ISLINGTON
For a more equal future

Childcare Sufficiency Assessment 2025

Contents

1. Assessment and summary

This report outlines how Islington is meeting its statutory duty to secure, so far as is reasonably practicable, sufficient childcare and early education places to meet the needs of local working and studying parents. Ensuring that there is high-quality, accessible and affordable childcare is also at the heart of the Islington Together strategic plan, with its child-friendly mission.

National Best Start initiatives, including the delivery of early education and childcare, are already well established in Islington. The aim of giving children the Best Start in Life, creating a more equal future for our residents, has for many years been embedded in Islington's Bright Start strategy for families, from conception to a child's fifth birthday.

This annual report compares childcare capacity and vacancy rates in summer 2025 with the same period in 2024 to establish any shifts in childcare sufficiency. It also considers Islington's childcare sufficiency in the context of the government's expanding funded childcare offer of 30 hours a week for eligible working families, which is now fully operational.

This report also considers the sufficiency of childcare for school-aged children, before and after school and during holidays. Islington parents are well served with options for out of school hours in schools, the voluntary sector and with childminders. There is recognition nationally, however, that funding for out of school provision for children with special educational needs and disabilities (SEND) needs a clearer focus. Islington has worked with providers to maximise the funding support for children with SEND through the DfE wraparound programme and holiday activities and food (HAF) project.

Capacity and vacancy data was gathered during the summer term through provider surveys, termly headcount and direct conversations with providers and partners. Information about demand has also been gathered from contact with parents via the Family Information Service.

In summary, there is sufficient early years childcare to meet current demand in Islington and there is likely to be sufficient capacity to meet the demand arising from the expanded funded childcare offer. The supply of early years childcare places in Islington currently outstrips demand in all planning areas. The vacancy rate across all providers in private and voluntary nurseries, schools and Islington maintained settings, has decreased slightly from 22% in summer 2024 to 20% in summer 2025.

The declining child population in Islington continues to have an impact on childcare demand and take up of early years places. It is too early to assess fully the demand for the new working parent entitlement places, but it is hoped that the expansion of free hours will encourage more families to move into employment or increase their hours of work, resulting in increased need for childcare.

The council continues to provide subsidised nursery places aimed at keeping prices as low as possible across a range of household incomes. A review of Islington's childcare offer at subsidised nurseries is ongoing to ensure maximum take up within a financially sustainable model in the light of the national childcare expansion.

Summary findings

- There is sufficient childcare in Islington to meet current parental demand across all planning areas.
- The vacancy rate across all nurseries has decreased slightly from 22% in summer 2024, to 20% in summer 2025, with a high vacancy rate in private nurseries at 28%.
- Take up of free early education entitlements for 2 year olds receiving some form of government support, is at 77%, our highest ever annual figure, compared with 62.9% for Inner London, 60.6% for Statistical Neighbours and 65.2% for England. Islington is now in the top quartile of local authorities, moving from 87th place in 2024 to 18th in 2025.
- Islington's population of under 5s is expected to fall further, by about 13% in five years.
- Staffing recruitment and retention issues continue to present challenges for early years providers both locally and nationally.
- Financial sustainability at some nurseries is a concern.
- The lack of national funding for out of school childcare for children with SEND, continues to create challenges for families.
- Holiday childcare options for under 5s and holiday places with childminders have reduced since the last report.

Priorities and actions

- Undertake regular data analysis through autumn 2025 and spring 2026 headcounts to assess parental demand for funded entitlements.
- Continue the review of the methodology for allocation of Islington's childcare subsidy in the light of expanded funded entitlements to ensure a fair and transparent model.
- Review our strategic approach to increasing take up of funded places by vulnerable children, while ensuring sufficient funded childcare places for eligible working families.
- Provide data for Islington's Sustainability of Schools and Settings Strategy Advisory Group, to enable childcare sufficiency to be considered when making proposals.
- Support childcare businesses with information and advice regarding sustainability and compliance with DfE requirements.
- Continue to explore initiatives to support with the recruitment and retention of the early years' workforce, including childminders.
- Contribute to government requests for insights about holiday childcare sufficiency and affordability issues.
- Continue to maximise opportunities for directing government funding to supporting out of school places for children with SEND.

- Work collaboratively to create a more joined up approach to supporting parents during the holidays through the holiday activity and food programme (HAF) and working parent entitlements.

2. Supply and demand for childcare

Number and types of early years providers and places

In summer 2025 there were 213 early years childcare settings. In 2025:

- Four nurseries closed (2 school, 1 private, 1 voluntary)
- One private nursery opened (Tufnell Park ward)
- One academy school nursery opened in September 2025 (Hillrise ward) – capacity figures not included in table
- One voluntary nursery due to open, 25/26 (Highbury ward)
- By the end of the calendar year 2025, there will be just one fewer nursery in operation since last year, with several new nurseries expected in 2026.
- There were 7 fewer childminders in operation in summer 2025

Capacity by sector, summer 2025, compared with 2024

Type of provision	Number of providers	Number of places in 2025	Number of places in 2024
Childminders	106	Not calculated	Not calculated
School-based children's centre	5	413	407
Voluntary sector children's centre	3	144	146
LBI-maintained children's centre	8	520	541
LBI nursery school	3	259	261
School nurseries	29	1,145	1,118
Private nurseries	42	2,468	2,497
Voluntary sector nurseries	17	542	569
All early years providers	**213**	**5,491**	**5,539**

Capacity by age, summer 2025, compared with 2024

Age group	Capacity in summer 2025	Capacity in summer 2024	Difference between years	Percentage change
0 to 2-year-olds	1,066	1,096	-30	-3%
2 to 3-year-olds	1,569	1,504	65	4%
3 and 4-year-olds	2,856	2,939	-83	-3%
All ages	5,491	5,539	-48	-0.9%

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 seven fewer early years registered childminders working in Islington compared to summer 2024. This reflects a continuing national downward trend.

Early years vacancies

Vacancy rates in Islington continue to indicate an oversupply of childcare places. Vacancies across all ages in summer 2025 were at 20% compared with 22% in summer 2024. The overall vacancy rate is driven largely by the significant vacancies (28%) seen in private nurseries. School nursery vacancies are also high at 20%, although this is an improvement on last year when they were at 25%. There has been a reduction in the number of vacancies in LBI maintained nurseries, from 15% last year to 11% this year.

Vacancy rates remain highest in the south of the borough. Data this year has been configured using the new planning areas (PA) [see Appendix 3]. The South PA (Bunhill, Clerkenwell, St Peter's and Canalside wards) has 25% vacancies, which are broadly spread across all the age ranges. The vacancy rate is largely driven by a high number of vacancies at a few private nurseries in Bunhill Ward. School-based children's centres and school nurseries in the South PA have lower vacancy rates in line with other planning areas.

Places available at settings by age range and provision types, compared with summer 2024

Setting	Places available for age 0-2 in 2025	Places available for age 0-2 in 2024	Places available for age 2-3 in 2025	Places available for age 2-3 in 2024	Places available for ages 3 and 4 in 2025	Places available for ages 3 and 4 in 2024
School-based children's centre	57	57	118	116	238	234
Voluntary sector children's centre	30	30	54	52	60	64
LBI-maintained children's centre	90	87	178	182	252	272
LBI nursery school	39	39	78	78	142	144
Private nursery	767	794	777	741	924	962
School nursery classes	0	0	160	133	985	985
Voluntary nursery	83	89	204	202	255	278
Total	1,066	1,096	1,569	1,504	2,856	2,939

Vacancy rates as a percentage of capacity, within age ranges and provision types, compared with summer 2024

Setting	Vacancy number for all ages in 2025	Vacancy number for all ages in 2024	Rate for age 0-2 in 2025	Rate for age 0-2 in 2024	Rate for age 2-3 in 2025	Rate for age 2-3 in 2024	Rate for ages 3 and 4 in 2025	Rate for ages 3 and 4 in 2024	Total rate in 2025	Total rate in 2024
School-based children's centre	33	53	17%	7%	11%	19%	4%	12%	8%	13%
Voluntary sector children's centre	19	15	10%	20%	12%	10%	17%	6%	13%	10%
LBI-maintained children's centre	56	83	16%	13%	19%	16%	3%	15%	11%	15%
LBI nursery school	6	13	7%	10%	3%	1%	1%	6%	2%	5%
Private nursery	691	715	23%	26%	32%	29%	28%	30%	28%	29%
School nursery classes	232	281	N/A	N/A	27%	21%	19%	26%	20%	25%
Voluntary nursery	68	44	4%	10%	13%	8%	15%	6%	12%	8%
Total	1,105	1,204	20%	22%	24%	21%	18%	22%	20%	22%

Vacancy rates by planning area (see Appendix 3 for planning areas map)

PA	Places 0-2	Places 2-3	Places 3 and 4	Vacancies all ages	% Vacs 0-2	% Vacs 2-3	% Vacs 3 and 4	Total % Vacs
North East	283	354	642	255	18%	22%	20%	20%
North West	340	564	968	348	17%	23%	16%	19%
Central	287	453	825	310	22%	26%	16%	20%
South	156	198	421	192	25%	24%	25%	25%
All PAs	**1066**	**1569**	**2856**	**1105**	20%	24%	18%	20%

Sustainability of early year providers

One private nursery, one voluntary, and two school nurseries have closed since the last report, with two of these indicating that sustainability was a reason for closure. One of the primary school nurseries closed as part of the wider Islington school reorganisation plan which is driven in part by the falling population of children (see Appendix 1). At the start of autumn term 2025, one voluntary sector nursery took the decision to close after half-term due to increasingly low numbers over the past year.

Sustainability is a potential issue for some term-time only small voluntary sector providers who are concerned that the full roll out of funded places for working families could result in their delivery models looking less attractive to families seeking longer days, all year round. These providers are also competing with schools for parents wanting term-time only places. Some larger private nurseries are also waiting to see how eligible working parents will combine their increased free hours with additional chargeable hours. For many private nurseries, their operating models depend on high levels of parental demand for chargeable hours.

Cost of living issues continue to impact provider sustainability. Staff salary costs have risen due to the increases on the minimum wage and national insurance contributions, while financial pressures on families have led to parents reducing their paid-for childcare hours. It is possible that the roll out of the funded childcare programme could encourage more families to start work, or to increase their childcare hours. But it will take at least two terms to fully understand parental demand, especially as providers have reported that many parents delayed enrolling their children in early years settings until the rollout of 30 hours of free childcare in September.

Increasing numbers of children with special educational needs are also impacting budgets and funding models, particularly for smaller, voluntary sector providers.

When nursery providers were asked how confident they felt about their sustainability, 40% of those who responded (103 out of 106 providers) compared with 53% last year, said they felt a degree of confidence compared with 34% who said they felt a degree of concern – a similar figure to last year. However, over 25% said they felt neither confident nor concerned, possibly indicating that providers are adopting an element of 'we shall see' in their outlook. Nearly 40% of providers said that they are likely to fill their vacancies in the autumn.

43% of providers who responded reported difficulties with recruitment and retention of staff with 17% of these saying the situation has got worse. The issue is more acute in private and voluntary nurseries than LBI maintained and school nurseries.

The following provider comments reflect a mixture of optimism and concern:

LBI maintained nursery: *Probably the 30-hours working parent entitlement from 9-months will boost my occupancy.*

School nursery: *Although we are not full, we are happy to see numbers have increased this year compared to the last academic year.*

Private nursery: *We have a current increased demand for baby places,*

Term-time only, voluntary: *We are aware the trend is generally to have less children in autumn terms and have taken this into consideration for 2025. We are however keeping an eye on this as we usually have more families on the waiting list by this time of year.*

School-based children's centre: *Demand seems less currently, but we are keeping this under review in light of new funded hours arrangement.*

Private: It's hard to tell if all places will be filled for autumn term at this stage, as we have found that the trend is changing with enquiries and we have more people who get in touch closer to the time of starting.

LBI maintained nursery: *parents are only wishing to start when they are eligible for free early education and childcare entitlements.*

Private nursery: *We are struggling with underfunding, lack of qualified staff, schools taking children.*

School nursery: *Nursery operates at a loss for much of the year. Hard to change this without being open in holidays.*

Private nursery: *My biggest concern is staffing (we are having to employ temps which is very costly).*

Maintained Nursery School: *We are very close to a deficit budget due to staffing costs and other expenditure such as energy bills and catering.*

School nursery: *The level and range of children being admitted with SEND is a real challenge.*

School age providers and places

Wraparound childcare – before and after school

Before- and after-school childcare is available at 39 out of 41 Islington primary schools with the number of places increasing at some schools since 2024, funded by the government's wraparound childcare programme. Capital and programme funding has been made available to schools and voluntary sector providers to enable an increase of places where there is demand and to set up provision where none existed previously. The DfE wraparound programme, designed to build capacity and demand to enable future sustainability, is funded until the end of the financial year 25/26. As the programme nears completion, we will be discussing sustainability models with providers, supported by the national Childcare Works team.

All 41 primary schools have a breakfast club or early drop-off options, and all but two have after-school childcare until approximately 6pm. Most wraparound provision is on school sites with a small number being provided off-site at voluntary sector venues.

Parents also choose childminders for their wraparound childcare needs. Islington childminders, offer before- and after-school care for children on roll at approximately 35 primary schools.

Holiday childcare

The availability and cost of childcare during the holidays, are among the biggest challenges for working parents. In its annual holiday childcare survey, Coram Family and Childcare, comments in the executive summary: "Holiday childcare remains the unspoken outlier of childcare policy and the gap that parents must bridge every school holiday."

Quantifying demand and supply of holiday childcare is difficult due to the varied offers of days and hours, and the range of options used by parents. Most Islington providers have reported a steady demand for holiday childcare, although a few providers have commented that numbers have been reducing over the past year due to parents turning to no-cost options through friends and family.

Holiday childcare playschemes run in Islington's community settings and schools each holiday, apart from during the Christmas period. About a quarter of primary schools have onsite holiday provision, run either by private and voluntary sector organisations or directly by the school. A further four schemes are available in community settings run by the voluntary sector. Parents also use activity or arts-related clubs as childcare. If these clubs are included, then there are approximately 41 holiday clubs providing paid for childcare for at least some of the holidays, as well as free access in Islington's 11 adventure playgrounds and one specialist playground for children with SEND.

Childminders are also an option as many of them take on additional children during the holidays, depending on the ages and numbers of children already attending their setting. With the national decline in childminder numbers, the Family Information Service (FIS) are reporting that it is becoming more difficult to meet holiday childcare needs in all areas of the borough. Many childminders are at capacity during the holidays, which is a relatively new situation, becoming more acute over the past two to three years.

Options for pre-school children, who attend term-time only provision, have also reduced in the past year due to falling childminder numbers and the closure of the only voluntary sector holiday provider offering places to pre-school-aged children. Parents of children due to start primary school in autumn 2025, have struggled to find childcare in the summer holiday in the transition between early years provision and school.

The FIS has reported increased expectations from parents around holiday childcare since the introduction of the Holiday Activities and Food (HAF) programme in 2021. HAF currently runs during Christmas, Easter and Summer holidays, but not during half term. Parents are typically using free activities in combination with other chargeable childcare options. With the HAF programme extended for a further three years, until 2029, the government is aiming for a more joined up strategy around holiday activities and food for the lowest income households, and holiday childcare for working families.

After-school and holiday childcare for children with SEND

The lack of available and affordable wraparound childcare for children with SEND – recognised nationally as an issue - was highlighted in last year's report. In Islington, there are some signs of improvement. While DfE funding through the wraparound childcare expansion programme did not account for the much higher costs of supporting children with SEND, Islington has worked within funding guidelines to support schools to increase staff numbers to enable children with high needs to attend after-school provision.

One school reported: "Thanks to our ability to fund additional staffing places, we are able to support children with SEN which has eased the burden on working parents to allow sustained employment and build consistency in their routine, which has benefitted the family as a whole."

Another provider, which benefitted from capital funding, commented: "Children with additional needs have benefited from the sensory room, specifically to support SEND children. We've noticed incredible changes on children's social skills and behaviour."

But wraparound programme funding is short-term and does not include holidays. A longer-term funding solution is required, as highlighted by Coram in the holiday childcare survey actions: "Provide additional funding, training and support to holiday childcare providers to meet the needs of children with SEND".

Free early education and childcare entitlements

The national expansion of funded early education and childcare for working parents entered the final phase in September 2025. Eligible families can get 30 free funded hours a week, across 38

weeks during term-time or stretched across more weeks for a total of 1140 hours a year. The entitlement is for babies from the term after they turn 9 months until they start school.

Take up, 2 year olds receiving additional government support

Alongside the expansion of funded hours for working parents, the funded offer for parents receiving some form of additional government support through benefits, continues to be offered for eligible two year olds. Take up by this cohort is closely monitored to ensure that these parents and children – some of the most disadvantaged families - are not missing out on entitlements.

While there is a risk that providers may favour funded places for working families who pay for additional hours, encouragingly, Islington's uptake by this group hasn't been affected. Islington has made significant improvements in take up, although the actual number of children accessing places in Islington and nationally has been falling gradually, due to the eligibility criteria not being adjusted for inflation. We are now ranked 18th highest among all local authorities in England – in the top performance quartile - which is a move from 87th highest in 2024. Islington had its highest ever annual figure in January 2025 at 77.3%, compared to 62.9% for Inner London, 60.6% for Statistical Neighbours and 65.2% for England. Through a partnership approach, embedded in Islington's Bright Start framework, we will continue to build strong relationships with families of under 5s to help them navigate an increasingly confusing system of free early education and childcare entitlements to ensure families are not missing out.

The take up for funded Islington resident 2 year olds showed representation from ethnicities which are broadly in line with the population: 30% of children from White British ethnicities (compared to an estimated 30% across the early years Islington population overall) followed by Mixed Other at 16% (estimated to be 14% for Islington under 5s). Take up of children from the White Other ethnic group, is also high at 12% (estimated to be 19% for Islington under-5s).

Percentage take up of funded entitlements, January 2020-2025, DfE published summary

Child age	2020	2021	2022	2023	2024	2025
2	67%	61%	70%	75%	74%	77%
3	95%	96%	89%	80%	76%	80%
4	95%	96%	95%	86%	79%	74%
3&4	95%	96%	92%	83%	78%	77%

Take up, 3 and 4 year olds

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 much 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 population estimates based on the GLA 2023-based projections (5-year low fertility model), the take up figures for Islington would be 90.9% for the 3 and 4 year olds, which is considerably higher than the 2025 published figure of 76.8%. This means that according to Islington's estimates, around 9% of children are not accessing early years provision before entering Reception.

Estimated 3- and 4-year-old free early education and childcare entitlements take up percentages, based on the latest mid-year population numbers

Academic year	3-year-olds registered	Eligible 3-year-olds (estimate)	Percentage of registered 3-year-olds (estimate)
2020/2021	2,052	2,139	95.9%
2021/2022	1,952	2,106	92.7%
2022/2023	1,883	1,937	97.2%
2023/2024	1,752	1,997	87.7%
2024/2025	1,896	2,011	94.3%

Academic year	4-year-olds registered	Eligible 4-year-olds (estimate)	Percentage of registered 4-year-olds (estimate)
2020/2021	2,060	2,106	97.8%
2021/2022	2,012	2,040	98.6%
2022/2023	1,876	1,977	94.9%
2023/2024	1,796	1,833	98%
2024/2025	1,636	1,874	87.3%

Academic year	3- and 4-year-olds registered	Eligible 3- and 4-year-olds (estimate)	Percentage of registered 3- and 4-year-olds (estimate)
2020/2021	4,112	4,245	96.9%
2021/2022	3,964	4,146	95.6%
2022/2023	3,759	3,914	96%
2023/2024	3,548	3,829	92.6%
2024/2025	3,532	3,885	90.9%

*SOURCE: DFE 2025 FUNDED EARLY EDUCATION AND CHILDCARE (REGISTERED CHILDREN) AND **GLA 2023-BASED PROJECTIONS (5 YEAR LOW FERTILITY MODEL)

Working parent entitlements, supply and demand

Estimating demand for the new working parent entitlements is extremely challenging, as working population trends are not available on a local level. The government has estimated that there is sufficient supply of places in Islington to meet the likely increase in demand. Furthermore, given the oversupply of childcare places across all ages in Islington, it is likely that there will be sufficient supply to meet current and future demand for working parent entitlements.

The number of childminders caring for funded children has continued to increase since the beginning of the childcare expansion in 2024. In summer 2025, 66 childminders (66% of early years registered childminders) claimed funding through headcount, an increase of 20 since last year, indicating that parents are using the full range of providers to access funded childcare.

Provider concerns about sustainability, in the light of increased government funded hours, have been well documented nationally. Islington providers tell us that while funding rates for under 3s are favourable, the rate for 3 and 4 year olds is too low to cover overheads and staffing. There is also concern from some smaller or term-time only providers that their operating models will make them less desirable with parents, who will expect greater flexibility and extended hours. On the other hand, all-year-round providers are concerned about the number of parents requesting term-time only hours which are challenging to deliver within their existing models of delivery.

We will be keeping in regular contact with providers over the coming terms, encouraging them to reach out where they have concerns to ensure we support with information, advice and guidance where possible.

School based children's centre: *It feels a little unknown territory at the moment - we will need to keep things under review.*

Private nursery: *The challenges we have are concerning the rates of funding; where does the shortfall come from? Considering the increase in wages and national insurance and general cost of living and inflation, the question remains how do you address the short fall of income and stay sustainable, and offer fair and reasonable childcare to parents?*

With uncertainty across the sector on how the childcare expansion will impact on sustainability, it is important to acknowledge that it is too early to assess accurately the sufficiency of funded places beyond autumn 2025. But Islington's substantial over supply of places currently would indicate that there will be sufficient places to meet demand. Nevertheless, Islington's School Organisation Plan will continue to incorporate childcare sufficiency considerations into any proposals which impact on the shape and size of the school estate.

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 grant-aided community nurseries.

There are 291 full-time equivalent PEL places in nursery settings. In summer term 2025, 83% of the PEL places were occupied, which is a small increase since summer 2024. Some settings have not filled as many PEL places for 2 year olds as last year which is perhaps due to the introduction of funded entitlements for working families. Marketing and communications about the new entitlements have highlighted for families the value and importance of early education on childhood development, potentially increasing the number of families approaching early years settings directly who might have previously been referred by practitioners to PEL.

3. Costs of childcare

Coram and Family Childcare reports annually on childcare costs in England, Scotland and Wales, with a breakdown of costs in England by region. Not surprisingly, costs in Inner London are the highest across the English regions. While eligible working parents are benefiting from the increase in funded hours, the high cost of non-funded hours continues to impact parents, particularly those not eligible for funded hours.

Coram's annual holiday childcare survey reported a 4% increase in costs since 2024. In Islington, holiday childcare costs on average £200 a week. Support with costs is available through tax-free childcare or Universal Credit (UC) but low-income parents struggle to pay childcare costs upfront with financial support through UC paid in arrears.

Islington Council's subsidised childcare offer

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.

4. Quality of childcare

As at the end of March 2025, 98%of registered active early years providers that had been inspected by Ofsted had received a good or outstanding inspection outcome. This puts Islington above the target, based on Inner London's overall performance, which was 96.6% at the same point. It remains the case that 100% of LBI managed nurseries have a good or better outcome, with 5 out of the 9 judged to be outstanding. 99% of Islington's childminder inspections resulted in outcomes which were either 'met', good or outstanding, with 12% being outstanding. To note: the reporting of Ofsted outcomes will change significantly from November 2025 with the introduction of a new inspection framework that replaces the one-word overall effectiveness grade with a detailed report card for schools and childcare settings.

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-based population projections. In total, there are an estimated 9,947 children under the age of five living in Islington. For comparison, population statistics from Office of National Statistics (ONS) Mid-year estimates (MYE) and Admin based estimates for 2024 are also provided.

Projected and estimated numbers of children under 5, Islington

Age	GLA 2023-based population projection for 2025	MYE 2024 (ONS)	Admin based estimates-2024 (ONS)
0	2,124	2,259	2,246
1	2,008	2,213	2,185
2	1,931	2,241	2,184
3	2,011	2,037	2,022
4	1,874	1,861	1,872
Total	9,947	10,611	10,509

*SOURCE: GLA 2023-BASED POPULATION PROJECTIONS FOR 2025 (5 YEAR LOW FERTILITY MODEL)

Projected numbers of children under 5, by Ward (GLA 2023-based projections for 2025)

Number of children	Age 0	Age 1	Age 2	Age 3	Age 4	Total
Arsenal	151	142	128	133	118	672
Barnsbury	120	105	108	96	78	507
Bunhill	102	95	80	89	90	457
Caledonian	111	104	101	110	105	531
Canonbury	134	118	124	100	112	588
Clerkenwell	99	95	95	90	85	465
Finsbury Park	143	133	142	120	126	664
Highbury	150	133	112	128	108	631
Hillrise	143	141	143	143	143	713
Holloway	114	105	96	104	91	509
Junction	114	112	101	120	99	545
Laycock	114	117	112	137	118	598
Mildmay	145	137	132	133	125	672
St Mary's & St James'	123	119	115	134	119	611
St Peter's & Canalside	127	134	136	135	135	667
Tollington	129	122	112	125	110	598
Tufnell Park	104	96	93	112	111	516
Islington total	2124	2008	1931	2011	1874	9947

* SOURCE: GLA 2023-BASED POPULATION PROJECTIONS FOR 2025 (5 YEAR LOW FERTILITY MODEL)

Numbers of children under 5, by Planning Areas (PA) (GLA 2023-based projections for 2025)

The current planning areas, agreed in 2025, saw a reduction from six PAs to four. Each planning area aligns with ward boundaries and provides a more accurate estimate of population figures.

Number of children	Age 0	Age 1	Age 2	Age 3	Age 4	Total
North East	589	545	514	514	477	2640
North West	604	575	545	605	554	2883
Central	602	564	561	577	533	2836
South	329	324	312	314	310	1589
Islington total	2124	2008	1931	2011	1874	9947

* SOURCE: GLA 2023-BASED POPULATION PROJECTIONS FOR 2025 (5 YEAR LOW FERTILITY MODEL)

Number of children with special educational needs and disabilities

Early years provision enables practitioners to identify, assess, and support emerging needs, but it is generally too early to do a full assessment through Education Health and Care Plans (EHCP) at this stage. Just 91 children under 5 had EHCPs in the academic year 2024/2025. So, a clearer insight into 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 the inclusion of children with SEND in early years settings. The funding contributes to increased staff ratios and specialist disability equipment, in addition to interventions that go beyond what is ordinarily available. SEND Funding further promotes early intervention and improves developmental outcomes for children with emerging or identified needs.

At the start of September 2025, 27 children were taking up PELSEND places. There were further applications to the PELSEND panel meeting in October, and it is likely that by the end of the autumn term the majority of the 36 PELSEND places will have been filled. A further 374 children have been funded in the academic year 24/25 through the SEND Funding Panel, an increase of approximately 20 children since 2023/24.

School roll pupil numbers

In total there were 19,378 pupils in Islington schools (aged 4-15) as of January 2025 compared with 19,893 pupils in January 2024. The 2025 figure includes 11,722 primary school pupils and 7,052 secondary school pupils, as of January 2025. Both sectors have seen a reduction from last year when there were 12,074 primary and 7,225 secondary pupils. All figures include Islington and other borough resident children attending Islington schools. 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)

The following table shows ages at the start of the 2024/25 academic year broken down by national curriculum year group attended, based on January 2025 School Census data for Islington schools. There are pupils in each age group that may be held back or ahead of the expected year groups.

Age at start of academic year	Number of children	Attending the specified NC year group	Number of children
Age 4	1505	Reception	1513
Age 5	1627	Year 1	1631
Age 6	1754	Year 2	1753
Age 7	1774	Year 3	1791
Age 8	1756	Year 4	1746
Age 9	1753	Year 5	1756
Age 10	1720	Year 6	1715
Age 11	1416	Year 7	1396
Age 12	1438	Year 8	1440
Age 13	1551	Year 9	1547
Age 14	1541	Year 10	1544
Age 15	1543	Year 11	1550

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 44% being young adults aged between 20 and 39 years. There are 41,575 children and young people aged 0-19 estimated to be living in Islington, and 68,925, 0- to 25-year-olds. [ONS mid-year estimates, 2024]

The proportion of children from an ethnic minority background (i.e. not White-British) is relatively high at 75% and 39% of Islington resident children at Islington schools live in households where English is not the first language. [January 2025 School Census – Islington resident pupils with recorded ethnicities]

In the 2025 Indices of Multiple Deprivation (IMD), Islington was found to be the 50th most deprived local authority in the country and 8th most deprived in London. Islington has England's 16th highest level of income deprivation affecting children (IDACI – 2025) and the 6th highest level in London. The IDACI score shows that 27.5% of children are living in income-deprived households. 21% of Islington children aged under 16 live in relative low-income families, and 18% live in absolute low-income families based on benefits and tax credits data for 2023/24 and 2024 mid-year population estimates. Islington has the fourth highest proportion of primary and third highest proportion of secondary school pupils in the country who are eligible for Free School Meals. (January 2025 School Census).

Changes to the population of Islington children

The number of births in an area will naturally have a direct impact on the demand for childcare. After a recent fall in the number of live births in many areas of the country and the 2023 national figure being the lowest since 1997, Office for National Statistics (ONS) data shows an increase in the number of live births in 2024 both nationally and locally.

The official number of live births to Islington mothers in 2024 was 2,282. This is a slight increase from 2,259 live births in 2023, which had the lowest annual number of live births for Islington seen in the historical data currently available.

The population projections by years are based on the GLA 2023-based population projections 5-year model. The GLA 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 2025 and every five years up to 2041

Age	2025	2030	2035	2040	2041
Age 0	2124	1999	2012	2048	2059
Age 1	2008	1838	1849	1880	1888
Age 2	1931	1679	1691	1718	1725
Age 3	2011	1590	1563	1590	1596
Age 4	1874	1524	1462	1488	1493
Age 5	1758	1496	1409	1435	1439
Age 6	1825	1477	1348	1373	1377
Age 7	1811	1498	1314	1338	1343
Age 8	1847	1633	1316	1309	1314
Age 9	1839	1566	1306	1271	1276
Age 10	1766	1539	1315	1256	1261
Age 11	1795	1622	1335	1239	1243
Age 12	1797	1623	1364	1225	1229
Age 13	1853	1684	1500	1254	1234
Age 14	1922	1712	1465	1269	1250
Islington Total	**28161**	**24480**	**22249**	**21693**	**21727**

SOURCE: GLA 2023-based FOR 2025 - 2041

Across the entire 0-14 age group, the population is expected to decline by 13% by 2030. The population is expected to drop by nearly a further 9% by 2035, equivalent to an overall 21%

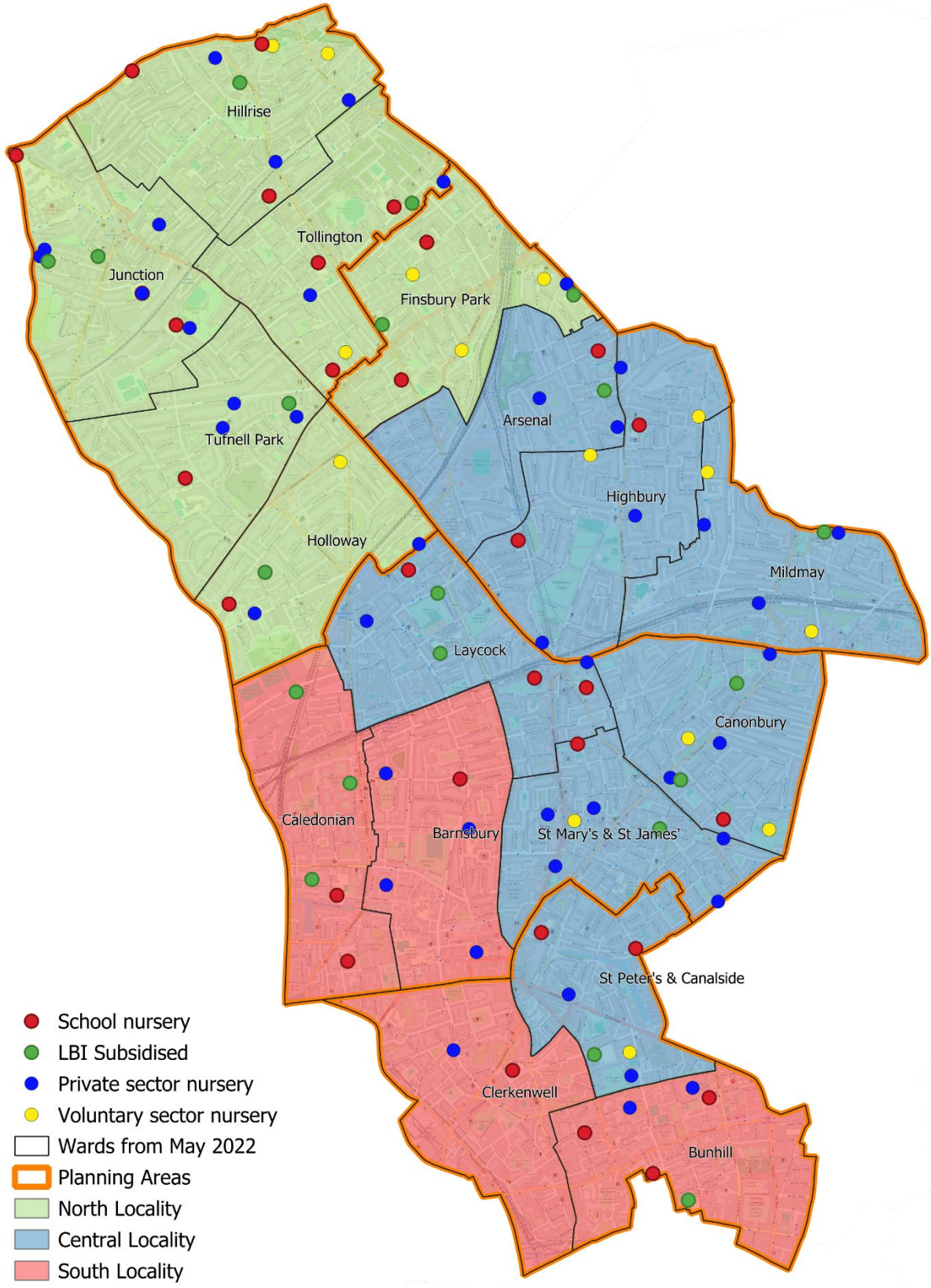
decline in 10 years. The projections suggest the Islington 0-14 population will reach its lowest point in 2039 and very slightly increase thereafter.

The roll projections modelling predicts a drop in the next 10 years. Breaking this down into different age groups, the population of early years children is currently expected to fall by 13% in 5 years (by 2030). A further 1% drop is expected by 2035 and the overall drop by 2040 is expected to be 12%.

The population of primary school aged children (5 to 10 year olds) is expected to decline 15% by 2030, and a further 13% between 2030 and 2040, with an overall reduction of 26% from 2025 to 2040.The population of children aged 11 to 14 is expected to decline 10% by 2030, and a further 15% by 2035 with continual reductions into 2041.

Of the Islington resident children aged 0-4 with known ethnicities attending Islington Early Years providers in January 2025, 39% were White British. They were followed by children from White Other and Mixed Other ethnic groups with 17% and 15% respectively. Both groups cover a wide range of ethnicities.

Appendix 2: Map of Islington providers



Appendix 3: Map of Islington planning areas and wards