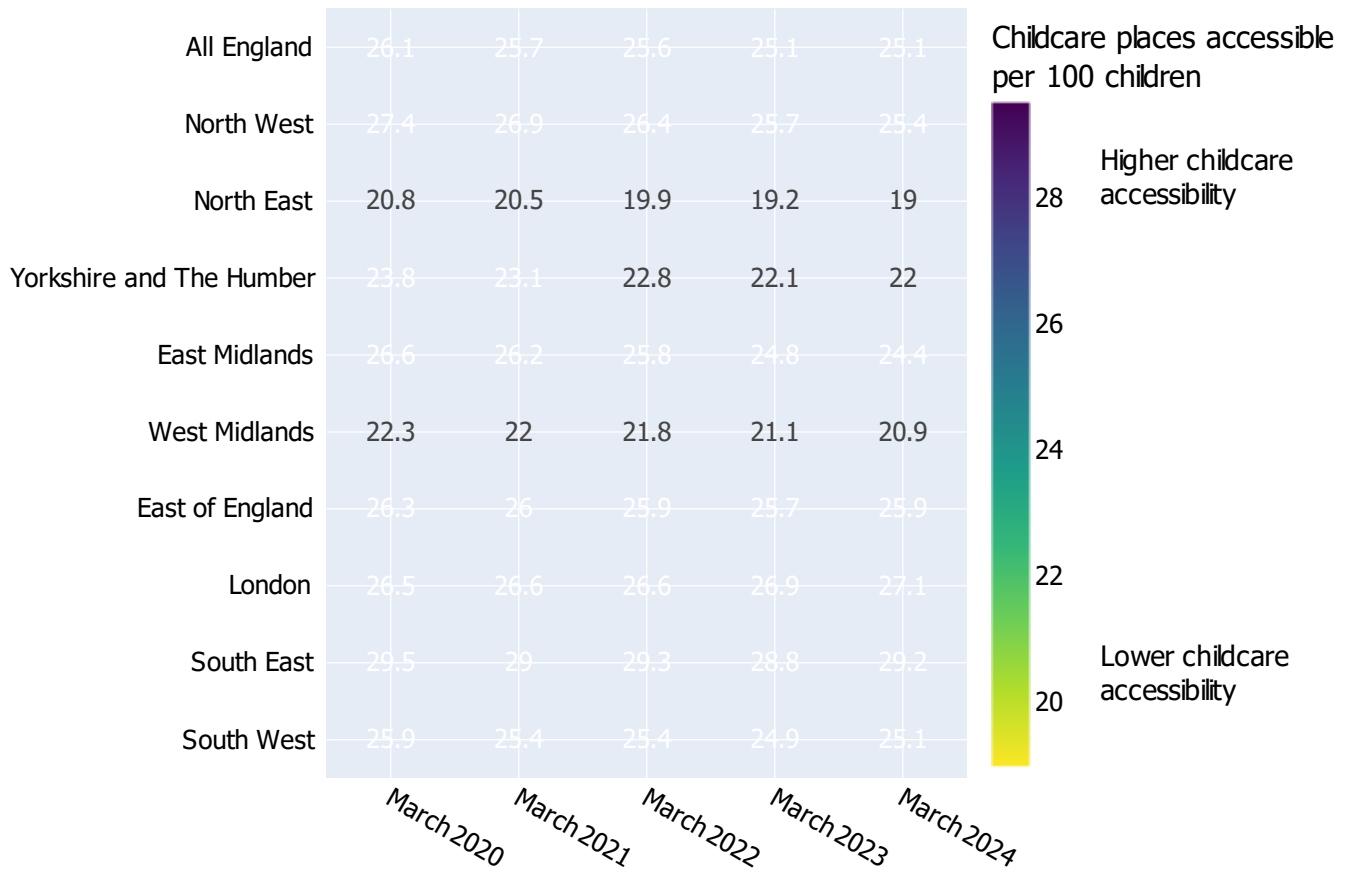
Changes in childcare accessibility

Average access to childcare has decreased in England since March 2020.

The decline in accessibility has not been evenly spread across the country.

In the past 4 years, access to childcare in England has decreased on average, but the change has not been evenly spread across the country. Some regions have been more affected, and some have seen only modest changes to their childcare accessibility.

Figure 1: The change in childcare accessibility by region over time

	March 2020	March 2021	March 2022	March 2023	March 2024
All England	26.1	25.7	25.6	25.1	25.1
North West	27.4	26.9	26.4	25.7	25.4
North East	20.8	20.5	19.9	19.2	19
Yorkshire and The Humber	23.8	23.1	22.8	22.1	22
East Midlands	26.6	26.2	25.8	24.8	24.4
West Midlands	22.3	22	21.8	21.1	20.9
East of England	26.3	26	25.9	25.7	25.9
London	26.5	26.6	26.6	26.9	27.1
South East	29.5	29	29.3	28.8	29.2
South West	25.9	25.4	25.4	24.9	25.1

Childcare places accessible per 100 children

Higher childcare accessibility

28

26

24

22

20

Lower childcare accessibility

View data in an accessible table format.

In March 2024, the South East and London had the highest childcare access, which reflects the high number of childcare providers in these areas. The North East and the West Midlands had the lowest access.

Since 2020, London has seen an increase to its childcare accessibility, while all other regions have seen a decrease to their access. The North East, the East Midlands and Yorkshire and The Humber have seen the largest proportional decrease in their childcare access over this period.

Our analysis

Regional analysis provides a good baseline comparison to look at access to childcare across the country. However, it does not tell us much about the experiences and challenges of people living in their local neighbourhoods. We used granular (very detailed) data, at output area (OA) level, to understand more about what is affecting local areas in England.

To determine how accessibility has changed across the country, we tracked the annual change in childcare accessibility for each OA, or 'local area', in England from March 2020 to March 2024, to form sequences. We then grouped these sequences into clusters based on their similarities. [footnote 2]You can read our [methodology](#).

We identified 5 distinct clusters of childcare accessibility:

- persistently low accessibility
- low and variable accessibility
- moderate and stable accessibility
- high and variable accessibility
- consistently high accessibility

Childcare deserts

With our analysis, we defined the areas that have faced low childcare accessibility over time. We refer to these local areas as 'childcare deserts'. They are the local areas in the 'persistently low accessibility' and 'low and variable accessibility' clusters.

> On average, childcare deserts have lower household incomes and higher levels of deprivation than other areas.

> A higher than average proportion of deserts are in rural areas.

It is useful to us, and the government, to be able to identify childcare deserts in England. This is because continued low access to childcare over time is likely to reduce parents' ability to re-enter the workforce. It will also prevent children from receiving the same benefits from early years education their peers in areas with higher access are likely to have.

Where are the childcare deserts?

There is a disproportionate amount of deserts in rural areas. In England, 12% of local areas are rural while 18% of deserts are in rural areas. Deserts are also more likely than average to be in coastal areas.

Childcare providers might be less willing to open in areas with low population densities. This may be due to longer commutes or poor public transport which limit parents' abilities to access suitable childcare near to where they live.

The North East has the highest proportion of childcare deserts across the country, followed by the West Midlands.

Table 1: Local authorities with the highest proportions of childcare deserts

Local authority	Percentage of local areas in local authority that are deserts
Torbay	96%
Walsall	91%
Sunderland	88%
Slough	86%
Hartlepool	86%

Use our interactive maps to investigate what childcare access is like in your area.

What are the characteristics of childcare deserts?

We used data from Census 2021 to provide context to the childcare deserts. The data shows that a slightly higher than average proportion of females (living in households with a dependent child) in these areas are economically inactive because they are looking after home or family. A lower than average proportion of

them have level 4 qualifications or higher.

We also used data from the [Consumer Data Research Centre (CDRC)](#) to classify each local area and provide further contextual information about the childcare deserts.

Childcare deserts are prevalent in local areas where there are individuals who:

- have dependent children
- have low educational attainment
- live in social-rented terraced or semi-detached housing, often in former industrial towns
- work part-time or are unemployed

Childcare deserts are also prevalent in local areas comprised of older parents or retirees who:

- are primarily UK-born
- live in low-density, owner-occupied houses, often in rural, scenic areas

There may be fewer children in these areas, meaning early years providers are not located there due to lower demand.

Childcare oases

We were also able to define the areas that have benefited from consistently high childcare access over time. We refer to these local areas as 'childcare oases'. They are the local areas in the 'consistently high accessibility' and 'high and variable accessibility' groups.

On average, childcare oases have higher household incomes and lower levels of deprivation than other areas.

A higher than average proportion of oases are in urban areas.

It is useful for policymakers to be able to determine the number of childcare oases within the country. It allows them to analyse the inequalities that exist in accessing childcare. It also helps them determine how successful models can be applied elsewhere.

Where are the childcare oases?

By contrast, childcare oases are more often found in urban centres. There is likely to be greater demand for childcare in urban areas, which makes it more appealing for providers to open in these areas. There is often better infrastructure, including public transport, which makes services more accessible generally. There is also likely to be a greater pool of staff available to work in these settings.

Oases are most prevalent in the South East, followed by London.

Table 2: Local authorities with the highest proportions of childcare oases

Local authority	Percentage of local areas in local authority that are oases
Wokingham	75%
Wandsworth	73%
Bromley	72%
Richmond upon Thames	70%
Brighton and Hove	70%

Use our interactive maps to investigate what childcare access is like in your area.

What are the characteristics of childcare oases?

On average, childcare oases have higher household incomes than other areas. Census data shows that a higher proportion of females living in oases have level 4 qualifications or higher than those living in other areas.

The CDRC data suggests that childcare oases are more likely to consist of neighbourhoods that:

- are located in suburbs
- have a high presence of ethnic minority families
- have low rates of disability and unpaid care
- have low rates of overcrowding and high rates of home ownership

Residents in these areas are often employed in professional and managerial roles; degree-level education is common.

Spread of childcare accessibility

Moderate and stable childcare accessibility is most common for local areas in England.

There are more local areas with low or very low childcare accessibility than there are with high or very high accessibility.

If there was an even spread of childcare accessibility, we would expect each cluster to consist of 20% of local areas in England.

Table 3: Spread of childcare accessibility across clusters

Childcare accessibility clusters	Percentage of local areas in each childcare accessibility cluster

Persistently low accessibility	4%
Low and variable accessibility	31%
Moderate and stable accessibility	41%
High and variable accessibility	18%
Consistently high accessibility	6%

How has childcare accessibility changed?

Most local areas have maintained their levels of childcare access since 2020.

Decreases in childcare accessibility were most common in local areas with high or very high accessibility.
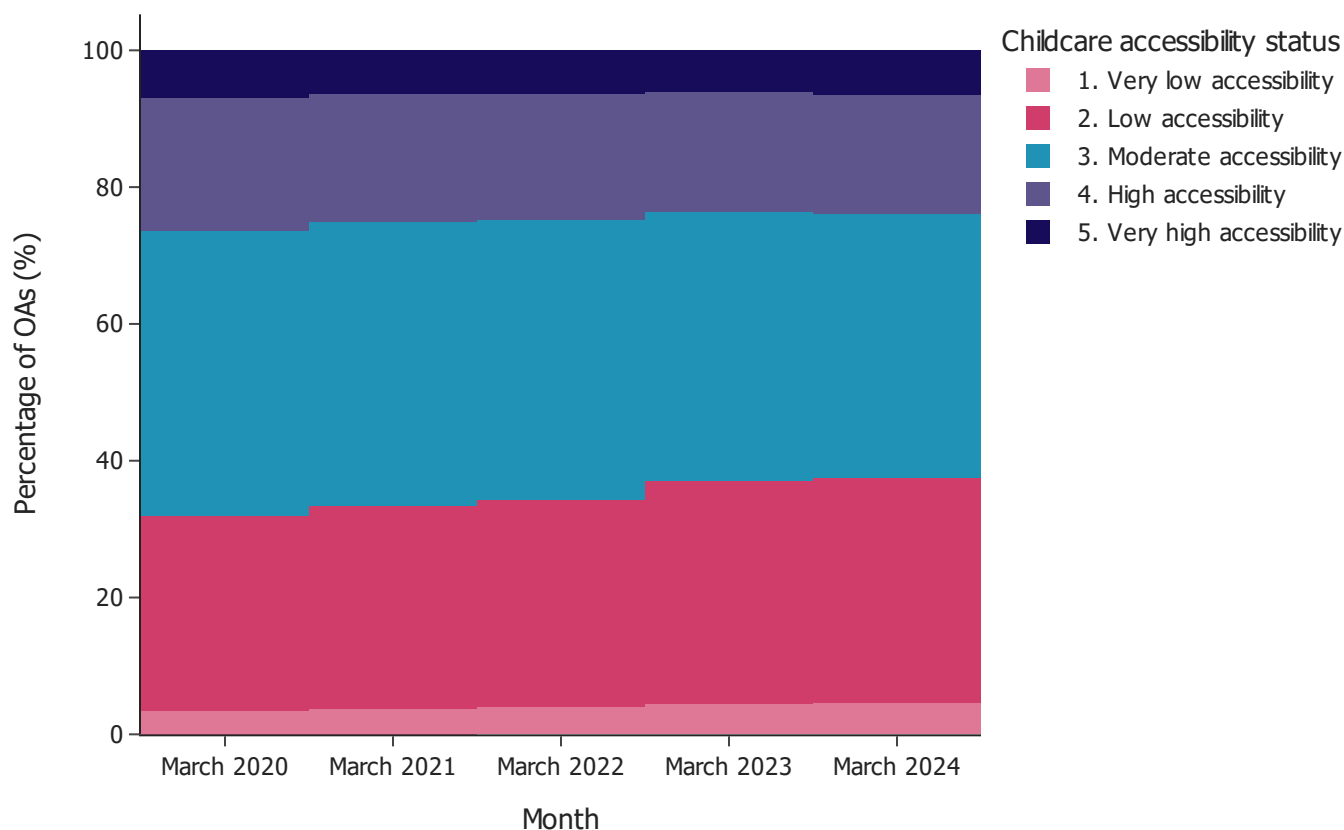
We were interested in looking at the change over time to determine whether local areas tend to move between groups or not. To do so, we compared each OA's group in March 2020 to the group in March 2024 and determined if they had improved, stayed the same or declined.

Table 4: Comparison of childcare accessibility from 31 March 2020 to 31 March 2024

OA group (31 March 2020)	Improved	Stayed the same	Declined
Very low accessibility	15%	85%	—
Low accessibility	9%	85%	6%
Moderate accessibility	7%	73%	20%
High accessibility	8%	63%	29%
Very high accessibility	—	68%	32%

Local areas mostly maintain the same level of childcare access over this period. Of those areas that have experienced a change to their childcare access, the groups with moderate or high accessibility more commonly experienced a decline in their childcare access.

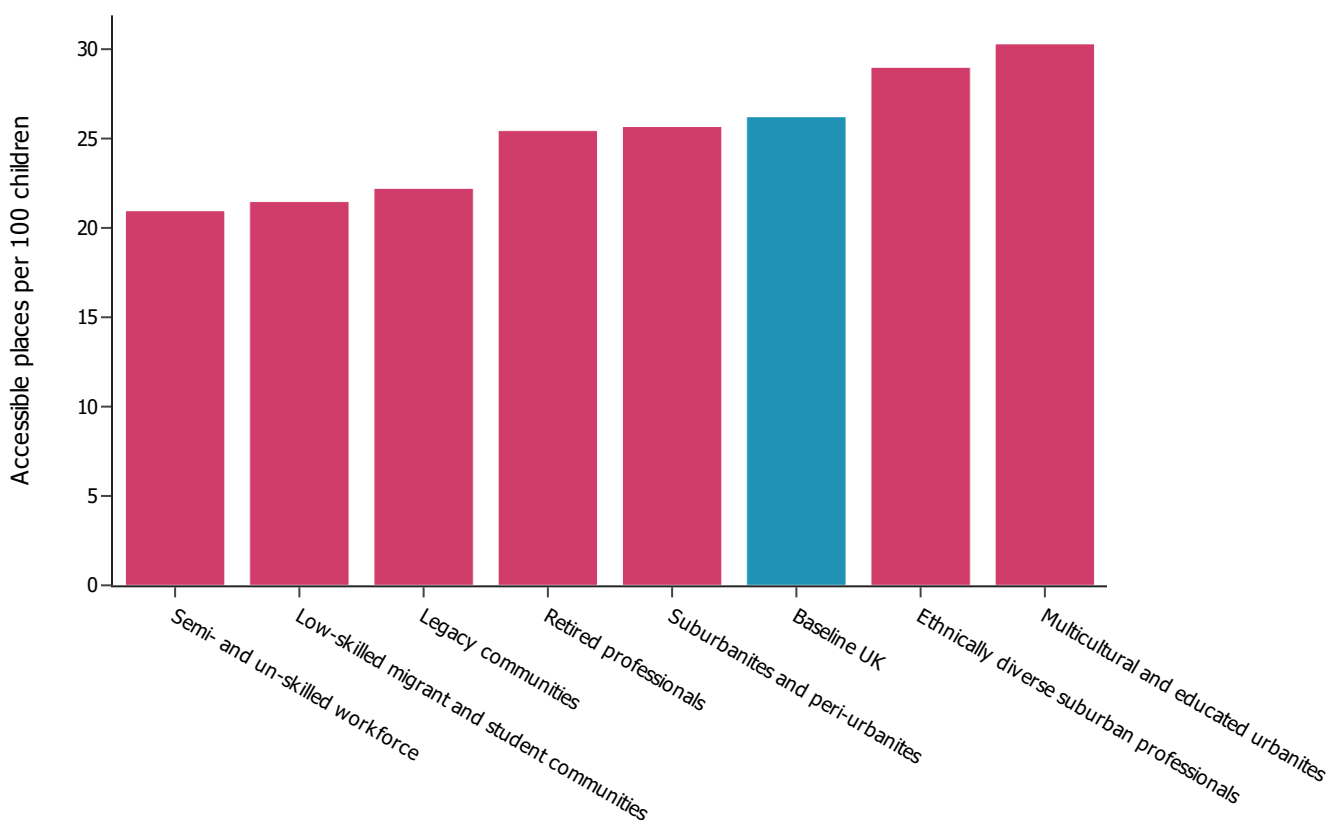**Figure 2: The proportion of output areas in each group over time**

View data in an accessible table format.

Childcare access by output area classification

Data from CDRC can also be used to classify each OA in England into 8 groups. Using these classifications allows us to gain deeper insights into the geographic areas. It also enables us to understand communities at a more granular level.
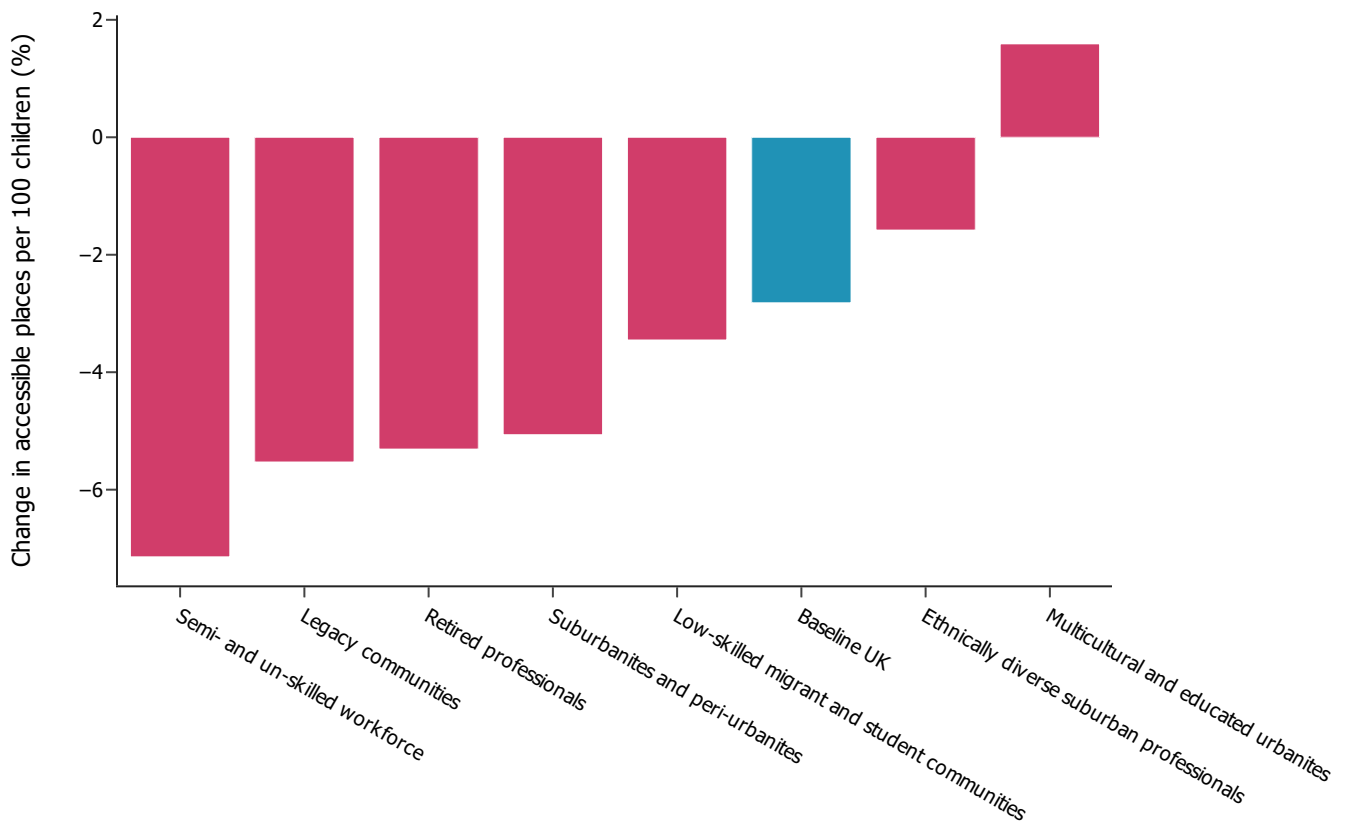
Figure 3: Childcare accessibility by output area classification group

View data in an accessible table format.

In March 2024, multicultural and educated urbanites have the highest average childcare access. Semi- and un-skilled workforce have the lowest average access to childcare.

Figure 4: Change in childcare accessibility since March 2020 by OA classification group

View .

If we look at the change in childcare accessibility over time by these groups, all groups except multicultural and educated urbanites have seen an average decrease. The semi- and un-skilled workforce group has seen the biggest average decrease, followed by legacy communities.

Output area classifications

Baseline UK

Summary of classification:

- this group represents a broad cross-section of the UK's population, covering average levels of various neighbourhood characteristics
- it includes a mix of housing types (like terraced houses and flats), different levels of education, and various religious affiliations
- the population in this group tends to be of working age; employment is often in

intermediate or low-skilled jobs

- however there are also higher-than-average levels of unemployment and lower levels of English being used as the main language
- many of these neighbourhoods are found in South London and other large urban areas across the UK

Ethnically diverse suburban professionals

Summary of classification:

- people in managerial, professional and administrative jobs typically come from a variety of ethnic backgrounds and live in detached or semi-detached houses
- they tend to live on the outskirts of cities and rely on cars for transportation
- these characteristics are more important in defining this group than where they were born or whether they have children
- most own their homes, and marriage rates are lower than the national average
- this group is mainly found in suburban areas across the UK

Legacy communities

Summary of classification:

- these neighbourhoods typically consist of small clusters of flats found across the UK, especially in towns with a history of heavy industry or in more isolated seaside areas
- most people living here work in low-skilled jobs and often have limited educational qualifications
- unemployment is higher than average, and some residents live in overcrowded, government-subsidised housing or have long-term disabilities
- while people of all adult ages live in these areas, there is a noticeable number of elderly residents, especially very old individuals
- few residents belong to ethnic minority or mixed-ethnicity groups

Low-skilled migrant and student communities

Summary of classification:

- these neighbourhoods are mostly made up of young adults, many of whom are students, living in densely populated and overcrowded rented terrace houses or flats
- they have a diverse mix of ethnic minorities, as well as people born in non-EU

European countries

- aside from students, most people work in low-skilled jobs, and unemployment is higher than average
- because of the mix of students and more settled households, there are few children in these areas
- these communities are typically found in non-central urban areas across the UK, especially in the Midlands and the outskirts of west, south, and north-east London

Multicultural and educated urbanites

Summary of classification:

- this group is mostly made up of long-established ethnic minority populations and people born outside the UK
- the residents have a variety of backgrounds and circumstances: many are well-educated and work in skilled jobs, but some live in overcrowded rental housing
- English is not always the main language spoken
- most adults are middle-aged, and there are many single-person households; marriage rates are lower than the national average
- this group is mainly found in inner London, with smaller communities in other densely populated cities

Retired professionals

Summary of classification:

- this group typically consists of married individuals who no longer have dependent children living with them
- they are well-educated and either still working in managerial, professional, administrative or skilled jobs, or retired from these roles
- most people in this group are older than the usual retirement age
- they tend to live in under occupied detached or semi-detached houses, and unpaid caregiving is more common than reported disabilities
- this group is mainly found in rural areas

Semi- and un-skilled workforce

Summary of classification:

- residents of these neighbourhoods usually live in terraced or semi-detached houses, have lower levels of education, and work in basic or routine service jobs

- unemployment is higher than average
- most residents were born in the UK, and many come from ethnic minority backgrounds
- social housing, but not private rentals, is common
- this group is found across the UK's cities and industrial areas, but also plays a key role in smaller towns

Suburbanites and peri-urbanites

Summary of classification:

- this group is widespread across the UK and typically consists of people who own or are buying their detached, semi-detached or terraced homes
- most are educated to at least A Level or degree level and work in skilled or professional jobs
- they are usually born in the UK
- although some families have children, the average adult age is over 45, with some homes becoming under-occupied as children move out
- this group is found not only in suburban areas but also in neighbourhoods on the outskirts of cities, often close to rural areas

Conclusion

This analysis suggests that childcare accessibility has declined in England in the past 4 years, but that regions are affected at differing rates. Having access to local childcare is something that parents seriously consider when they are deciding whether to return to work. It also has an impact on the early development of children. Therefore, any solution to this decline will need to ensure childcare providers enter and remain within the sector to support all families across the country.

Data tables for figures

Data for figure 1: The change in childcare accessibility by region over time

Region	March 2020	March 2021	March 2022	March 2023	March 2024
All England	26.1	25.7	25.6	25.1	25.1
North West	27.4	26.9	26.4	25.7	25.4
North East	20.8	20.5	19.9	19.2	19
Yorkshire and The Humber	23.8	23.1	22.8	22.1	22
East Midlands	26.6	26.2	25.8	24.8	24.4
West Midlands	22.3	22	21.8	21.1	20.9
East of England	26.3	26	25.9	25.7	25.9
London	26.5	26.6	26.6	26.9	27.1
South East	29.5	29	29.3	28.8	29.2
South West	25.9	25.4	25.4	24.9	25.1

See Figure 1.

Data for figure 2: The proportion of output areas in each group over time

Group	March 2020	March 2021	March 2022	March 2023	March 2024
Very low accessibility	3.4	3.7	3.9	4.5	4.7
Low accessibility	28.6	29.8	30.4	32.5	32.8
Moderate accessibility	41.6	41.4	40.8	39.4	38.7
High accessibility	19.6	18.7	18.4	17.4	17.3
Very high	6.9	6.4	6.4	6.1	6.6

accessibility

See .

Data for figure 3: Childcare accessibility by output area classification group

Output area classification	Average score (March 2024)
Baseline UK	26.2
Ethnically diverse suburban professionals	29.0
Legacy communities	22.2
Low-skilled migrant and student communities	21.5
Multicultural and educated urbanites	30.3
Retired professionals	25.4
Semi- and un-skilled workforce	21.0
Suburbanites and peri-urbanites	25.7

See .

Data for figure 4: Change in childcare accessibility since March 2020 by OA classification group

Output area classification	Percentage change (March 2020 to March 2024)
Baseline UK	-2.8%
Ethnically diverse suburban professionals	-1.6%
Legacy communities	-5.5%
Low-skilled migrant and student communities	-3.5%

Multicultural and educated urbanites	1.6%
Retired professionals	-5.3%
Semi- and un-skilled workforce	-7.1%
Suburbanites and peri-urbanites	-5.1%

See Figure 4.

1. 'Schools, pupils and their characteristics', Department for Education, 2024. ↩
2. Rowe, F., Cabrera-Arnau, C., Pietrostefani, E. 2024. Population Data Science. Online book. ↩

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