

Childcare and early years providers survey 2010

Richard Brind, Oliver Norden, Stephen McGinigal, Erica Garnett and Daniel Oseman (TNS-BMRB), with Ivana La Valle and Helena Jelcic (NCB Research Centre)

The views expressed in this report are the authors' and do not necessarily reflect those of the Department for Education.

Content

1.	Summary.....	15
1.1	Introduction	15
1.2	Characteristics of provision	15
1.3	Places and children	17
1.4	Staff.....	18
1.5	Qualifications.....	20
1.6	Financial information	20
2.	Introduction	22
2.1	Background	22
2.2	Objectives of the research	24
2.3	The survey	24
2.4	Survey design	25
2.5	Structure of the report	27
2.6	Notes on reading the report	27
3.	Characteristics of provision.....	32
3.1	Number of providers.....	32
3.2	Providers in deprived areas	36
3.3	Providers by region	39
3.4	Ownership of provision.....	41
3.5	Charitable status	43
3.6	School links in out of school clubs.....	43
3.7	Length of operation	44
3.8	Opening times	44
3.9	Business planning and expansion.....	47
3.10	Types of service provided in children’s centres	50
3.11	Types of support offered in children’s centres	51
3.12	Children’s centres relationships with the Primary Care Trust	52
4.	Places and attendance	53
4.1	Number of places	53
4.2	Number of places in deprived areas.....	57
4.3	Number of places by region	60
4.4	Childcare places by ownership.....	62
4.5	Number of children attending	65
4.6	Child vacancies	69
4.7	Proportion of places occupied.....	76
4.8	Free early education entitlement for 3 and 4 year olds	77
4.9	Age of children	78
4.10	Ethnicity of children.....	79
4.11	Children with disabilities.....	82
5.	Workforce composition	84
5.1	Number of staff.....	84
5.2	Number of places per paid staff member	89
5.3	Staff type	90
5.4	Agency, freelance and supply staff	94

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

5.5	Age of staff	95
5.6	Gender of staff	97
5.7	Ethnicity of staff	98
5.8	Disability	99
5.9	Working hours	99
5.10	Pay levels	102
5.11	Other work	106
6.	Qualifications	107
6.1	Definition of qualifications	107
6.2	Qualifications held by all staff	108
6.3	Trends in qualification levels	113
6.4	Qualification levels by deprivation	114
6.5	Qualification levels by region	116
6.6	Qualification levels by ownership	118
6.7	Requisite qualifications for childcare staff	119
6.8	Qualifications for early years staff	129
6.9	Qualified Teacher Status	138
6.10	Early Years Professional Status	141
6.11	Staff with QTS and EYP Status	143
6.12	Qualifications being worked towards	145
6.13	NVQ Assessors	152
6.14	Providers with at least one graduate member of staff	153
6.15	Graduate staff working towards EYP Status	155
7.	Training	157
7.1	Training provision in early years provision in maintained schools	157
7.2	Training plans and budgets	158
7.3	Training for childminders	159
7.4	Views on current levels of training	160
7.5	Graduate Leader Fund	161
8.	Recruitment and retention	163
8.1	Staff vacancies	163
8.2	Level of recruitment	164
8.3	Recruitment methods	168
8.4	Problems with recruitment	169
8.5	Time taken to fill vacancies	171
8.6	Average length of service	172
8.7	Annual staff losses	173
8.8	Destination of staff who left	175
8.9	Employment growth rate	176
9.	Income and expenditure	178
9.1	Deposits or registration fees	178
9.2	Fees	180
9.3	Changes to fees	186
9.4	Income from fees	188
9.5	Awareness of childcare vouchers	189
9.6	Fees paid by employers	191
9.7	Income	192
9.8	Breaking even	199

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

9.9 Profitability.....	200
9.10 Expenditure.....	206
Appendix 1 – Additional tables.....	208
Additional Tables - Chapter 3.....	208
Additional Tables - Chapter 4.....	212
Additional Tables - Chapter 5.....	217
Appendix 2 – Unweighted base sizes	227
Appendix 3 – Glossary	238

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Index of Tables and Charts

Table 3.1 Numbers of childcare providers and early years providers in maintained schools..	32
Table 3.2 Percentage changes in numbers of childcare providers and early years providers in maintained schools between 2010 and previous years	33
Chart 3.1 Number of childcare providers.....	34
Chart 3.2 Number of childminders.....	35
Chart 3.3 Number of early years providers in maintained schools.....	36
Table 3.3 Distribution of providers in the most deprived areas	38
Table 3.4 Distribution of providers by Government Office Region	40
Table 3.5a Ownership of childcare providers.....	42
Table 3.5b Ownership of childcare providers.....	43
Table 3.6 Average length of time per day that settings are open.....	45
Chart 3.3a: Number of hours per week children are cared for by childminders in term time ...	46
Chart 3.3b: Number of hours per week children are cared for by childminders in school holidays.....	46
Chart 3.4: The proportion of childcare providers that had a written business plan.	48
Table 3.7 Proportion of settings that had a written business plan by ownership.....	48
Chart 3.5 Proportion of settings with a written business plan that had been updated in the last two years	49
Table 3.8 Proportion of providers who have expanded or plan to expand	50
Table 3.9 Support services offered in children’s centres	52
Table 4.1a Number of Ofsted registered places.....	54
Table 4.1b Number of Ofsted registered places.....	54
Table 4.2 Capacity of settings - childcare.....	55

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Table 4.3 Capacity of settings - childminders	56
Table 4.4 Ofsted registered places per setting – early years provision in maintained schools	57
Table 4.5 Number of places in the 30% most deprived areas	58
Table 4.5b Number of places in the 30% most deprived areas.....	59
Table 4.6a Distribution of places by Government Office Region	60
Table 4.6b Distribution of places by Government Office Region	60
Table 4.6c Distribution of places by Government Office Region	61
Table 4.7a Proportion of Ofsted registered places by ownership.....	63
Table 4.7b Proportion of Ofsted registered places by ownership.....	64
Table 4.8a Mean number of Ofsted registered places by ownership.....	64
Table 4.8b Mean number of Ofsted registered places by ownership	65
Table 4.9 Number of children attending childcare and early years provision	66
Table 4.9b Number of children attending childcare and early years provision	66
Table 4.10 Mean number of children attending childcare and early years provision	67
Table 4.11 Number of attendees per place in childcare and early years provision	69
Table 4.12 Number of vacancies for children in childcare and early years providers	70
Table 4.13 Mean number of vacancies for children in childcare and early years providers	70
Table 4.14a Number of vacant places in the 30% most deprived areas	72
Table 4.14b Number of vacant places in the 30% most deprived areas	73
Table 4.15 Distribution of vacant places by Government Office Region.....	74
Table 4.16 Number of places vacant	75
Table 4.17 Occupied child places as a proportion of registered child places	76
Table 4.18 Number of weeks per year 3 and 4 year olds are able to access the free early education sessions	77
Chart 4.1: Age of children.....	78

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Table 4.19a Proportion of children of black and minority ethnic (BME) origin.....	81
Table 4.19b Proportion of children of black and minority ethnic (BME) origin	82
Table 4.20 Proportion of childcare providers caring for children with disabilities	82
Table 5.1a Number of staff working in childcare providers	85
Table 5.1b Number of staff working in childcare providers.....	86
Table 5.2 Number of staff working in early years providers in maintained schools.....	88
Table 5.3 Number of Ofsted registered places per paid member of staff.....	89
Table 5.4 Number of places per paid member of staff by ownership	89
Table 5.5 Number of Ofsted registered places per paid member of staff.....	90
Table 5.6a Breakdown of staff by staff type	91
Table 5.6b Breakdown of staff by staff type	91
Table 5.6c Breakdown of staff by staff type	92
Table 5.7 Breakdown of staff by staff type	93
Table 5.8 Proportion of providers using agency staff in the last 12 months.....	94
Table 5.9a Age profile of all paid staff.....	95
Table 5.9b Age profile of all paid staff.....	96
Table 5.10 Age profile of all paid staff.....	96
Table 5.11 Proportion of male staff in paid workforce	97
Table 5.12 Proportion of staff from a black and minority ethnic (BME) background in paid workforce	98
Table 5.13 Proportion of staff with a disability in paid workforce.....	99
Table 5.14 Average (mean) hours worked per week.....	100
Table 5.15 Average (mean) hours worked per week.....	100
Table 5.16a Average (mean) hours spent interacting directly with children.....	101
Table 5.16b Average (mean) hours spent interacting directly with children	101

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Table 5.17a Average (mean) hourly pay	102
Table 5.17b Average (mean) hourly pay	103
Table 5.18 Average annual pay	103
Table 5.19 Average hourly pay	103
Table 5.20 Average (mean) hourly pay by qualification of senior manager	105
Table 5.21 Average (mean) pay per hour by region	105
Table 6.1 Relevant qualifications of paid staff across all types of providers	109
Table 6.2 Relevant qualifications of paid staff across all types of providers, 2007-2010	110
Table 6.3a Relevant staff qualifications held by all paid staff - childcare providers	111
Table 6.3b Relevant staff qualifications held by all paid staff - childcare providers	111
Table 6.4 Relevant staff qualifications held by all paid staff - early years providers	112
Table 6.5a Highest levels of relevant staff qualification for all paid staff	113
Table 6.5b Highest levels of relevant staff qualification for all paid staff	113
Table 6.6 Highest levels of relevant staff qualification for all paid staff	113
Table 6.7a Proportion of paid staff that hold a relevant qualification (levels 1 to 8) by deprivation	115
Table 6.7b Proportion of paid staff that hold at least a relevant level 3 qualification by deprivation	115
Table 6.7c Proportion of paid staff that hold at least a relevant level 6 qualification by deprivation	115
Table 6.8a Proportion of paid staff that hold a relevant qualification (levels 1 to 8) by region	117
Table 6.8b Proportion of paid staff that hold at least a relevant level 3 qualification by region	117
Table 6.8c Proportion of paid staff that hold at least a relevant level 6 qualification by region	117
Table 6.9a Proportion of paid staff that hold a relevant qualification (levels 1 to 8) by ownership of provision	118
Table 6.9b Proportion of paid staff that hold at least a relevant level 3 qualification by ownership of provision	118

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Table 6.9c Proportion of paid staff that hold at least a relevant level 6 qualification by ownership of provision	118
Table 6.10 Relevant qualifications by staff type across all childcare settings	120
Table 6.11 Supervisors with at least a relevant Level 3 qualification	121
Table 6.12 Other paid childcare staff with at least a relevant Level 2 qualification	121
Table 6.13a Relevant qualifications of senior manager	123
Table 6.13b Relevant qualifications of senior manager	124
Table 6.14a Relevant qualifications of supervisors	126
Table 6.14b Relevant qualifications of supervisors	127
Table 6.15a Relevant qualifications of other paid childcare staff	128
Table 6.15b Relevant qualifications of other paid childcare staff	129
Table 6.16 Relevant qualifications of paid staff by staff type in early years provision in maintained schools	130
Table 6.17 Relevant qualifications of early years coordinators/head teachers	131
Table 6.18 Relevant qualifications of qualified early years teachers	133
Table 6.19 Relevant qualifications of nursery nurses	135
Table 6.20 Relevant qualifications of other paid early years support staff	137
Table 6.21 Proportion of paid childcare staff with Qualified Teacher Status	138
Table 6.22 Proportion of paid early years staff with Qualified Teacher Status	139
Table 6.23 Proportion of paid childcare staff with Qualified Teacher Status, by deprivation .	139
Table 6.24a Proportion of paid early years staff with Qualified Teacher Status (% of all paid staff), by region	140
Table 6.24b Proportion of paid early years staff with Qualified Teacher Status (% of paid staff with at least a level 5 qualification), by region	140
Table 6.25 Proportion of paid childcare staff with Early Years Professional Status	141
Table 6.26 Proportion of paid staff with Early Years Professional Status, by deprivation	142

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Table 6.27a Proportion of staff with Early Years Professional Status (% of all staff), by region	143
Table 6.27b Proportion of staff with Early Years Professional Status (% of staff with at least a level 6 qualification), by region	143
Table 6.28 Proportion of childcare staff with Qualified Teacher Status and Early Years Professional Status	143
Table 6.29 Proportion of childcare staff with Qualified Teacher Status and Early Years Professional Status, by deprivation	144
Table 6.30 Proportion of childcare staff with Qualified Teacher Status and Early Years Professional Status, by region	145
Table 6.31 Relevant qualifications being worked towards by all paid early years staff	146
Table 6.32a Relevant qualifications being worked towards by all paid childcare staff	147
Table 6.32b Relevant qualifications being worked towards by all paid childcare staff	148
Table 6.33 Relevant qualifications being worked towards by all paid early years staff, by deprivation	149
Table 6.34a Relevant qualifications being worked towards by all paid childcare staff, by deprivation	150
Table 6.34b Relevant qualifications being worked towards by all paid childcare staff, by deprivation	150
Table 6.35 Proportion of staff working towards any relevant qualification, by region	151
Chart 6.1 Proportion of paid staff qualified to below level 3 who are working towards a relevant qualification of level 3 or higher	152
Table 6.36 Proportion of senior managers and early years co-ordinators that are NVQ assessors	153
Chart 6.2 Number of graduates with EYP Status in non-LA run full day care settings	154
Chart 6.3 Number of graduates with EYP Status in non-LA run full day care settings, by region	154
Chart 6.4 Number of staff working towards EYP Status, in non-LA run full day care settings with no graduates with EYP Status	155

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Chart 6.5 Number of staff working towards EYP Status, in non-LA run full day care settings with no graduates with EYP Status, by region.....	156
Table 7.1 Proportion of providers in maintained schools that help staff to receive training and the type of training they help staff to receive.....	158
Table 7.2 Whether provider has a specific training plan or training budget.....	158
Table 7.3 Amount of training in last 12 months amongst Childminders	160
Table 7.4 Respondent’s views on amount of training received.....	161
Chart 7.1 Awareness of, applications to and awards made by the Graduate Leader Fund	161
Table 8.1 Number of childcare staff vacancies and proportion of providers actively recruiting	163
Table 8.2 Number of early years staff vacancies and proportion of providers actively recruiting	164
Table 8.3a Number of staff recruited in childcare providers	165
Table 8.3b Number of staff recruited in early years providers	165
Table 8.4 Proportion of childcare providers that have recruited and number of staff recruited, by staff type	166
Table 8.5 Proportion of early years providers that have recruited and number of staff recruited, by staff type	167
Table 8.6a Recruitment rate for childcare providers	167
Table 8.6b Recruitment rate for early years providers	168
Chart 8.1 Top 5 methods of recruitment used.....	168
Table 8.7 Proportion and number of settings that had experienced difficulty recruiting.....	170
Table 8.8 Length of time settings would expect to take to fill a vacancy.....	171
Table 8.9 Average length of service in current setting.....	172
Table 8.10 Length of service in current setting by provider type	173
Table 8.11 Proportion of providers that had at least one member of staff leave in the 12 months prior to the survey.....	174

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Table 8.12 Total number of staff losses and average number of losses per setting, in the last 12 months.....	174
Table 8.13 Turnover rate for childcare and early years providers	175
Table 8.14 Proportion of early years providers that have had staff leave their job to work in specific sectors	176
Table 8.15 Employment growth rate for childcare and early years providers	177
Table 9.1a Proportion of providers who charged a deposit registration fees and average deposits and registration fees charged	178
Table 9.1b Proportion of providers who charged a deposit, registration fees and average deposits and registration fees charged	179
Table 9.2 Proportion of providers who charged a deposits, registration fees and average deposits and registration fees charged by profit/not-for-profit status	180
Table 9.3 Proportion of providers who vary their fees from child to child.....	180
Table 9.4 Reasons for varying fees	181
Table 9.5 Average fees charged by ownership	183
Table 9.6 Averages hourly fees by level of deprivation	183
Table 9.7 Average hourly fees charged by Government Office Region	184
Table 9.8 Average hourly fees by qualification of senior manager.....	185
Table 9.9 Averages hourly fees by age of child	185
Table 9.10 Changes to fees	187
Table 9.11 Average annual income from fees	188
Table 9.12 Awareness of childcare vouchers.....	190
Table 9.13 Fees paid for (in part or in full) by direct payments or voucher payments by parents' employers.....	191
Table 9.14 Number of children that had at least part of their fees paid for by direct payments or voucher payments parents' employers	192
Table 9.15 Proportion of providers receiving income from local authorities and central government.....	192

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Table 9.16 Average income received from local authorities and central government.....	193
Table 9.17 Other sources of income (most frequently mentioned).....	194
Table 9.18 Average income received from other sources, excluding those who received nothing from this source	196
Table 9.19 Sources of income including those who received nothing from the source	198
Table 9.20 Proportion of places needing to be filled in order to break even	199
Table 9.21 Average (mean) proportion of places needing to be filled in order to break even	200
Table 9.22a Profitability	201
Table 9.22b Profitability	201
Table 9.23a Provider profitability by deprivation	202
Table 9.23b Provider profitability by deprivation	203
Table 9.24 Provider profitability by region.....	203
Table 9.25 Provider by Government Office Region	205
Table 9.26 Average annual expenditure of childcare providers	206
Table 3.2a Distribution of providers by deprivation	208
Table 3.3a Distribution of providers by Government Office Region	209
Table 3.5c Distribution of childcare providers by ownership.....	210
Table 3.5d Distribution of childcare providers by ownership.....	211
Table 4.6d Number of places by Government Office Region.....	212
Table 4.7c Number of Ofsted registered places by ownership.....	212
Table 4.7d Number of Ofsted registered places by ownership	213
Table 4.7e Number of Ofsted registered places by ownership.....	213
Table 4.20a Number of places by age of child.....	214
Table 4.20b Proportion of places by age of child	214
Table 4.20c Number of providers by proportion of black and minority ethnic (BME) origin ..	215

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Table 4.20d Number of providers by proportion of black and minority ethnic (BME) origin ..	215
Table 4.20e Number of providers by proportion of children of black and minority ethnic (BME) origin.....	216
Table 5.6d Proportions and numbers of staff in childcare providers	217
Table 5.6e Numbers and proportions of paid staff by staff level and ownership: full day care	217
Table 5.6f Numbers and proportions of paid staff by staff level and ownership: Full day care in children's centres	217
Table 5.6g Numbers and proportions of paid staff by staff level and ownership: sessional..	218
Table 5.6h Numbers and proportions of paid staff by staff level and ownership: after school clubs	218
Table 5.6i Numbers and proportions of paid staff by staff level and ownership: holiday clubs	218
Table 5.7a Proportions and numbers of staff in early years providers	219
Table 5.8a Proportion of providers using agency staff by type of ownership.....	219
Table 5.8b Proportion of providers using agency staff by Government Office Region.....	220
Table 5.8c Proportion of providers using agency staff by area deprivation and population density.....	220
Table 5.14a Hours worked (mean) by type of provider and staff type in 2006, 2007, 2008, 2009 and 2010: childcare providers.....	221
Table 5.14b Hours worked (mean) by type of provider and staff type in 2006, 2007, 2008, 2009 and 2010: childcare providers.....	221
Table 5.14c Hours worked (mean) in childcare providers by staff level; type of ownership and profit making status: full day care.....	221
Table 5.14d Hours worked (mean) in childcare providers by staff level; type of ownership and profit making status: full day care in children's centres.....	221
Table 5.14e Hours worked (mean) in childcare providers by staff level; type of ownership and profit making status: sessional	222
Table 5.14f Hours worked (mean) in childcare providers by staff level; type of ownership and profit making status: after school clubs	222

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Table 5.14g Hours worked (mean) in childcare providers by staff level; type of ownership and profit making status: holiday clubs.....	222
Table 5.15a Hours worked (mean) by area deprivation.....	222
Table 5.17c Average pay (mean) by staff type and type of ownership: full day care.....	223
Table 5.17d Average pay (mean) by staff type and type of ownership: full day care in children's centres.....	223
Table 5.17e Average pay (mean) by staff type and type of ownership: sessional.....	223
Table 5.17f Average pay (mean) by staff type and type of ownership: after school clubs.....	224
Table 5.17g Average pay (mean) by staff type and type of ownership: holiday clubs.....	224
Table 5.17h Average (mean) hourly pay by staff type and area deprivation - childcare.....	224
Table 5.17i Average (mean) pay by profit making status and qualification of senior manager: full day care.....	225
Table 5.17j Average (mean) pay by profit making status and qualification of senior manager: full day care in children's centres.....	225
Table 5.17k Average (mean) pay by profit making status and qualification of senior manager: sessional.....	225
Table 5.17l Average (mean) pay by profit making status and qualification of senior manager: after school club.....	226
Table 5.17m Average (mean) pay by profit making status and qualification of senior manager: holiday club.....	226
Table 5.18a Average (mean) hourly pay by staff type and area deprivation – early years.....	226

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

1. Summary

1.1 Introduction

The Department for Education commissioned TNS-BMRB to conduct surveys collecting information about childcare and early years provision across England in 2010. In this report the survey findings are drawn together to provide an overview of the whole childcare and early years sector, as well as highlighting similarities and differences between specific types of provider.

Where appropriate, the findings from the 2010 survey have been compared with those from similar surveys conducted in 2009, 2008, 2007, 2006, 2005, 2003 and 2001. However, as discussed in detail in chapter 2, it has been necessary to change the sampling method for all groups apart from childminders in 2010. As such, year on year changes should be viewed bearing this in mind.

The data have been weighted and grossed to provide national estimates.

1.2 Characteristics of provision

The childcare market in England has undergone a considerable transformation in the past decade, both in terms of the range of providers who offer childcare services and also in terms of the growth in the number of places available.

In 2010 the survey recorded 105,100 providers of childcare and early years education, of which 15,700 were early years providers in maintained schools and 89,500 were childcare providers.

1.2.1 Childcare provision overview

Childminders

There were more childminders than any other type of provider, with the survey recording a total of 47,400 working childminders in 2010. However, this marked a continuation of the long term decrease in the number of active childminders, falling by 7 per cent from the number seen in 2009 (51,000) and by 21 per cent since 2007 (when there were 59,800). Childminders supply the broadest provision of all the childcare providers, catering for both pre-school and school aged children and typically providing care throughout full days and with availability throughout the year. The survey found that virtually all funding for childminders comes from fees (97 per cent), with very few having access to public funding through programmes such as the free entitlement to three and four year olds.

Childminders tend to be less strongly represented in the less affluent areas of the country, with only 19 per cent of all childminders to be found in the 30 per cent most deprived areas.

The decline in the number of active childminders reflects a trend that predates the recession and, as such, would seem to be due to broader market factors and issues of parental preference, rather than directly caused by financial issues.

Full day care providers

Amongst the larger, group-based childcare providers, full day care providers were the most widespread, with the survey estimating a total of 16,700 such settings in 2010. This continues the long-term trend whereby the estimated number of full day care providers has increased every

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

year since 2001. Like childminders, full day care providers (as their name would suggest), cover a full and long day and are typically open all year round. They usually cater for pre-school children and tend to be the type of provision used by working parents. Fees are the primary source of funding for full day care providers, accounting for nearly three quarters of their income in 2010 (72 per cent), with the rest coming mainly from public funding (27 per cent). While privately run settings still predominate in this segment of the market (59 per cent), voluntary run providers do account for a significant proportion of full day care provision (30 per cent).

Maintained providers have a very specific role in the full day care sector – while they account for a small proportion of providers overall, the maintained sector is responsible for most of the full day care provision offered on-site in children’s centres. The children’s centre provision remains concentrated in the most deprived areas, as these were targeted during the early stages of the children’s centre programme. Children’s centre provision is more reliant on public funding than is the case for other full day care providers, with public funding accounting for half of the income (50 per cent) and fees accounting for 49 per cent of their total income in 2010. Less than one per cent of children’s centres’ income derived from other sources, such as fundraising.

Full day care settings in general were distributed fairly evenly across areas with differing levels of deprivation, with 26 per cent of all such settings to be found in the 30 per cent most deprived areas. Looking specifically at full day care providers within children’s centres, these remain heavily concentrated in the less affluent areas of the country, with 73 per cent of all such settings to be found in the 30 per cent most deprived areas. This is a result of government guidance requiring children’s centres in the 30 per cent most deprived areas to offer full day care provision, while children’s centres operating outside the most deprived areas were given more flexibility about the type of childcare provision they offered.

Sessional providers

The number of sessional providers in 2010 remained lower than the number seen prior to 2009, with an estimated total of 8,300. This segment of the market is predominated by voluntary settings, which accounted for almost two thirds (64 per cent) of all sessional providers in 2010. Sessional providers are more dependent on public funding than the other childcare providers, with around 61 per cent of their total income coming from this source in 2010. Sessional settings were more likely to be found in the more affluent areas of the country, with 81 per cent of all sessional settings being located in the 70 per cent least deprived areas.

Out of school providers

In 2010, the survey recorded 17,200 out of school settings, of which 9,500 were after school clubs and 7,700 holiday clubs.

These providers cater primarily for school aged children, with after school clubs providing part-time provision to wrap around the school day during the academic year, while holiday clubs cover a full day and operate during school holidays. This diversity of service is reflected in the mix of providers for after school and holiday care and their sources of funding.

Ownership of after school clubs is split between privately run settings (38 per cent), voluntary run settings (28 per cent) and maintained settings (35 per cent). Privately run settings are more common amongst holiday clubs (48 per cent), though the provision is diverse nonetheless, with 27 per cent of settings being voluntary run, and 26 per cent maintained.

Fees are important for both types of out of school provider, accounting for 79 per cent of the income for after school clubs and 68 per cent for holiday clubs in 2010. Holiday clubs were more dependent on public funding in 2010 (30 per cent of income compared to 19 per cent for after school clubs). Out of schools settings were distributed relatively proportionally across areas with high and low levels of deprivation.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

1.2.2 Early years provision overview

The picture for early years provision remained relatively stable in 2010, with the number of providers in this sector remaining steady compared to 2009 – the survey recorded a total of 15,700 providers in both years.

Nursery schools were particularly important within less affluent areas of the country, with 58 per cent of all nursery schools to be found in the 30 per cent most deprived areas in 2010. This was also true, to a lesser extent, of primary schools with nursery and reception classes, 41 per cent of which were to be found in the 30 per cent most deprived areas. Primary schools with reception classes but no nursery classes were very much concentrated in the more affluent areas, with only 10 per cent of such settings to be found in the 30 per cent most deprived areas.

1.3 Places and children

The survey estimated a total of 2,755,800 registered childcare and early years places in 2010, though any given child may occupy more than one of those places (for example attending both full day care and holiday clubs).

Each childminder cares for a relatively small number of children, meaning that in total they accounted for only 245,100 registered places. This figure marks a continuation of the longer term decline recorded by the survey, falling from 262,900 registered places in 2009 and from 291,500 places in 2007, though there still remain many more childminders than there were any other type of provider in 2010.

Full day care providers accounted for a substantial proportion of the total provision in 2010, with 716,700 places – more than is offered by any of the other specific types of provider and significantly more than the 251,000 places offered by sessional settings.

The survey recorded a large increase in the number of out of school places in 2010, with the total number of places in after school clubs now standing at 368,100 and holiday clubs offering a total of 349,400 places. However, it is likely that the increases are at least partly driven by the change to sampling method in 2010 and the figures should be viewed in this light.

Among early years providers in maintained schools, there was an estimated total of 825,500 places in 2010. Nursery schools accounted for a small proportion of these, offering an estimated 25,300 places. Primary schools with nursery and reception classes accounted for 491,800 places, whilst the remaining 308,400 places were to be found in primary schools with reception but no nursery classes.

Overall, across all types of provision in 2010, the total proportion of places to be found in the 30 per cent most deprived areas remained the same as it was in 2009 (28 per cent). This proportion is, however, slightly lower than was seen between 2006 and 2008.

1.3.1 Child vacancies

In 2010, there were an estimated 440,800 vacancies across all types of provider. Around a quarter of these (28 per cent) were to be found in full day care settings, where there were 122,700 vacancies. This equates to an average of 8 per setting. Looking specifically at full day care provision in children's centres, there were an estimated 4,000 vacancies in 2010, a

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

decrease from the number seen in previous years, and a figure that equates to an average of 6 vacancies per setting.

Holiday clubs had the largest amount of spare capacity, with an average of 11 vacancies per setting (compared to an average of 7 vacancies per setting in after school clubs). The average number of vacancies in sessional providers had risen to 5 in 2010 (compared to 3 in 2009 and 2 in 2008).

Interestingly, although the total number of childminders had declined in 2010, which might suggest a reduction in spare capacity in this sector of the market, the estimated number of vacancies had actually increased slightly compared to 2009 (from 59,400 to 61,500). This would seem to point towards a fall in demand in 2010.

In spite of a slight decline in the number of nursery schools, the number of vacancies actually increased to a total of 3,000 in 2010 (compared to 2,500 in 2009). The average number of vacancies per setting remained stable in primary schools with reception but no nursery classes (3 per setting in 2010) but increased in primary schools with nursery and reception classes (8 per setting in 2010, compared to 6 in 2009).

The overall proportion of registered places that were vacant in 2010 was considerably higher in the 30 per cent most deprived areas compared with the equivalent national figure (28 per cent and 16 per cent respectively). However, this reflects the situation in previous years and a high level of vacancies may actually help to meet the intended extension of the offer for disadvantaged two year olds, much of which is likely to be needed in deprived areas.

1.4 Staff

With the exception of sessional providers, there has been an increase in the estimated number of paid and unpaid staff working in all types of childcare settings since 2005, and the total across all types of setting now stands at 434,100.

In 2010 the estimated total number of staff in full day care providers stands at 213,300. Within this total, the number of unpaid staff had risen significantly since 2009, from 16,100 to 26,800.

Overall there were an estimated 65,400 employees working in sessional providers, 72,100 in after school clubs and 83,300 in holiday clubs. Sessional providers had the highest proportion of unpaid employees in 2010, with 17 per cent of their staff working without pay.

Age

Sessional providers had the oldest paid staff profile of any of the group-based childcare providers, with staff aged 40 years or older accounting for 58 per cent of their total workforce in 2010. This is a markedly higher proportion than was seen in full day care providers (32 per cent), after school clubs (43 per cent), and holiday clubs (29 per cent). However, childminders also tended to have an older age profile, with 66 per cent aged 40 plus in 2010.

Amongst childminders, the long term decline in the proportion of under 40's has continued, with this group accounting for only 34 per cent of all active childminders in 2010 (compared to 43 per cent in 2006). This might suggest that the decrease in the overall number of active childminders is driven by younger childminders leaving the sector, whilst the older childminders are more likely to continue in their work.

In early years settings, the age profile of paid staff has remained quite stable over time, with around half of paid staff in all early years settings aged 40 or older.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Gender

As has been the case in previous years, the childcare and early years workforce remained overwhelmingly female in 2010, with the majority of providers in both the childcare and the early years sectors employing only one or two per cent male staff. The only exception to this was to be found in out of school providers, where 8 per cent of staff in after school clubs and 10 per cent of staff in holiday clubs were male.

Ethnicity

In general there remained an under-representation of staff from a BME background in most provider types. General population figures show that around 13 per cent of the working age population are from a BME background – however the proportion of BME staff in the different types of provider ranged from only two per cent in primary schools with reception but no nursery classes to 10 per cent in full day care providers. The only settings that reached or exceeded the 13 per cent threshold were nursery schools (13 per cent) and full day care settings in children's centres (17 per cent). However, it should be borne in mind that both of these types of provider tend to be concentrated in the 30 per cent most deprived areas, where people from a BME background make up a larger proportion of the population and therefore a higher level of BME staffing is to be expected.

Disability

As in previous years a very low proportion of the childcare and early years workforce had a disability (between one and two per cent in each type of provider).

1.4.1 Pay

Amongst group-based childcare providers, pay levels increased for all types of staff across all types of provider between 2009 and 2010 (the only exception being other paid staff in after school clubs). Overall, pay levels rose by five per cent in full day care providers, children's centres offering full day care, sessional providers and after school clubs. Holiday clubs saw a six per cent rise in pay compared with 2009.

Staff in full day care offered on site at children's centres earned more per hour than staff at other childcare providers, earning an average of £10.90 per hour in 2010. This was followed by staff in holiday clubs earning on average £9.00 per hour and those in after school clubs earning £8.30 on average. Staff in full day care providers earned £8.00 an hour on average and those in sessional providers earned £7.80.

The average rates of pay for early years providers in maintained schools had increased less quickly than was the case for childcare providers in 2010. In nursery schools average pay had increased by only one per cent, whilst in both primary schools with nursery and reception classes and in primary schools with reception but no nursery classes, average pay had increased by four per cent.

To put this into context, the national increase in average hourly wages between 2009 and 2010 was two per cent. The generally higher rates of increase in the childcare and early years sectors may in part be a reflection of the move to increase the quality of provision (for example by raising the qualification levels of those working with children, which would naturally also tend to increase pay rates).

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

1.5 Qualifications

One of the key goals for the childcare and early years sector is to improve the quality of the workforce and data on staff qualifications and training can be used as proxies for this measure.

The large majority of staff in group-based childcare settings (76 per cent) had a relevant qualification at level 3 and slightly fewer than one in ten (8 per cent) had a relevant level 6 qualification in 2010. This increase represents real progress since 2007, when only 65 per cent held at least a level 3 qualification and five per cent held at least a level 6 qualification. It also marks progress from the 2009 data, in which 73 per cent were found to hold at least a level 3 qualification.

Childminders have consistently had lower levels of qualifications than staff in group based settings, with 54 per cent holding at least a level 3 qualification and only 3 per cent holding a relevant level 6 qualification in 2010. However, this does mark a significant improvement since 2007, when only 41 per cent of childminders held at least a level 3 qualification. In 2009, the equivalent proportion was 49 per cent.

Qualification levels in early years settings were typically higher than those in childcare settings. Eight in ten early years staff held at least a level 3 qualification in 2010 (80 per cent), while 42 per cent held at least a level 6 qualification. However, unlike the childcare providers, there has been no real change in these figures since 2007 – as such, the childcare sector is closing the gap with the early years sector.

Early years settings were asked about the training they provide to staff and it was apparent that the long term trend for an increased breadth of training had continued in 2010. In particular, there were increases in the proportion of paid staff in nursery schools receiving SEN/disability/inclusion training, whilst both types of primary school setting saw increases in first aid, health and safety, child protection and early years/foundation stage training.

Across both childminders and early years providers, the large majority felt that the amount of training they were receiving was 'about right' (79 per cent for childminders and 87 per cent for early years settings).

1.6 Financial information

1.6.1 Fees

In general, providers were less inclined to vary their fees from child to child in 2010 than they had been in previous years. This was particularly the case for full day care providers in children's centres, where the proportion varying their fees declined from 61 per cent in 2009 to 48 per cent in 2010, bringing them more closely in line with other childcare providers.

The age of child was the key factor in varying fees for most providers, although the number of siblings enrolled was the main consideration for after school and holiday clubs.

In spite of the difficult economic climate, hourly fees had increased by around six percent in full day care providers, and there were also increases in the fees of other providers.

With flexibility being one of the key requirements of parents, it is interesting to note that childminders appear to offer the most flexibility in terms of payment, with 80 per cent charging by the hour. Hourly payment was far less common amongst other providers, potentially meaning that

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

parents have to pay for provision that they do not need (for example, if a provider charges per day, families need to pay for a full day even if they need care for only part of it).

1.6.2 Profitability

The results relating to providers' profitability show a mixed picture. However, in general there was little evidence that their financial situation had deteriorated in 2010, in spite of the difficult economic situation in the months leading up to the survey. Two thirds (66 per cent) of full day care providers reported that they had made a profit or covered their costs in the previous financial year, as did three quarters (74 per cent) of sessional providers.

Nonetheless, the findings show that a significant minority of providers were experiencing financial problems in 2010 and were unable to fill a proportion of their places - an indication that continued business support and advice would be beneficial for the future health of providers.

With the exception of full day care providers operating in children's centres, slightly less than one third of childcare providers reported making a profit or surplus (33 per cent of full day care providers, 30 per cent of after school clubs, 29 per cent of holiday clubs and 28 per cent of sessional providers). As in previous years this figure was lower for full day care providers in children's centres (11 per cent).

The full day care and sessional groups were the only provider types to show an increase in the proportion of settings operating at a loss in 2010, rising from 13 per cent to 19 per cent for full day care and from 15 per cent to 20 per cent for sessional care. These represent the highest loss making levels seen for these two groups since the survey began, though the trend is more positive for other providers.

There were also some notable changes for providers operating in the 30 per cent most deprived areas. In 2009, the proportion of full day care, sessional and holiday club providers making a loss was relatively similar in the 30 per cent most deprived areas and in the 70 per cent least deprived areas. In 2010 this was no longer the case. For all of these providers, the proportion of loss making settings in the most deprived areas had become significantly higher than the proportion in the less deprived areas. This would seem to indicate that providers in the less affluent areas are finding it harder to weather the difficult economic conditions than those in the better off areas.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

2. Introduction

2.1 Background

There is a large body of evidence showing that high quality early education and childcare is associated with improved educational outcomes for children. These improvements are particularly likely to be substantial and long-lasting for disadvantaged children.¹ Access to childcare services is also a key facilitator of parental employment, particularly for mothers (who are still mainly responsible for child rearing), giving them more choice over the timing of their return to work, as well as the range employment options open to them. If mothers work while their children are young, they can avoid many of the penalties associated with long breaks from employment, such as reduced earning potential and de-skilling.² Furthermore, in both dual and single parent families, mothers' earnings can play a key role in maintaining household income above the poverty line.³ In addition to these benefits for the individuals concerned, good childcare services are also associated with a range of public benefits including: a reduction in child poverty; increased social mobility for children from poorer backgrounds; reduced welfare bills as more parents are able to work and more disadvantaged children obtain the higher education levels which are connected with better employment prospects.

There is now widespread recognition of the value of early education and childcare. The new Coalition Government, formed in May 2010, made a number of important announcements in its early days in office, including:

- Extending the free early education offer for disadvantaged two year olds; by 2013, following trials of the different means of providing such care, all disadvantaged two year olds will be legally entitled to free part-time early education.
- Extending the free entitlement to early education for three and four year olds from 12.5 to 15 hours per week and introducing a new funding formula for this programme.
- Trialling new approaches to free early education to improve the quality of provision and its flexibility.
- Reviewing the Early Years Foundation Stage with a view to introducing a simplified and less bureaucratic early years framework, with a strong focus on improving children's learning and outcomes.
- Improving the quality of the early years workforce.⁴

The Government has also said that it wants to retain a national network of Sure Start Children's Centres, accessible to all but identifying and supporting the most vulnerable and disadvantaged families.⁵

¹ Organisation for Economic Co-operation and Development (2006) *Starting Strong II. Early Childhood and Care*, Paris, OECD; Sylva K. et al. (1999) *Characteristics of the pre-school environment*, EPPE Technical Paper 6A, London, Institute of Education.

² Connolly, S. and Gregory, M. (2008), 'Moving down: women's part-time work and occupational change in Britain 1991–2001', *The Economic Journal*, 118 (February), pp. 52–76; Scott, J., Dex, S. and Joshi, H. (eds) (2008), *Women and Employment. Changing Lives and New Challenges*, Cheltenham, Edward Elgar Publishing.

³ Field F. (2010) *The Foundation Years: Preventing poor children becoming poor adults. The report of the independent review on poverty and life chances*, London, Cabinet Office.

⁴ Business Plan 2011-2015, Department for Education, May 2011.

⁵ Sure Start Children's Centres: Government Response to the Fifth Report from the Children, Schools and Families Committee, Session 2009–10

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

The Childcare and Early Years Providers Survey series is a key source of evidence that will help to monitor progress towards meeting commitments made by the Government, in three particular areas:

Free early education for disadvantaged two year olds

- The planned extension of the free offer for disadvantaged two year olds ((from the current 20,000 places to around 130,000 in 2013) will require a substantial increase in capacity among those who cater for this age group, primarily daycare providers and childminders.
- Trend data on available places and planned changes will be essential to understand if the sector is building sufficient sustainable capacity to meet the continued demand for provision, including new places, and what can be done to overcome possible barriers to expansion.

The impact of a high quality workforce

- There is strong evidence showing that early education has a positive effect on children's social and cognitive development only if it meets certain quality standards, but some providers still operate below these standards.⁶ The quality of staff, and in particular their qualification levels, is strongly associated with good quality provision, hence the Government's commitment to improve the quality of the early years workforce.
- The survey series, which produces data on staff qualifications, training, pay, recruitment and retention, will provide essential data to assess progress towards improving the quality of the childcare workforce.

Flexible early education and childcare

- Evidence from parents has shown that childcare services are not sufficiently flexible to meet some families' needs, particularly if parents work or study, and this can prove a barrier to employment.⁷
- The Government is committed to ensuring that free early education can be used flexibly, enabling more children to experience the developmental benefits associated with the uptake of the free entitlement. The survey series collects data on opening hours and the adaptability of the free entitlement, which will help to assess whether providers are becoming more flexible and to identify factors which may be preventing them from doing so.

⁶ Burchinal, M. R., Roberts, J. E., Riggins, R., Jr., Zeisel, S. A., Neebe, E., & Bryant, D. (2000). Relating quality of center-based child care to early cognitive and language development longitudinally. *Child Development*, 71(2), 339-357; Smith R., Purdon S., Schneider V., La Valle I., Woolny I., Owen R., Bryson C., Mathers S., Sylva K., Lloyd E. (2009) *Early Education Pilot for Two Year Old Children Evaluation*, Research Report DCSF-RR134, DCSF: London; Sylva K. et al. (1999) *Characteristics of the pre-school environment*, EPPE Technical Paper 6A, London, Institute of Education.

⁷ Butt, S., Goddard, K., La Valle, I. and Hill, M. (2007), *Childcare Nation? Progress on the childcare strategy and priorities for the future*, London, Daycare Trust; La Valle and Smith (2009) 'Good quality childcare for all? Quality towards universal provision' *National Institute Economic Review*, N. 207, January 2009.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

2.2 Objectives of the research

The DfE needs robust information on the key characteristics of childcare provision in the early years and childcare sector, as well as information on its workforce and the cost of childcare, in order to monitor what provision is available and to inform policy development in this area.

Previously, the Department for Children, Schools and Families (DCSF) and the Department for Education and Skills (DfES) commissioned surveys amongst childcare and early years providers in 1998, 2001, 2003, 2005, 2006, 2007, 2008 and 2009. The 2010 phase of research consisted of surveys amongst the nine following childcare and early years settings:

Childcare

- Full-day childcare
 - Sessional childcare
 - After school childcare
 - Holiday care
 - Children's centres
 - Childminders
- } Collectively referred to as 'out of school' care

Other Early Years providers

- Primary schools with nursery and reception classes
- Primary schools with reception but no nursery classes
- Nursery schools

This report presents an overview of the findings across all of these groups.

2.3 The survey

The survey examines the key characteristics of childcare and early years provision and its workforce:

- Provider characteristics (ownership, charitable status, opening times, length of operation, free early education sessions);
- Number of places and children attending (number of places, ages, ethnicity, vacancies);
- Staff characteristics (number of staff, demographics of paid staff, pay, hours, time spent with children);
- Qualifications (qualifications held and worked towards by paid staff);
- Training (current level of training, training plans and budgets);
- The Graduate Leader Fund (awareness of the Fund, whether provider has applied for money via the Fund);
- Recruitment and retention (level of recruitment, retention rates, vacancies);
- Income (fees, funding, childcare vouchers, business performance);
- Expenditure (cost of the premises, staff wages).

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

2.4 Survey design

This report is based on interviews conducted with senior managers⁸ of childcare providers (or in a small number of cases, an alternative senior member of staff), childminders, and head teachers/early years or foundation stage co-coordinators amongst the early years settings.

2.4.1 Questionnaire

Three different questionnaires were used; one for the childcare group (full day care, sessional, after school, holiday care and children's centres)⁹, one for the early years group (nursery schools, primary schools with reception but no nursery classes and primary schools with nursery and reception classes) and a third for childminders.

Copies of the questionnaires are included in the Technical Report and can be downloaded from the DfE website (www.education.gov.uk/rsgateway).

Interviews were conducted by telephone using CATI (Computer Assisted Telephone Interviewing) by Kantar Operations' fully trained telephone interviewers in Ealing and Hull.¹⁰ Interviews were carried out between 20th September and 23rd December 2010.

2.4.2 Changes to the sampling approach

Changes to the way in which Ofsted classifies providers have meant that the 2010 surveys had to employ a different sampling method to that which had been used previously. There were three key factors which affected the surveys' samples in 2010; changes to Ofsted's classification of registered childcare providers; a change in the available sample source for school-run out of school providers; and a new sampling approach for the early years group. These factors are discussed in more detail below.

(i) Changes to Ofsted's classification of registered childcare providers

Previously, Ofsted had classified providers according to the type of care they provided - full day care, sessional care and out of school care (holiday clubs or after school clubs). It was therefore possible to draw the sample for each of these groups directly from the Ofsted database. It was also possible for population estimates to be made, based on the total number of each type of provider held in the Ofsted database together with the eligibility rates determined by the survey itself (i.e. whether a given provider was still offering the flagged type of care at the time of the interview). However, changes to the classification system used in Ofsted's database meant that this information ceased to be available from September 2008 onwards.

The impact of these changes to the Ofsted classification system was first felt during the 2009 survey. Bearing in mind the fact that the changes occurred close to the set-up period for the 2009 survey, it was decided by DCSF that the most practical way forward, bearing in mind the limited timeframe available, was to conduct the 2009 survey as a recontact survey, in which the sample was drawn from childcare and early years providers who had participated in the 2007 and 2008 surveys. This was a robust compromise solution, but did have the potential to impact on data, as discussed in chapter 2.6.3.

⁸ No specific definition was provided for 'Senior Manager'. Settings decided themselves who best fitted this description.

⁹ Some questions were asked only of children's centres.

¹⁰ Kantar Operations provide the operational resources and capabilities for all Kantar's UK companies (including TNS-BMRB).

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

With the additional time available for the set-up of the 2010 survey, a more complex solution was possible. In 2010, an additional 'sample building' stage was therefore added to the survey. During this stage, a large number of short interviews were conducted with providers in the Ofsted database, with a view to determining the types of care that they provided – essentially providing the information that had previously been flagged on the database. The inclusion of this sample building stage meant that the sample for each of the different provider types, to be used for the longer mainstage interviews, could be drawn in a similar manner to that employed in previous years (using the information about the types of provision offered by each setting which was gathered during the sample building stage). It also meant that, as in previous years, it was possible to derive population estimates (by grossing up the proportion of sample building respondents offering each type of care to reflect the total number of providers in the database). Care was taken to ensure that the provider classifications used in the new sample building stage were as close as possible to those which had previously been used on the Ofsted database.

(ii) A change in the available data source for school-run out of school providers

Compounding the sampling issue, the Ofsted database also ceased to include the details of primary schools offering out of school care. As such, in 2010 it was necessary to source sample from the School Census database in addition to that drawn from the Ofsted database, in order to ensure that this group wasn't excluded.

Whilst great care was taken to maximise the comparability of the 2010 data with that from previous years, the changes brought about by the change in Ofsted's data collection did mark a very significant change in sampling approach, and year on year comparisons for the childcare groups should be viewed bearing this in mind.

(iii) A new sampling approach for the early years group

It was also decided that a change in the sampling approach for the early years groups (nursery schools, primary schools with both reception and nursery classes, and primary schools with reception classes but no nursery classes) was desirable. Up until 2009, these groups were sampled from the Edubase database. However, it was decided by DCSF that the School Census offered a more robust sample source and this was therefore adopted for the 2010 survey.

The sampling approach for childminders was not affected by the above changes.

For discussion of how the sampling changes may have impacted on trends, please see chapter 2.6.3. For further details about the sampling process, please see the Technical Report.

2.4.3 Weighting and grossing

Data are weighted by region to ensure the figures are representative of providers throughout England. The population profiles used for the weighting were taken from the School Census database in January 2009 for early years providers and for out of school provision by primary schools; the DCSF database of children's centres in February 2010; and a snapshot of the Ofsted database from February 2010 for childcare providers and childminders.

To reduce both the burden on providers and the overall length of interview, settings employing more than a certain number of staff (more than three supervisors or three other paid childcare staff for childcare settings and two qualified teachers, two nursery nurses or two early years support staff for the early years groups) were asked to randomly select members of staff, rather than having to give details for the whole team. Respondents in the childcare groups were asked

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

to randomly select three supervisory staff and three other childcare staff. They were also asked for information about the senior manager.

Respondents in early years settings in maintained schools were asked to randomly select two qualified early years teachers, two nursery nurses and two other paid early years support staff and were asked questions about the head teacher or early years co-ordinator.

When selecting the members of staff, respondents were instructed to list them in alphabetical order by surname and pick the first three or two in order to provide a random selection. The data were weighted at a provider level to the true number of staff that each provider employs.¹¹

In addition, the data were weighted and grossed up to the total number of active providers in England.

Full details of the methodology and analysis are included in the Technical Report.

2.5 Structure of the report

The report is structured as follows:

Chapter 1	Summary
Chapter 2	Introduction
Chapter 3	Characteristics of provision
Chapter 4	Places and attendance
Chapter 5	Workforce composition
Chapter 6	Qualifications
Chapter 7	Training
Chapter 8	Recruitment and Retention
Chapter 9	Income and Expenditure

2.6 Notes on reading the report

2.6.1 Notes on numbers

In the tables, either grossed up figures or percentages are provided. Where the main report shows a table of percentages, the equivalent table showing grossed up figures may appear in Appendix A (or vice versa). The grossed up figures are based on the total number of providers registered with Ofsted in February 2010, recorded on the DCSF database of children's centres in January 2010, or recorded on the School Census database in January 2009, excluding the proportion found by the survey to be no longer eligible for the survey (e.g. closed down, no longer in business).¹² These grossed up figures are not exact and, like the percentages reported, are subject to margins of error.

Throughout the report, where the text comments on differences between subgroups of the sample, these differences have been tested for statistical significance and were found to be statistically significant at the 95 per cent confidence level or above, giving these findings a confidence interval of +/- five per cent. Tests were run on the effective sample sizes, factoring in

¹¹ In some cases staff weights have been capped in order to prevent reducing the sample efficiency by too large a margin. Full details are given in section 4.3.1 of the Technical Report.

¹² In the 2009 dataset, the grossed up number of childcare providers and childminders was calculated based on the August 2008 Ofsted database, which was the most recent usable source at that time. As such, 18 months worth of updates to the Ofsted database occurred between the 2009 and 2010 surveys, which may have served to increase the magnitude of year on year changes in the data for childcare providers and childminders.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

design effects for each sample group (see the Technical Report). Occasionally comments are made on shifts that were not statistically significant but which may nonetheless serve as an early indicator of future significant shifts. In such cases these changes are described as 'directional'.

Data have been analysed at both provider level (e.g. characteristics of provision, places and children, income) and staff level (e.g. characteristics of staff such as age, pay, qualifications). For those questions where analysis is at a staff level the bases noted show the overall number of staff, rather than the number of settings.

Additionally, because of the complexity surrounding childcare services offered by children's centres, it was decided to focus on their on-site full day care provision. However, because the sample was originally drawn from the DCSF database of children's centres and as providers of full day care are required to register with Ofsted and therefore appear on their database, children's centres have been treated as a sub-group of full day care providers in the report.

Further, because a substantial proportion of childminders registered with Ofsted are not currently working as childminders, analysis has usually been based on those that are currently engaged in childminding activity. In the few instances where figures based on the total number of childminders are shown (i.e. including those not currently working), they appear alongside the figures for the number of working childminders and are clearly labelled as 'registered childminders'.

Numbers of providers and staff have been rounded throughout the report. Figures have been rounded to nearest 100 if they are greater than 1000, to nearest 50 if the number is 100-999 and to the nearest 10 if the number is below 100.

In most cases where averages have been reported they have been given as the mean. Where the median value has been used this is referenced as such. The median value is the middle value of a group of numbers and is not affected by outliers. The mean is the sum of all numbers in a group divided by the number of items in the group.

2.6.2 Notes on tables

The last row of each table describes the base (who the table is based on). The unweighted base numbers are given in Appendix 2 of the report.

Where respondents can give multiple responses to a question, the sum of the individual responses may be greater than 100 per cent.

Also the percentages in the tables do not always add to 100 per cent due to rounding, and where percentages in the text differ to the sum of percentages in the tables this too will be due to rounding. Also 'netted' (i.e. where a number of responses have been grouped together) responses may not always equal the sum of the individual responses, again due to rounding.

Symbols used in tables:

- * signifies a percentage that is greater than 0 but less than 0.5.
- # signifies a value that is less than 50.
- † signifies a cell where data has not been included due to a base of less than 50.
- ‡ signifies a cell where data should be treated with caution due to a low base size.
- +/-0 signifies no change from previous years.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

N/A signifies we are unable to make a comparison with previous years as either the question was not asked or the data was not available.

Unless otherwise stated the figures referred to are weighted.

2.6.3 Notes on trends

Where appropriate, comparisons are made with previous waves of the survey, largely the 2009, 2008, 2007 and 2006 waves.

The focus has been on these waves partly because it is not possible to display all data points and recent trends tend to be of most interest, and partly because of changes to the survey over time. Children's centres were included in the survey for the first time in 2006, while the 2005 survey did not include the early years groups. Although out of school clubs were included in 2005, the sample was dealt with differently and therefore no comparisons should be made.

As described in chapter 2.4.2, there have been a number of sampling changes in 2010, which mean that care should be taken when comparing 2010 results with those from previous years. The discussion below focuses on how the sampling changes impact on the survey's estimates of the number of providers, but it should be remembered that there will also be knock-on effects on the estimates of the number of staff and children attending (as well as any other variables influenced by the total number of providers). If the estimated number of providers increases, the estimates of the number of staff and attendees will also tend to increase.

It seems that the data for after school clubs and holiday clubs, in particular, may have been impacted by the change in sampling method, with a marked increase in the number of providers (and certain shifts in their profile) since 2009. One of the key changes in the out of school profile is that a higher proportion of such settings in 2010 also offered full day care than was the case in previous years. This shift may partly be a reflection of genuine trends in the sector, but the scale of the change (discussed in chapter 3.1) would seem to indicate that the 2010 sample of out of school providers may have included settings that were not within the scope of the sample in previous years. The fact that a relatively small proportion of out of school providers in the sample claimed to have opened in the past year (see chapter 3.7) also suggests that the sampling approach has played a part in the increase in the estimated number of providers.

However, as discussed below, it should also be borne in mind that the 2009 data is likely to have underestimated the number of out of school providers at that time. Indeed, had the rate of increase in the number of out of school providers between 2007 and 2008 continued over the following two years, then the 2010 figures for the total number of providers would be very much in line with the earlier trend.

In so far as full day care providers are concerned, there was again a significant increase in the total number of settings recorded in 2010 compared to 2009. This difference would also seem to be at least partly attributable to changes in the sampling approach, with the 2009 data perhaps underestimating the total number of providers at that time and the 2010 data picking up more full day care providers than would have been the case using the former sampling approach. A relatively small proportion of full day care providers claimed to have opened in the past year, which again supports the idea that the sampling is at least partially responsible for the increase in the number of recorded settings.

Sessional providers will also have been affected in a similar manner, and the increase in the total number (again discussed in chapter 3.1) between 2009 and 2010 may not reflect the true trend within the sector. It is likely that the 2009 data exaggerated the decline in numbers from 2008,

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

while the 2010 data may have estimated a higher total than that which would have been found using the previous sampling approach.

For childminders the year on year data were less affected by the changes to the sampling method. While the 2009 data may have provided a slightly low estimate of the total number of childminders, the sampling approach in 2010 was in line with that used in 2008 and previous years, meaning that the trends across those periods are reliable.

For early years providers, the change in sample source from Edubase to the School Census appears to have had a relatively limited impact on trends. Estimates for the total number of providers in each of the sub-groups (nursery schools, primary schools with nursery and reception classes, and primary schools with reception but no nursery classes) are relatively consistent with those seen in previous years.

As mentioned above, there needs to be caution in comparing results for the settings from 2009 with those from previous waves of the survey. The sample for the settings in 2009 came from a different source – by re-contacting settings interviewed in 2007 and 2008 who agreed to be re-contacted (rather than a fresh sample approach as was used previously). This means that any new providers, i.e. providers which have opened since the 2008 sample was drawn, were excluded from the survey. In turn this affected the ability to effectively ‘gross up’ the survey findings. In previous years, we were able to gather estimates of ‘eligibility’ from the survey. More specifically, the survey gave us an estimate of how many providers on the original sampling frame were no longer providing that service. This enabled us to gross up the survey figures to provide likely population figures that we could compare to those from previous years. The re-contact survey in 2009 still gave us an estimate of how many of the providers in the re-contact sample were no longer in business or providing that service, i.e. ineligible.

However, to apply these ineligibility rates to recent snapshots of the total number of providers from the Ofsted/DCSF/Edubase databases of providers does not provide an accurate estimate of the total number of providers in 2009, as the ineligibility rates did not take account of any new providers. Furthermore, given the changes in the classification system used on the Ofsted database in September 2008, it was necessary to use an August 2008 snapshot of the database to calculate population estimates for childcare providers, rather than a more recent 2009 snapshot. All of the above factors mean that it is likely that the 2009 data underestimated the total number of providers, places and staff for all groups.

Additional care also needs to be taken when comparing the results for full day care in children’s centres from 2010 and 2009 with previous years. As noted earlier, the survey only covers on-site provision of full day care and excludes off-site provision. The Department’s early guidance for Phase 1 (2004-2006) children’s centres took the line that all services, including full day care provision, should be delivered in the same location. This led to the vast majority of Phase 1 centres developing their full day care provision on-site. Guidance on Phase 2 centres (2006-2008), issued in November 2006, took the line that where it was not possible to provide all services in one location or where it is decided to build on good quality private, voluntary and independent provision, the full day care provision could be located in a separate building up to half a mile away from the main centre. Phase 3 centres, operating in the least deprived areas, had fewer requirements in terms of childcare provision.

Given that the survey only includes *on-site* full day care provision, it will have excluded any Phase 2 or phase 3 children’s centres that provide full day care at linked sites (often through PVI providers), and will only cover Phase 1 children’s centres and those Phase 2 children’s centres that have developed on-site full day care provision. Therefore, the year-on-year figures will become less representative of children's centre full day care provision overall as time goes by.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Moving on to consider the earlier data points, there also needs to be some caution in comparing results for childcare settings from 2003 with those from 2005, 2006, 2007 and 2008 due to differences in sampling, as the sample for the childcare settings in 2003 came from a different source – the Childcarelink database held by Opportunity Links. This did not have full details of all providers in all parts of the country and additional work was done to obtain the necessary contact details in certain areas.

In the 2003 report some analysis was carried out to look at providers in the 20 per cent most deprived wards. By 2005 there had been a change in the areas used to define levels of deprivation from wards to Super Output Areas. Therefore, this report looks at the 30 per cent most deprived areas (as did the 2008, 2007 and 2006 reports), which is roughly the equivalent to the 20 per cent most deprived wards.

When comparing data with previous years, in the majority of cases, the changes have been noted in terms of the percentage change from year to year.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

3. Characteristics of provision

This chapter discusses the number of providers in operation. It compares the distribution of settings across the most and least deprived areas, their geographical spread, and ownership profile and where possible, how these have changed since previous surveys.

It should be noted that due to the necessary changes in sampling method, as detailed in chapter 2.4.2, caution should be taken when comparing data from 2010 with previous years. There is a discussion of the potential impact of these sampling changes on trends in chapter 2.6.3 - the points raised in that chapter should be considered when looking at the data which appears throughout the report. The childminders group is the one least impacted by changes to the sampling approach over time and, for this group, trends from 2010 to 2008 and previous years are reliable.

3.1 Number of providers

Table 3.1 shows the number of providers of each type since 2005.

	2010	2009	2008	2007	2006	2005
	No.	No.	No.	No.	No.	No.
Full day care	16,700	14,100	13,800	13,600	12,700	11,800
<i>Full day care in children's centres</i>	800	1,000	1,000	950	800	N/A
Sessional	8,300	7,800	8,500	8,700	9,700	10,000
After school clubs	9,500	7,900	8,800	8,500	7,700	N/A
Holiday clubs	7,700	6,400	6,500	5,800	6,400	N/A
Childminders - working	47,400	51,000	56,100	59,800	57,900	57,700
<i>Childminders - registered</i>	57,900	63,600	65,800	69,200	71,500	70,200
Childcare total	89,500	87,200	93,800	96,400	94,400	N/A
Nursery schools	400	450	450	450	450	N/A
Primary schools with nursery and reception classes	6,700	6,700	6,700	6,800	6,500	N/A
Primary schools with reception but no nursery classes	8,600	8,600	8,700	8,900	9,200	N/A
Early years total	15,700	15,700	15,900	16,200	16,200	N/A
Total providers¹³	105,100	103,000	109,700	112,600	110,600	N/A
<i>Base: All childcare providers 2010, 2009, 2008, 2007, 2006, 2005. All early years provision in maintained schools 2010, 2009, 2008, 2007, 2006</i>						

¹³ The total number of childcare providers includes full day care, sessional providers, after school providers, holiday clubs and working childminders. The early years total includes nursery schools, primary schools with nursery and reception classes, and primary schools with reception but no nursery classes. It was not possible to calculate comparable figures for all previous years as not all of the data are available.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Table 3.2 Percentage changes in numbers of childcare providers and early years providers in maintained schools between 2010 and previous years					
	% change from 2009 to 2010	% change from 2008 to 2010	% change from 2007 to 2010	% change from 2006 to 2010	% change from 2005 to 2010
	%	%	%	%	%
Full day care	18%	21%	23%	31%	42%
<i>Full day care in children's centres</i>	-20%	-20%	-16%	0%	n/a
Sessional	6%	-2%	-5%	-14%	-17%
After school clubs	20%	8%	12%	23%	n/a
Holiday clubs	20%	18%	33%	20%	n/a
Childminders - working	-7%	-16%	-21%	-18%	-18%
<i>Childminders - registered</i>	-9%	-12%	-16%	-19%	-18%
Childcare total	3%	-5%	-7%	-5%	n/a
Nursery schools	-11%	-11%	-11%	-11%	n/a
Primary schools with nursery and reception classes	0%	0%	-1%	3%	n/a
Primary schools with reception but no nursery classes	0%	-1%	-3%	-7%	n/a
Early years total	0%	-1%	-3%	-3%	n/a
Total providers	2%	-4%	-7%	-5%	n/a
<i>Base: All childcare providers 2010, 2009, 2008, 2007, 2006, 2005. All early years provision in maintained schools 2010, 2009, 2008, 2007, 2006.</i>					

There were an estimated 105,100 childcare and early years providers in England in 2010; this was a marginal increase on the number recorded in 2009, and it represents a decrease of five per cent from 2006, when there were 110,600 providers. It should, however, be borne in mind that the 2009 estimate was potentially on the low side, and that the 2010 data have been affected by the change in sampling approach.

The total number of childcare providers increased from 87,200 in 2009 to 89,500 in 2010 (although this is lower than the years previous to 2009). This increase may also be affected by changes to the sampling method. In 2010 childcare providers were comprised as follows; 16,700 full day care providers, 800 of whom provided full day care on site in children's centres; 8,300 sessional providers; 9,500 after school clubs; 7,700 holidays clubs; and 47,400 working childminders.

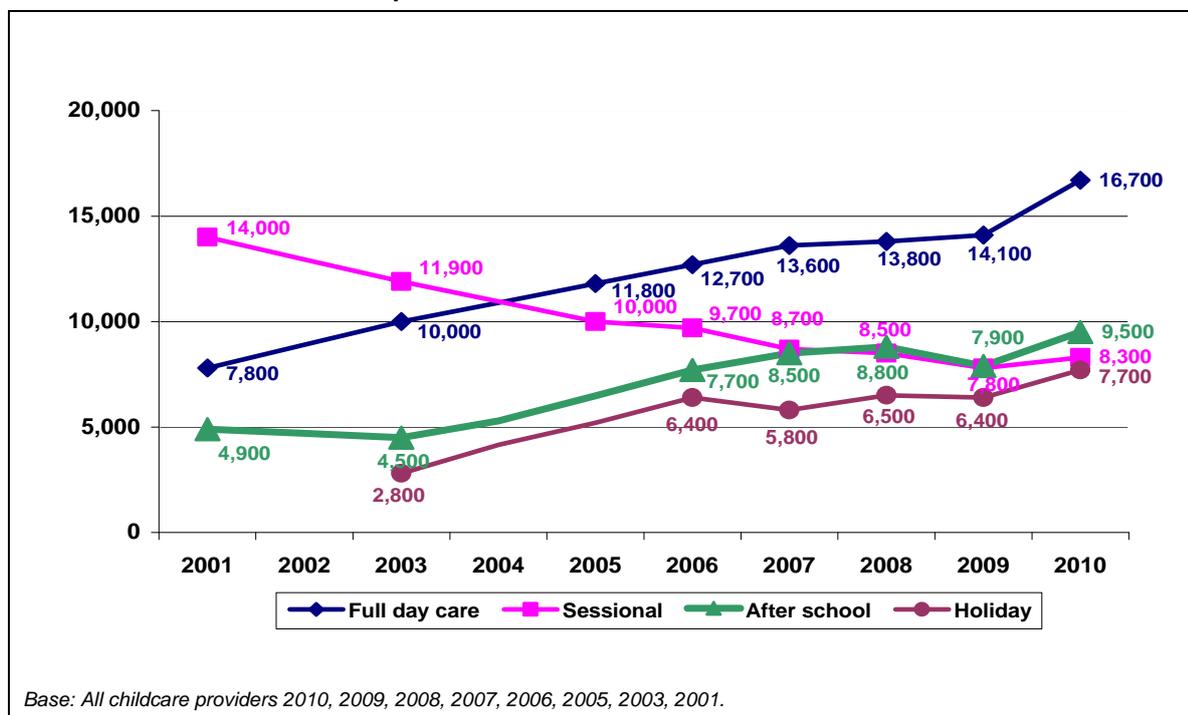
The number of early years providers has remained relatively stable. In 2010 there were 15,700 providers, very similar to the number recorded in 2009. In 2010 early years providers consisted of the following; 400 nursery schools; 6,700 primary schools with nursery and reception classes; and 8,600 primary schools with reception but no nursery classes.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Childcare

Chart 3.1 shows the number of childcare providers by type since 2001.

Chart 3.1 Number of childcare providers



Looking at the past decade, all types of childcare provider have increased in number since 2001 (or 2003 for holiday clubs) with the exception of sessional care providers, which have declined in number by 41 per cent since 2001.

Full day care providers have increased in number each year since 2001. The rate of increase had appeared to be levelling off in recent years, but there was a large increase in 2010 to 16,700 providers. This constitutes a 114 per cent increase in full day care provision since 2001. There was an 18 per cent increase between 2009 and 2010.¹⁴

The decline in the number of sessional providers had levelled off in the preceding years and saw an increase in 2010 to 8,300, a rise of six per cent.¹⁵ The drop in the number of sessional providers from 2001 could in part be due to increasing parental demand for childcare that covers longer hours. In 2010 three in ten full day care providers (29 per cent) said that they had changed from offering sessional care. More than half of these (62 per cent) said that they did this because of parental demand for longer hours of childcare, and one in five (18 per cent) said that this was done because there was more funding available to them if they provided full day care rather than sessional care.

There have been large increases from 2009 in the number of after school clubs and holiday clubs. After school clubs saw an increase of 20 per cent to 9,500, although the increase from

¹⁴ The increase in 2010 in the number of the various different types of childcare provider, with the exception of childminders, may be influenced by the change in sampling method. Caution should therefore be taken when comparing with previous years.

¹⁵ This slight increase may, once again, be connected to the change in sampling method in 2010, coupled with the fact that the 2009 data may have underestimated the number of sessional providers.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

2008 is less pronounced (eight per cent). The number of holiday clubs also increased by 20 per cent from 2009, with the total now standing at 7,700. One point of interest is that the proportion of after school clubs and holiday clubs who also provide full day care increased from 2009 for both of the out of school groups. The proportion of holiday clubs offering full day care increased from 40 per cent in 2009 to 60 per cent in 2010 and amongst after school clubs the proportion offering full day care increased from 27 per cent in 2009 to 42 per cent in 2010.¹⁶

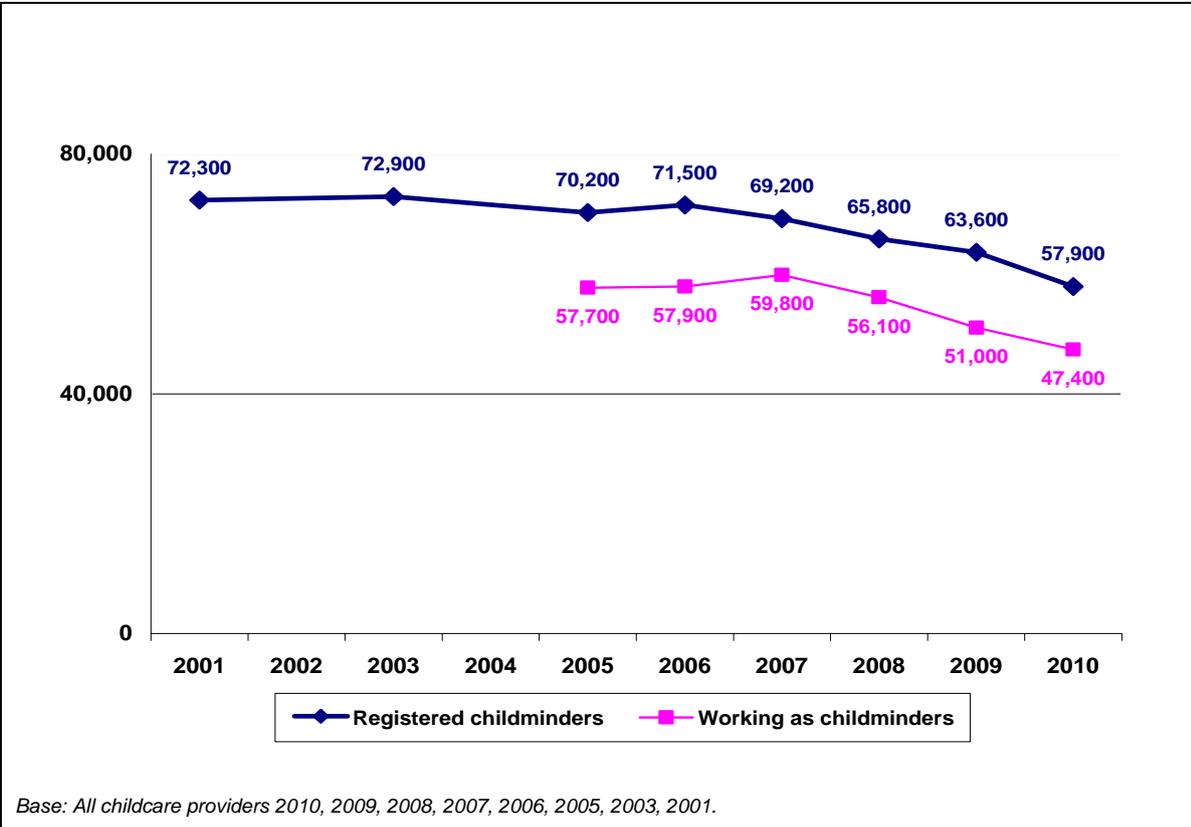
Childminders

Ofsted records indicated there were around 57,900 registered childminders in England at the start of 2010.¹⁷ As in previous years a substantial minority of these providers (18 per cent) were not actively caring for children and were therefore ineligible to participate in the survey.

The total number of active childminders in 2010 was 47,400; this represents a seven per cent decrease since 2009 and marks a continuation of the longer term downward trend.¹⁸ Over the same period the number of registered childminders decreased by nine per cent.

Chart 3.2 shows the number of childminders (both registered and active) since 2001.

Chart 3.2 Number of childminders



¹⁶ It is possible that the change in sampling method provided a wider coverage of out of school care in 2010, meaning that more of the full day care providers who also offer out of school care were picked up (whereas previously our sample had a greater concentration of providers which *only* provided after school or holiday care).

¹⁷ Based on a snapshot of the Ofsted Regulatory Support Application (RSA)

¹⁸ The size of the decline in the number of active childminders between 2009 and 2010 may actually be larger than this, bearing in mind the fact that the 2009 data may have underestimated provider numbers, as discussed in chapter 2.6.3.

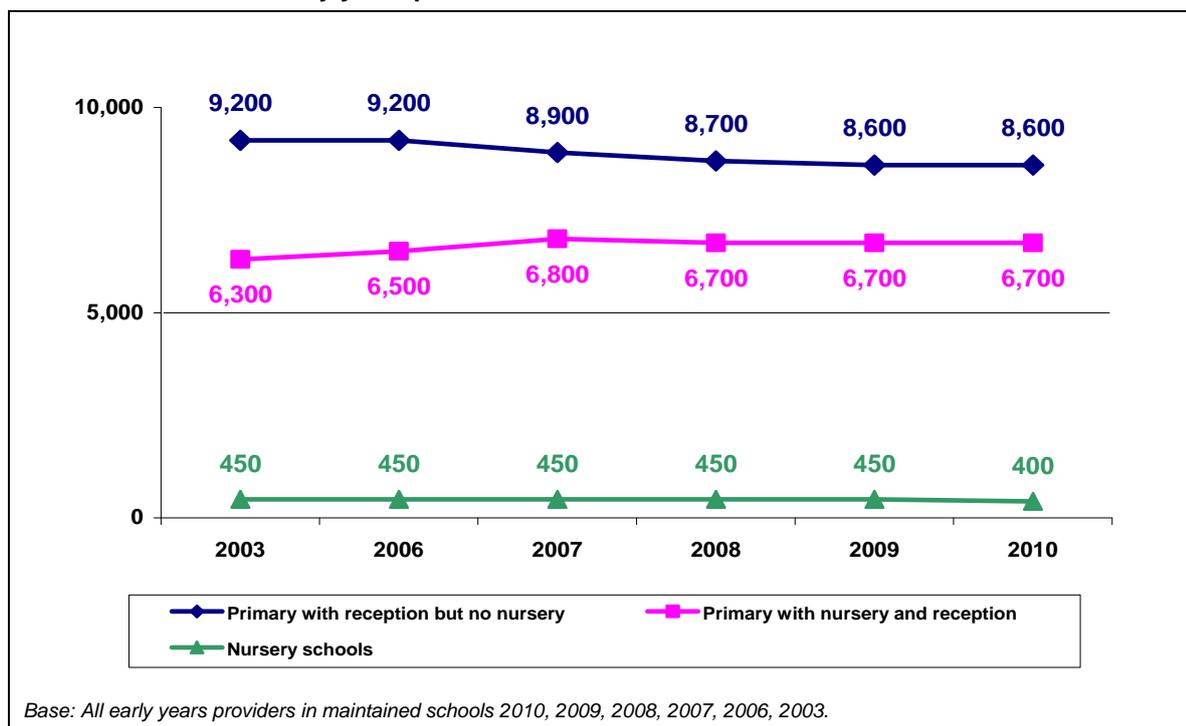
N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Early years provision in maintained schools

Chart 3.3 shows the number of early years providers in maintained schools by type since 2003.

Overall the number of early years providers has been stable between 2003 and 2010 (16,000 in 2003 compared with 15,700 in 2010). Within this total, the number of primary schools with reception but no nursery has fallen by seven per cent over the same period whereas primary schools with nursery and reception classes has increased by six per cent. There has been no change in number of providers for these groups since 2009. The number of nursery schools has declined slightly since 2003 (although in the chart below this is slightly exaggerated due to the rounding of the number of providers to the nearest 50 for figures below 1000).¹⁹ A proportion of the decrease in nursery numbers would be attributable to mergers between nurseries.

Chart 3.3 Number of early years providers in maintained schools



3.2 Providers in deprived areas

Table 3.3 shows the proportion of providers that operate in the 30 per cent most deprived areas in England. Table 3.2a in Appendix 1 shows the *number* of providers that operate in different areas.

Childcare

Overall 22 per cent of childcare providers (19,900 providers) were in the 30 per cent most deprived areas in England – this proportion has not changed significantly since 2006.

¹⁹ The change in Nursery schools between 2009 and 2010 is less pronounced than chart 3.3 indicates as the data in the chart are rounded. The actual numbers fell from 434 in 2009, to 405 in 2010. See chapter 2.6.1 for further details of rounding.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Around three in four children's centres offering on site full day care were located in the 30 per cent most deprived areas (73 per cent). This is similar to 2008 and 2009. The skew towards deprived areas is unsurprising as children's centres in the 30 per cent most deprived areas were historically required to provide full day care, while children's centres outside the most deprived areas were under no obligation to provide full day care.

There was a slight increase in the proportion of sessional care settings located in the 30 per cent most deprived areas (19 per cent in 2010, compared to 15 per cent in 2009). However, this remains a lower proportion than that seen for all the other types of provider, with the exception of childminders.

Childminders

Childminders were less likely than full day care or out of school providers to operate in the more deprived areas in England, though the proportion has remained very stable since 2006. In 2010, 19 per cent of childminders were to be found in the 30 per cent most deprived areas.

Early years provision in maintained schools

One in four (25 per cent) early years providers were located in the 30 per cent most deprived areas in England. Of the different types of early years provider, nursery schools were most likely to be based in the 30 per cent most deprived areas (58 per cent), compared to 41 per cent of primary schools with nursery and reception and ten per cent of primary schools with reception but no nursery class.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

	2010		2009		2008		2007		2006	
	30% most deprived areas	70% least deprived areas	30% most deprived areas	70% least deprived areas	30% most deprived areas	70% least deprived areas	30% most deprived areas	70% least deprived areas	30% most deprived areas	70% least deprived areas
Childcare settings	22%	78%	21%	79%	22%	78%	22%	78%	21%	79%
Full day care	26%	74%	26%	74%	29%	71%	30%	70%	28%	72%
<i>Full day care in children's centres</i>	73%	27%	72%	28%	71%	29%	77%	22%	78%	21%
Sessional	19%	81%	15%	85%	17%	83%	17%	83%	15%	85%
After school clubs	26%	74%	31%	69%	30%	70%	29%	71%	29%	71%
Holiday clubs	31%	69%	28%	72%	28%	72%	31%	69%	34%	66%
Childminders	19%	81%	18%	82%	20%	80%	18%	82%	19%	81%
Early years settings	25%	75%	24%	76%	28%	72%	25%	75%	28%	72%
Nursery schools	58%	42%	68%	32%	62%	38%	65%	35%	57%	43%
Primary schools with nursery and reception classes	41%	59%	43%	57%	50%	50%	44%	56%	50%	50%
Primary schools with reception but no nursery classes	10%	90%	8%	92%	10%	90%	14%	86%	11%	89%

Base: All childcare providers 2010, 2009, 2008, 2007, 2006. Early years provision in maintained schools 2010, 2009, 2008, 2007, 2006.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

3.3 Providers by region

Table 3.4 shows the distribution of providers by Government Office Region (GOR). Table 3.3a in Appendix 1 shows the *number* of providers by Government Office Region.²⁰

Childcare

There was considerable variation in the distribution of providers by region.

The North East, Yorkshire and Humberside's share of children's centres providing full day care was 22 per cent with similar proportions in London (21 per cent) and the North West (19 per cent).

A larger proportion of sessional and full day care providers operated in the South East than in other regions, as was the case in 2009.

After school clubs and holiday clubs were most likely to be based in the North West (17 per cent after school, 15 per cent holiday) or the North East, Yorkshire and Humberside (16 per cent for both). All of the southern regions (South West, South East and London) had a smaller proportion of holiday and after school providers than full day care providers.

The distribution of childminders remained almost entirely static compared to 2009 (which itself showed minimal change from 2008). The South East and London continued to host the largest proportion at 20 and 17 per cent respectively whilst the East Midlands (nine per cent), South West (nine per cent), and West Midlands (eight per cent) had the lowest proportion of childminders.

²⁰ After the Comprehensive Spending Review, it was confirmed that the GORs would close at the 31st March 2011, shifting focus away from regions to local areas. They were, however, still active at the time of the 2010 survey, hence their inclusion in this report. From the 1st April 2011, the areas covered by the GORs will instead be referred to simply as 'regions' and future reports will reflect this change.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

	Full day care	<i>Full day care in children's centres</i>	Sessional	After school clubs	Holiday clubs	Childminders	Nursery schools	Primary schools with nursery and reception classes	Primary schools with reception but no nursery classes
Total number of providers	16,700	800	8,300	9,500	7,700	47,400	400	6,700	8,600
East Midlands	8%	4%	9%	9%	10%	9%	8%	7%	12%
East	10%	9%	14%	10%	10%	12%	8%	9%	13%
London	14%	21%	14%	12%	12%	17%	20%	19%	4%
North East	13%	22%	11%	16%	16%	14%	9%	9%	3%
Yorkshire & Humberside							8%	15%	9%
North West	14%	19%	12%	17%	15%	11%	17%	17%	12%
South East	18%	7%	19%	13%	14%	20%	12%	7%	21%
South West	12%	7%	11%	10%	10%	9%	4%	4%	18%
West Midlands	11%	12%	10%	13%	13%	8%	15%	14%	9%
<i>Base: All childcare providers 2010. All early years providers in maintained schools 2010.</i>									

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Early years provision in maintained schools

The levels of early years provision in maintained schools continued to vary considerably across the regions, but shifts in this distribution between years are negligible.

Nursery schools continued to be heavily concentrated in London (20 per cent) and the North West (17 per cent). The smallest proportion was in the South West where only four per cent of nursery schools were located.

There were also large variations in the regional distribution of primary schools. Primary schools with nursery and reception classes were heavily concentrated in London (19 per cent) and the North West (17 per cent) whereas primary schools with reception but no nursery classes were concentrated in the South East (21 per cent) and the South West (18 per cent).

The South West, in addition to having a low proportion of nursery schools, also had a low proportion of primary schools with nursery classes (four per cent).

3.4 Ownership of provision

This section looks at who manages the childcare provision – whether providers were privately run, or maintained by the local authority or a school or college. Early years provision in maintained schools is not covered in this section as all early years providers in the sample are, by definition, run by local authorities.

Tables 3.5a and 3.5b show the breakdown of providers by ownership.²¹ Tables 3.5c and 3.5d in Appendix 1 show the *number* of providers by ownership.

There were clear variations in ownership of childcare settings by childcare sector.

In 2010 six in ten (59 per cent, a decrease from 66 in 2009) full day care providers were privately run whilst three in ten (30 per cent, an increase from 22 per cent in 2009) were run by voluntary organisations. This trend between 2009 and 2010, with a fall in private ownership and increase in voluntary ownership is interesting to note given the economic climate in recent years, and the Big Society-related interest in a strengthened role for VCS provision. The ownership pattern is reversed when looking at sessional care providers with 31 per cent being privately owned versus 64 per cent owned by voluntary organisations in 2010.

Onsite full day care provision in children's centres was less likely than other types of provision to be either privately or voluntarily owned (34 per cent). Two in three children's centres offering full day care were maintained (68 per cent, an increase from 57 per cent in 2009), and most of these were run by local authorities (57 per cent).

Many children's centres grew from earlier Sure Start funded settings such as Sure Start Local Programmes, Neighbourhood Nurseries and Early Excellence Centres. These would generally, but not always, have been owned and run by local authorities, explaining the relatively high level of local authority ownership in this area of childcare. It was intended that more centres should be developed from other sources such as

²¹ It should be noted that respondents were able to give more than one response when answering, to allow for multiple ownership. As such, adding the individual types of ownership together will, in some cases, result in a total which is larger than the overall number of settings.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

privately run settings and settings run by voluntary organisations²². As the survey only covers full day care provision on site at children's centres, it is possible that a higher proportion of private and voluntary organisations are running full day care provision off site. However, we are unable to establish this with the current data set.

In 2010 after school and holiday clubs were still the most likely to be privately run compared with other types of ownership. Around four in ten after school clubs (38 per cent) and five in ten holiday clubs (48 per cent – an increase from 38 per cent in 2009) were privately run in 2010. This shift in the ownership of holiday clubs may, again, be influenced by the change in sampling approach in 2010.

	Full day care					<i>Full day care in children's centres</i>					Sessional				
	2010	2009	2008	2007	2006	2010	2009	2008	2007	2006	2010	2009	2008	2007	2006
Total number of providers	16,700	14,100	13,800	13,600	12,700	800	1,000	1,000	950	700	8,300	7,800	8,500	8,700	9,700
Private or Voluntary	89%	88%	87%	87%	89%	34%	40%	30%	39%	36%	95%	95%	93%	93%	96%
Private	59%	66%	65%	66%	65%	16%	21%	12%	20%	19%	31%	28%	29%	29%	27%
Voluntary	30%	22%	22%	21%	24%	18%	19%	18%	19%	17%	64%	67%	64%	65%	68%
Maintained	12%	10%	11%	12%	10%	68%	57%	68%	58%	59%	7%	4%	6%	7%	5%
Local authority	6%	4%	5%	6%	5%	57%	50%	58%	49%	50%	4%	2%	4%	4%	4%
School/college	5%	6%	6%	7%	5%	11%	7%	10%	9%	*	3%	2%	2%	3%	1%
Other	2%	2%	3%	2%	2%	3%	2%	3%	*	*	1%	*	1%	1%	*

Base: All childcare providers 2010, 2009, 2008, 2007, 2006

²² Sure Start Children's Centres: Phase 3 Planning and Delivery, DCSF, <http://publications.everychildmatters.gov.uk/eOrderingDownload/DCSF-00665-2007.pdf>

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

	After school clubs					Holiday clubs				
	2010	2009	2008	2007	2006	2010	2009	2008	2007	2006
Total number of providers	9,500	7,900	8,800	8,500	7,700	7,700	6,400	6,500	5,800	6,400
Private or Voluntary	66%	69%	67%	68%	77%	75%	74%	72%	76%	72%
Private	38%	37%	37%	43%	33%	48%	38%	38%	44%	36%
Voluntary	28%	32%	30%	26%	44%	27%	36%	34%	32%	36%
Maintained	35%	30%	31%	33%	22%	26%	24%	24%	25%	25%
Local authority	7%	6%	9%	8%	11%	10%	14%	14%	13%	19%
School/college	28%	24%	22%	25%	11%	16%	10%	10%	12%	5%
Other	*	2%	3%	2%	1%	1%	4%	4%	3%	4%

Base: All childcare providers 2010, 2009, 2008, 2007, 2006.

3.5 Charitable status

Providers were asked whether they were set up as a charity or not-for-profit organisation.

As in previous years sessional care providers were most likely to be not-for-profit organisations (74 per cent in 2010) although the proportion had decreased from 80 per cent in 2009. There were also decreases in the proportions of not-for-profit after school clubs (44 per cent in 2010, down from 59 per cent in 2009) and holiday clubs (42 per cent in 2010, down from 58 per cent in 2009).²³

Four in ten full day care providers were not-for-profit organisations (40 per cent). This compares to 48 per cent of children's centres offering full day care (a fall from 2009, but a return to 2007 and 2008 levels).

3.6 School links in out of school clubs

One in four (24 per cent) after school clubs which were not themselves a school governing body had a contract or partnership agreement with other schools for the provision of childcare. This was very similar to the proportion seen in 2008 (26 per cent). Of those who had links with other schools, more than four in ten (44 per cent) were linked with more than one school, leading to an average of 2.2 linked schools per linked provider.

Four in ten (38 per cent) of those after school clubs who had links with other schools provided supervised transport between themselves and the other schools.

²³ This may again be influenced by the change in sampling method employed in 2010, which has meant that a greater number of out of school providers also offering full day care were included in the sample.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Thirteen per cent of holiday club providers had contracts or agreements with other schools (compared to 16 per cent in 2008 and 19 per cent in 2007). Holiday clubs were perhaps more often independent than after school clubs, as they run at times when schools are unlikely to be open. Almost half (47 per cent) of those holiday clubs who had links with other schools had agreements with more than one school. One in four (23 per cent) of those holiday clubs with partnership agreements provided supervised transport between these other schools.

3.7 Length of operation

Childcare providers were asked how long they have been in operation²⁴. Reflecting the maturation of a relatively new sector, full day care providers in children's centres have changed in age profile since this question was last asked in 2008. In 2008 nine per cent had been open less than a year, in 2010 this has decreased to just three per cent. In 2008 just three in ten (31 per cent) of this type of setting had been operating for five years or more, in 2010 this had increased to 46 per cent.

At the other end of the scale, sessional providers tended to be the most well established providers, with nine in ten operating for five years or more. The majority of full day care providers were also relatively well-established, with 72 per cent having been in operation for at least five years, and just five per cent being less than a year old.²⁵

In 2010, 65 per cent of after school clubs and 64 per cent of holiday clubs had been operating for at least five years. This marked an increase in the proportion of long-established after school clubs compared to 2008 (58 per cent). Only six per cent of after school and five per cent of holiday clubs had been open for less than a year.

3.8 Opening times

Since 2001 there has been a general pattern for childcare to increasingly be provided for longer periods of time to fit in with changing lifestyles and parental demand, such as the propensity of parents to work longer and less typical hours. In recent years this trend has, however, been less pronounced.

²⁴ Early years providers in maintained schools were not asked this question.

²⁵ The relatively low proportion of new full day care settings suggests that the change in sampling method has impacted on the estimated total number of full day care providers (which saw a sizeable increase in spite of this relatively low proportion of new settings).

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Table 3.6 Average length of time per day that settings are open					
	2010	2008	2007	2006	2005
Full day care	8h37m	9h01m	8h50m	8h50m	9h2m
<i>Full day care in children's centres</i>	9h50m	<i>N/A²⁶</i>	<i>9h58m</i>	<i>9h58m</i>	<i>N/A</i>
Sessional	4h37m	4h09m	4h00m	4h00m	4h13m
After school clubs	5h45m	4h02m	3h29m	3h52m	4h38m
Holiday clubs	9h4m	8h46m	8h37m	8h19m	7h21m
Childminders	9h8m	9h04m	9h26m	9h10m	9h13m
Nursery schools	7h5m	6h50m	6h38m	6h58m	N/A
Primary schools with nursery and reception classes	5h46m	5h56m	5h25m	5h16m	N/A
Primary schools with reception but no nursery classes	N/A	N/A	N/A	N/A	N/A
<i>Base: All childcare providers 2010, 2008, 2007, 2006, 2005.</i>					
<i>All early years provision in maintained schools 2010, 2008, 2007, 2006.</i>					

Full day care providers were open for an average of eight hours and 37 minutes per day in 2010, a decline from the average of nine hours and one minute seen in 2008. Reflecting this decline in the average, there has been a decrease in the proportion offering nine or more hours of care per day (60 per cent in 2010 compared to 73 per cent in 2008). This decrease in the proportion of settings offering nine or more hours of care per day applied across the full spectrum of settings, irrespective of the number of children attending or whether they were for-profit or not-for-profit providers. There were also decreases regardless of the level of deprivation of the area in which settings were sited. As such, this appears to be a genuine shift in provision – possibly linked to the increase in the average hours of provision for after school clubs, as discussed below.

As would be expected, after school clubs and sessional providers were open for shorter periods of time. However, both have increased their opening hours in 2010. For after school clubs, the average increased to five and three quarter hours per day and for sessional providers there was an increase of twenty eight minutes, to four hours and 37 minutes. It is likely that these increases are partly attributable to the change in sampling approach in 2010.

The opening hours of holiday clubs also seem to be increasing, rising from seven hours and 21 minutes a day in 2005 to nine hours and four minutes in 2010. Six in ten (58 per cent) holiday clubs were open between nine and 10 hours every day, and one in five (19 per cent) opened for eleven hours or more. Again, these changes may be linked to the change in sampling approach in 2010.

Eighty-seven per cent of childminders accepted children both during term time and during the school holidays, a situation which has not changed significantly since 2008. In 2010 childminders accepted children for an average of nine hours and fourteen minutes a day during term time and nine hours 37 minutes during school holidays.

In addition to how many hours childminders were prepared to accept children for, they were also asked how long they looked after the children they were caring for (charts 3.3a,

²⁶ Full day care providers in children's centres were not asked this question in 2008.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

3.3b). In a typical week, the average time spent looking after children was 15 hours in term-time and 22 hours during the school holidays. This marks a directional²⁷ decrease on the hours of care offered in 2008, when childminders cared for children for 16 hours per week during term time and 24 hours per week during school holidays.

Chart 3.3a: Number of hours per week children are cared for by childminders in term time

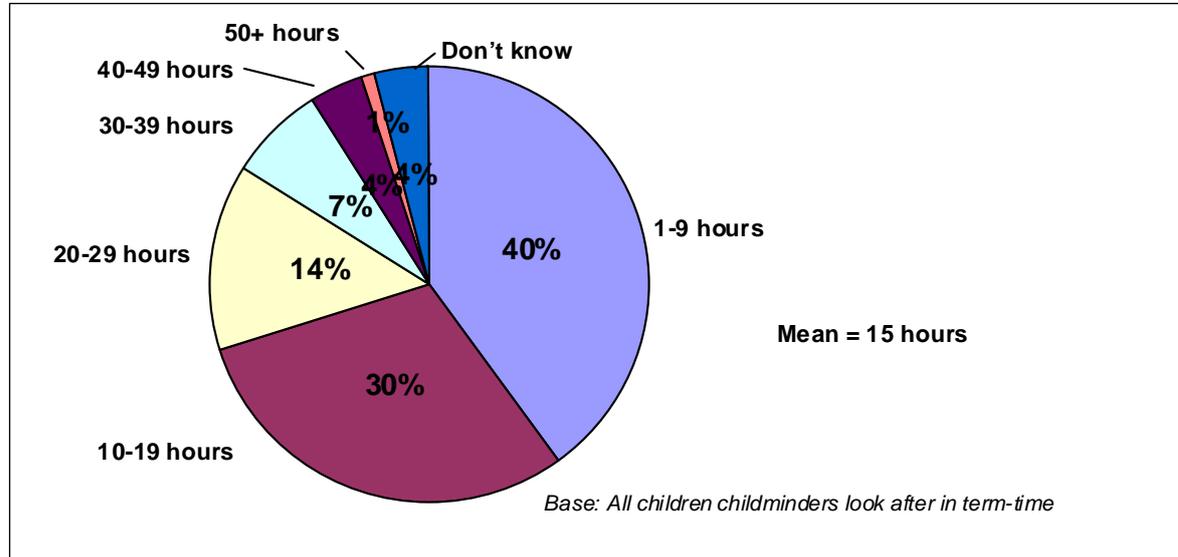
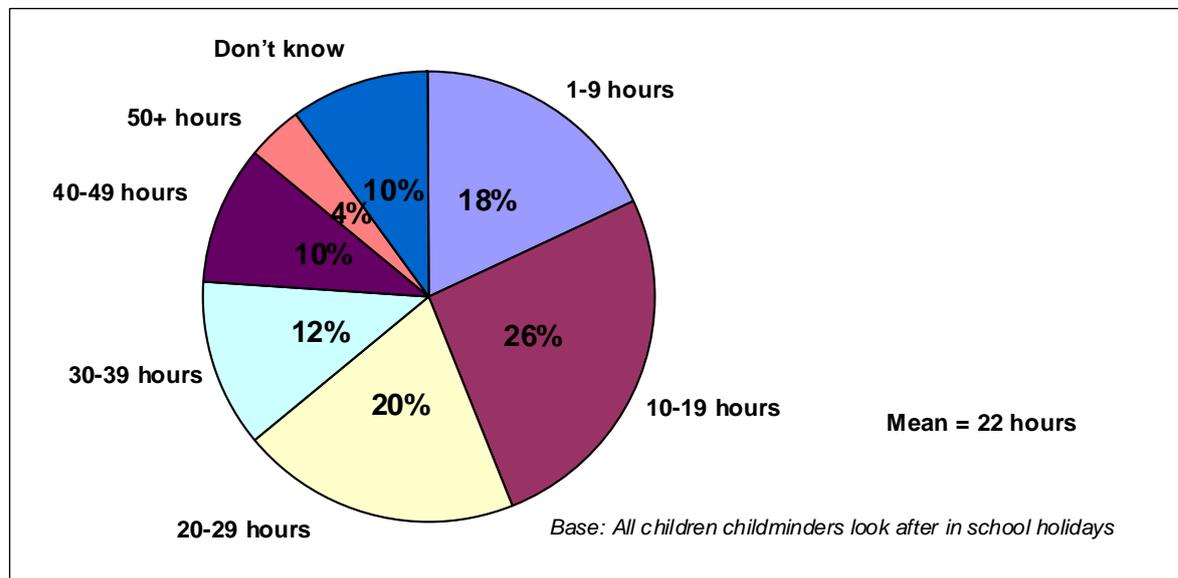


Chart 3.3b: Number of hours per week children are cared for by childminders in school holidays



²⁷ A 'directional decrease' whilst not statistically significant, may serve as an early indicator of a new trend. Comment has only been passed on non-significant changes in cases where it is felt that they could be early indicators of future change.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

3.9 Business planning and expansion

Childcare providers were asked about their business planning, providing details of whether they currently have a written business plan. Those who had a business plan were also asked whether or not it had been updated in the past two years. Whilst there is no hard and fast rule about the regularity with which business plans should be updated, times of recession and recovery would generally require more planning than would be the case during more stable periods.

3.9.1 Business planning

Seven in ten (68 per cent) full day care providers reported having a written business plan. This has been decreasing since 2007 when 80 per cent of full day providers had a business plan. The decline is, perhaps, surprising during a period of economic turbulence, when planning is likely to be most necessary. However, the existence of a business plan seems to have little bearing on profitability amongst full day care providers; amongst those with a business plan 34 per cent made a profit/surplus and 20 per cent made a loss; amongst those without a business plan 39 per cent made a profit/surplus and 20 per cent made a loss.

Nine in ten (89 per cent) full day care settings in children's centres have a written business plan, more than any other type of provider.

A high proportion of after school clubs and holiday clubs also had a written business plan (68 per cent and 70 per cent respectively), although the proportion of holiday clubs that reported having a written plan has decreased from 80 per cent in 2007.

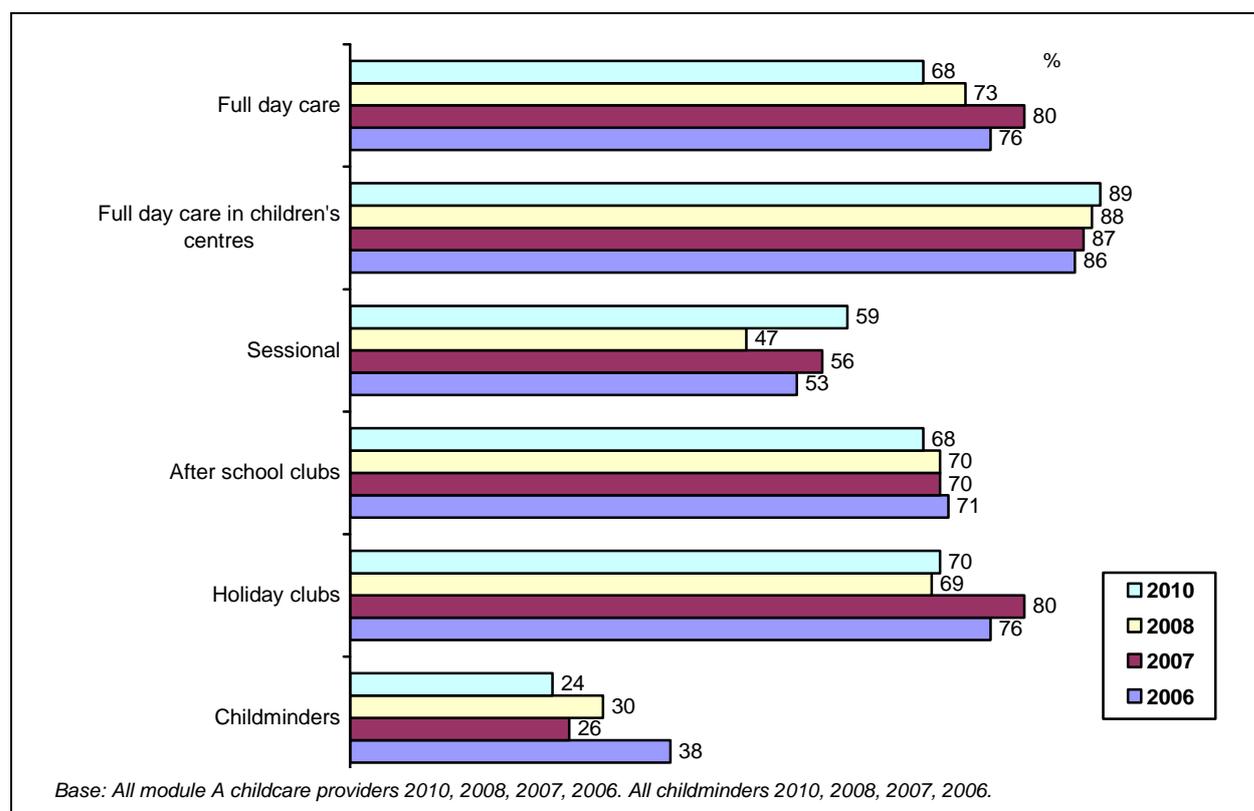
Six in ten sessional providers reported having a business plan (59 per cent), an increase from 47 per cent in 2008.

Reflecting the relatively small scale of their business, only one in four childminders (24 per cent) had a written business plan though, interestingly bearing in mind the difficult economic conditions in 2010, this proportion is actually decreasing, having fallen from 38 per cent in 2006.

However, when comparing results from the earliest comparable year (2003) the proportion of providers with a written business plan had increased for all of the provider types. In 2003, 63 per cent of holiday clubs, 57 per cent of after school clubs, 56 per cent of full day care settings and just 17 per cent of childminders had a written business plan.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Chart 3.4: The proportion of childcare providers that had a written business plan.



	Full day care		Full day care in children's centres		Sessional		After school clubs		Holiday clubs	
	2010	2008	2010	2008	2010	2008	2010	2008	2010	2008
Overall	68%	73%	89%	88%	59%	47%	68%	70%	70%	69%
Private	68%	73%	†	†	60%	49%	69%	77%	74%	73%
Voluntary	65%	71%	†	†	57%	46%	68%	72%	68%	59%
Local authority	76%‡	†	86%	87%	†	†	†	†	67%‡	77%‡
School/college	†	75%‡	†	†	†	†	68%	59%	65%‡	†
Other	†	†	†	†	†	†	†	†	†	†

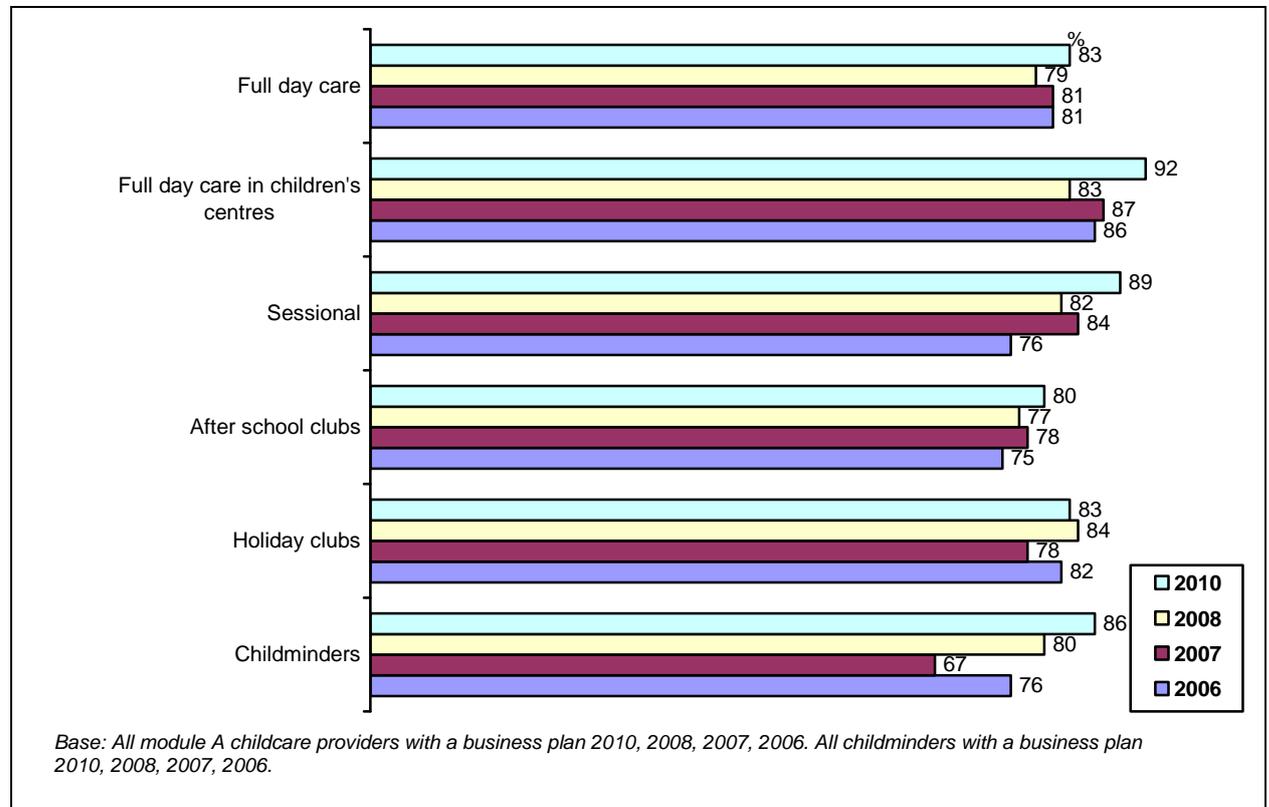
Base: All module A childcare providers 2010, 2008.

Differences in the type of ownership have a relatively limited impact on the propensity for providers to have a written business plan. The differences in business planning are driven more by the sector in which the provider operates than on whether the provider is privately owned or not, with full day care providers in children's centres the most likely of all the groups to have a plan (89 per cent).

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Providers were also asked whether their business plan had been updated within the last two years. Chart 3.5 gives these responses as a proportion of all settings with a business plan.

Chart 3.5 Proportion of settings with a written business plan that had been updated in the last two years



The proportion of providers that had updated their business plan in the past two years was high, at around 80 to 90 per cent for all groups. This proportion had increased for children's centres offering full day care, sessional providers and childminders between 2008 and 2010.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

3.9.2 Business expansion

Table 3.8 Proportion of providers who have expanded or plan to expand				
	Proportion who have expanded in the last year		Proportion who plan to expand in the next year	
	2010	2009	2010	2009
Full day care	15%	15%	13%	13%
<i>Full day care in children's centres</i>	8%	13%	17%	12%
Sessional	10%	10%	10%	13%
After school clubs	24%	12%	16%	12%
Holiday clubs	14%	13%	13%	11%
Childminders	16%	14%	14%	13%
<i>Base (1st column): All childcare providers 2010, 2009. All childminders 2010, 2009.</i>				
<i>Base (2nd column): All childcare providers 2010, 2009 who have not expanded in the last 12 months. All childminders 2010, 2009 who have not expanded in the last 12 months.</i>				

In 2010 after school club providers were the most likely to have expanded (24 per cent), followed by 16 per cent of childminders, 15 per cent of full day care providers and 14 per cent of holiday clubs. Sessional care settings (ten per cent) and children's centres who offer full day care (eight per cent) were the least likely to have expanded.

Between 2009 and 2010 there was minimal change in the proportion of providers who had expanded in the 12 months prior to the survey. A notable exception were after school clubs which were more likely to have expanded in the 12 months prior to the 2010 survey compared with the 12 months prior to the 2009 survey (with respective figures of 24 per cent and 12 per cent). Again, the size of this shift may have been influenced by the change in sampling method in 2010.

Among those who had not expanded in the last year, the proportion of providers saying that they planned to expand in the next 12 months was similar across the different provider types with between one in ten and 17 per cent saying that they thought they would do so. Again, there is a directional indication of momentum in the after school clubs sector, with 16 per cent saying that they plan to expand in the next year, compared to 12 per cent in 2009.

3.10 Types of service provided in children's centres

Following a rapid expansion in the number of children's centres between 2006 and 2008 (from 800 to 2,900) the number of children's centres operating in England has recently increased at a slower rate to 3,200 in 2010.

As in previous years, all children's centres were asked what types of childcare they provided on-site. The proportion offering full day care for children under five declined to 25 per cent (from 35 per cent in 2009).

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Sessional care fell from 45 per cent in 2009 to 25 per cent in 2010. As well as continuing a downward trend there was a slight change in the definition of sessional care which is likely to have increased the size of this shift.²⁸

Relatively low proportions of children's centres offered before school care (10 per cent), holiday care (16 per cent) and after school care (10 per cent), and there has been a decline for all of these groups since 2008. Weekend care was offered by just one per cent of children's centres.

Children's centres in the 30 per cent most deprived areas continued to be more likely than those elsewhere to offer on-site full day care (37 per cent compared with 13 per cent elsewhere) and sessional care (28 per cent compared with 22 per cent).

These findings are not surprising given that all phase one children's centres (established in 2004-6) were required to provide full day care, as were phase two children's centres (established 2006-8) in the 30 per cent most deprived areas. Phase three children's centres (established in 2008-10) were under no obligation to provide any full day care. In contrast to phase one children's centres, which were advised to deliver their full day care on site, phase two children's centres were advised that they could provide their full day care in a separate location up to half a mile away where necessary. If on and off site full day care is included, in 2010 43 per cent of children's centres in the 30 per cent most deprived areas offered full day care, compared with 20 per cent in the 70 per cent least deprived areas.

3.11 Types of support offered in children's centres

Children's centres first opened in the more deprived areas and many offer a range of support services to assist those in more disadvantaged groups. The most common services offered were family support outreach and/or home visiting services (offered by 98 per cent of centres), employment advice links to Jobcentre Plus and support for parents with disabled children (both offered by 97 per cent of centres). Table 3.11 shows more information on the types of services offered in children's centres.

It was less common for children's centres to have offered support for families with a parent in prison or involved in criminal activity (85 per cent), support for families of asylum seekers (78 per cent) or other support services (72 per cent), though these services were still available at the majority of children's centres. There were small increases in the level of provision of virtually all services between 2008 and 2010.

Children's centres could provide these services themselves, or could share the provision through links with other organisations. The amount of support supplied by other organisations was highest in cases of families with drug or alcohol related problems (28 per cent off site). This is likely to be because families in these situations need specialist help.

²⁸ Sessional care is defined as 'Sessional care for children under 5 (by sessional care, we mean where a session is less than a continuous period of 4 hours in any day, with a break between sessions with no children in the care of the provider). The bracketed text was used for clarification purposes only in 2009, while in 2010 it was obligatory to read the entire definition.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

	2010	2008
Family support outreach and/or home visiting services	98%	94%
Employment advice links to Jobcentre Plus	97%	95%
Support for parents with disabled children	97%	94%
Support for lone parents	96%	91%
Support for teenage parents	95%	90%
Literacy language or numeracy programmes for parents/carers with basic skills needs	94%	91%
Support for families with drug or alcohol related problems	94%	86%
Support for people with mental health problems	93%	85%
Relationship support	88%	84%
Support for particular minority ethnic groups	86%	80%
Support for families with a parent in prison or involved in criminal activity	85%	76%
Support for families of asylum seekers	78%	71%
Any other services	72%	73%
<i>Base: All children's centres 2010, 2008.</i>		

3.12 Children's centres relationships with the Primary Care Trust

Most children's centres were positive about their relationship with their Primary Care Trust at a delivery level. Nearly a quarter (24 per cent) said their relationship was excellent, an increase from 18 per cent in 2009, and 46 per cent described it as good (compared to 44 per cent in 2009).

One in four (25 per cent) children's centres said the relationship with the Primary Care Trust was still developing, a decrease from 32 per cent in 2009.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

4. Places and attendance

This chapter compares the number of places and the number of children attending registered settings. It also looks at the ages of children attending, the number of vacancies for children and the free early years entitlement for three and four year olds.

4.1 Number of places

Tables 4.1a and 4.1b show the number of Ofsted registered places amongst childcare providers, and amongst early years providers in maintained schools.

In 2010, the survey estimated that there were 2,755,800 childcare and early years places registered with Ofsted. Of these, 1,930,300 were provided by full day care settings,²⁹ sessional providers, after school and holiday clubs, and childminders,³⁰ and 825,500 places were registered in early years education in maintained schools.

Childcare

The number of Ofsted registered places in full day care settings has increased over time. There were 716,700 places in 2010, a 40 per cent increase from 2005. While the change in sampling method in 2010 may have impacted on the rate of increase, there was already a trend for consistent increases in the number of registered places over the preceding years. Over the same period, since 2005, the number of full day care places increased at a similar rate to the increase in the number of registered full day care providers reported in chapter 3.1 (42 per cent). However, between 2009 and 2010 the number of registered places increased at a slower rate (11 per cent) than the increase in the number of providers (18 per cent). This is because the average number of registered places in full day care settings fell from 46 in 2009 to 43 in 2010.

There were 251,000 sessional care places in 2010, a 10 per cent increase from 2009.³¹ This is a very similar amount of sessional places to that seen in 2008 and 2007.

There has been a large increase in the number of registered places in after school clubs since 2006 (a 42 per cent increase), largely accounted for by an increase of 35 percent between 2009 and 2010 to 368,100 places. There was a similar increase for holiday clubs between 2009 and 2010, with the number of places rising by 34 per cent (from 260,400 in 2009 to 349,400 in 2010).³²

²⁹ Including registered places in full day care provided by children's centres.

³⁰ Including places registered with active childminders only.

³¹ As discussed in chapter 2, it is likely that the 2009 data provided low estimates of the number of settings and places

³² These changes for after school and holiday clubs should be read with caution as they are likely to have been affected by the change in sampling method employed in 2010. It may be that the 2010 sample had a wider coverage than that in previous years, picking up more holiday and after school clubs that also offered full day care.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Table 4.1a Number of Ofsted registered places						
	Number of registered places					
	2010	2009	2008	2007	2006	2005
Full day care	716,700	647,800	620,700	596,500	544,200	511,100
<i>Full day care in children's centres</i>	40,300	50,600	50,000	51,100	37,700	N/A
Sessional	251,000	227,900	243,500	248,100	278,300	265,400
After school clubs	368,100	272,500	282,700	259,900	260,100	N/A
Holiday clubs	349,400	260,400	262,600	230,300	263,900	N/A
Childminders	245,100	262,900	275,300	291,500	272,600	275,600
Total childcare	1,930,300	1,671,500	1,684,800	1,626,400	1,619,100	N/A
Nursery schools	25,300	29,600	30,600	28,400	28,100	N/A
Primary schools with nursery and reception classes	491,800	468,300	511,200	533,000	477,300	N/A
Primary schools with reception but no nursery classes	308,400	272,700	275,500	306,300	286,100	N/A
Total early years	825,500	770,600	817,400	867,600	791,500	N/A
Total overall	2,755,800	2,442,100	2,502,200	2,494,000	2,410,600	N/A
<i>Base: Childcare providers 2010, 2009, 2008, 2007, 2006, 2005. Early years provision in maintained schools 2010, 2009, 2008, 2007, 2006</i>						

Table 4.1b Number of Ofsted registered places					
	% change in numbers				
	From 2009 to 2010	From 2008 to 2010	From 2007 to 2010	From 2006 to 2010	From 2005 to 2010
Full day care	+11%	+15%	+20%	+32	+40%
<i>Full day care in children's centres</i>	-20%	-19%	-21%	+7%	N/A
Sessional	+10%	+3	+1%	-10%	-5%
After school clubs	+35%	+30%	+42%	+42%	N/A
Holiday clubs	+34%	+33%	+52%	+32%	N/A
Childminders	-7%	-11%	-16%	-10%	-11%
Total childcare	+15%	+15%	+19%	+19%	N/A
Nursery schools	-15%	-17%	-11%	-10%	N/A
Primary schools with nursery and reception classes	+5%	-4%	-8%	+3%	N/A
Primary schools with reception but no nursery classes	+13%	+12%	+1%	+8%	N/A
Total early years	+7%	+1%	-5%	+4%	N/A
Total overall	+13%	+10%	+10%	+14%	N/A
<i>Base: Childcare providers 2010, 2009, 2008, 2007, 2006, 2005. Early years provision in maintained schools 2010, 2009, 2008, 2007, 2006</i>					

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Looking at the number of registered places per setting, full day care in children's centres and holiday clubs tend to have a greater capacity than sessional providers or after school clubs. These settings reported the highest average number of places (52 in full day care in children's centres and 47 in holiday clubs) as well as comparatively high proportions of providers reporting more than 50 registered places. In contrast, sessional providers tended to be medium sized establishments with an average of 31 places (table 4.2) and the majority (56 per cent) offering between 20 and 29 places.

Table 4.2 Capacity of settings - childcare						
	Full day care	Full day care in children's centres	Sessional	After school clubs	Holiday clubs	Total
Ofsted registered places per setting in 2010						
1-9	1%	*	1%	2%	2%	2%
10-19	7%	4%	10%	12%	10%	9%
20-29	30%	12%	56%	28%	22%	34%
30-39	18%	16%	17%	16%	17%	17%
40-49	14%	16%	6%	18%	15%	14%
50 or more	30%	51%	9%	22%	32%	25%
Don't know	*	1%	1%	3%	2%	1%
Mean number of places per setting over time						
2010	43	52	31	40	47	41
2009	46	50	29	35	42	40
2008	45	51	29	33	41	38
2007	44	54	28	31	40	36
2006	43	55	29	35	43	37
2005	44	N/A	27	N/A	N/A	N/A
<i>Base: Childcare providers 2010, 2009, 2008, 2007, 2006, 2005.</i>						

Childminders

In total there were 245,100 Ofsted registered places with childminders in 2010, representing a decline of seven per cent compared with 2009 (similar to the decline in number of active childminders, which also fell by seven per cent).

Childminders are only able to register to look after up to a maximum six children under the age of eight. In 2010 each childminder was registered to provide an average of 5.2 places, the same average as was seen in 2009 (see table 4.3), maintaining the slight upward trend since 2005.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Table 4.3 Capacity of settings - childminders	
Ofsted registered places per childminder in 2010	
1-2	4%
3-4	28%
5-6	62%
7 or more	6% ³³
Don't know	*
Mean number of places per childminder over time	
2010	5.2
2009	5.2
2008	4.9
2007	4.9
2006	5.0
2005	4.8
<i>Base: Childminders 2010, 2009, 2008, 2007, 2006, 2005.</i>	

Early years provision in maintained schools

Among early years providers in maintained schools, there was a total of 825,500 registered places, a seven per cent increase from 2009 and four per cent increase from 2006.

There were 25,300 nursery school places, 491,800 places in primary schools with nursery and reception classes and 308,400 places in primary schools with reception but no nursery classes.

The number of places in nursery schools declined by ten per cent from 2006 to 2010; this is similar to the decline in the number of providers over the same period. Between 2009 and 2010, there was a 15 per cent decrease in places in nursery schools. This was a result of the decrease in the average number of registered places per nursery, from 69 in 2009 to 63 in 2010 (as shown in table 4.4), as well as the decrease in the overall number of nursery providers, as discussed earlier.³⁴

Between 2006 and 2010, the number of places offered by primary schools with nursery and reception classes increased by three per cent (as did the number of providers in this group). In 2010 there was an average of 73 places in these settings.

The number of places offered by primary schools with reception but no nursery classes increased by eight per cent between 2006 and 2010 while the number of settings in operation decreased by seven per cent. This reflects an increase in the average number of places from 32 to 36 over the same period.

³³ It appears that a small proportion of childminders included the places they have for children aged 8 and over in their response. It may also be the case that some childminders had registered assistants, effectively boosting their capacity.

³⁴ Again it should be noted that changes in the data between 2009 and 2010 could be linked to the change in sampling method described in Chapter 2.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Table 4.4 Ofsted registered places per setting – early years provision in maintained schools				
	Nursery schools	Primary schools with nursery and reception classes	Primary schools with reception but no nursery classes	Total
Places per setting in 2010				
1-24	3%	7%	31%	20%
25-49	29%	17%	43%	32%
50-74	36%	31%	19%	25%
75-99	18%	25%	5%	14%
100-149	11%	16%	1%	8%
150-199	2%	3%	*	1%
200 or more	-	1%	*	*
Don't know	2%	*	-	*
Mean number of places per setting over time				
2010	63	73	36	53
2009	69	70	32	49
2008	71	76	32	52
2007	65	79	35	50
2006	66	75	32	49
<i>Base: Early years provision in maintained schools 2010, 2009, 2008, 2007, 2006.</i>				

4.2 Number of places in deprived areas

Table 4.5 shows the change in the number of places in the 30 per cent most deprived areas between 2006 and 2010. The total number of places in the 30 per cent most deprived areas increased by seven per cent from 2006 to 2010, a lower rate than the overall increase across all areas that was seen over the same period (14 per cent). However, the more recent trend from 2009 to 2010 shows no such difference, with the 30 per cent most deprived areas mirroring the increase in the number of places that was seen across all areas (13 per cent for both groups).

Overall, around 28 per cent of the total number of registered places in 2010 were to be found in the 30 per cent most deprived areas. However, a large proportion of the places in the most deprived areas were accounted for by primary schools with nursery and reception classes, and the other provider types (with the exception of nursery schools and full day care in children's centres) tended to have relatively low representation.

Childcare

There was an increase in the number of full day care places available in the 30 per cent most deprived areas between 2006 and 2010 (up 20 per cent). However, the increase since 2008 has been less pronounced (3 per cent).

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

The number of sessional places available in the 30 per cent most deprived areas increased from 34,000 in 2009 (15 per cent of the sessional places available in all areas) to 49,200 in 2010 (20 per cent of the sessional places available in all areas).³⁵

While the number of after school places in deprived areas increased from 78,000 in 2006 to 94,400 in 2010, the proportion of all after school places available in England fell from 30 per cent to 26 per cent in the deprived areas (i.e. the rate of increase in deprived areas was slower than was the case in the less deprived areas). Similarly, the number of holiday club places in deprived areas increased from 89,700 in 2006 to 111,200 in 2010. However, this represented 34 per cent of the total number of holiday club places in 2006 compared with 32 per cent of the total in 2010.

	30% most deprived areas (2010)		30% most deprived areas (2009)		30% most deprived areas (2008)		30% most deprived areas (2007)		30% most deprived areas (2006)	
	No	%	No.	%	No.	%	No.	%	No.	%
Full day care	191,000	27%	180,700	28%	186,000	30%	183,100	31%	159,300	29%
<i>Full day care in children's centres</i>	29,100	72%	34,700	69%	34,900	70%	38,200	75%	30,300	80%
Sessional	49,200	20%	34,000	15%	41,000	17%	44,000	18%	37,200	13%
After school clubs	94,400	26%	84,700	31%	84,800	30%	78,900	30%	78,000	30%
Holiday clubs	111,200	32%	70,000	27%	75,400	29%	62,800	27%	89,700	34%
Childminders	46,100	19%	44,100	17%	51,500	19%	49,500	17%	47,800	18%
Nursery schools	15,100	60%	20,100	68%	19,500	64%	19,200	68%	15,300	54%
Primary schools with nursery and reception classes	224,200	46%	222,000	47%	266,100	52%	253,100	47%	251,500	53%
Primary schools with reception but no nursery classes	39,600	13%	24,600	9%	34,800	13%	44,900	15%	39,300	14%
Total	770,800	28%	680,200	28%	759,200	30%	735,500	29%	718,100	30%

*Base: Childcare providers 30% most deprived areas 2010, 2009, 2008, 2007, 2006.
Early years provision in maintained schools, 30% most deprived areas 2010, 2009, 2008, 2007, 2006.*

³⁵ Again, this could be linked to the change in sampling method described in Chapter 2.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Table 4.5b Number of places in the 30% most deprived areas				
	% change in number of places			
	From 2009 to 2010	From 2008 to 2010	From 2007 to 2010	From 2006 to 2010
Full day care	+6%	+3%	+4%	+20%
<i>Full day care in children's centres</i>	-16%	-17%	-24%	-4%
Sessional	+45%	+20%	+12%	+32%
After school clubs	+11%	+11%	+20%	+21%
Holiday clubs	+59%	+47%	+77%	+24%
Childminders	+5%	-10%	-7%	-4%
Nursery schools	-25%	-23%	-21%	-1%
Primary schools with nursery and reception classes	+1%	-16%	-11%	-11%
Primary schools with reception but no nursery classes	+61%	+14%	-12%	+1%
TOTAL	+13%	+2%	+5%	+7%

*Base: Childcare providers in 30 per cent most deprived areas 2010, 2009, 2008, 2007, 2006.
Early years provision in maintained schools in 30 per cent most deprived areas 2010, 2009, 2008, 2007, 2006.*

Childminders

The number of places in deprived areas offered by childminders in 2010 was four per cent lower than was with case in 2006, at 46,100 places. This is a smaller decrease than was seen across all areas over the same period, where the number of registered places fell by ten per cent.

Early years provision in maintained schools

The number of places in nursery schools in deprived areas increased between 2006 and 2007, was stable in 2008 and 2009 and then decreased in 2010 to 15,100, returning to the level seen in 2006. The proportion of all nursery places that are to be found in deprived areas remains high, at 60 per cent (reflecting the fact that 58 per cent of all nursery providers are found in the 30 per cent most deprived areas).

The number of places in primary schools with nursery classes in deprived areas showed minimal change from 2009, at 224,200 (46 per cent of all such registered places).

The number of places for primary schools with reception but no nursery class in deprived areas has shown little change from 2006 (39,600 places, 13 per cent of all such places). However, this has increased from the levels seen in 2009 (24,600 places) when nine per cent of primary schools with reception but no nursery class were in deprived areas. This is an increase of 61 per cent.³⁶

³⁶ As discussed earlier, it is possible that the 2009 survey offered low estimates in terms of the number of providers and registered places, due to the fact that it was conducted as a recontact survey. It should also be borne in mind that the 2010 sample was taken from a different source, as discussed in chapter 2.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

4.3 Number of places by region

Tables 4.6a-c show the distribution of places by Government Office Region. A table showing the *number* of places by Government Office Region in 2010 is included in Appendix 1 (table 4.6d).

	Full Day Care					<i>Full day care in children's centres</i>					Sessional				
	2010	2009	2008	2007	2006	2010	2009	2008	2007	2006	2010	2009	2008	2007	2006
East Midlands	8%	8%	8%	9%	9%	4%	5%	6%	6%	7%	10%	12%	10%	10%	10%
East	10%	10%	10%	9%	10%	12%	9%	8%	6%	7%	14%	15%	16%	17%	17%
London	14%	16%	14%	14%	14%	20%	20%	21%	18%	19%	14%	11%	11%	11%	11%
North East, Yorkshire & Humberside	14%	13%	13%	13%	14%	21%	23%	23%	22%	22%	11%	10%	10%	10%	11%
North West	15%	14%	14%	15%	15%	20%	13%	13%	18%	14%	12%	11%	10%	9%	10%
South East	18%	18%	18%	18%	18%	8%	10%	10%	10%	13%	19%	22%	21%	23%	21%
South West	10%	9%	12%	10%	10%	6%	10%	7%	8%	7%	10%	12%	13%	12%	12%
West Midlands	11%	12%	12%	12%	12%	10%	10%	13%	12%	12%	10%	7%	8%	8%	8%

Base: Childcare providers 2010, 2009, 2008, 2007, 2006.

	After school clubs					Holiday clubs					Childminders				
	2010	2009	2008	2007	2006	2010	2009	2008	2007	2006	2010	2009	2008	2007	2006
East Midlands	9%	7%	7%	7%	7%	9%	7%	7%	6%	7%	9%	9%	10%	9%	9%
East	8%	8%	8%	7%	8%	10%	10%	11%	10%	8%	12%	12%	13%	12%	13%
London	16%	17%	16%	14%	16%	17%	15%	15%	15%	18%	16%	14%	16%	14%	13%
North East, Yorkshire & Humberside	16%	12%	13%	17%	13%	14%	12%	14%	10%	11%	15%	15%	15%	16%	16%
North West	16%	24%	21%	23%	23%	14%	12%	13%	15%	16%	12%	12%	11%	12%	12%
South East	15%	16%	14%	13%	13%	14%	20%	17%	23%	17%	18%	20%	18%	18%	19%
South West	8%	6%	8%	7%	7%	10%	12%	12%	10%	12%	9%	10%	9%	9%	10%
West Midlands	13%	11%	12%	12%	12%	12%	12%	12%	11%	11%	9%	9%	8%	9%	10%

Base: Childcare providers 2010, 2009, 2008, 2007, 2006.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

	Nursery Schools					Primary schools with nursery and reception classes					Primary schools with reception but no nursery classes				
	2010	2009	2008	2007	2006	2010	2009	2008	2007	2006	2010	2009	2008	2007	2006
East Midlands	8%	6%	8%	8%	6%	6%	6%	7%	8%	6%	12%	10%	11%	10%	10%
East	10%	12%	9%	11%	10%	8%	9%	9%	9%	9%	12%	12%	13%	13%	12%
London	20%	16%	18%	22%	19%	26%	23%	19%	23%	25%	5%	6%	4%	5%	5%
North East, Yorkshire & Humberside	16%	16%	16%	13%	16%	22%	20%	23%	N/A	21%	10%	10%	11%	10%	10%
North West	16%	16%	18%	17%	17%	16%	17%	17%	N/A ³⁷	16%	11%	12%	14%	12%	13%
South East	13%	10%	11%	11%	13%	7%	7%	7%	8%	6%	24%	23%	20%	25%	23%
South West	5%	9%	4%	4%	5%	2%	3%	4%	3%	3%	16%	18%	17%	17%	16%
West Midlands	13%	14%	15%	14%	13%	14%	14%	13%	13%	14%	9%	8%	9%	9%	9%

Base: Early years provision in maintained schools 2010, 2009, 2008, 2007, 2006

In 2010 the regional distribution of places was similar to that reported in previous years, with places broadly reflecting the distribution of settings and more provision in regions of higher population density.

Childcare

The South East had the greatest proportion of full day care (18 per cent), sessional (19 per cent) and childminding (18 per cent) places. London had the highest proportion of holiday club places (17 per cent), while children's centres' full day care provision was concentrated in London, the North East, Yorkshire & Humberside and the North West (which, together, accounted for 61 per cent of all such provision).

Early years provision in maintained schools

London had the greatest proportion of places in nursery schools (20 per cent) and primary schools with nursery and reception classes (26 per cent), though accounted for a relatively small proportion of places in primary schools with reception but no nursery classes (five per cent). The South East had the highest proportion of places in primary schools with reception but no nursery classes (24 per cent).

³⁷ Data are not available for primary schools with nursery and reception classes in the North East and North West regions as an insufficient number of interviews were achieved in these areas. Data are also not available for primary schools with nursery and reception classes in Yorkshire & Humberside as this region was grouped with the North East and North West to ensure that national figures were representative. For further details please see the Technical Report.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

4.4 Childcare places by ownership

Tables 4.7a and 4.7b show the proportions of Ofsted registered places per setting, by ownership. Tables 4.7c, 4.7d & 4.7e in Appendix 1 show the *number* of places per setting.

The distribution of registered places across the different types of ownership corresponded largely to the patterns of ownership for settings discussed in chapter 3.4 and was largely similar to the distribution of places in previous years.

The large majority of sessional places (95 per cent) and full day care places (87 per cent) were in either privately or voluntary owned settings. Places in full day care were more likely to be in privately owned settings (65 per cent), while sessional places were more likely to be in voluntary owned settings (59 per cent). While there has been an increase in the proportion of voluntary owned full day care providers (23 per cent in 2010 compared to 16 per cent in 2009), this shift may partly be attributable to the change in sampling method.

The distribution of out of school places across different types of ownership was more varied. Two in three (65 per cent) after school places were privately or voluntarily owned, with a tendency towards private ownership (37 per cent). After school places were the most likely of all the care types to be offered under school/college ownership (29 per cent). Three quarters (73 per cent) of holiday club places were in private/voluntary owned settings, with 48 per cent being private.

Places in full day care in children's centres were more likely to be in maintained settings than any other type (69 per cent), with only three in ten (32 per cent) being owned privately or voluntarily.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Table 4.7a Proportion of Ofsted registered places by ownership															
	Full day care					<i>Full day care in children's centres</i>					Sessional				
	2010	2009	2008	2007	2006	2010	2009	2008	2007	2006	2010	2009	2008	2007	2006
Total number of places	716,700	647,800	620,700	596,500	544,200	40,300	50,600	50,000	51,100	37,700	251,000	227,900	243,500	248,100	278,300
Private or Voluntary	87%	88%	86%	86%	88%	32%	37%	28%	35%	†	95%	95%	93%	93%	96%
Private	65%	72%	70%	70%	70%	15%	19%	11%	16%	†	36%	30%	29%	28%	30%
Voluntary	23%	16%	16%	16%	18%	17%	†	18%	18%	†	59%	65%	64%	65%	66%
Maintained	12%	10%	10%	11%	10%	69%	60%	69%	61%	58%	7%	5%	6%	6%	5%
Local Authority	6%	4%	5%	6%	6%	58%	52%	59%	53%	50%	4%	†	3%	3%	3%
School/college	5%	5%	5%	6%	4%	11%	†	†	†	†	3%	†	3%	3%	1%
Other	2%	2%	4%	3%	3%	3%	†	†	†	†	1%	†	2%	1%	*

Base: Childcare providers 2010, 2009, 2008, 2007, 2006.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

	After school clubs					Holiday Clubs				
	2010	2009	2008	2007	2006	2010	2009	2008	2007	2006
Total number of places	368,100	272,500	282,700	259,900	260,100	349,400	260,400	262,600	230,300	263,900
Private or Voluntary	65%	69%	68%	68%	77%	73%	71%	70%	71%	69%
Private	37%	39%	40%	44%	35%	48%	37%	40%	42%	37%
Voluntary	28%	29%	29%	24%	43%	24%	33%	30%	29%	32%
Maintained	36%	30%	30%	33%	22%	28%	25%	26%	29%	27%
Local Authority	7%	7%	10%	8%	12%	13%	17%	16%	17%	21%
School/college	29%	23%	20%	25%	10%	15%	8%	10%	11%	5%
Other	*	3%	2%	2%	*	2%	5%	5%	3%	5%

Base: Childcare providers 2010, 2009, 2008, 2007, 2006.

Tables 4.8a and 4.8b show the mean number of Ofsted registered places per setting, by ownership.

Full day care settings in children's centres generally offered the highest mean number of places per setting across most types of ownership (from 49 places for private providers, to 52 for LA providers) although local authority run holiday clubs offered the highest mean number of places overall (62 places per setting).

Among full day care providers in general, there was no real difference in size for private providers, local authority, and school or college run providers (47, 46 and 48 places on average respectively). However, voluntary run providers were smaller on average (32 places). In after school clubs, school or college run settings offered the highest number of places on average (43 places). Amongst sessional providers, privately run settings were the largest, with 36 places on average (compared to 28 registered places for voluntary sessional providers).

	Full day care					Full day care in children's centres					Sessional				
	2010	2009	2008	2007	2006	2010	2009	2008	2007	2006	2010	2009	2008	2007	2006
Private or Voluntary	42	46	45	44	43	50	46	48	50	58	30	29	29	28	29
Private	47	50	49	48	46	49	45	†	49	†	36	31	29	28	32
Voluntary	32	33	33	33	33	50	†	50	51	†	28	29	29	29	28
Maintained	47	46	43	39	43	52	53	52	56	54	31	30	28	26	29
Local Authority	46	47	43	40	45	52	53	52	58	55	30	†	26	27	28
School/college	48	45	43	38	41	†	†	†	†	†	†	†	31	26	34
Other	†	49	61	50	55	†	†	†	†	†	†	†	31	28	20

Base: Childcare providers 2010, 2009, 2008, 2007, 2006.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

	After school clubs					Holiday Clubs				
	2010	2009	2008	2007	2006	2010	2009	2008	2007	2006
Private or Voluntary	39	35	33	31	35	45	40	40	38	41
Private	38	37	34	32	36	47	41	43	40	44
Voluntary	40	33	32	29	34	42	39	36	36	38
Maintained	42	36	32	30	35	51	45	44	46	46
Local Authority	38	39	37	30	38	62	51	46	53	47
School/college	43	35	30	31	32	45	37	42	40	45
Other	†	38	28	30	35	†	56	47	†	51

Base: Childcare providers 2010, 2009, 2008, 2007, 2006.

4.5 Number of children attending

The number of children attending refers to the number of children actually attending a setting in a typical week rather than the number of registered places. The number of children attending can be greater than the number of places, as part time children can share places. It may also be lower than the number of places if providers are unable to fill all of their places. Although care is taken to avoid double counting in individual settings, because children can attend more than one setting some double counting is unavoidable. We would therefore advise caution when using the total row in table 4.9 as we are unable to estimate the extent to which this has occurred.

Table 4.9 shows the number of children attending childcare and early years provision in maintained schools, while table 4.9b shows how the number of children attending in 2010 has changed compared to previous years.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Table 4.9 Number of children attending childcare and early years provision					
	Number of children				
	2010	2009	2008	2007	2006
	No.	No.	No.	No.	No.
Full day care	957,700	873,900	872,800	820,100	766,900
<i>Full day care in children's centres</i>	53,500	72,100	66,600	68,400	45,600
Sessional	311,800	326,200	361,500	356,800	389,700
After school clubs	509,000	412,600	426,400	414,300	404,800
Holiday clubs	398,400	328,200	347,600	297,700	352,500
Childminders	259,000	276,600	294,200	278,500	267,900
Nursery schools	33,800	39,800	40,500	38,300	36,100
Primary schools with nursery and reception classes	519,100	494,200	526,500	517,800	505,900
Primary schools with reception but no nursery classes	273,900	241,400	245,300	263,200	251,000
Total	3,262,700	2,992,900	3,114,800	2,986,700	2,974,800
<i>Base: Childcare providers 2010, 2009, 2008, 2007, 2006. Early years provision in maintained schools 2010, 2009, 2008, 2007, 2006.</i>					

Table 4.9b Number of children attending childcare and early years provision				
	From 2009 to 2010	From 2008 to 2010	From 2007 to 2010	From 2006 to 2010
% change	%	%	%	%
Full day care	10%	10%	17%	25%
<i>Full day care in children's centres</i>	-26%	-20%	-22%	17%
Sessional	-4%	-14%	-13%	-20%
After school clubs	23%	19%	23%	26%
Holiday clubs	21%	15%	34%	13%
Childminders	-6%	-12%	-7%	-3%
Nursery schools	-15%	-17%	-12%	-6%
Primary schools with nursery and reception classes	5%	-1%	0%	3%
Primary schools with reception but no nursery classes	13%	12%	4%	9%
Total	9%	5%	9%	10%
<i>Base: Childcare providers 2010, 2009, 2008, 2007, 2006. Early years provision in maintained schools 2010, 2009, 2008, 2007, 2006.</i>				

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Table 4.10 shows the mean number of children attending childcare and early years provision in maintained schools.

	2010	2009	2008	2007	2006
Full day care	58	62	64	61	61
<i>Full day care in children's centres</i>	69	73	69	73	67
Sessional	38	42	43	41	40
Holiday clubs	54	53	56	53	57
After school clubs	54	52	49	50	53
Childminders	6	5	5	5	5
Nursery schools	83	92	92	86	82
Primary schools with nursery and reception classes	78	74	79	77	78
Primary schools with reception but no nursery classes	32	28	28	30	27

Base: Childcare providers 2010, 2009, 2008, 2007, 2006, 2005. Early years provision in maintained schools 2010, 2009, 2008, 2007, 2006.

Childcare

The total number of children attending childcare and early years provision increased by nine per cent from 2009 to 3,262,700 in 2010.³⁸ Amongst the childcare groups, there have been increases in the estimated attendance for full day care, after school clubs and holiday clubs.

The estimated number of children attending full day care providers, after school clubs and holiday clubs increased between 2006 and 2010 (by 25, 26 and 13 per cent respectively).

Considering the more recent time period from 2009 to 2010, the number of children recorded by the survey as attending full day care increased by ten per cent, standing at 957,700 in 2010. Over the same period there was an increase of more than 20 per cent for both after school clubs (23 per cent) and holiday clubs (21 per cent).³⁹

The reverse picture is true for full day care provision in children's centres, with the estimated number of children attending decreasing by 26 per cent from 2009 to 53,500. This decrease was attributable to a decrease in the average number of children attending per setting (which fell from 73 in 2009 to 69 in 2010) as well as to the decrease in the number of children's centres offering full daycare discussed in chapter 3.1.

The estimated number of children attending sessional care decreased by four per cent between 2009 and 2010, while the number of registered places increased by ten per cent. During this period the average number of attendees decreased from 42 to 38 (while the average number of registered places in each sessional setting increased from 29 to 31). This suggests that there is an increasing amount of spare capacity in sessional

³⁸ This total is likely to have been affected by the change in sampling method described in Chapter 2.

³⁹ Again this is likely to have been influenced by the change in sampling method adopted in 2010.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

providers (which is also supported by the figures in tables 4.12 and 4.13), which in turn may point towards a further decrease in the number of sessional providers in future years.

Childminders

In 2010 there were 259,000 children attending childminders. This represents a fall of six per cent since 2009, which is in line with the fall in the number of registered places (down seven per cent) and is slightly lower than the rate of decline in the number of registered childminders (down nine per cent) over the same period. The average number of children attending per childminder was six in 2010.

Early years provision in maintained schools

Since 2009, there has been a rise of seven per cent in the estimated number of children attending early years provision in maintained schools. The number of children attending primary schools with reception but no nursery classes increased by 13 per cent between 2009 and 2010 to 273,900 children, a similar rate of increase as seen in the number of registered places. There was no change in the number of settings from 2009 to 2010 - the increase reflects an increase in the average number of children attending per setting (from 28 to 32).

In 2010 there were 519,100 children attending primary schools with nursery and reception classes, with an average of 78 per setting. This total has remained relatively stable since 2007.

However, the number of children attending nursery schools stood at 33,800 in 2010, which represented a 15 per cent decrease from 2009. This reflected a decrease in the average number of children attending each nursery (from 92 in 2009 to 83 in 2010) as well as a decrease in the number of nursery settings.⁴⁰

⁴⁰ The change in sampling may have impacted on the Early Years trend from 2009 to 2010.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

4.5.1 Ratio of children to places

Table 4.11 shows the ratio of children attending to places for each setting.

	Number of attendees per place				
	2010	2009	2008	2007	2006
Full day care	1.3	1.3	1.4	1.4	1.4
<i>Full day care in children's centres</i>	1.3	1.4	1.3	1.3	1.2
Sessional	1.2	1.4	1.5	1.4	1.4
After school clubs	1.4	1.5	1.5	1.6	1.6
Holiday clubs	1.1	1.3	1.3	1.3	1.4
Childminders	1.1	1.1	1.1	1.0	1.0
Nursery schools	1.3	1.3	1.3	1.3	1.3
Primary schools with nursery and reception classes	1.1	1.1	1.1	1.1	1.1
Primary schools with reception but no nursery classes	0.9	0.9	0.9	0.9	0.9
<i>Base: Childcare providers 2010, 2009, 2008, 2007, 2006. Early years provision in maintained schools 2010, 2009, 2008, 2007, 2006.</i>					

Childcare

There were more children attending than there were places for all types of childcare provider. As discussed earlier, this is because two (or more) children may attend on a part time basis, only occupying a single registered place between them. The ratio of children attending to places has remained fairly consistent since 2003 for full day care, sessional and after school club settings (at around 1.3, 1.2 and 1.4 children per place respectively).

For holiday clubs and childminders the ratio was 1.1 children per place, with the figure for holiday clubs having decreased slightly from 1.4 in 2006.

Early years provision in maintained schools

In nursery schools and primary schools with nursery and reception classes there were more children attending than there were places (1.3 children per place in nursery schools and 1.1 children per place in primary schools with nursery and reception classes). The ratio was just 0.9 children per place for primary schools with reception but no nursery classes, as the number of children attending was actually lower than the number of places available (273,900 children compared with 308,400 places). The ratio has not changed for any of the early years groups since 2006.

4.6 Child vacancies

Table 4.12 shows the number of vacancies for children amongst childcare and early years providers, while table 4.13 shows the mean number of vacancies per setting and the proportion of the total available places that are vacant.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

	Number of vacancies					Percentage change			
	2010	2009	2008	2007	2006	From 2009 to 2010	From 2008 to 2010	From 2007 to 2010	From 2006 to 2010
	No.	No.	No.	No.	No.	%	%	%	%
Full day care	122,700	100,500	82,300	107,300	81,000	22%	49%	14%	51%
<i>Full day care in children's centres</i>	4,000	5,700	5,100	8,800	6,600	-30%	-22%	-55%	-39%
Sessional	41,700	25,500	19,900	32,400	29,300	64%	110%	29%	42%
After school clubs	63,800	58,300	59,200	64,300	54,400	9%	8%	-1%	17%
Holiday clubs	75,500	70,400	62,800	70,000	76,700	7%	20%	8%	-2%
Childminders	61,500	59,400	65,900	85,900	67,000	4%	-7%	-28%	-8%
Nursery schools	3,000	2,500	1,400	1,400	2,000	20%	114%	114%	50%
Primary schools with nursery and reception classes	48,500	39,000	44,000	56,400	45,800	24%	10%	-14%	6%
Primary schools with reception but no nursery classes	24,100	26,600	30,900	42,900	42,900	-9%	-22%	-44%	-44%
Total	440,800	382,300	371,500	460,600	399,100	15%	19%	-4%	10%

*Base: Childcare providers 2010, 2009, 2008, 2007, 2006.
Early years provision in maintained schools 2010, 2009, 2008, 2007, 2006.*

	Mean number of vacancies					Proportion of places vacant nationally				
	2010	2009	2008	2007	2006	2010	2009	2008	2007	2006
	No.	No.	No.	No.	No.	%	%	%	%	%
Full day care	8	7	6	9	7	17%	16%	13%	18%	15%
<i>Full day care in children's centres</i>	6	6	6	11	12	10%	11%	10%	17%	18%
Sessional	5	3	2	4	3	17%	11%	8%	13%	11%
After school clubs	7	8	7	8	8	17%	21%	21%	25%	21%
Holiday clubs	11	12	11	13	13	22%	27%	24%	30%	29%
Childminders	1	1	1	1	1	25%	23%	24%	29%	24%
Nursery schools	8	6	3	3	5	12%	8%	5%	5%	7%
Primary schools with nursery and reception classes	8	6	7	9	7	10%	8%	9%	11%	10%
Primary schools with reception but no nursery classes	3	3	4	5	5	8%	10%	11%	14%	15%
Total	4	4	3	4	4	16%	16%	15%	18%	14%

*Base: Childcare providers 2010, 2009, 2008, 2007, 2006.
Early years provision in maintained schools 2010, 2009, 2008, 2007, 2006.*

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Childcare

The estimated total number of vacancies rose across all provider types between 2009 and 2010 except for full day care in children's centres (at least partly attributable to the lower recorded number of children's centres offering full day care in 2010). This increase in the number of vacancies may be related to the increase in the number of recorded settings in 2010 – as each setting will have a certain number of vacancies, it follows that if more settings are recorded then the estimated number of vacancies will also increase. As such, the more telling aspects to focus on are the average number of vacancies per setting and the proportion of the total available places that are vacant for each type of provider.

Nationally, 17 per cent of full day care places were unoccupied in 2010, a level very similar to that seen in 2009 (16 per cent). The average number of vacancies per setting increased from seven in 2009 to eight in 2010.

Looking specifically at full day care settings in children's centres, these settings had a slightly lower proportion of vacancies than full day care overall. Nationally, ten per cent of places in full day care in children's centres were unoccupied (compared with 17 per cent in full day care overall). The average number of vacancies per full day care setting in children's centres remained the same as in 2008 and 2009 (six places).

The proportion of vacant places in sessional providers increased from 11 per cent in 2009 to 17 per cent in 2010. This was driven by an increase in the average number of vacant places per sessional setting, which increased from three in 2009 to five in 2010 (the highest level recorded since the survey began). As can be seen in chapter 9.9, this excess capacity appears to be impacting on profitability.

After school clubs and holiday clubs had around one in five places vacant (17 per cent and 22 per cent of their total available capacity respectively). This is lower than was the case in the 2009 data (21 and 27 per cent respectively). Holiday clubs had a higher average number of vacancies (11 per setting) than after school providers (seven). Again, it should be borne in mind that the out of school groups appear to have been affected significantly by the change in sampling approach in 2010.

A quarter of the registered places at childminders were vacant (25 per cent). The total number of vacant childminder places was 61,500, a marginal increase from the number in 2009 (59,400), but lower than in previous years (an effect that is to be expected bearing in mind the decline in the number of childminders over time). The number of vacancies per childminder remained stable over the same period (at one).

Early years provision in maintained schools

In 2010 there were approximately 3,000 vacancies in nursery schools. This represents 12 per cent of places, an increase from the eight per cent of places that were vacant in 2009. There were more vacancies in 2010 despite a decrease in the number of nursery settings and registered places available. On average there were eight vacancies per setting (an increase from six in 2009 and only three in 2008).

In primary schools with nursery and reception classes there were 48,500 vacant places (compared with 39,000 in 2009 and 44,000 in 2008) and an average of eight per setting (up from six in 2009). Ten per cent of places were unoccupied.

For primary schools with reception but no nursery classes, the number of vacancies decreased by nine per cent between 2009 and 2010 to 24,100 places. From 2006 to

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

2010, the number of vacancies for this group fell by 44 per cent. The proportion of vacant places nationally was eight per cent in 2010, compared with 15 per cent in 2006.

4.6.1 Number of places vacant by deprivation

Table 4.14a shows the number of places vacant in the 30 per cent most deprived areas. It also shows the proportion of the total vacancies for each type of provider that are to be found in the 30 per cent most deprived areas.

	30% most deprived areas (2010)		30% most deprived areas (2009)		30% most deprived areas (2008)		30% most deprived areas (2007)		30% most deprived areas (2006)	
	No.	% of total vacancies								
Full day care	33,800	28%	25,900	26%	25,500	31%	35,700	33%	24,600	30%
<i>Full day care in children's centres</i>	3,000	74%	4,400	77%	3,900	76%	6,900	78%	5,300	80%
Sessional	7,800	19%	3,900	15%	4,000	20%	6,100	19%	5,100	17%
After school clubs	18,900	30%	21,500	37%	19,700	33%	21,300	33%	13,000	24%
Holiday clubs	22,800	30%	17,100	24%	18,800	30%	19,400	28%	16,800	22%
Childminders	14,200	23%	11,600	20%	13,200	20%	15,700	18%	14,600	22%
Nursery schools	1,900	64%	2,000	80%	900	64%	900	64%	800	40%
Primary schools with nursery and reception classes	21,300	44%	17,000	44%	23,200	53%	27,600	49%	22,700	50%
Primary schools with reception but no nursery classes	3,000	13%	2,600	10%	4,500	15%	7,800	18%	6,400	15%
Total	123,700	28%	101,500	26%	109,800	30%	134,700	29%	104,000	26%

*Base: Childcare providers 30% most deprived areas 2010, 2009, 2008, 2007, 2006.
Early years provision in maintained schools, 30% most deprived areas 2010, 2009, 2008, 2007, 2006.*

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Table 4.14b Number of vacant places in the 30% most deprived areas				
	% change in number of vacant places			
	From 2009 to 2010	From 2008 to 2010	From 2007 to 2010	From 2006 to 2010
Full day care	31%	33%	-5%	38%
<i>Full day care in children's centres</i>	-33%	-24%	-57%	-44%
Sessional	98%	94%	27%	54%
After school clubs	-12%	-4%	-12%	45%
Holiday clubs	33%	21%	18%	35%
Childminders	22%	8%	-10%	-3%
Nursery schools	-2%	118%	105%	156%
Primary schools with nursery and reception classes	26%	-8%	-23%	-6%
Primary schools with reception but no nursery classes	18%	-33%	-61%	-53%
TOTAL	22%	13%	-8%	19%

*Base: Childcare providers 30% most deprived areas 2010, 2009, 2008, 2007, 2006.
Early years provision in maintained schools 2010, 2009, 2008, 2007, 2006.*

Overall, almost three in ten of the vacant places to be found nationally (28 per cent) were in the 30 per cent most deprived areas (123,700). This is in line with the proportion of registered places in the 30 per cent most deprived areas (also 28 per cent). The total number of vacant places in the 30 per cent most deprived areas increased by 19 per cent between 2006 and 2010 (from 104,000 to 123,700).

Childcare

As with registered places, there was a strong variation in the proportion of the nationally vacant places to be found in the 30 per cent most deprived areas between full day care providers (28 per cent) and full day care providers in children's centres (74 per cent).

There was an increase of 98 per cent for sessional providers between 2009 and 2010, with the number of vacancies rising from 3,900 to 7,800 in deprived areas. This represents an increase from 15 per cent of the nationally vacant sessional places being in deprived areas in 2009 to 19 per cent in 2010.⁴¹

Thirty per cent of the nationally vacant places in after school clubs and holiday clubs were in the 30 per cent most deprived areas. The number of vacant places for childminders in the 30 per cent most deprived areas was 14,200, which equates to 23 per cent of the national total for vacant childminder places.

Early years provision in maintained schools

In 2010, the majority of the nationally vacant nursery school places were to be found in the 30 per cent most deprived areas. Two in three vacancies in nursery schools (64 per cent) were to be found in deprived areas in 2010, though the absolute amount of spare

⁴¹ This increase may be affected by the change in sampling method described in Chapter 2.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

capacity was relatively low due to the small number of nursery providers (1,900 places in deprived areas).

The proportion of vacancies in primary schools with nursery and reception classes and primary schools with reception but no nursery classes in deprived areas was in line with the proportion of places in deprived areas for these provider types (44 per cent and 13 per cent respectively).

4.6.2 Number of places vacant by region

Table 4.15 shows the distribution of vacant places by Government Office Region.

	Full Day Care	Full day care in children's centres	Sessional	After school clubs	Holiday clubs	Childminders	Nursery Schools	Primary schools with nursery and reception classes	Primary schools with reception but no nursery classes
East Midlands	9%	4%	10%	9%	10%	9%	12%	9%	21%
East	10%	13%	16%	9%	11%	13%	9%	10%	14%
London	12%	16%	10%	13%	13%	19%	4%	14%	2%
North East, Yorkshire & Humberside	15%	26%	11%	18%	16%	14%	18%	23%	9%
North West	14%	20%	15%	18%	13%	10%	27%	20%	12%
South East	17%	4%	16%	12%	14%	18%	11%	8%	16%
South West	12%	5%	11%	11%	10%	7%	4%	3%	15%
West Midlands	11%	13%	12%	10%	14%	9%	16%	13%	10%

Base: Childcare providers 2010. Early years provision in maintained schools 2010

Childcare

The South East had the greatest proportion of full day care (17 per cent) vacancies. The North East, Yorkshire and Humberside, and the North West had the highest proportion of vacancies in full day care in children's centres (26 per cent and 20 per cent respectively) and after school clubs (both 18 per cent). These findings are very similar to those for the distribution of places.

Early years provision in maintained schools

The North East, Yorkshire and Humberside had the highest proportion of vacancies for primary schools with nursery and reception classes (23 per cent) and the East Midlands had the greatest proportion of vacancies for primary schools with reception class but no nursery classes (21 per cent). The North West had the highest proportion of vacancies for nursery schools (27 per cent).

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

4.6.3 Number of places vacant

Table 4.16 shows the proportion of settings with different numbers of vacancies for each provider type.

	Full day care	Full day care in children's centres	Sessional	After school clubs	Holiday clubs	Nursery schools	Primary schools with nursery and reception classes	Primary schools with reception but no nursery classes	Total (excl. Childminders)
Number of vacancies	122,700	4,000	41,700	63,800	75,500	3,000	48,500	24,100	379,300
None	21%	27%	36%	23%	16%	44%	34%	57%	30%
1-5	33%	29%	29%	31%	20%	13%	23%	23%	27%
6-10	21%	23%	20%	23%	22%	10%	16%	11%	19%
11-20	12%	7%	9%	13%	17%	16%	13%	6%	12%
21-30	4%	2%	2%	3%	7%	6%	7%	1%	4%
31 or more	3%	2%	1%	2%	5%	6%	4%	1%	3%
Don't Know	6%	11%	3%	5%	13%	5%	4%	1%	5%

Base: Childcare providers 2010. Early years provision in maintained schools 2010.

Childcare

Sessional providers were most likely to report having no vacancies (36 per cent), although this had decreased from 2009 (46 per cent) and 2008 (57 per cent). A further 29 per cent of sessional providers had only one to five vacancies.

One in five (21 per cent) full day care providers had no vacancies, a very similar level to that seen in 2009 (22 per cent). In 2010, 33 per cent of full day care providers had one to five vacancies, 21 per cent had six to ten, 12 per cent had 11 to 20 and seven per cent had 21 or more. One in four full day care settings in children's centres reported having no vacancies (27 per cent, compared to 24 per cent in 2009).

A higher proportion of after school clubs reported no vacancies than holiday clubs (23 per cent and 16 per cent respectively) whereas a higher proportion of holiday clubs than after school clubs had 11 or more vacancies (29 per cent and 18 per cent respectively). The proportion of out of school settings with no vacancies in 2009 was very similar to that seen in 2010 (20 per cent for after school clubs and 17 per cent for holiday clubs).

Four in ten (40 per cent) childminders reported having no vacant Ofsted registered places. This is a decrease from 2009 (47 per cent). One-fifth of childminders had one vacancy (21 per cent). Eighteen per cent of childminders had two vacancies, and a further fifth of all childminders had three or more vacancies (19 per cent).

Early years provision in maintained schools

Forty four per cent of nursery schools had no vacancies (compared to 62 per cent in 2009), whilst 13 per cent had one to five, ten per cent had six to ten and 27 per cent had more than 10 vacancies.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

One in three (34 per cent) primary schools with nursery and reception classes had no vacancies on an average day (compared to 40 per cent in 2009). Two-fifths (39 per cent) of such settings had between one and 10 vacancies, and 23 per cent had over 10 vacancies.

Almost six in ten (57 per cent) of primary schools with reception but no nursery classes had no vacancies (compared to 53 per cent in 2010). Amongst these settings 23 per cent had one to five vacancies, 11 per cent had six to 10 and eight per cent had more than 10 vacancies.

4.7 Proportion of places occupied

Table 4.17 shows the proportion of registered places occupied for each provider type.

	Full Day Care	Full day care in children's centres	Sessional	After school clubs	Holiday clubs	Childminders	Nursery Schools	Primary schools with nursery and reception classes	Primary schools with reception but no nursery classes
None	2%	1%	1%	2%	2%	-	-	-	-
1 to 25% occupied	1%	-	*	1%	2%	6%	1%	1%	1%
26 to 50% occupied	5%	1%	6%	8%	12%	17%	6%	3%	5%
51 to 75% occupied	18%	8%	20%	20%	23%	17%	16%	14%	11%
76 to 99% occupied	47%	52%	33%	38%	30%	13%	28%	44%	24%
100% occupied	21%	27%	35%	23%	16%	40%	44%	34%	57%
Don't Know	6%	11%	4%	7%	14%	5%	5%	4%	1%
Mean occupancy rate%	81%	89%	83%	80%	74%	76%	87%	88%	90%

Base: Childcare providers 2010. Early years provision in maintained schools 2010

Childcare

High levels of occupied places as a proportion of registered places were found in sessional, full day care and after school clubs. On average, nine in ten registered places at full day care in children's centres (89 per cent) and eight in ten registered places at sessional providers (83 per cent), full day care (81 per cent) and after school clubs (80 per cent) were occupied. The type of provider with the highest proportion of settings being fully occupied was sessional. One in three sessional providers (35 per cent) was fully occupied.

The average occupancy rates at holiday clubs was lower than for the other groups, at 74 per cent. Only 16 per cent of holiday clubs were fully occupied and after school clubs also had a relatively low level of full occupancy (23 per cent), indicating that there is still spare capacity in the majority of out of school settings.

Childminders had an average occupancy rate of 76 per cent, with four in ten reporting full occupancy.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Early years provision in maintained schools

Early years providers in maintained schools generally reported higher levels of occupancy compared to childcare providers. On average, nine in ten early years places were occupied (87 per cent nursery, 88 per cent of primary schools with nursery and reception classes and 90 per cent of primary schools with reception but no nursery classes). Primary schools with reception but no nursery classes were most likely to be fully occupied (57 per cent).

4.8 Free early education entitlement for 3 and 4 year olds

In September 2010, shortly before the survey was conducted, the government increased children's entitlement to free early years care from 12.5 hours per week to 15 hours per week. This care was to be made available for 38 weeks per year. Table 4.18 shows the number of weeks per year that three and four year olds were actually able to access their 15 hours of free care.

	Full Day Care	Full day care in children's centres	Sessional	After school clubs	Holiday clubs	Childminders	Nursery Schools	Primary schools with nursery and reception classes	Primary schools with reception but no nursery classes
None	2%	6%	4%	46%	34%	9%	*	*	33%
Less than 16 weeks	1%	1%	*	1%	3%	3%	1%	*	1%
16 to 38 weeks	67%	52%	75%	26%	34%	36%	63%	56%	36%
39 to 52 weeks	28%	39%	19%	16%	22%	36%	35%	41%	15%
Don't Know	2%	2%	1%	11%	7%	16%	1%	2%	15%
Mean	39	38	36	19	25	36	39	38	23

Base: Childcare providers with 3 and 4 year olds 2010. Childminders who offer the sessions 2010. Early years provision in maintained schools with 3 and 4 year olds 2010

Childcare

Childminders and full day care providers were the most likely to offer the sessions across more than the statutory 38 weeks per year.

Not surprisingly, holiday clubs and after school clubs were less likely to offer this facility (16 and 22 per cent respectively).⁴² Only one in five (19 per cent) sessional providers provided free care for more than 38 weeks per year.

Early years provision in maintained schools

Nursery schools and primary schools with nursery classes were the most likely to offer the free early education sessions over more than 38 weeks (35 and 41 per cent

⁴² It is likely that some out of school providers that also provide full day care were thinking about their broad provision rather than their out of school provision specifically when answering this question.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

respectively). Only 15 per cent of primary schools with reception but no nursery classes offered this.

4.9 Age of children

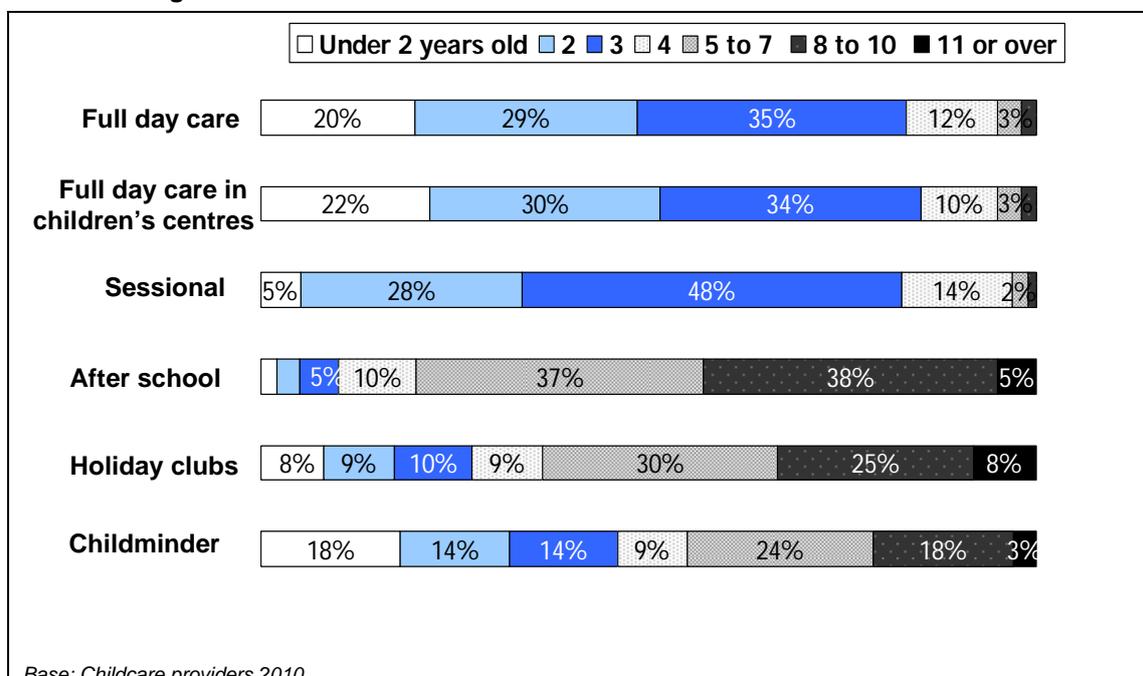
Childcare

Chart 4.1 shows the age breakdown of children attending childcare providers. Tables 4.20a and 4.20b in Appendix 1 show the number and proportion of places by age of child for each type of setting.

The majority of children attending full day care (95 per cent) and sessional day care (96 per cent) were aged under 5 years old, reflecting the pre-school focus of these providers. The age profile for full day care providers included significant proportions of all age groups under 5 years old - under 2's (20 per cent), 2 year olds (29 per cent), 3 year olds (35 per cent) and 4 year olds (12 per cent). However, sessional settings had a narrower age focus, with only five per cent of children aged under 2, 28 per cent aged 2, just under half (48 per cent) were 3 years old and 14 per cent were 4 years old.

Again, as expected, the majority of children attending after school clubs (80 per cent) and holiday clubs (63 per cent, a decrease from 79 per cent in 2009) were school aged (between 5 and 14 years of age). However, some providers said they catered for children under the age of 5. This is because some older 4 year olds may have already begun reception classes and may use the extended care. Additionally, some 3 year olds may be receiving additional care, over and above their part time nursery education place. The fact that there is a lower age profile of holiday clubs in 2010 may indicate that the change in sampling method affected the coverage, including more settings that also offered full day care.

Chart 4.1: Age of children



N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

4.10 Ethnicity of children

Tables 4.19a and 4.19b show the proportion of children of black and minority ethnic (BME) origin attending by provider type. Tables 4.20c-e, showing the number of providers by proportion of BME children, are in Appendix 1.

Data from the Office for National Statistics publication 'Population Estimates by Ethnic Group Mid-2007' showed that while people of BME origin made up around 12 per cent of England's population, the proportion rose to 17 per cent amongst those aged under nine (and 18 per cent amongst those aged under five). As such, the overall proportion of BME children attending childcare and early years providers is broadly in line with the proportion found in the broader population. However, BME children had a high representation in settings that were more likely to be located in the most deprived areas (children's centres, nursery schools and primary schools with nursery and reception classes).

Childcare

In 2010, there were 137,000 children of black and minority ethnic (BME) origin attending registered full day care settings in total. The average proportion⁴³ of children attending that were from a BME group was 16 per cent per full day care setting – broadly in line with what one would expect based on population figures.

The average proportion of children attending full day care in children's centres from a BME group was 30 per cent in 2010, approximately 14,500 children. This is more than the proportion of BME children in the population and may be explained by the fact that higher proportions of some BME groups live in the 30 per cent most deprived areas.⁴⁴ As discussed earlier, the majority of children's centres are based in the 30 per cent most deprived areas.

For sessional settings the average proportion of children attending who were from a BME group was 14 per cent per setting (42,200 children in total), an increase from 11 per cent in 2009.

In total there were approximately 81,800 children of BME origin attending after school clubs and 70,400 attending holiday clubs. The average proportion of children attending that were from a BME group was 17 per cent in after school clubs and 19 per cent in holiday clubs.

Early years provision in maintained schools

There were around 10,700 children of BME origin attending nursery school settings in 2010. The average proportion of children attending who were from a BME group was 30 per cent per setting. This indicates that children attending nursery schools from a BME group represented a much higher proportion of the total number of children than they do in the general population. The most likely explanation for this is that nursery schools are generally located in areas with a higher than average BME origin population, such as London, where a fifth (20 per cent) of all nursery schools were located.

⁴³ For details of how average proportions were calculated, please see section 5.6 of the Technical Report.

⁴⁴ Tinsley, J. and Jacobs, M., 2006, Deprivation and Ethnicity in England: A Regional Perspective, Regional Trends 39: 2006 Edition, National Statistics <http://www.statistics.gov.uk/articles/RegionalTrends/Article3RT39.pdf>

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

The total number of BME children attending primary schools with nursery and reception classes was around 153,600. The average proportion of children attending who were from a BME group was 23 per cent per setting. This is a lower proportion than was reported for nursery schools but is still higher than the overall proportion of BME children aged under seven in the population (15 per cent) and is likely to be influenced by the results from the London region. As seen in chapter 3.3, primary schools with nursery and reception classes were most likely to be situated in London (19 per cent) and London contains the highest concentration of people of BME origin.

In total there were 33,400 children of BME origin attending primary schools with reception but no nursery classes in 2008, an average of just nine per cent of children per setting. One cause of this relatively low proportion was the low number of primary schools with reception classes based in London, where the BME population is much higher.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Table 4.19a Proportion of children of black and minority ethnic (BME) origin																								
	Full day care				<i>Full day care in children's centres</i>				Sessional				After school clubs				Holiday clubs				Childminders			
	2010	2008	2007	2006	2010	2008	2007	2006	2010	2008	2007	2006	2010	2008	2007	2006	2010	2008	2007	2006	2010	2008	2007	2006
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
None	20	19	20	22	7	9	10	13	30	30	33	34	25	24	25	24	21	20	19	20	68	68	72	70
1 to 5%	25	29	28	30	17	19	27	27	18	25	24	28	19	21	18	22	18	17	17	16	2	2	1	2
6 to 10%	16	16	16	16	14	14	14	12	17	18	15	14	16	14	178	15	13	17	15	17	8	8	7	6
11% or more	37	34	24	32	57	54	47	48	34	26	26	24	37	37	38	36	41	38	42	40	20	21	19	21
Don't know	2	2	3	1	4	3	1	1	1	1	1	1	3	4	3	3	6	8	6	7	2	1	1	1
Mean proportion per setting	16	15	16	15	30	29	24	24	14	11	10	10	17	16	16	17	19	17	19	19	14	14	13	13

Base: Childcare providers 2010, 2008, 2007, 2006

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

	Nursery schools				Primary schools with nursery and reception classes				Primary schools with reception but no nursery classes			
	2010	2008	2007	2006	2010	2008	2007	2006	2010	2008	2007	2006
None	5%	7%	6%	9%	13%	13%	19%	16%	37%	47%	44%	48%
1 to 5%	20%	13%	18%	19%	24%	24%	25%	26%	16%	15%	19%	18%
6 to 10%	11%	14%	14%	15%	12%	11%	13%	14%	18%	16%	15%	16%
11% or more	59%	61%	58%	54%	45%	45%	40%	40%	27%	20%	21%	16%
Don't know	5%	5%	4%	3%	5%	6%	3%	4%	1%	1%	2%	1%
Mean proportion per setting	30%	33%	31%	31%	23%	24%	21%	22%	9%	7%	8%	7%

Base: Early years provision in maintained schools 2010, 2008, 2007, 2006.

4.11 Children with disabilities

In 2010, childcare providers were asked if they cared for any children with mental and/or physical disabilities. Table 4.20 shows the proportion of childcare providers who cared for at least one child with minor, moderate or severe disabilities.

	Full Day Care	Full day care in children's centres	Sessional	After school clubs	Holiday clubs	Childminders
Minor disabilities	39%	61%	36%	46%	49%	8%
Moderate disabilities	25%	60%	24%	31%	39%	4%
Severe disabilities	14%	33%	11%	14%	22%	2%
Does not currently care for children with disabilities	44%	13%	47%	36%	29%	87%

Base: Childcare providers 2010

Childminders were the least likely to look after children with disabilities, though this is at least partly attributable to the fact that they look after fewer children than the other providers do. This may also be connected to the fact that childminders primarily work alone and are therefore less likely to have the additional resources that are available in group settings and which allow, for example, one-to-one support. Almost nine in ten childminders (87 per cent) did not currently care for children with disabilities. One in ten (eight per cent) looked after children with minor disabilities and very few childminders cared for children with severe disabilities (two per cent).

Even taking into account the relatively high average number of children attending full day care settings in children's centres, it is still apparent that they are more likely than other

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

providers to have children with disabilities on their books. Only 13 per cent did not care for children with a disability and they had the highest level of care of all the provider groups for minor disabilities, moderate disabilities and severe disabilities. There were similar levels of care for children with disabilities amongst general full day care providers and sessional providers. Holiday clubs and after school clubs were more likely than full day care and sessional providers to care for children with disabilities.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

5. Workforce composition

This chapter looks at the number and type of paid and unpaid staff working within the childcare and early years sector. It focuses on the demographic profile of those working in the sector, including their age, gender, ethnicity and the proportion with a disability. It also explores their average rates of pay, the amount of hours they work and how much of that time is spent interacting with children.

For the childcare settings the survey looked in detail at three different paid staff types:

- Senior managers. The person with overall responsibility for running the setting.
- Supervisory staff. Staff who are qualified to look after a group of children on their own, they may or may not supervise other members of staff.
- Other paid childcare staff. Staff who are not qualified to look after a group of children on their own.

For the early years providers in maintained schools the survey looked in detail at four different paid staff types:

- The head teacher (in nursery schools)/the Early years or foundation stage co-ordinator (in relevant primary schools - i.e. those with reception classes that cater for 5 year olds - with or without nursery classes).
- Qualified early years teachers. Teachers who teach early years education.
- Nursery nurses. Staff who are not teachers, but are qualified to look after a group of children on their own. They may or may not supervise other members of staff.
- Other paid early years support staff. Staff who are not qualified to look after a group of children on their own.

In addition to this, settings were asked how many unpaid volunteers and students on placements were used to help run the setting.

5.1 Number of staff

Estimates of staffing numbers are correlated to the estimated number of settings detailed in chapter 3. As the estimated number of settings has increased in 2010, it is to be expected that the estimated number of staff would also increase (as is the case).

Childcare

Table 5.1a shows the number of paid and unpaid staff working within childcare settings, while table 5.1b shows the percentage change in the number of staff working in these settings across the years.

Seven per cent of providers in the childcare sector reported that at least one member of staff held other jobs in the childcare and education sector in addition to working for them. It is therefore possible that some double counting of staff took place - if one person was

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

working at two different childcare and education providers in the sample they would have been counted once in each. Similarly, it is possible for a single provider to offer different types of care, which again may result in double counting in the totals. We would therefore advise caution when using the totals in table 5.1a and table 5.1b

Table 5.1a Number of staff working in childcare providers						
	Number of paid and unpaid staff					
	2010	2009	2008	2007	2006	2005
	No.	No.	No.	No.	No.	No.
Full day care	213,300	187,600	178,500	161,800	152,400	148,200
<i>Full day care in children's centres</i>	12,900	15,800	13,900	13,700	10,000	N/A
Sessional	65,400	60,800	66,500	63,100	72,200	77,100
After school clubs	72,100	51,400	53,100	50,400	54,500	N/A
Holiday clubs	83,300	60,500	62,800	51,200	68,200	N/A
Total	434,100	360,300	360,900	326,500	347,300	N/A
Number of paid staff						
	2010	2009	2008	2007	2006	2005
	No.	No.	No.	No.	No.	No.
Full day care	187,800	173,200	165,500	151,200	140,000	132,700
<i>Full day care in children's centres</i>	11,400	14,600	13,500	12,900	9,200	N/A
Sessional	54,600	50,100	54,800	52,700	57,000	59,800
After school clubs	66,300	46,800	48,600	46,100	48,500	N/A
Holiday clubs	73,000	52,600	50,800	45,400	55,500	N/A
Total	381,700	322,700	319,700	295,400	301,000	N/A
Number of unpaid staff						
	2010	2009	2008	2007	2006	2005
	No.	No.	No.	No.	No.	No.
Full day care	26,800	16,100	15,800	15,000	15,400	15,500
<i>Full day care in children's centres</i>	1,800	1,500	1,400	1,400	1,100	N/A
Sessional	11,100	11,100	13,400	12,200	16,800	17,300
After school clubs	7,100	4,800	4,900	4,700	6,000	N/A
Holiday clubs	11,900	8,700	12,700	6,700	12,700	N/A
Total	56,900	40,700	46,800	38,600	50,900	N/A
<i>Base: Childcare providers 2010, 2009, 2008, 2007, 2006, 2005</i>						

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Table 5.1b Number of staff working in childcare providers					
	% change in number of paid and unpaid staff				
	From 2009 to 2010	From 2008 to 2010	From 2007 to 2010	From 2006 to 2010	From 2005 to 2010
	%	%	%	%	%
Full day care	+14%	+19%	+32%	+40%	+44%
<i>Full day care in children's centres</i>	-18%	-7%	-6%	+29%	N/A
Sessional	+8%	-2%	+4%	-9%	-15%
After school clubs	+40%	+36%	+43%	+32%	N/A
Holiday clubs	+38%	+33%	+63%	+22%	N/A
Total	+20%	+20%	+33%	+25%	N/A
	% change in number of paid staff				
	From 2009 to 2010	From 2008 to 2010	From 2007 to 2010	From 2006 to 2010	From 2005 to 2010
	%	%	%	%	%
Full day care	+8%	+13%	+24%	+34%	+42%
<i>Full day care in children's centres</i>	-22%	-16%	-12%	+24%	N/A
Sessional	+9%	0	+4%	-4%	-9%
After school clubs	+42%	+36%	+44%	+37%	N/A
Holiday clubs	+39%	+44%	+61%	+32%	N/A
Total	+18%	+19%	+29%	+27%	N/A
	% change in number of unpaid staff				
	From 2009 to 2010	From 2008 to 2010	From 2007 to 2010	From 2006 to 2010	From 2005 to 2010
	%	%	%	%	%
Full day care	+66%	+70%	+79%	+74%	+73%
<i>Full day care in children's centres</i>	+20%	+29%	+29%	+64%	N/A
Sessional	0	-17%	-9%	-34%	-36%
After school clubs	+48%	+45%	+51%	+18%	N/A
Holiday clubs	+37%	-6%	+78%	-6%	N/A
Total	+40%	+22%	+47%	+12%	N/A

Base: Childcare providers 2010, 2009, 2008, 2007, 2006, 2005.

As shown in tables 5.1a and 5.1b, since 2006 the total number of staff working in Childcare providers has increased substantially (by 25 per cent). Sessional providers were the only type that did not experience an increase in the total number of staff over this period, with the total staffing for this group actually seeing a nine per cent decrease since 2006 (and a 15 per cent decrease compared with 2005). It is to be expected that staff numbers for sessional providers would have fallen, as the total number of sessional providers has declined over time (as shown in chapter 3.1).

In the shorter term, between 2009 and 2010, there has been an increase in the estimated total number of staff for the childcare sector (20 per cent). This increase in the total was driven by increases in all provider types with the exception of children's centres offering on site full day care, which saw a decrease of 18 per cent between 2009 and 2010. This decrease was driven by the 20 per cent decline in the estimated number of children's centres offering full day care (see chapter 3.1) – average staffing levels per children's centre setting have remained relatively stable. Continuing to focus on the staff in children's centres offering full day care, there was a decline of 22 per cent in the number of paid staff, but the number of unpaid staff actually saw an increase of 20 per cent.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

However, the proportion of unpaid staff remains markedly smaller than the proportion of paid staff (hence the overall decline in children's centre staff numbers, in spite of the increase in unpaid staff numbers).

As discussed in chapter 3, there has been a rise in the total estimated number of providers from 2009 to 2010.⁴⁵ This has been a significant factor in the increase in the total number of paid staff and may be linked to the change in sampling method in 2010.

The most notable increase in staff numbers from 2009 to 2010 has been with the out of school providers, with staff numbers in holiday clubs rising by 38 per cent and in after school clubs by 40 per cent. Over that same period, the total number of holiday clubs operating increased by 20 per cent and the number of after school clubs also increased by 20 per cent. Both these groups also saw an increase in the average number of registered places for each provider, as discussed in chapter 4. The potential impact of the change in sampling method should be considered when looking at these shifts in the data.

From 2009 to 2010 there was a 14 per cent increase in the number of staff working in full day care providers and an eight per cent rise in staff numbers at sessional providers. For paid staff there was an increase of eight per cent in full day care providers and nine per cent at sessional providers and for unpaid staff there was an increase of 66 per cent in full day care providers whilst sessional unpaid staff numbers remained the same. Again, the overall increase in full day care staff levels may be connected to the change in sampling approach and the associated increase in the estimated number of full day care settings.

Early years provision in maintained schools

As with childcare providers, we would advise caution when using the total rows in table 5.2 as it is possible that some double counting of staff took place. Two per cent of early years providers surveyed reported that at least one member of staff held other jobs in the childcare and education sector in addition to working for them as a provider.

The number of staff in nursery schools has decreased slightly (two per cent) between 2009 and 2010 from 6,100 to 6,000. Over the same period we have seen a slight fall in the number of nursery school providers (see chapter 3) and number of registered places (see chapter 4). For both primary schools with nursery and reception classes, and primary schools with nursery but no reception classes, there has been an increase in staff numbers. In 2010 there were 68,400 staff in primary schools with nursery and reception classes (compared to 61,800 in 2009) and 53,200 staff in primary schools with reception but no nursery classes (compared to 49,400 in 2009).⁴⁶ The number of each type of provider has shown no increase over this time period, but the number of registered places for both providers has increased (see chapter 4).

Focusing on the number of paid staff from 2009 to 2010, both primary schools with nursery and reception classes, and primary schools with reception but no nursery classes, saw an increase (six per cent and five per cent respectively), whilst nursery schools saw an eight per cent decrease in the number of paid staff.

⁴⁵ This increase in the total number of providers may partly be attributable to the change in sampling methodology detailed in Chapter 2.4.2 and results should be viewed in this light

⁴⁶ The sample source for Early Years providers was also changed in 2010, as discussed in Chapter 2.4.2

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

All three types of provider saw an increase in the number of unpaid staff (up by 20 per cent in primary schools with reception but no nursery classes, 29 per cent in schools with nursery and reception classes and 71 per cent in nursery schools).

	Number of paid and unpaid staff					% change in number of staff			
	2010	2009	2008	2007	2006	From 2009 to 2010	From 2008 to 2010	From 2007 to 2010	From 2006 to 2010
	No.	No.	No.	No.	No.	%	%	%	%
Nursery schools	6,000	6,100	6,000	5,900	5,500	-2%	0	+2%	+9%
Primary schools with nursery and reception classes	68,400	61,800	63,600	64,900	55,600	+11%	+8%	+5%	+23%
Primary schools with reception but no nursery classes	53,200	49,400	48,100	53,500	47,100	+8%	+11%	-1%	+13%
TOTAL	127,600	117,300	117,700	124,200	108,200	+9%	+8%	+3%	+18%
	Number of paid staff					% change in number of staff			
	2010	2009	2008	2007	2006	From 2009 to 2010	From 2008 to 2010	From 2007 to 2010	From 2006 to 2010
	No.	No.	No.	No.	No.	%	%	%	%
Nursery schools	4,900	5,300	5,300	5,000	4,600	-8%	-8%	-2%	+7%
Primary schools with nursery and reception classes	54,500	51,400	52,400	52,300	43,000	+6%	+4%	+4%	+27%
Primary schools with reception but no nursery classes	39,400	37,600	37,700	38,600	31,200	+5%	+5%	+2%	+26%
TOTAL	98,800	94,300	95,400	95,800	78,900	+5%	+4%	+3%	+25%
	Number of unpaid staff					% change in number of staff			
	2010	2009	2008	2007	2006	From 2009 to 2010	From 2008 to 2010	From 2007 to 2010	From 2006 to 2010
	No.	No.	No.	No.	No.	%	%	%	%
Nursery schools	1,200	700	1,000	1,000	1,200	+71%	+20%	+20%	0
Primary schools with nursery and reception classes	15,200	11,800	14,600	14,700	15,000	+29%	+4%	+3%	+1%
Primary schools with reception but no nursery classes	14,800	12,300	12,900	15,600	17,100	+20%	+15%	-5%	-13%
TOTAL	31,200	24,800	28,500	31,400	33,200	+26%	+9%	-1%	-6%

Base: Early years provision in maintained schools 2010, 2009, 2008, 2007, 2006.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

5.2 Number of places per paid staff member

Childcare

Ofsted have specified minimum staffing ratios for children of different ages. As a general guide, the minimum ratios are as follows, though there are some differences according to the type of provider: 1:3 for children under age two years; 1:4 for children aged two years; and 1:8 for children aged three to seven years.

Table 5.3 shows the number of Ofsted registered places per paid member of staff reported in the survey for the different childcare provider types.

	2010	2009	2008	2007	2006	2005
Full day care	3.8	3.7	3.8	4.0	3.9	3.9
Full day care in children's Centres	3.5	3.5	3.7	4.0	4.1	N/A
Sessional	4.6	4.5	4.4	4.7	4.9	4.4
After school clubs	5.6	5.8	5.8	5.6	5.4	N/A
Holiday clubs	4.8	5.0	5.2	5.1	4.8	N/A

Base: Childcare providers 2010, 2009, 2008, 2007, 2006, 2005.

The ratio of registered places to staff has changed very little between 2009 and 2010. As shown in table 5.3, in both full day care and full day care in children's centres there were less than four places per member of staff (3.8 and 3.5 places per paid member of staff respectively). This is a reflection of the younger age profile of children cared for in these establishments and the according requirements set out by Ofsted.

Sessional providers tend to care for a more diverse age range of children so their ratio of places to staff was therefore slightly higher at 4.6 places per staff member.

Out of school providers had generally higher ratios of registered places to members of staff; 4.8 places per member of staff in holiday clubs and 5.6 places per member of staff in after school clubs. These providers tend to care for older children.

	Full day care	Full day care in children's centres	Sessional	After school clubs	Holiday clubs
Private or Voluntary	3.8	3.4	4.6	5.4	4.6
Private	3.8	3.7	4.5	5.0	4.5
Voluntary	3.9	3.2	4.6	5.9	4.7
Maintained	3.8	3.6	4.9	5.9	5.7
Local authority	3.5	3.5	†	4.8	6.0
School/college	4.2	†	†	6.2	5.4
Other	†	†	†	†	†

Base: Childcare providers 2010.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

As shown in table 5.4, ratios of registered places to staff varied relatively little by ownership of the establishment. Private and voluntary holiday clubs had fewer places per staff member than maintained holiday clubs, the same was true, to a lesser extent, for after school clubs. Otherwise there were no noteworthy differences between the sectors.

Early years provision in maintained schools

Minimum staffing ratios are set out in the *Early Years Foundation Stage Statutory Framework* for the maintained sector. Once again, children under two years require a ratio of 1:3 and children aged two years require a ratio of 1:4. However, for children aged three and over attending early years provision in maintained schools there must be a ratio of at least 1:13.

Table 5.5 displays the ratio of places to staff members among early years providers. For primary schools with reception but no nursery classes there was an increase between 2009 and 2010 from 7.3 places per staff member to 7.8. Both nursery schools and primary schools with nursery classes saw slight directional falls in the number of places per staff member from 2009 to 2010, declining from 5.6 to 5.2 and 9.1 to 9.0 respectively.⁴⁷ Nursery schools reported the lowest ratios (5.2 registered places per member of staff) of the maintained sector, which is unsurprising given the younger age profile of children in these settings.

	2010	2009	2008	2007	2006
Nursery schools	5.2	5.6	5.7	5.7	6.1
Primary schools with nursery and reception classes	9.0	9.1	9.8	8.2	11.1
Primary schools with reception but no nursery classes	7.8	7.3	7.3	7.9	9.2

Base: Early years provision in maintained schools 2010, 2009, 2008, 2007, 2006.

5.3 Staff type

Childcare

Tables 5.6a, 5.6b and 5.6c show the breakdown of childcare staff by staff type. Additionally, the numbers and proportions of staff by staff type, type of provider and type of ownership are included in Appendix 1 (tables 5.6d-5.6i).

In all types of provider supervisors are the largest staff group. Over half of staff in full day care and full day care within children's centres settings were supervisors (52 and 54 per cent respectively), while just under half of after school club (48 per cent), sessional (46 per cent), and holiday club (46 per cent) staff were supervisors. In sessional and after school settings, senior managers accounted for more than ten percent of staff (12 per cent and 13 per cent respectively), whereas in full day care settings only eight per cent of staff were senior managers and the proportion was even lower in children's centres (six per cent).

Between 2009 and 2010 the proportion of other paid childcare staff (those unable to supervise children) has seen a directional fall across most provider types. The one

⁴⁷ A 'directional decrease' whilst not statistically significant, may serve as an early indicator of a new trend. Comment has only been passed on non-significant changes in cases where it is felt that they could be early indicators of future change.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

exception was found in children's centres offering full day care, where the proportion of other paid childcare staff increased from 22 to 27 per cent. From 2009 to 2010 the proportion of staff types for full day care has remained relatively stable, whereas for full day care within children's centres there has been more fluctuation. There has been a 10 per cent decrease in the proportion of supervisors from 64 to 54 per cent in full day care within children's centres. There was an increase in the proportion of students on placement over the same time period, from six to 11 per cent.

The proportion of supervisory staff within sessional providers increased slightly between 2009 and 2010 from 44 to 46 per cent. Other paid childcare staff accounted for 25 per cent of sessional staff and unpaid staff accounted for a further 17 per cent.

After school clubs once again had the highest concentration of senior managers (13 per cent). Supervisory staff accounted for almost half (48 per cent) of staff, other paid childcare staff made up just under a third (29 per cent) of the workforce, while nine per cent of staff were unpaid. The breakdown of staff types within after school clubs had changed very little since 2009.

The proportion of supervisors within holiday clubs increased slightly from 2009 to 2010 (from 43 to 46 per cent). Over the same time period there has been a slight decrease in the proportion of other paid staff from 34 to 31 per cent, whilst the proportion of unpaid staff has remained stable at 14 per cent.

	Full day care					Full day care in children's centres				
	2010	2009	2008	2007	2006	2010	2009	2008	2007	2006
Senior manager	8%	7%	8%	8%	9%	6%	6%	7%	7%	7%
Supervisory	52%	56%	52%	54%	57%	54%	64%	64%	61%	58%
Other paid childcare staff	28%	29%	34%	31%	28%	27%	22%	27%	25%	23%
Students on placement	9%	5%	6%	6%	7%	11%	6%	7%	3%	8%
Volunteers	3%	3%	2%	3%	3%	3%	3%	3%	3%	3%

Base: Childcare providers 2010, 2009, 2008, 2007, 2006.

	Sessional				
	2010	2009	2008	2007	2006
Senior manager	12%	12%	12%	12%	11%
Supervisory	46%	44%	40%	41%	39%
Other paid childcare staff	25%	27%	31%	30%	28%
Students on placement	9%	7%	8%	7%	8%
Volunteers	8%	11%	12%	12%	16%

Base: Childcare providers 2010, 2009, 2008, 2007, 2006.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

	After school clubs					Holiday Clubs				
	2010	2009	2008	2007	2006	2010	2009	2008	2007	2006
Senior manager	13%	15%	16%	16%	13%	9%	10%	10%	11%	9%
Supervisory	48%	46%	43%	43%	44%	46%	43%	38%	42%	40%
Other paid childcare staff	29%	30%	33%	33%	32%	31%	34%	33%	36%	32%
Students on placement	5%	4%	4%	5%	4%	7%	5%	9%	6%	5%
Volunteers	4%	5%	5%	5%	7%	7%	9%	11%	7%	13%

Base: Childcare providers 2010, 2009, 2008, 2007, 2006.

Early years provision in maintained schools

Table 5.7 displays the breakdown of early years staff in maintained schools by staff type. The *numbers* of staff at each level are shown in table 5.7a in Appendix 1 of the report.

The findings in 2010 are similar to those in 2009. However, there has been an increase in the proportion of unpaid staff in all provider types across this time period (nursery schools from 12 to 20 per cent, primary schools with nursery and reception classes from 19 to 23 per cent and primary schools with reception but no nursery classes from 25 to 30 per cent).

As would be expected, nursery schools had a higher proportion of nursery nurses (38 per cent) than any other provider type.⁴⁸ Early years teachers and early years support staff each comprised around a fifth of the nursery schools workforce (18 per cent for both). Early years co-ordinators made up the smallest proportion of paid staff (seven per cent), although only one co-ordinator per setting would be expected. Thirteen per cent were students and seven per cent were volunteers, so in total a fifth (20 per cent) of nursery staff were unpaid.

A quarter of staff in primary schools with nursery and reception classes were nursery nurses (25 per cent) followed by a fifth (22 per cent) who were early years teachers and a fifth (20 per cent) other paid support staff. A tenth (10 per cent) of staff were heads/early years co-ordinators. Around a quarter (23 per cent) of all staff were unpaid; 12 per cent were students on placements and 11 per cent were volunteers.

In primary schools with reception but no nursery classes the largest paid staff group was early years support staff, accounting for a fifth of all staff (22 per cent). This was followed by 17 per cent who were heads/early years co-ordinators, 17 per cent early years teachers and 15 per cent were nursery nurses. Three in ten (30 per cent) staff were unpaid in total.

⁴⁸ Nursery nurses are defined as being those qualified to supervise a group of children on their own, but who are not qualified early years teachers.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Table 5.7 Breakdown of staff by staff type															
	Nursery schools					Primary schools with nursery and reception classes					Primary schools with reception but no nursery classes				
	2010	2009	2008	2007	2006	2010	2009	2008	2007	2006	2010	2009	2008	2007	2006
Head teacher/Early years or foundation stage co-ordinator	7%	7%	7%	8%	7%	10%	10%	10%	11%	10%	17%	17%	17%	16%	16%
Early years teachers	18%	21%	20%	19%	18%	22%	22%	21%	20%	21%	17%	14%	17%	14%	16%
Nursery nurses	38%	40%	42%	40%	40%	25%	25%	25%	24%	25%	15%	12%	12%	11%	12%
Early years support staff	18%	19%	18%	18%	16%	20%	20%	21%	22%	17%	22%	23%	23%	20%	21%
Students on placements	13%	8%	10%	12%	13%	12%	9%	12%	12%	12%	10%	7%	8%	8%	10%
Volunteers	7%	4%	6%	6%	9%	11%	10%	11%	12%	14%	20%	18%	19%	21%	25%

Base: Early years providers 2010, 2009, 2008, 2007, 2006.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

5.4 Agency, freelance and supply staff

Table 5.8 shows the proportions of childcare and early years providers using agency staff in the 12 months prior to the survey for both 2010 and 2008. A more detailed breakdown of this data covering ownership, deprivation, region and population density is given in tables 5.8a-5.8c in Appendix 1.

	% using agency staff	
	2010	2008
Full day care	28%	30%
Full day care in children's centres	68%	68%
Sessional	11%	10%
After school clubs	13%	9%
Holiday clubs	16%	15%
Nursery schools	71%	63%
Primary schools with nursery and reception classes	59%	53%
Primary schools with reception but no nursery classes	47%	39%

Base: Childcare providers 2010, 2008. Early years provision in maintained schools 2010, 2008

Childcare

As was the case in 2008, compared with other types of provider, higher proportions of full day care providers in children's centres reported having used agency staff in the last 12 months (68 per cent). Although lower, a substantial proportion of full day care providers reported using agency staff (28 per cent). As shown in table 5.8, much lower proportions of holiday clubs (16 per cent), after school clubs (13 per cent) and sessional providers (11 per cent) had used agency staff in the last 12 months.

From 2008 to 2010 the proportion of childcare providers using agency staff has remained relatively stable. However, there was a slight increase in the proportion of after school clubs using agency staff (from nine per cent in 2008 to 13 per cent in 2010).

As was found in 2008, higher proportions of local authority run providers had used agency staff within in the last 12 months than providers operating under any other type of ownership. Again, as was the case in 2008, providers in the 30 per cent most deprived areas were more likely to have used agency staff than those in the 70 per cent least deprived areas. This was the case for all of the childcare provider types.

Early years provision in maintained schools

Nursery schools were most likely to report using agency staff (71 per cent). Three-fifths (59 per cent) of primary schools with nursery and reception classes and almost half (47 per cent) of primary schools with reception but no nursery classes reported using agency staff. From 2008 to 2010 there has been an increase in the usage of agency staff amongst all three provider types.

As was found in 2008, across all three provider types the proportions using agency staff was greater in providers operating in the 30 per cent most deprived areas than those in the 70 per cent least deprived areas. This difference was smaller in primary schools with

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

reception but no nursery classes (eight percentage points) compared with primary schools with nursery and reception classes (15 percentage points) and nursery schools (19 percentage points).

5.5 Age of staff

Tables 5.9a, 5.9b and 5.10 show the age profile of all paid staff working within childcare and early years providers.

Childcare

Tables 5.9a and 5.9b show the age profile of the paid staff in different types of provider.

Staff in sessional providers and childminders have the oldest age profile with three-fifths (58 per cent) of sessional staff and two-thirds (66 per cent) of childminders being over 40 years of age. The very large majority of both of these groups are over 25 years of age (89 per cent and 99 per cent respectively).

Staff working in full day care providers, after school clubs and holiday clubs had the youngest age profile, with 28 per cent of holiday club staff, 23 per cent of full day care staff and 22 per cent of after school club staff being less than 25 years old. However, the proportion of employees aged less than 25 has decreased in full day care settings, from 30 per cent in 2008 to 23 per cent in 2010. Holiday clubs have seen a similar decline in the proportion of under 25s, which made up 28 per cent of their workforce in 2010, compared to 38 per cent in 2008. These shifts are likely to have been influenced by the change in sampling approach.

Given the likelihood that senior managers and early years co-ordinators will have been working in the industry for longer than less senior staff across all types of provider, it is perhaps unsurprising that more senior staff tended to be older than more junior staff.

	Full day care				<i>Full day care in children's centres</i>				Sessional			
	2010	2008	2007	2006	2010	2008	2007	2006	2010	2008	2007	2006
16-19	3%	5%	6%	5%	2%	2%	3%	4%	2%	2%	1%	1%
20-24	20%	25%	25%	24%	18%	18%	22%	19%	7%	5%	4%	3%
25-39	42%	43%	43%	43%	45%	45%	44%	45%	31%	35%	35%	36%
40-49	20%	16%	17%	18%	19%	21%	22%	21%	37%	38%	39%	40%
50+	12%	9%	8%	10%	13%	12%	7%	8%	21%	18%	18%	19%

Base: Childcare providers 2010, 2008, 2007, 2006.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

	After school clubs				Holiday clubs				Childminders			
	2010	2008	2007	2006	2010	2008	2007	2006	2010	2008	2007	2006
16-19	4%	7%	7%	7%	5%	11%	10%	11%	0% ⁴⁹			
20-24	18%	17%	16%	17%	23%	27%	28%	28%	1%	*	1%	1%
25-39	34%	32%	33%	32%	38%	33%	34%	32%	33%	35%	39%	42%
40-49	25%	26%	26%	25%	17%	16%	16%	18%	38%	41%	36%	35%
50+	18%	17%	16%	19%	12%	10%	9%	9%	28%	24%	24%	22%

Base: Childcare providers 2010, 2008, 2007, 2006.

Early years provision in maintained schools

Table 5.10 shows the age profile of staff in early years providers. Nursery school staff and staff in primary schools with reception but no nursery had a slightly older age profile than staff working in primary schools with reception and nursery. More than half of nursery school staff and staff in primary schools with reception but no nursery classes were aged over 40 (55 and 54 per cent respectively), compared with 48 per cent in primary schools with reception and nursery classes.

	Nursery schools				Primary schools with nursery and reception classes				Primary schools with reception but no nursery classes			
	2010	2008	2007	2006	2010	2008	2007	2006	2010	2008	2007	2006
16-19	1%	*	*	1%	1%	*	1%	*	*	*	*	*
20-24	5%	5%	5%	7%	6%	7%	6%	6%	4%	4%	4%	4%
25-39	37%	33%	32%	31%	43%	40%	41%	42%	37%	37%	37%	35%
40-49	31%	34%	34%	34%	30%	30%	28%	30%	31%	31%	31%	31%
50+	24%	28%	28%	26%	18%	21%	20%	21%	23%	25%	23%	26%

Base: Early years provision in maintained schools 2010, 2008, 2007, 2006.

The large majority (93 per cent) of early years co-ordinators/heads within nursery schools were over the age of 40.

In primary schools with reception but no nursery classes almost half of early years co-ordinators/heads (46 per cent) were aged over 40, as were a third (32 per cent) of qualified early years teachers, while two-thirds of nursery nurses (64 per cent) and 69 per cent of other paid early years staff were age 40 or over.

Within primary schools with nursery and reception classes around half (51 per cent) of co-ordinators/heads and a third (34 per cent) of qualified early years teachers were aged

⁴⁹ No childminders interviewed were aged 16-19.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

over 40, as were 59 per cent of nursery nurses and 51 per cent of other paid early years staff.

5.6 Gender of staff

As shown in table 5.11 the childcare and early years workforce is overwhelmingly female, as has been the case in previous years. Out of school providers have the highest proportion of male staff, with eight per cent of paid staff in after school clubs and 10 per cent of paid staff in holiday clubs being male. The decrease for holiday clubs may have been influenced by the change in sampling approach in 2010.

	Proportion of male staff	
	2010	2008
Full day care	2%	2%
Full day care in children's centres	2%	2%
Sessional	1%	1%
After school clubs	8%	7%
Holiday clubs	10%	14%
Childminders	2%	2%
Nursery schools	2%	2%
Primary schools with nursery and reception classes	1%	1%
Primary schools with reception but no nursery classes	1%	1%

Base: Childcare providers 2010, 2008. Early years provision in maintained schools 2010, 2008.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

5.7 Ethnicity of staff

Table 5.12 shows the proportion of staff from a black and minority ethnic (BME) background across all types of provider.

Table 5.12 Proportion of staff from a black and minority ethnic (BME) background in paid workforce			
	Proportion of BME staff 2010	Proportion of BME staff 2008	Proportion of BME staff 2007
Full day care	10%	10%	N/A
<i>Full day care in children's centres</i>	17%	16%	N/A
Sessional	6%	6%	N/A
After school	10%	10%	N/A
Holiday clubs	9%	13%	N/A
Childminders	9%	8%	7%
Nursery schools	13%	13%	12%
Primary schools with nursery and reception classes	8%	8%	10%
Primary schools with reception but no nursery classes	2%	1%	2%
<i>Base: Childcare providers 2010, 2008. Childminders 2010, 2008, 2007. Early years provision in maintained schools 2010, 2008, 2007.</i>			

Data from the Office for National Statistics publication 'Population Estimates by Ethnic Group Mid-2007' estimated that around 13 per cent of the working age population were from a BME background.⁵⁰ As such, there is an under-representation of staff from a BME background in most of the provider types.

As was found in 2008, full day care in children's centres had the highest proportion of staff from a BME background at 17 per cent of staff. This was followed by 13 per cent of staff in nursery schools. Both of these types of provider tend to be concentrated in the 30% most deprived areas, where people from a BME background are more likely to reside; as such, their higher level of BME staffing is to be expected. Primary schools with reception but no nursery classes had the lowest proportion of BME staff, at just two per cent of the workforce.

Again, it should be noted that the decrease amongst holiday clubs is likely to have been affected by the change in sampling method in 2010.

⁵⁰ This proportion was based on persons aged 15-64. Amongst those aged 15-69, the proportion from a BME background was marginally lower, at 12 per cent.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

5.8 Disability

	Proportion of staff with a disability 2010	Proportion of staff with a disability 2008	Proportion of staff with a disability 2007
Full day care	1%	1%	1%
<i>Full day care in children's centres</i>	2%	2%	1%
Sessional	1%	1%	1%
After school clubs	1%	2%	2%
Holiday clubs	2%	2%	2%
Nursery schools	2%	2%	2%
Primary schools with nursery and reception classes	1%	1%	1%
Primary schools with reception but no nursery classes	1%	1%	1%

Base: Childcare providers 2010, 2008, 2007. Early years provision in maintained schools 2010, 2008, 2007.

The proportion of paid staff with a disability has remained minimal in all types of provider in 2010. There have been no significant changes over time in this regard.

5.9 Working hours

Tables 5.14 and 5.15 show the average working hours for different levels of paid staff at each type of provider. A more detailed breakdown, including by type of ownership, profit making status (for childcare providers) and area deprivation (for both childcare and early years providers) has been included in Appendix 1 (tables 5.14a-g and 5.15a).

Childcare

As shown in table 5.14, staff working in full day care providers tended to work the longest hours (an average 32 hours per week, rising to 34 hours for full day care provision in children's centres). This was followed by staff working in holiday clubs (an average of 30 hours per week). These providers offer longer hours of care than both sessional and after school providers, where staff worked a lower average of 22 hours per week. Senior managers in all types of provider worked longer hours than supervisory staff who, in turn, worked longer hours than the other paid childcare staff.

Between 2009 and 2010 there were no marked differences in the average hours worked per week, with the exception of a slight increase in the number of hours worked by all staff in both sessional (from 19 to 22 hours per week) and after school clubs (from 19 to 22 hours a week). This may have been affected by the change in sampling method in 2010.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

	Full day care	Full day care in children's centres	Sessional	After school clubs	Holiday clubs
All staff	32	34	22	22	30
Senior managers	35	36	25	27	34
Supervisory staff	34	35	23	23	32
Other paid childcare staff	30	32	18	18	26

Base: All paid childcare staff 2010.

Early years provision in maintained schools

Between 2009 and 2010 there were no significant differences in the number of hours worked for all staff across all types of early years providers.

As shown in table 5.15, staff in nursery schools tended to work longer hours (an average of 31 hours per week) than those in primary schools with nursery and reception classes (29 hours per week) and primary schools with reception but no nursery classes (26 hours per week).

As was the case with childcare settings, across all three types of early years provider more senior staff tended to work longer hours than less senior staff.

	Nursery schools					Primary schools with nursery and reception classes					Primary schools with reception but no nursery classes				
	2010	2009	2008	2007	2006	2010	2009	2008	2007	2006	2010	2009	2008	2007	2006
All staff	31	30	30	31	32	29	29	29	29	31	26	26	26	27	29
Early years coordinators	35	37	35	41	44	31	32	32	34	37	31	32	32	33	38
Early years teachers	30	30	30	33	34	29	30	30	31	34	28	29	28	30	33
Nursery nurses	33	32	32	32	32	30	30	30	30	30	27	26	26	26	27
Other early years support staff	25	22	24	23	24	25	24	25	24	25	22	22	22	21	23

Base: All paid early years staff 2010, 2009, 2008, 2007, 2006.

5.9.1 Time spent interacting with children

Staff qualified to at least level 6 spent were asked the amount of time spent interacting with children on an average day. Tables 5.16a and 5.16b show the average number of hours for different levels of staff at each type of provider. Where qualification levels are discussed, these always relate to qualifications relevant to working with children or young people.

Childcare

As shown in table 5.16a, staff qualified to at least level 6 in full day care, on site full day care at children's centres, and holiday clubs tended to spend more time interacting

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

directly with children than staff at other types of provider. This is at least partly due to their longer hours of operation. The most notable increase from 2009 is for holiday clubs (from 2.7 to 5.8 average hours per day), though again this shift is likely to have been influenced by the change in sampling in 2010.

Senior managers qualified to at least level 6 in all types of provider spent less time interacting directly with children than less senior staff qualified to the same level. As was found in 2009, senior managers in children's centres offering full day care spent less time interacting directly with children than senior managers at other types of childcare provider, possibly a result of the relatively large size of such settings, which would naturally tend to entail a heavier administrative burden.

	Full day care	Full day care in children's centres	Sessional	After school clubs	Holiday clubs
All staff qualified to at least level 6	5.7	5.3	4.3	4.2	5.8
Senior managers qualified to at least level 6	3.9	1.8	3.4	2.6	3.7
Supervisory staff qualified to at least level 6	6.3	5.9	4.8	5.5†	6.6
Other paid childcare staff qualified to at least level 6	†	†	†	†	†

Base: All childcare staff qualified to at least level 6 2010.

Early years provision in maintained schools

As was found in 2009, staff qualified to at least level 6 in nursery schools tended to spend less time interacting directly with children (4.8 hours per day) than equivalent staff at both primary schools with nursery and reception classes (5.7 hours per day) and primary schools with reception but no nursery classes (5.4 hours per day respectively). This effect was particularly pronounced at the most senior level, with early years coordinators qualified to at least level 6 in nursery schools spending just 1.9 hours a day interacting directly with children (compared to an average of more than 5 hours per day in both primary school settings).

Between 2009 and 2010 there were no marked differences in the average hours staff spent interacting directly with children across the three types of provider.

	Nursery schools	Primary schools with nursery and reception classes	Primary schools with reception but no nursery classes
All staff qualified to at least level 6	4.8	5.7	5.4
Early years coordinators qualified to at least level 6	1.9	5.3	5.2
Early years teachers qualified to at least level 6	5.6	5.8	5.7
Nursery nurses qualified to at least level 6	†	†	†
Other early years support staff qualified to at least level 6	†	†	†

Base: All paid early years staff qualified to at least level 6 2010.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

5.10 Pay levels

Childcare

Tables 5.17a and 5.17b show the average hourly wage by staff type for all childcare providers.

Staff in full day care offered on site at children's centres earned more per hour than staff at other childcare providers, earning an average of £10.90 per hour. This was followed by staff in holiday clubs earning on average £9.00 per hour and those in after school clubs earning £8.30 on average. Staff in full day care providers earned £8.00 an hour on average and sessional providers earned £7.80.

Pay levels have increased for all types of staff across all types of provider between 2009 and 2010 (the only exception being other paid staff in after school clubs). Overall, pay levels rose by 5 per cent in full day care providers, children's centres offering full day care, sessional providers and after school clubs. Holiday clubs saw a six per cent rise in pay compared with 2009. The largest rise was for supervisory staff within after school clubs who saw a eight per cent increase, though this may have been influenced by the change in sampling method.

To put these findings into context, the national average hourly wage for UK employees rose two per cent between 2009 and 2010 (from £14.43 to £14.65).⁵¹

	Full day care			<i>Full day care in children's centres</i>		Sessional		
	2010	% change from 2009 to 2010	% change from 2008 to 2009	2010	% change from 2009 to 2010	2010	% change from 2009 to 2010	% change from 2008 to 2009
All staff	£8.00	+5%	+4%	£10.90	+5%	£7.80	+5%	+3%
Senior managers	£10.80	+2%	+6%	£16.30	+4%	£9.60	+7%	+0%
Supervisory	£8.30	+5%	+4%	£11.50	+6%	£8.00	+7%	+1%
Other paid staff	£6.60	+3%	+3%	£8.40	+6%	£6.70	+3%	+2%

Base: All childcare providers 2010.

⁵¹ http://www.statistics.gov.uk/downloads/theme_labour/ashe-2010/2010-all-employees.pdf/ (Table 1.6a)

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Table 5.17b Average (mean) hourly pay						
	After school clubs			Holiday clubs		
	2010	% change from 2009 to 2010	% change from 2008 to 2009	2010	% change from 2009 to 2010	% change from 2008 to 2009
All staff	£8.30	+5%	+1%	£9.00	+6%	+4%
Senior managers	£11.20	+6%	+1%	£11.90	+3%	-1%
Supervisory	£8.60	+8%	+1%	£9.30	+6%	+2%
Other paid staff	£6.70	+0%	+2%	£7.80	+4%	+9%

Base: All childcare providers 2010.

Early years provision in maintained schools

Table 5.18 and 5.19 show the average annual and hourly wage by staff type for all early years providers.

Table 5.18 Average annual pay						
	Nursery schools		Primary schools with nursery and reception classes		Primary schools with reception but no nursery classes	
	2010	% change from 2009 to 2010	2010	% change from 2009 to 2010	2010	% change from 2009 to 2010
All staff	£23,400	+2%	£22,100	+3%	£21,400	+2%
Head teachers/ Early years or foundation stage co-ordinators	£50,500	+1%	£38,100	+2%	£35,100	+4%
Qualified early years teachers	£33,300	+3%	£29,100	+2%	£28,600	+1%
Nursery nurses	£19,300	+0%	£17,200	+3%	£14,300	+1%
Other paid early years support staff	£12,100	+15%	£11,900	+4%	£10,300	-3%

Base: All paid early years staff 2010.

Table 5.19 Average hourly pay						
	Nursery schools		Primary schools with nursery and reception classes		Primary schools with reception but no nursery classes	
	2010	% change from 2009 to 2010	2010	% change from 2009 to 2010	2010	% change from 2009 to 2010
All staff	£14.30	+1%	£14.60	+4%	£14.70	+4%
Head teachers/ Early years or foundation stage co-ordinators	£28.10	+1%	£23.70	+3%	£21.80	+7%
Qualified early years teachers	£21.80	+3%	£19.90	+6%	£19.80	+5%
Nursery nurses	£11.30	-2%	£10.90	+2%	£10.10	-3%
Other paid early years support staff	£9.40	+4%	£9.00	-2%	£9.10	-2%

Base: All paid early years staff 2010.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

As has been the case in previous years average rates of pay are generally highest in nursery schools, with the two primary school settings having more similar rates of pay. As shown in tables 5.18 and 5.19, this pattern was evident for both annual and hourly pay for senior members of staff, qualified early years teachers, nursery nurses and other paid staff.

Nursery nurses earned an average £19,300 per annum in nursery schools compared with £17,200 in primary schools with nursery classes and £14,300 in primary schools with reception but no nursery classes. This is partially driven by the fact that nursery nurses working in primary schools with reception but no nursery classes work fewer hours (as shown in table 5.15) than nursery nurses working in other early years providers.

Other paid early years support staff earned £12,100 in nursery schools compared with £11,900 in primary schools with nursery classes and £10,300 in primary schools with reception but no nursery classes. Other paid early years support staff tended to work longer hours in nursery schools and primary schools with nursery classes than in primary schools with reception but no nursery classes.

Head teachers/early years or foundation stage co-ordinators earned in nursery schools a substantial amount more than those in their equivalents in primary school settings (£50,500 per annum compared with £38,100 in primary schools with nursery and reception classes and £35,100 in primary schools with reception but no nursery classes). This is a reflection of both longer working hours and higher hourly rates of pay for head teachers/early years or foundation stage co-ordinators working in nursery schools.

5.10.1 Variations in pay

A more detailed breakdown of pay levels by staff type, ownership, profit making status (for childcare providers) and area deprivation (for both childcare and early years providers) has been included in Appendix 1 (tables 5.17c–m and 5.18a).

For all full day care providers (including those run by children's centres) staff in local authority run establishments earned more per hour than those working in privately owned, voluntary or school run providers. For after school clubs, holiday clubs and sessional providers, staff earned more per hour working at school run providers than in establishments under any other ownership.

Staff working for all types of childcare provider in the 30 per cent most deprived areas earned slightly more per hour than those working in the 70 per cent least deprived areas.

Staff working in after school clubs and full day care providers earned slightly less per hour if they were employed by a profit making organisation than a not-for-profit organisation. Conversely, for-profit organisations offered higher hourly rates for staff working in sessional providers, on-site full day care providers in children's centres and holiday clubs.

Pay and qualification of senior manager

Table 5.20 shows the average hourly pay for staff working for graduate and non-graduate led settings.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

	Not graduate led	Graduate led
Full day care	£7.80	£8.50
<i>Full day care in children's centres</i>	£9.80	£11.80
Sessional	£7.60	£9.00
After school club	£7.70	£9.90
Holiday club	£8.50	£10.80

Base: All childcare providers 2010.

As shown in table 5.20, staff working in graduate led settings across all types of childcare provider earned a higher average hourly wage than those working in settings where the manager was not qualified to at least level 6. The gap between average pay in graduate led and non-graduate led settings varied for the different childcare provider types. Holiday clubs showed the largest difference in hourly pay for staff across graduate and non-graduate led settings (£2.30) and full day care providers demonstrated the smallest difference (£0.70).

Pay and qualification

As would be expected, pay levels generally increase with level of qualification. However, it is difficult to make firm comparisons at a staff level due to low base sizes.

Pay and region

	East Midlands	East of England	London	North East	Yorkshire and Humber	North West	South East	South West	West Midlands
Full day care	£7.30	£7.60	£9.70	£7.70	£7.90	£7.60	£8.20	£7.70	£7.30
<i>Full day care in children's centres</i>	£11.40	£10.20	£13.60	£10.10	£10.80	£9.50	£10.90	£10.20	£11.10
Sessional	£7.20	£7.40	£9.00	£10.60	£7.30	£7.20	£7.80	£8.10	£7.60
After school clubs	£8.10	£7.80	£9.50	£8.00	£9.50	£8.10	£7.90	£7.80	£7.60
Holiday clubs	£7.50	£9.30	£11.50	£9.20	£8.90	£8.90	£9.00	£8.60	£8.50
Nursery schools	£14.40†	£13.80	£15.90	£14.40	£14.40†	£14.00	£13.60	†	£13.10
Primary school with nursery and reception classes	£15.80	£13.50	£16.20	£14.40	£13.40	£14.10	£13.70	£13.30	£14.00
Primary schools with reception but no nursery classes	£15.20	£14.20	£16.50†	£17.10†	£14.60	£15.10	£13.80	£14.30	£16.00

Base: All childcare providers 2010. All early years provision in maintained schools 2010.

Unsurprisingly staff working for childcare and early years providers in London generally earned more per hour than their counterparts working in other regions. The one

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

exception was for sessional providers who earned most per hour in the North East. It would be expected that salaries would be greater in London given that the cost of living is higher and salaries tend to include London weighting to account for this.

For childcare providers, the greatest variation between London and the next highest paid region was found in holiday clubs, where staff in London earned £2.20 per hour more than staff in the next highest paid region (East of England).

Pay rates were lowest in the East Midlands for three of the five different childcare provider types (full day care, sessional and holiday clubs). Pay levels in the West Midlands were also low (with the lowest hourly rates for after school clubs and nurseries, and the joint lowest rate for full day care).

5.11 Other work

Childcare

Almost a third (32 per cent) of those working for after school providers also did paid work for another employer. Around one in five paid employees working for holiday clubs (22%) and sessional providers (18 per cent) also did paid work elsewhere. This proportion was markedly lower in full day care settings in general (9 per cent), and particularly in those full day care settings based in children's centres (3 per cent).

Early years provision in maintained schools

The proportion of paid staff who also worked for other employers was lower in early years settings than was generally the case in the childcare settings. Only 6 per cent of those working for nurseries did paid work elsewhere, whilst this proportion was 5 per cent in primary schools with reception but no nursery classes and 4 per cent in primary schools with nursery and reception classes.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

6. Qualifications

This section looks at the qualifications held by all paid staff working for childcare and early years provider. It covers requisite qualifications and how well the Government guidelines are being met, as well as detailing the qualifications that staff are working towards.

The questionnaire was designed to pick up only qualifications that were relevant to working with young people and children ⁵².

Throughout this chapter qualifications are broken down by a number of different factors, such as ownership of provision, type of staff, deprivation and region. Base sizes become quite small in certain instances, particularly when comparing different regions. In combination with the changes to the sampling in 2010, figures broken down into many groups should be treated with caution.

6.1 Definition of qualifications

The qualifications are grouped together in the levels that they have been accredited with by the Qualifications and Curriculum Authority⁵³.

- Level 1 (foundation level) – GCSE grade D-G, Foundation level GNVQ, Level 1 NVQ
- Level 2 (intermediate level) – GCSE A*-C, Intermediate GNVQ, Level 2 NVQ
- Level 3 (Advanced level) – A level, Vocational A level (Advanced GNVQ), Level 3 NVQ
- Level 4 – Higher level qualifications, BTEC Higher Nationals, Level 4 NVQ (e.g. Level 4 Certificate in Early Years Practice)
- Level 5 – Higher level qualifications, BTEC Higher Nationals, Level 5 NVQ (e.g. Diploma in Higher Education and Playwork, Early Years Foundation Degree)
- Level 6 – Honours degree (e.g. BA Early Childhood Studies)
- Level 7 – Masters degree, PGCE, National Professional Qualification for Integrated Centre Leadership (NPQICL)
- Level 8 – Doctorate

⁵² Overseas qualifications have been excluded from the analysis, but they have been included in the tables for information.

⁵³ For further information on how the different qualification levels are defined please see <https://secure.cwdcouncil.org.uk/eypqd/qualification-search>

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

6.2 Qualifications held by all staff

6.2.1 Qualification level by sector

Table 6.1 displays the proportion of staff qualified at each level in each of the three sectors. Across all paid staff within all types of provider, three in four members of the workforce (75 per cent) were qualified to at least level 3⁵⁴ and one in seven (14 per cent) were qualified to at least level 6.

There was some variation between different parts of the sector. Many staff in early years providers in maintained schools are required to hold higher qualifications upon appointment, such as an NNEB⁵⁵ diploma for nursery nurses or a PGCE⁵⁶ for qualified early years teachers. Therefore it is not surprising that staff in early years providers in maintained schools held higher qualifications than childcare staff. Four in five staff in the early years sector were qualified to at least level 3⁵⁷ (80 per cent) and two in five (42 per cent) to at least level 6.

Amongst childcare and childminders, staff were more likely to be qualified to level 3 than any other level with the majority of staff in childcare providers (55 per cent) and nearly half of childminders (47 per cent) holding level 3 qualifications. Around three in four (76 per cent) staff in childcare providers and just over half (54 per cent) of childminders held at least a level 3 qualification. These findings reflect historical government policy aimed at encouraging staff working in under eights day care to achieve level 3 qualifications as set out in the Early Years Foundation Stage Statutory Framework.⁵⁸ However, while only eight per cent of childcare staff did not have any relevant qualification, around two in ten childminders (22 per cent) did not. The requirements set out in the Early Years Foundation Stage stated that childminders are not required to hold any qualifications, although they are expected to undertake an approved course prior to commencing childminding activities.

⁵⁴ Those qualified to 'at least level 3' are those qualified to level 3 and above.

⁵⁵ National Nursery Examination Board.

⁵⁶ Post-Graduate Certificate of Education.

⁵⁷ Those qualified to 'at least level 3' are those qualified to level 3 and above.

⁵⁸ The statutory framework for the Early Years Foundation Stage, which superseded the National Standards for Under 8s Day Care and Childminding in September 2008, stipulates that in registered settings other than childminding settings, all supervisors and managers must hold a full and relevant level 3 qualification and half of all other staff must hold a full and relevant level 2 qualification.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Table 6.1 Relevant qualifications of paid staff across all types of providers				
	Total paid childcare staff	Childminders	Total paid early years staff	Total
Level 1	1%	6%	1%	1%
Level 2	13%	8%	8%	11%
Level 3	55%	47%	31%	50%
Level 4	9%	3%	2%	7%
Level 5	4%	1%	4%	4%
Level 6	7%	2%	31%	11%
Level 7	1%	1%	11%	3%
Level 8	*	0%	*	*
Overseas	*	0%	*	*
No qualification	8%	22%	5%	8%
Any qualification	90%	69%	89%	88%
Other	*	3%	1%	1%
Don't Know	2%	5%	6%	3%
<i>At least level 3</i>	76%	54%	80%	75%
<i>At least level 6</i>	8%	3%	42%	14%
<i>Base: All paid childcare staff 2010. All childminders 2010. All early years staff 2010.</i>				

Table 6.2 summarises how the proportion of staff holding different qualifications has changed between 2007 and 2010, a period which has seen the workforce becoming increasingly qualified. The proportion holding at least a level 3 qualification has continually increased over the years. Across all sectors, the proportion has increased from 64 per cent in 2007, to 66 per cent in 2008, 72 per cent in 2009 and finally to 75 per cent in 2010. This total increase can be attributed to the childcare sector (rising from 65 per cent in 2007 to 76 per cent in 2010 amongst staff in childcare providers, and from 41 per cent to 54 per cent amongst childminders). Among childminders there has been a decrease in the proportion not holding any qualifications at all (from 31 per cent in 2009 to 22 per cent in 2010). However this decrease may be linked to the decrease in the total number of childminders discussed in chapter 3.1, with some of the least qualified childminders leaving the sector altogether.

The figures for staff in early years providers in maintained schools have remained similar across time (79 per cent in 2007, compared to 80 per cent in 2010).

The proportion of staff qualified to at least level 6 has increased slightly since the 2007 survey (from 11 per cent to 14 per cent overall), attributable to a slow but steady increase amongst staff in childcare providers (from five per cent to eight per cent).

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

	Total paid childcare staff				Childminders				Total paid early years staff				Total			
	2010	2009	2008	2007	2010	2009	2008	2007	2010	2009	2008	2007	2010	2009	2008	2007
Level 1	1%	1%	1%	2%	6%	8%	9%	12%	1%	1%	2%	2%	1%	2%	2%	3%
Level 2	13%	14%	17%	18%	8%	6%	7%	8%	8%	8%	9%	8%	11%	12%	14%	15%
Level 3	55%	56%	54%	54%	47%	41%	38%	36%	31%	31%	31%	31%	50%	49%	48%	47%
Level 4	9%	8%	5%	4%	3%	4%	3%	1%	2%	2%	2%	2%	7%	6%	5%	4%
Level 5	4%	3%	2%	2%	1%	1%	1%	0%	4%	5%	4%	3%	4%	3%	2%	2%
Level 6	7%	6%	5%	4%	2%	2%	2%	2%	31%	31%	30%	32%	11%	10%	9%	9%
Level 7	1%	1%	1%	1%	1%	1%	1%	1%	11%	9%	9%	8%	3%	2%	2%	2%
Level 8	*	*	*	*	0%	*	0%	0%	*	*	*	*	*	*	*	*
Overseas	*	*	*	*	0%	0%	N/A	*	*	*	*	*	*	*	*	*
No qualification	8%	10%	11%	13%	22%	31%	34%	33%	5%	6%	7%	9%	8%	11%	13%	15%
Any qualification	90%	89%	86%	85%	69%	66%	63%	64%	89%	90%	89%	88%	88%	87%	84%	82%
Other	*	*	1%	1%	3%	3%	N/A	3%	1%	1%	1%	*	1%	1%	1%	1%
Don't Know	2%	1%	2%	2%	5%	3%	3%	3%	6%	4%	4%	3%	3%	2%	3%	3%
At least level 3	76%	73%	68%	65%	54%	49%	44%	41%	80%	79%	77%	79%	75%	72%	66%	64%
At least level 6	8%	7%	6%	5%	3%	3%	3%	3%	42%	40%	39%	42%	14%	13%	11%	11%

Base: All paid childcare staff, All childminders, All early years staff, 2010, 2009, 2008, 2007.

6.2.2 Qualification level by type of provider

Tables 6.3a, 6.3b and 6.4 show the levels of highest qualification held by each specific type of provider (the proportions holding at least level 3 and level 6 qualifications are discussed in sections 6.2.3 and 6.2.4).

A fairly similar proportion of staff among full day care providers and sessional providers held a level 3 qualification (58 per cent of full day care settings, 52 per cent within children's centres and 57 per cent of sessional settings). Staff working in full day care in children's centres were the most likely to have a level 6 qualification (15 per cent), while the proportion holding a level 6 qualification in other childcare providers was around half as large (seven per cent of full day care, after school and holiday clubs and six per cent for sessional settings).

Childminders and staff at after school clubs were least likely to hold a level 3 qualification (47 per cent each), though the proportion for holiday clubs was only marginally higher (51 per cent).

There has generally been a continuation in the rise of the proportion of staff with a level 3 qualification. Specifically, the proportion of staff working in sessional care with a level 3 qualification has increased since 2009 (from 55 to 57 per cent), as has the proportion in holiday clubs (46 to 51 per cent) and, most markedly, childminders (41 to 47 per cent). In after school clubs the proportion with a level 3 qualification has remained unchanged since last year at 47 per cent. Staff working in full day care were less likely to hold a level 3 qualification than in previous years, but the proportion with a higher level qualification (levels 4 or above) has increased, suggesting that those previously qualified at level 3 have been moving on to take other, higher level qualifications. This is also true of full day care staff in children's centres and other full day care staff.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

	Full day care					Full day care in children's centres					Sessional				
	2010	2009	2008	2007	2006	2010	2009	2008	2007	2006	2010	2009	2008	2007	2006
Level 1	*	1%	1%	1%	1%	*	*	*	*	1%	1%	1%	2%	2%	3%
Level 2	10%	11%	14%	16%	14%	7%	8%	9%	10%	11%	14%	18%	21%	19%	19%
Level 3	58%	61%	62%	61%	64%	52%	57%	57%	61%	63%	57%	55%	51%	51%	50%
Level 4	11%	10%	6%	5%	4%	11%	12%	8%	7%	4%	7%	6%	4%	3%	2%
Level 5	5%	4%	2%	2%	1%	6%	6%	4%	4%	3%	3%	2%	1%	1%	1%
Level 6	7%	6%	4%	3%	3%	15%	11%	11%	7%	8%	6%	4%	4%	3%	3%
Level 7	1%	1%	1%	1%	*	4%	3%	3%	2%	2%	1%	1%	1%	1%	1%
Level 8	*	*	*	*	*	*	*	*	*	0%	*	*	0%	*	*
Overseas	*	*	*	*	*	*	0%	*	0%	*	*	*	*	*	*
Other	*	*	*	1%	1%	*	*	1%	*	1%	*	*	1%	1%	1%
Don't know	2%	1%	2%	2%	2%	3%	*	3%	3%	3%	1%	1%	1%	2%	2%
No qualification	6%	6%	8%	9%	10%	3%	4%	4%	4%	6%	9%	12%	14%	16%	19%

Base: All paid childcare staff 2010, 2009, 2008, 2007, 2006. All childminders 2010, 2009, 2008, 2007, 2006.

	After school clubs					Holiday clubs					Childminders				
	2010	2009	2008	2007	2006	2010	2009	2008	2007	2006	2010	2009	2008	2007	2006
Level 1	1%	2%	2%	3%	3%	1%	2%	3%	3%	4%	6%	8%	9%	12%	9%
Level 2	18%	20%	20%	21%	22%	14%	19%	19%	21%	19%	8%	6%	7%	8%	5%
Level 3	47%	47%	45%	43%	43%	51%	46%	41%	40%	41%	47%	41%	38%	36%	33%
Level 4	7%	5%	4%	3%	2%	9%	5%	4%	4%	3%	3%	4%	3%	1%	1%
Level 5	4%	2%	2%	2%	1%	4%	3%	3%	2%	1%	1%	1%	1%	*	0%
Level 6	7%	5%	5%	4%	4%	7%	7%	7%	7%	6%	2%	2%	2%	2%	2%
Level 7	1%	1%	1%	1%	1%	1%	1%	1%	2%	1%	1%	1%	1%	1%	1%
Level 8	*	*	*	*	*	*	0%	*	0%	*	0%	*	0%	0%	0%
Overseas	*	*	*	*	*	*	*	*	*	*	*	0%	N/A	*	*
Other	*	*	1%	1%	1%	*	1%	2%	2%	2%	3%	3%	N/A	3%	5%
Don't know	3%	1%	3%	3%	3%	4%	3%	4%	3%	4%	5%	3%	3%	3%	4%
No qualification	11%	16%	17%	19%	21%	8%	13%	16%	16%	19%	22%	31%	34%	33%	33%

Base: All paid childcare staff 2010, 2009, 2008, 2007, 2006. All childminders 2010, 2009, 2008, 2007, 2006.

As table 6.4 shows, within the early years maintained sector primary schools with reception but no nursery classes had the largest proportion of staff qualified to level 6 (34 per cent). Staff in schools with reception and nursery classes were slightly less likely to be qualified to level 6 (30 per cent), while staff in nursery schools were the least likely (21 per cent) and were more likely to have a level 3 qualification (43 per cent, compared with 35 per cent of staff in primary schools with nursery and reception classes, and 24 per cent of staff in primary schools with reception but no nursery classes). These figures have generally been stable over time.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

	Nursery schools					Primary schools with nursery and reception classes					Primary schools with reception but no nursery classes				
	2010	2009	2008	2007	2006	2010	2009	2008	2007	2006	2010	2009	2008	2007	2006
Level 1	1%	1%	2%	1%	2%	1%	1%	2%	2%	2%	1%	2%	2%	2%	1%
Level 2	8%	7%	7%	7%	6%	7%	8%	8%	8%	6%	9%	10%	10%	8%	7%
Level 3	43%	45%	42%	44%	45%	35%	35%	36%	35%	34%	24%	24%	21%	22%	21%
Level 4	3%	3%	5%	3%	2%	2%	2%	2%	2%	3%	2%	2%	3%	2%	2%
Level 5	5%	7%	5%	4%	3%	4%	5%	4%	3%	2%	5%	5%	4%	4%	3%
Level 6	21%	22%	22%	24%	23%	30%	32%	30%	30%	29%	34%	32%	33%	36%	35%
Level 7	12%	10%	9%	8%	7%	10%	8%	8%	7%	9%	11%	10%	9%	9%	10%
Level 8	*	*	*	*	*	*	1%	*	*	*	*	*	*	*	*
Overseas	*	*	N/A	*	*	*	*	*	*	1%	*	*	*	*	0%
Other	2%	*	1%	*	2%	1%	1%	1%	*	1%	1%	1%	*	2%	
Don't know	2%	*	1%	1%	1%	5%	3%	3%	3%	5%	7%	8%	5%	4%	7%
No qualification	4%	4%	6%	7%	9%	4%	5%	5%	8%	8%	6%	6%	10%	10%	11%

Base: All paid early years staff 2010, 2009, 2008, 2007, 2006.

6.2.3 Level 3 or above

Tables 6.5a, 6.5b and 6.6 show the proportion of staff qualified to *at least* each level.

In the childcare sector, staff in full day care provided by children's centres were most likely to hold at least a level 3 qualification (87 per cent); this proportion fell to 81 per cent of all full day care staff, 74 per cent of staff in sessional care, 72 per cent in holiday clubs, 67 per cent in after school clubs, and 54 per cent of childminders.

Proportions of staff qualified to at least level 3 were similar in nursery schools (84 per cent) and primary schools with nursery and reception classes (82 per cent) as they were in full day care. This was slightly higher than the proportion qualified to at least level 3 in primary schools with reception but no nursery classes (76 per cent).

6.2.4 Level 6 or above

Within childcare settings the highest proportion of staff holding at least a level 6 (graduate level) qualification were found in children's centres with full day care, with around one in five (19 per cent) qualified to this level. In all other childcare settings (including childminders) fewer than 10 per cent of staff held a qualification of at least level 6. This ranged from nine per cent in after school clubs to three per cent of childminders.

In contrast, around two in five staff in early years maintained primary schools held at least a level 6 qualification (45 per cent in primary schools with reception but no nursery classes, and 40 per cent in primary schools with nursery and reception classes), as did one in three (33 per cent) in nursery schools. This is unsurprising given that a substantial proportion of staff working in these settings will be qualified teachers and will therefore hold degrees.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

	Full day care					Full day care in children's centres					Sessional				
	2010	2009	2008	2007	2006	2010	2009	2008	2007	2006	2010	2009	2008	2007	2006
At least level 1	92%	93%	90%	88%	87%	94%	96%	93%	92%	91%	89%	87%	84%	81%	78%
At least level 2	92%	92%	89%	88%	86%	94%	96%	92%	92%	91%	88%	86%	82%	79%	76%
At least level 3	81%	82%	75%	72%	72%	87%	88%	83%	82%	79%	74%	68%	61%	60%	57%
At least level 5	13%	11%	7%	5%	4%	25%	20%	18%	14%	13%	10%	7%	6%	6%	4%
At least level 6	8%	7%	5%	4%	3%	19%	14%	14%	9%	10%	7%	5%	4%	4%	4%

Base: All paid childcare staff 2010, 2009, 2008, 2007, 2006.. All childminders 2010, 2009, 2008, 2007, 2006.

	After school clubs					Holiday clubs					Childminders				
	2010	2009	2008	2007	2006	2010	2009	2008	2007	2006	2010	2009	2008	2007	2006
At least level 1	86%	82%	78%	77%	75%	87%	83%	78%	78%	75%	68%	63%	60%	61%	52%
At least level 2	85%	80%	76%	75%	73%	86%	82%	75%	75%	72%	63%	55%	51%	49%	43%
At least level 3	67%	60%	56%	53%	51%	72%	63%	56%	54%	53%	54%	49%	44%	41%	38%
At least level 5	12%	9%	8%	7%	6%	12%	12%	11%	10%	9%	4%	3%	4%	3%	3%
At least level 6	9%	6%	6%	5%	5%	8%	8%	8%	9%	8%	3%	3%	3%	3%	3%

Base: All paid childcare staff 2010, 2009, 2008, 2007, 2006. All childminders 2010, 2009, 2008, 2007, 2006.

	Nursery schools					Primary schools with nursery and reception classes					Primary schools with reception but no nursery classes				
	2010	2009	2008	2007	2006	2010	2009	2008	2007	2006	2010	2009	2008	2007	2006
At least level 1	92%	95%	91%	91%	87%	90%	91%	90%	87%	85%	86%	85%	82%	83%	80%
At least level 2	91%	94%	89%	91%	86%	89%	89%	88%	85%	83%	85%	83%	80%	81%	78%
At least level 3	84%	88%	82%	83%	80%	82%	81%	80%	77%	77%	76%	74%	70%	73%	71%
At least level 5	38%	40%	36%	36%	33%	44%	45%	42%	40%	40%	50%	48%	47%	49%	48%
At least level 6	33%	32%	31%	32%	30%	40%	40%	38%	37%	38%	45%	42%	42%	45%	45%

Base: All paid early years staff 2010, 2009, 2008, 2007, 2006.

6.3 Trends in qualification levels

The proportion of staff qualified to at least level 3 has increased since 2009 for sessional providers, after school clubs and holiday clubs (sessional from 68 per cent to 74 per cent, after school clubs from 60 per cent to 67 per cent and holiday clubs from 63 per cent to

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

72 per cent). This continues a longer-term rise since 2006. Similarly the number of childminders qualified to at least level 3 has increased from 49 per cent in 2009 to 54 per cent in 2010.

Between the different types of childcare providers the changes in the proportion of staff qualified to at least level 6 were mixed. The proportions of full day care staff working in children's centres qualified to at least level 6 had increased from 14 per cent in 2009 to 19 per cent in 2010. The proportion also increased from five to seven per cent in sessional providers and from six to nine per cent in after school clubs over the same period. In contrast the proportion of staff qualified to at least level 6 has not changed noticeably over this period for holiday clubs, full day care generally, and for childminders.

It is likely that this overall general pattern of increase is related to the introduction of the National Standards for Under Eights Day Care and Childminding in 2003,⁵⁹ which formally set out minimum levels of qualification for different types of staff and stipulated that action plans should be prepared where organisations had not yet met these qualification requirements. Although in 2003 a good proportion of staff in the childcare sector already held at least a level 3 qualification, there has since been an increase in the number of staff meeting these requirements across all setting types. For example in 2003, 44 per cent of staff in sessional settings held at least a level 3 qualification and by 2010 this had risen to 74 per cent.

There has been no statistically significant change in the proportion of paid staff qualified to at least level 3 in primary schools, while the proportion of staff in nursery schools qualified to at least level 3 have seen a small decrease from 88 per cent to 84 per cent. However for all three types of schools, the figures show a slow long-term increase since 2003 that may now have reached a plateau.

Similarly there has been no statistically significant change since the 2009 survey in the proportions of early years staff in maintained schools qualified to higher levels (at least level 5 or level 6), but here the longer-term pattern (since 2006) is also generally stable.

6.4 Qualification levels by deprivation

Tables 6.7a-c show the proportion of paid staff that held any childcare related qualification (levels 1 to 8), a qualification of at least level 3, and a qualification of at least level 6. This is analysed by deprivation area (the 30 per cent most deprived areas compared with the 70 per cent least deprived areas).

In full day care settings generally, after school clubs and holiday clubs, staff were more likely to have a qualification of some kind (at any level) in the more deprived areas than in the less deprived areas. However, there was no statistically significant difference for childminders, or staff in children's centres, sessional settings or at early years providers in maintained schools.

The same types of providers were also more likely to have at least a level 3 qualification if they were based in the more deprived areas. Differences were statistically significant for full day care (excluding children's centres), after school clubs and holiday clubs.

Sessional settings were the only provider type where there was a statistically significant difference in the proportion of staff qualified to at least level 6 when broken down by deprivation.

⁵⁹ These standards were superseded by the Early Years Foundation Stage in September 2008.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Table 6.7a Proportion of paid staff that hold a relevant qualification (levels 1 to 8) by deprivation				
	2010		2009	
	30% most deprived areas	70% least deprived areas	30% most deprived areas	70% least deprived areas
Early years providers				
Nursery schools	92%	93%	96%	94%
Primary schools with nursery and reception classes	91%	90%	92%	92%
Primary schools with reception but no nursery classes	86%	86%	92%	85%
Childcare				
Full day care	94%	92%	95%	92%
<i>Full day care in children's centres</i>	95%	93%	97%	93%
Sessional	90%	89%	91%	86%
After school clubs	92%	84%	89%	79%
Holiday clubs	90%	85%	91%	81%
Childminders	72%	67%	69%	65%
Table 6.7b Proportion of paid staff that hold at least a relevant level 3 qualification by deprivation				
	2010		2009	
	30% most deprived areas	70% least deprived areas	30% most deprived areas	70% least deprived areas
Early years providers				
Nursery schools	84%	84%	90%	83%
Primary schools with nursery and reception classes	82%	82%	81%	82%
Primary schools with reception but no nursery classes	74%	76%	78%	73%
Childcare				
Full day care	84%	81%	84%	81%
<i>Full day care in children's centres</i>	88%	85%	90%	84%
Sessional	76%	74%	69%	68%
After school clubs	73%	64%	65%	59%
Holiday clubs	76%	71%	70%	60%
Childminders	50%	55%	50%	48%
Table 6.7c Proportion of paid staff that hold at least a relevant level 6 qualification by deprivation				
	2010		2009	
	30% most deprived areas	70% least deprived areas	30% most deprived areas	70% least deprived areas
Early years providers				
Nursery schools	32%	35%	33%	31%
Primary schools with nursery and reception classes	40%	41%	39%	41%
Primary schools with reception but no nursery classes	41%	45%	38%	43%
Childcare				
Full day care	9%	8%	7%	7%
<i>Full day care in children's centres</i>	19%	20%	14%	14%
Sessional	9%	6%	5%	5%
After school clubs	11%	8%	6%	7%
Holiday clubs	9%	8%	7%	9%
Childminders	3%	3%	3%	3%
<i>Base: All paid childcare staff, All childminders, All early years staff, 2010, 2009.</i>				

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

6.5 Qualification levels by region

Tables 6.8a-c display the levels of qualification held by staff within each region. Base sizes become quite small when looking at individual regions. As such care should be taken when comparing between regions as confidence intervals are likely to be large.

For the early years providers the only statistically significant different regions from the average were the North West and West Midlands where staff were more likely to have any qualification or a level 3 qualification. Those working in the East of England were less likely to be qualified to any level, at least level 3 or at least level 6 than average. Staff in the South East was also less likely to be qualified to at least level 3 or at least level 6.

In childcare settings, staff in the North East were more likely to have at least a level 3 qualification (in full day care and out of school clubs), and to be qualified to at least level 6 (in sessional and after school clubs). Similarly, figures were higher in the West Midlands in relation to having any qualification and at least a level 3 qualification (both in sessional and holiday clubs). By contrast, staff in the South East were less likely to have a qualification at any level (in sessional and full day care), less likely to be qualified to at least level 3 (all provider types including children's centres) and at least level 6 (sessional and after school clubs). In the East of England, staff were only less likely be qualified to at least level 3 (in full day care, sessional, and holiday clubs).

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Table 6.8a Proportion of paid staff that hold a relevant qualification (levels 1 to 8) by region									
	East Midlands	East of England	London	North East	Yorkshire & Humberside	North West	South East	South West	West Midlands
Early years providers									
Nursery schools	91%‡	92%	92%	98%‡	92%‡	95%	84%‡	†	94%
Primary schools with nursery and reception classes	92%	83%	92%	89%	91%	94%	76%	87%	93%
Primary schools with reception but no nursery classes	85%	83%	90%‡	85%‡	79%	89%	85%	88%	90%
Childcare									
Full day care	93%	92%	92%	97%	95%	91%	88%	92%	95%
Full day care in children's centres	89%‡	96%	90%	97%	93%	97%	93%	98%	98%
Sessional	90%	89%	90%	88%	90%	86%	84%	91%	94%
After school clubs	87%	77%	88%	89%	84%	92%	80%	86%	89%
Holiday clubs	88%	82%	79%	91%	88%	92%	82%	87%	93%
Childminders	53%‡	69%	70%		69%	66%‡	69%	69%	80%‡
Table 6.8b Proportion of paid staff that hold at least a relevant level 3 qualification by region									
	East Midlands	East of England	London	North East	Yorkshire & Humberside	North West	South East	South West	West Midlands
Early years providers									
Nursery schools	87%‡	79%	80%	91%‡	88%‡	91%	76%‡	†	87%
Primary schools with nursery and reception classes	84%	72%	81%	86%	84%	88%	65%	72%	89%
Primary schools with reception but no nursery classes	77%	72%	80%‡	81%‡	68%	78%	73%	79%	84%
Childcare									
Full day care	82%	77%	80%	90%	87%	84%	77%	80%	84%
Full day care in children's centres	81%‡	86%	85%	90%	87%	89%	79%	88%	95%
Sessional	73%	69%	75%	81%	80%	76%	69%	76%	85%
After school clubs	71%	61%	68%	78%	67%	72%	55%	64%	68%
Holiday clubs	77%	64%	59%	84%	75%	80%	66%	70%	80%
Childminders	43%‡	53%	50%		59%	54%‡	54%	60%	67%‡
Table 6.8c Proportion of paid staff that hold at least a relevant level 6 qualification by region									
	East Midlands	East of England	London	North East	Yorkshire & Humberside	North West	South East	South West	West Midlands
Early years providers									
Nursery schools	36%‡	35%	30%	34%‡	33%‡	35%	35%‡	34%†	32%
Primary schools with nursery and reception classes	45%	35%	40%	37%	39%	43%	34%	41%	44%
Primary schools with reception but no nursery classes	40%	44%	39%‡	46%‡	40%	48%	45%	46%	52%
Childcare									
Full day care	8%	6%	8%	8%	12%	8%	7%	9%	7%
Full day care in children's centres	30%‡	16%	20%	26%	17%	19%	14%	27%	15%
Sessional	6%	5%	7%	21%	5%	8%	4%	12%	6%
After school clubs	6%	6%	14%	17%	8%	11%	4%	8%	7%
Holiday clubs	6%	6%	11%	7%	9%	8%	8%	10%	9%
Childminders	2%‡	3%	2%		1%	2%‡	8%	1%	1%‡

Base: All paid childcare staff, All childminders, All early years staff, 2010.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

6.6 Qualification levels by ownership

Tables 6.9a-c show the proportion of all paid childcare staff that held any childcare related qualification (levels 1 to 8), a qualification of at least level 3, and a qualification of at least level 6, broken down by ownership type. Analysis is not provided for early years provision in maintained schools because the schools are all run by Local Authorities. Overall providers owned by local authorities or by a school or college tended to have higher proportions of staff qualified to level 6 than other types of providers. However, amongst out of school providers, privately owned settings had the highest proportion of staff qualified to at least level 3 (71 per cent in after school clubs and 76 per cent in holiday clubs).

Table 6.9a Proportion of paid staff that hold a relevant qualification (levels 1 to 8) by ownership of provision					
	Full day care	Full day care in children's centres	Sessional	After school clubs	Holiday clubs
All settings	92%	94%	89%	86%	87%
Private	92%	94%	88%	87%	88%
Voluntary	91%	94%	89%	85%	87%
Local authority	95%	95%	96%	83%	85%
School/college	94%	95%	93%	86%	82%
Other	89%	†	97%‡	†	79%‡
Table 6.9b Proportion of paid staff that hold at least a relevant level 3 qualification by ownership of provision					
	Full day care	Full day care in children's centres	Sessional	After school clubs	Holiday clubs
All settings	81%	87%	74%	67%	72%
Private	82%	82%	75%	71%	76%
Voluntary	77%	84%	72%	63%	68%
Local authority	89%	90%	85%	63%	69%
School/college	89%	87%	84%	63%	67%
Other	78%	†	89%‡	†	69%‡
Table 6.9c Proportion of paid staff that hold at least a relevant level 6 qualification by ownership of provision					
	Full day care	Full day care in children's centres	Sessional	After school clubs	Holiday clubs
All settings	8%	19%	7%	9%	8%
Private	7%	11%	7%	6%	7%
Voluntary	8%	16%	5%	5%	9%
Local authority	11%	20%	24%	16%	10%
School/college	14%	27%	16%	15%	11%
Other	6%	†	18%‡	†	4%‡
<i>Base: All paid childcare staff 2010.</i>					

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

6.6.1 Ownership and paid staff holding any qualification

In general, the proportion of paid staff with any qualification did not differ greatly by type of ownership. However staff in providers owned by local authorities were slightly more likely to have a qualification (in full day care and sessional providers), while staff in school-run holiday clubs were less likely to hold any qualification.

6.6.2 Ownership and paid staff holding at least a level 3 qualification

There was a similar trend when looking at the proportions of staff qualified to at least level 3. Providers owned by schools and local authorities were more likely than settings under other types of ownership to have staff qualified to at least level 3 in full day care and sessional settings. Voluntary full day care providers had lower proportions of staff qualified to at least level 3 while privately owned after school clubs had higher proportions of staff qualified to level 3.

6.6.3 Ownership and paid staff holding at least a level 6 qualification

There was a clear difference in the proportions of staff qualified to at least level 6 when comparing by ownership type. Staff in local authority and school run settings were more likely to be qualified to at least level 6 than those working in private and voluntary settings for all specific provider types. However this difference was more subtle among staff in holiday clubs.

6.7 Requisite qualifications for childcare staff

In the statutory framework for the Early Years Foundation Stage,⁶⁰ which superseded the National Standards for Under Eights Day Care and Childminding in September 2008, the Government had set out requirements for what qualifications those working within the childcare sector should hold.

The requirements are:

- Every supervisor and manager working within registered full day care, sessional and out-of-school settings should hold at least a full level 3 qualification appropriate to the post.⁶¹
- At least half of all other staff should hold at least a full level 2 qualification appropriate to the post.⁶²

There are no specific qualification requirements for childminders, who are required to undertake 'a local authority approved childminders' pre-registration course within six months of commencing childminding'.

⁶⁰ The Statutory Framework for EYFS: welfare requirements:
<http://webarchive.nationalarchives.gov.uk/20110202093118/http://nationalstrategies.standards.dcsf.gov.uk/search/earlyyears/results/nav:46528>

⁶¹ As defined by the Children's Workforce Development Council (CWDC).

⁶² As defined by the Children's Workforce Development Council (CWDC).

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Additionally, in 2004 the Government published *Choice for Parents, the Best Start for Children: A Ten Year Strategy for Childcare*, which made the case for a better qualified early years workforce. In 2006, this was followed up with the launch of the Transformation Fund with the Graduate Leader Fund superseding this in 2008. Historically, the Graduate Leader Fund aimed to transform the quality of childcare by providing financial support and incentives to ensure that, by 2015, every full day care setting has a graduate leading practice (including graduates with Early Year's Professional Status, but the Status is not essential, only that the graduate has a degree which is relevant to Early Years) with two graduates in settings in disadvantaged areas. The Graduate Leader Fund was still in place at the time of the survey, but was discontinued in March 2011.⁶³ Whether the objective of employing graduates with Early Year's Professional Status is being met is covered in section 6.14.

The survey can be used to gauge how well childcare settings are meeting these requirements. However, the Statutory Framework for the Early Years Foundation Stage applies on a setting to setting basis, and the survey figures are aggregated across all settings; so there may be individual settings that do not meet the requirements.

Table 6.10 shows qualifications by staff type across all childcare settings (excluding childminders).

	2010			2009		
	Senior managers	Supervisors	Other paid childcare staff	Senior managers	Supervisors	Other paid childcare staff
Level 1	*	*	2%	*	*	3%
Level 2	1%	5%	30%	1%	7%	31%
Level 3	44%	67%	37%	51%	70%	33%
Level 4	20%	11%	2%	18%	10%	1%
Level 5	10%	5%	1%	8%	4%	1%
Level 6	17%	8%	2%	14%	7%	2%
Level 7	5%	1%	*	4%	1%	*
Level 8	*	*	*	*	*	0%
Overseas	*	*	*	*	*	*
No qualification	2%	1%	22%	2%	1%	27%
Any qualification	97%	97%	75%	97%	98%	71%
Other	*	*	*	1%	*	*
Don't Know	1%	2%	4%	1%	1%	2%
At least level 3	96%	92%	42%	96%	90%	37%
At least level 6	22%	9%	2%	18%	8%	2%

Base: All paid childcare staff 2010, 2009.

Across all childcare settings, nearly all senior managers and supervisors held a qualification at some level (97 per cent of both senior managers and supervisors), and

⁶³ In place of the Graduate Leader Fund, there are now Quality Supplement payments available through the Early Years Single Funding Formula.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

similar proportions held at least a level 3 qualification (96 per cent of senior managers and 92 per cent of supervisors). Around one in five senior managers were qualified to at least level 6 (22 per cent), compared with nine per cent of supervisors.

Other paid childcare staff tended to be less qualified, with three-quarters (75 per cent) holding any relevant qualification, two-fifths (42 per cent) being qualified to at least level 3, and just two per cent being qualified to at least level 6.

Table 6.11 shows the proportion of supervisors with at least a level 3 qualification by type of ownership for each specific provider type.

	Private	Voluntary	Local Authority	School/college	Other
Full day care	97%	94%	98%	97%	92%‡
Full day care in children's centres	96%	99%	98%	100%‡	†
Sessional	91%	88%	92%	90%‡	†
After school	90%	84%	69%	70%	†
Holiday clubs	92%	84%	90%	83%	†

Base: All supervisors in childcare providers 2010.

Nearly all supervisors in full day care provision were qualified to at least level 3; this was consistent across all provision ownership with the exception of voluntary run providers where a slightly lower proportion (94 per cent) of supervisors held at least a level 3 qualification. This pattern was replicated for sessional providers.

In after school clubs, supervisors in privately and voluntary owned settings were more likely to be qualified to at least level 3 (90 per cent and 84 per cent respectively), than supervisors in settings run by schools or local authorities (70 per cent and 69 per cent respectively).

Table 6.12 shows the proportion of other paid childcare staff that held at least a level 2 qualification.

	Private	Voluntary	Local Authority	School/college	Other
Full day care	77%	75%	82%	83%	81%‡
Full day care in children's centres	83%	83%	85%	82%‡	†
Sessional	66%	67%	†	†	†
After school	64%	65%	55%‡	69%	†
Holiday clubs	75%	91%	62%	61%	†

Base: All other paid childcare staff 2010.

In general there were no statistically significant differences according to ownership of the settings with the exception of other paid staff in voluntary run holiday clubs (these were more likely to be qualified to at least level 2 than holiday clubs under different ownership).

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

6.7.1 Senior managers

Tables 6.13a and 6.13b show the level of qualification of senior managers in childcare providers.

Across all types of provider except full day care in children's centres, the most commonly held highest qualification was level 3, although the proportions varied by type of provider, from 38 per cent of those working in full day care to 56 per cent of those working in sessional provision.

Nearly all senior managers in the various types of setting held a highest qualification of at least level 3 ranging from 98 per cent in full day care to 93 per cent in holiday clubs. Senior managers in full day care in children's centres were more likely than senior managers working for other types of provider to be qualified to at least level 5 (64 per cent) or at least level 6 (54 per cent), while the proportion qualified to at least level 6 was lowest in sessional care settings (17 per cent).

Although the most commonly held qualification among senior managers was a level 3 qualification, proportions holding level 3 qualifications have been falling consistently over the last few years for all types of provider. This has largely been due to the significant increase in the proportion of senior managers qualified to higher levels. All provider types have seen a continuation of the gradual increase in the number of senior managers qualified to at least level 6 (the increases between 2006 and 2010 in the proportions of senior managers qualified to at least level 6 were from 11 per cent to 25 per cent in full day care, from 9 per cent to 17 per cent in sessional settings, from 13 per cent to 23 per cent in after school clubs and from 16 per cent to 23 per cent in holiday clubs).

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Table 6.13a Relevant qualifications of senior manager															
	Full day care					Full day care in children's centres					Sessional				
	2010	2009	2008	2007	2006	2010	2009	2008	2007	2006	2010	2009	2008	2007	2006
Level 1	*	0%	0%	*	*	0%	0%	0%	*	0%	*	0%	*	*	1%
Level 2	*	*	*	*	1%	0%	*	0%	*	*	1%	1%	1%	1%	2%
Level 3	38%	42%	52%	58%	65%	17%	21%	27%	34%	39%	56%	62%	64%	69%	73%
Level 4	24%	24%	20%	17%	16%	15%	20%	19%	20%	17%	17%	16%	15%	11%	8%
Level 5	11%	11%	8%	5%	4%	10%	10%	9%	9%	5%	7%	7%	4%	4%	2%
Level 6	20%	18%	14%	12%	9%	27%	25%	21%	16%	22%	13%	9%	10%	8%	6%
Level 7	4%	3%	3%	4%	3%	26%	19%	19%	14%	12%	3%	3%	2%	3%	2%
Level 8	*	*	*	*	*	0%	2%	1%	1%	0%	*	0%	0%	*	0%
Overseas	*	*	*	*	*	0%	0%	0%	0%	*	*	*	*	*	*
Other	*	*	*	1%	1%	0%	1%	2%	2%	2%	*	*	1%	1%	1%
Don't know	*	*	1%	1%	1%	2%	*	1%	2%	2%	1%	1%	1%	1%	1%
No qualification	1%	1%	1%	2%	2%	1%	*	1%	1%	1%	1%	2%	14%	3%	3%
At least level 1	98%	98%	97%	96%	97%	96%	98%	96%	95%	94%	98%	97%	96%	95%	95%
At least level 2	98%	98%	97%	96%	96%	96%	98%	96%	95%	94%	98%	97%	96%	95%	94%
At least level 3	98%	98%	97%	96%	96%	96%	98%	96%	95%	94%	97%	96%	95%	94%	93%
At least level 5	36%	32%	25%	21%	15%	64%	56%	50%	40%	38%	24%	19%	16%	15%	11%
At least level 6	25%	21%	17%	16%	11%	54%	46%	41%	31%	33%	17%	12%	12%	11%	9%

Base: All senior managers in childcare providers 2010, 2009, 2008, 2007, 2006.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

	After school clubs					Holiday clubs				
	2010	2009	2008	2007	2006	2010	2009	2008	2007	2006
Level 1	*	*	0%	*	1%	*	*	*	1%	*
Level 2	1%	1%	1%	2%	3%	1%	1%	2%	2%	3%
Level 3	48%	55%	59%	62%	65%	41%	49%	52%	51%	55%
Level 4	15%	14%	12%	8%	9%	20%	15%	13%	13%	9%
Level 5	9%	6%	5%	5%	3%	10%	7%	7%	5%	3%
Level 6	16%	12%	13%	12%	9%	17%	15%	14%	15%	11%
Level 7	7%	6%	4%	4%	3%	5%	3%	3%	4%	4%
Level 8	*	*	*	*	*	1%	0%	0%	0%	*
Overseas	0%	0%	0%	0%	0%	*	*	*	0%	0%
Other	1%	1%	1%	1%	2%	1%	1%	1%	2%	2%
Don't know	1%	15	3%	2%	2%	2%	1%	1%	1%	2%
No qualification	2%	3%	2%	3%	4%	3%	5%	6%	7%	9%
At least level 1	96%	95%	94%	94%	93%	94%	92%	91%	90%	86%
At least level 2	96%	95%	94%	94%	92%	94%	92%	90%	89%	86%
At least level 3	95%	94%	93%	92%	90%	93%	90%	89%	87%	83%
At least level 5	33%	25%	22%	21%	15%	32%	26%	24%	23%	18%
At least level 6	23%	19%	16%	16%	13%	23%	19%	17%	18%	16%

Base: All senior managers in childcare providers 2010, 2009, 2008, 2007, 2006.

6.7.2 Supervisors

Tables 6.14a and 6.14b show the level of qualification of supervisors in childcare providers.

For supervisory staff in full day care settings the proportions qualified to each level were very similar to the proportions for senior managers. As was the case for senior managers, the most commonly held qualification for supervisors was a level 3 qualification for all types of provider, ranging from 55 per cent (full day care in children's centres) to 71 per cent (sessional settings). In full day care settings (including full day care in children's centres), 97 per cent of supervisors held at least a level 3 qualification. This suggests that the majority of supervisors in this type of setting meet the requirements set out in the Statutory Framework for the Early Years Foundation Stage,⁶⁴ which stipulate that supervisors should hold full and relevant level 3 qualifications. The proportion of supervisors in full day care settings who were qualified to at least level 6 has increased slowly from 2007 (from three per cent in 2007 to nine per cent in 2010).

Supervisors in full day care children's centres were significantly more likely than supervisors in other types of setting to be qualified to at least level 5 (30 per cent) or at least level 6 (23 per cent), and these figures have also increased in recent years: the proportion qualified to at least level 5 has increased from 13 per cent in 2007 to 30 per cent in 2010, while the equivalent increase in those qualified to at least level 6 has been from eight per cent to 23 per cent.

⁶⁴ Which superseded the National Standards for Under Eights Day Care and Childminding in September 2008.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

In sessional and after school clubs, 90 per cent and 89 per cent of supervisors held at least a level 3 qualification respectively, while in holiday clubs the proportions were lower (82 per cent). The Statutory Framework for the Early Years Foundation Stage stipulates that all supervisory staff in these types of settings should be qualified to level 3, so not all settings are meeting this requirement. Prior to September 2008 when the Early Years Foundation Stage came into force, the National Standards stipulated that only half of all supervisory staff in these types of settings should be qualified to level 3, so these proportions are well above the National Standard requirements. They have also increased in the last year, continuing a longer-term increase since 2003.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Table 6.14a Relevant qualifications of supervisors															
	Full day care					Full day care in children's centres					Sessional				
	2010	2009	2008	2007	2006	2010	2009	2008	2007	2006	2010	2009	2008	2007	2006
Level 1	*	*	*	*	*	0%	0%	0%	*	*	*	*	1%	1%	1%
Level 2	2%	2%	4%	6%	7%	1%	1%	1%	3%	2%	8%	10%	14%	15%	18%
Level 3	70%	73%	78%	80%	82%	55%	63%	64%	74%	77%	71%	73%	71%	70%	69%
Level 4	13%	12%	8%	6%	4%	13%	14%	10%	8%	4%	8%	7%	4%	3%	2%
Level 5	5%	4%	2%	2%	1%	8%	6%	4%	5%	3%	3%	2%	2%	1%	1%
Level 6	8%	7%	5%	3%	3%	19%	13%	13%	6%	9%	6%	4%	3%	4%	3%
Level 7	1%	1%	1%	*	*	3%	2%	2%	2%	1%	1%	1%	1%	1%	1%
Level 8	*	*	*	*	*	*	0%	0%	0%	0%	0%	*	0%	0%	*
Overseas	*	*	*	*	*	0%	0%	0%	0%	0%	*	0%	*	*	*
Other	*	*	*	*	1%	0%	0%	1%	*	1%	*	0%	*	1%	1%
Don't know	1%	*	1%	2%	1%	1%	*	3%	2%	2%	1%	1%	1%	2%	2%
No qualification	*	*	*	1%	1%	*	2%	*	1%	0%	*	2%	2%	4%	3%
At least level 1	99%	99%	98%	97%	97%	99%	100%	96%	98%	98%	98%	97%	96%	94%	94%
At least level 2	99%	99%	98%	97%	97%	99%	100%	96%	98%	98%	97%	97%	95%	93%	93%
At least level 3	97%	97%	94%	91%	91%	98%	98%	94%	94%	95%	90%	87%	81%	78%	75%
At least level 5	14%	12%	8%	5%	4%	30%	22%	19%	13%	14%	10%	7%	6%	6%	4%
At least level 6	9%	8%	6%	3%	3%	23%	15%	16%	8%	11%	7%	5%	4%	4%	4%

Base: All supervisors in childcare providers 2010, 2009, 2008, 2007, 2006.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

	After school clubs					Holiday clubs				
	2010	2009	2008	2007	2006	2010	2009	2008	2007	2006
Level 1	*	1%	2%	1%	1%	*	*	1%	1%	2%
Level 2	13%	18%	19%	22%	24%	6%	14%	14%	15%	19%
Level 3	61%	62%	60%	58%	57%	63%	60%	57%	58%	56%
Level 4	8%	6%	3%	3%	2%	11%	6%	4%	5%	3%
Level 5	4%	2%	1%	2%	1%	5%	5%	4%	2%	1%
Level 6	8%	5%	5%	3%	4%	9%	9%	9%	9%	7%
Level 7	1%	1%	*	1%	1%	1%	1%	1%	2%	1%
Level 8	0%	0%	0%	*	*	*	0%	*	0%	0%
Overseas	*	*	*	*	*	0%	*	*	*	*
Other	*	*	1%	1%	1%	1%	1%	2%	2%	1%
Don't know	3%	1%	3%	2%	3%	3%	1%	5%	2%	4%
No qualification	2%	4%	6%	6%	6%	1%	2%	4%	3%	5%
At least level 1	95%	95%	91%	91%	91%	95%	96%	90%	92%	89%
At least level 2	94%	94%	89%	90%	89%	95%	96%	89%	91%	87%
At least level 3	82%	76%	70%	68%	65%	89%	81%	75%	76%	69%
At least level 5	13%	8%	7%	7%	6%	15%	15%	14%	13%	10%
At least level 6	8%	6%	5%	4%	5%	10%	10%	10%	11%	8%

Base: All supervisors in childcare providers 2010, 2009, 2008, 2007, 2006.

6.7.3 Other paid childcare staff

Tables 6.15a and 6.15b show the level of qualification of other paid staff working for childcare providers.

After school clubs were the only type of provider where the most commonly held qualification among other paid staff was *not* a level 3 qualification (instead a level 2 qualification). For both sessional and holiday clubs 2010 was the first year that more other paid staff held a level 3 qualification than a level 2 qualification. In addition, a relatively high proportion of other paid childcare staff in sessional settings and out of school clubs had no relevant qualifications (27 per cent in sessional settings, 29 per cent in after school clubs and 21 per cent in holiday clubs).

Around half of other childcare staff in full day care settings were qualified to at least level 3 (48 per cent), and the figure was higher in full day care children's centres (63 per cent). The equivalent proportions were lower in holiday clubs (36 per cent), sessional care (41 per cent) and after school clubs (30 per cent).

However in all childcare settings, there has been a gradual increase in the proportions qualified to at least levels 1, 2 and 3 since 2006. The exception is in full day care settings where the proportion qualified to at least levels 1, 2 and 3 has stabilised.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

	Full day care					Full day care in children's centres					Sessional				
	2010	2009	2008	2007	2006	2010	2009	2008	2007	2006	2010	2009	2008	2007	2006
Level 1	1%	2%	1%	2%	3%	2%	1%	1%	1%	2%	3%	4%	4%	5%	6%
Level 2	29%	29%	33%	37%	33%	20%	28%	30%	31%	35%	31%	38%	37%	31%	28%
Level 3	42%	44%	39%	30%	25%	53%	49%	48%	42%	33%	33%	21%	19%	18%	15%
Level 4	3%	2%	1%	1%	1%	4%	1%	1%	2%	1%	1%	1%	1%	1%	*
Level 5	2%	1%	*	*	*	1%	2%	2%	1%	1%	*	*	*	1%	*
Level 6	2%	2%	1%	1%	1%	5%	2%	2%	2%	2%	2%	1%	2%	1%	1%
Level 7	*	0%	*	*	*	*	0%	0%	0%	0%	*	*	*	*	*
Level 8	0%	0%	*	*	0%	0%	0%	0%	0%	0%	*	0%	0%	0%	0%
Overseas	*	*	*	*	*	*	0%	*	0%	*	*	0%	0%	*	*
Other	*	*	*	*	1%	*	0%	0%	*	*	1%	1%	1%	1%	1%
Don't know	3%	1%	3%	2%	3%	7%	1%	3%	6%	4%	2%	2%	2%	5%	2%
No qualification	18%	20%	21%	26%	33%	8%	15%	13%	15%	21%	27%	32%	34%	38%	46%
At least level 1	78%	79%	75%	71%	63%	85%	84%	84%	79%	74%	70%	66%	63%	57%	50%
At least level 2	77%	77%	74%	69%	60%	83%	83%	83%	78%	72%	67%	62%	59%	52%	44%
At least level 3	48%	48%	41%	32%	27%	63%	54%	53%	47%	37%	36%	24%	22%	21%	16%
At least level 5	4%	3%	1%	2%	1%	6%	4%	4%	3%	3%	2%	1%	2%	2%	1%
At least level 6	2%	2%	1%	1%	1%	5%	2%	2%	2%	2%	2%	1%	2%	1%	1%

Base: All other paid childcare staff in childcare providers 2010, 2009, 2008, 2007, 2006.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Table 6.15b Relevant qualifications of other paid childcare staff										
	After school clubs					Holiday clubs				
	2010	2009	2008	2007	2006	2010	2009	2008	2007	2006
Level 1	3%	4%	4%	6%	6%	2%	4%	5%	7%	7%
Level 2	35%	31%	30%	29%	27%	29%	30%	30%	32%	25%
Level 3	25%	19%	19%	14%	13%	37%	26%	19%	16%	16%
Level 4	1%	*	*	*	*	2%	1%	1%	1%	1%
Level 5	*	*	*	*	*	*	1%	1%	*	*
Level 6	3%	1%	2%	1%	1%	1%	3%	4%	3%	3%
Level 7	*	*	*	*	*	*	*	*	*	1%
Level 8	0%	*	0%	0%	0%	0%	0%	*	0%	0%
Overseas	*	*	*	0%	*	0%	0%	0%	*	0%
Other	1%	*	1%	1%	1%	*	1%	2%	1%	2%
Don't know	2%	2%	4%	3%	4%	7%	5%	4%	5%	5%
No qualification	29%	42%	39%	44%	48%	21%	30%	32%	34%	41%
At least level 1	67%	56%	56%	51%	47%	72%	65%	61%	59%	53%
At least level 2	65%	52%	52%	45%	41%	70%	61%	56%	52%	46%
At least level 3	30%	21%	22%	16%	14%	41%	31%	26%	20%	21%
At least level 5	4%	2%	2%	2%	1%	2%	4%	5%	3%	5%
At least level 6	3%	2%	2%	1%	1%	2%	3%	4%	3%	4%

Base: All other paid childcare staff in childcare providers 2010, 2009, 2008, 2007, 2006.

6.8 Qualifications for early years staff

Table 6.16 shows the level of qualification held by each staff type working in early years providers in maintained schools.

All (100 per cent) of the early years coordinators, early years teachers and nursery nurses held a relevant qualification, compared with around four in five (82 per cent) other paid early years support staff.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

The vast majority of early years coordinators, early years teachers and nursery nurses were qualified to at least level 3 (between 96 and 99 per cent), while half (51 per cent) of other paid early years support staff were qualified to at least level 3. Still very high proportions of years co-ordinators and teachers were qualified to least level 6 (97 and 96 per cent respectively). In comparison only six per cent of nursery nurses and five per cent other paid early years support staff were qualified to at least level 6.

Table 6.16 Relevant qualifications of paid staff by staff type in early years provision in maintained schools				
	Early years co-ordinators	Early years teachers	Nursery nurses	Other paid early years support staff
Level 1	*	*	*	4%
Level 2	*	*	3%	24%
Level 3	1%	1%	71%	38%
Level 4	*	*	6%	2%
Level 5	1%	2%	11%	3%
Level 6	62%	68%	5%	4%
Level 7	24%	24%	*	*
Level 8	*	*	0%	0%
Overseas	0%	*	*	*
No qualification	0%	*	*	17%
Other	1%	1%	4%	*
Don't know	11%	4%	2%	5%
<i>Base: All paid staff in early years providers 2010.</i>				
Any qualification	100%	100%	100%	82%
At least level 3	99%	99%	96%	51%
At least level 6	97%	96%	6%	5%
<i>Base: All paid staff in early years providers answering question (i.e. excluding 'don't know' responses) 2010.</i>				

6.8.1 Early years or foundation stage co-ordinators

Table 6.17 shows the level of qualification of early years coordinators within each of the specific types of early years provider.

Nearly all early years or foundation stage co-ordinators were qualified to at least level 6 (98 per cent in nursery schools and 97 per cent in primary schools), as was the case in previous years. In addition, nearly two-thirds of early years co-ordinators in nursery schools had a level 7 qualification (63 per cent), an increase on the 2009 proportion of 55 per cent. Early years co-ordinators were less likely to have a level 7 qualification in primary schools with nursery and reception classes (26 per cent) and in primary schools with reception but no nursery classes (21 per cent), and these proportions have remained consistent over time.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Table 6.17 Relevant qualifications of early years coordinators/head teachers															
	Nursery schools					Primary schools with nursery and reception classes					Primary schools with reception but no nursery classes				
	2010	2009	2008	2007	2006	2010	2009	2008	2007	2006	2010	2009	2008	2007	2006
Level 1	0%	0%	0%	0%	0%	*	0%	0%	0%	0%	0%	0%	0%	0%	0%
Level 2	0%	0%	0%	0%	1%	*	0%	0%	0%	*	0%	*	*	*	*
Level 3	1%	0%	1%	1%	1%	*	*	1%	1%	1%	1%	1%	*	*	*
Level 4	0%	3%	1%	1%	1%	*	*	1%	*	2%	*	1%	1%	1%	1%
Level 5	1%	2%	*	2%	2%	1%	1%	1%	1%	2%	1%	*	*	1%	2%
Level 6	31%	35%	37%	61%	58%	62%	68%	69%	67%	65%	64%	60%	54%	66%	71%
Level 7	63%	55%	53%	34%	29%	26%	21%	20%	19%	26%	21%	22%	18%	19%	20%
Level 8	2%	4%	1%	1%	2%	*	1%	1%	*	*	*	*	*	*	*
Overseas	0%	0%	0%	0%	0%	0%	*	*	*	1%	0%	0%	*	*	0%
Other	1%	0%	4%	0%	5%	1%	2%	2%	0%	2%	1%	2%	3%	0%	3%
Don't know/ not stated	3%	1%	4%	0%	2%	9%	7%	10%	12%	2%	13%	14%	23%	13%	2%
No qualification	0%	0%	0%	0%	0%	0%	*	0%	0%	0%	0%	0%	*	0%	*
<i>Base: All early years coordinators/head teachers in early years providers in maintained schools 2010, 2009, 2008, 2007, 2006.</i>															
At least level 1	99%	100%	96%	100%	93%	99%	97%	97%	98%	96%	99%	98%	95%	99%	95%
At least level 2	99%	100%	96%	100%	93%	98%	97%	97%	98%	96%	99%	98%	95%	98%	95%
At least level 3	99%	100%	96%	100%	92%	98%	97%	97%	98%	95%	99%	98%	95%	98%	94%
At least level 5	99%	97%	95%	98%	91%	98%	96%	96%	97%	93%	98%	96%	94%	97%	93%
At least level 6	98%	95%	94%	96%	88%	97%	96%	96%	95%	91%	97%	96%	93%	96%	91%
<i>Base: All early years coordinators/head teachers in early years providers in maintained schools answering question 2010, 2009, 2008, 2007, 2006.</i>															

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

6.8.2 Qualified early years teachers

Table 6.18 shows the level of qualification of early years teachers.

The majority of teachers were also qualified to high levels, and generally the proportion holding at least level 3 qualifications and the proportion holding at least level 6 qualifications were just a few percentage points lower than for early years co-ordinators. The proportion qualified to at least level 3 ranged from 93 per cent (for nursery schools) to 95 per cent (for primary schools with nursery and reception classes), while the proportion qualified to at least level 6 ranged from 90 per cent (for nursery schools) to 93 per cent (for primary schools with nursery and reception classes). The small variations between the figures in the three types of schools are mainly due to different proportions of 'don't know' answers.

These figures have remained stable over time.⁶⁵

The data suggest a small increase in the proportion of teachers with a level 7 qualification (from 22 per cent in 2009 to 31 per cent in 2010 in nursery schools; from 17 per cent to 24 per cent in primary schools with nursery and reception classes, and 19 per cent to 23 per cent in primary schools with reception but no nursery classes).

⁶⁵ The apparent slight drop in the proportions qualified to at least each level in nursery schools is just due to an increase in the proportion saying they 'don't know'.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Table 6.18 Relevant qualifications of qualified early years teachers															
	Nursery schools					Primary schools with nursery and reception classes					Primary schools with reception but no nursery classes				
	2010	2009	2008	2007	2006	2010	2009	2008	2007	2006	2010	2009	2008	2007	2006
Level 1	0%	0%	0%	0%	0%	*	0%	0%	0%	0%	0%	0%	*	0%	*
Level 2	0%	0%	*	0%	*	*	*	*	0%	*	*	*	1%	0%	*
Level 3	1%	1%	1%	*	1%	*	2%	1%	1%	2%	1%	1%	1%	1%	1%
Level 4	*	1%	1%	1%	1%	*	*	*	1%	2%	*	1%	1%	1%	1%
Level 5	2%	1%	2%	5%	2%	1%	1%	1%	1%	1%	3%	1%	2%	1%	2%
Level 6	59%	75%	70%	72%	71%	69%	73%	70%	75%	66%	67%	69%	67%	73%	68%
Level 7	31%	22%	22%	21%	19%	24%	17%	21%	18%	19%	23%	19%	17%	17%	18%
Level 8	*	0%	0%	0%	0%	0%	2%	*	*	*	*	1%	0%	0%	0%
Overseas	*	0%	0%	*	1%	*	1%	0%	1%	2%	0%	*	*	*	0%
Other	2%	*	2%	0%	4%	1%	2%	1%	*	2%	1%	2%	3%	1%	2%
Don't know	4%	1%	1%	1%	2%	4%	2%	5%	3%	6%	5%	6%	7%	5%	7%
No qualification	0%	0%	*	0%	0%	0%	*	*	*	*	*	0%	*	*	*
At least level 1	93%	99%	97%	99%	94%	95%	96%	94%	96%	90%	94%	92%	90%	94%	91%
At least level 2	93%	99%	97%	99%	94%	95%	96%	94%	96%	90%	94%	92%	90%	94%	91%
At least level 3	93%	99%	97%	99%	93%	95%	95%	94%	96%	90%	94%	92%	89%	94%	90%
At least level 5	92%	97%	94%	98%	92%	94%	93%	92%	94%	87%	93%	90%	86%	91%	88%
At least level 6	90%	97%	92%	93%	90%	93%	92%	91%	93%	86%	90%	89%	84%	90%	86%

Base: All qualified early years teachers in early years providers in maintained schools 2010, 2009, 2008, 2007, 2006.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

6.8.3 Early years nursery nurses

Table 6.19 shows the level of qualification of nursery nurses.

The majority of nursery nurses held level 3 qualifications (72 per cent of nurses in nursery schools, 74 per cent of nurses in primary schools with nursery and reception classes and 63 per cent in primary schools with reception but no nursery classes). Very few nurses held qualifications below a level 3. In fact 97 per cent of nurses in nursery schools held at least a level 3 qualification and 95 per cent of nurses in primary schools with nursery and reception classes. However, this was slightly lower in primary schools with reception but no nursery classes (87 per cent).

The proportion of nursery nurses with a level 5 qualification has been increasing since 2003, with around one in six now qualified to at least level 5: 20 per cent in nursery schools, 14 per cent in primary schools with nursery and reception classes, and 19 per cent in primary schools with reception but no nursery classes. While only five per cent of nurses were qualified to at least level 6 in primary schools, there had been an increase from three per cent in 2009 to 11 per cent in 2010 qualified to at least level 6 in nursery schools.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

	Nursery schools					Primary schools with nursery and reception classes					Primary schools with reception but no nursery classes				
	2010	2009	2008	2007	2006	2010	2009	2008	2007	2006	2010	2009	2008	2007	2006
Level 1	0%	0%	0%	0%	0%	*	*	*	0%	*	*	1%	*	*	*
Level 2	*	0%	*	*	1%	1%	3%	2%	1%	3%	7%	5%	6%	7%	9%
Level 3	72%	79%	79%	81%	87%	74%	76%	79%	85%	83%	63%	66%	62%	68%	67%
Level 4	5%	4%	8%	6%	3%	6%	5%	4%	5%	4%	4%	5%	6%	5%	4%
Level 5	9%	14%	7%	6%	5%	10%	11%	8%	5%	3%	14%	15%	11%	11%	7%
Level 6	10%	3%	4%	5%	2%	4%	4%	3%	2%	3%	5%	3%	6%	4%	3%
Level 7	*	0%	0%	0%	0%	*	0%	*	*	*	*	0%	1%	*	*
Level 8	0%	0%	0%	0%	0%	0%	*	0%	0%	0%	0%	0%	0%	0%	0%
Overseas	0%	0%	0%	1%	0%	*	0%	*	*	*	0%	0%	0%	0%	0%
Other	2%	0%	*	*	1%	*	*	*	0%	*	*	0%	1%	0%	2%
Don't know	*	0%	1%	0%	0%	3%	1%	2%	1%	3%	5%	4%	3%	2%	3%
No qualification	*	0%	*	0%	*	*	*	0%	*	*	1%	1%	4%	2%	3%
At least level 1	97%	100%	98%	99%	98%	96%	99%	98%	98%	96%	94%	95%	93%	97%	91%
At least level 2	97%	100%	98%	99%	98%	96%	99%	98%	98%	96%	93%	94%	92%	96%	91%
At least level 3	97%	100%	98%	99%	97%	95%	96%	95%	97%	93%	87%	89%	86%	89%	81%
At least level 5	20%	17%	11%	11%	7%	14%	15%	11%	7%	6%	19%	18%	18%	16%	11%
At least level 6	11%	3%	4%	5%	2%	5%	4%	3%	2%	3%	5%	3%	7%	5%	4%

Base: All nursery nurses in early years providers in maintained schools 2010, 2009, 2008, 2007, 2006.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

6.8.4 Other paid early years support staff

Table 6.20 shows the level of qualification of paid early years support staff.

Other paid staff were most likely to hold a level 2 or level 3 qualification, although around one in six did not hold any relevant qualification (17 per cent in nursery schools, 16 per cent in primary schools with nursery and reception classes, and 19 per cent in primary schools with reception but no nursery classes).

Around three-quarters were qualified to at least level 2 (between 76 and 70 per cent in the three types of school) and just under half were qualified to at least level 3 (between 42 and 49 per cent). Very few other paid staff held qualifications above level 3, although other paid staff were more likely to be qualified to at least level 5 in primary schools with reception but no nursery classes (10 per cent) compared with staff in the other types of school.

As one might expect, the level of qualification for other support staff tended to be lower than was the case for nursery nurses in all types of early years provider. Nursery nurses typically had at least a level 3 qualification (ranging from 87 per cent in primary schools with reception but no nursery classes up to 97 per cent in nursery schools). The proportion of other support staff holding at least a level 3 qualification was markedly lower, ranging from 42 per cent (in nursery schools) up to 49 per cent in primary schools with nursery and reception classes.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Table 6.20 Relevant qualifications of other paid early years support staff															
	Nursery schools					Primary schools with nursery and reception classes					Primary schools with reception but no nursery classes				
	2010	2009	2008	2007	2006	2010	2009	2008	2007	2006	2010	2009	2008	2007	2006
Level 1	4%	5%	8%	4%	8%	5%	5%	6%	7%	7%	3%	4%	5%	5%	4%
Level 2	35%	30%	34%	33%	24%	25%	27%	27%	28%	22%	23%	25%	23%	20%	17%
Level 3	38%	38%	19%	22%	16%	42%	36%	34%	26%	23%	33%	33%	27%	28%	23%
Level 4	1%	3%	1%	1%	1%	2%	1%	1%	1%	2%	4%	2%	3%	2%	3%
Level 5	1%	3%	2%	0%	1%	2%	2%	3%	2%	1%	5%	6%	5%	4%	3%
Level 6	2%	2%	3%	2%	1%	3%	3%	4%	2%	1%	5%	3%	3%	3%	3%
Level 7	0%	0%	0%	0%	0%	0%	0%	0%	*	*	*	1%	*	*	*
Level 8	0%	0%	0%	0%	0%	0%	0%	0%	*	0%	0%	0	*	0%	0%
Overseas	1%	*	0%	0%	1%	0%	*	1%	*	1%	*	0	*	*	0%
Other	*	0%	2%	*	1%	1%	1%	1%	*	2%	1%	*	1%	1%	2%
Don't know	1%	*	3%	2%	2%	5%	4%	4%	6%	10%	7%	7%	9%	5%	14%
No qualification	17%	20%	29%	35%	46%	16%	21%	18%	28%	32%	19%	18%	25%	30%	31%
At least level 1	80%	80%	67%	63%	51%	78%	75%	76%	66%	56%	74%	74%	65%	64%	53%
At least level 2	76%	75%	59%	59%	43%	73%	69%	70%	59%	49%	70%	70%	60%	58%	49%
At least level 3	42%	45%	25%	26%	18%	49%	43%	42%	31%	28%	47%	46%	38%	38%	32%
At least level 5	3%	4%	5%	2%	1%	5%	5%	7%	4%	3%	10%	10%	8%	8%	6%
At least level 6	2%	2%	3%	2%	1%	3%	3%	4%	2%	2%	6%	4%	3%	4%	3%

Base: All other early years support staff in early years providers in maintained schools 2010, 2009, 2008, 2007, 2006.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

6.9 Qualified Teacher Status

Paid staff who held a qualification of at least level 5 were asked whether they had Qualified Teacher Status (QTS).

6.9.1 Childcare settings

Overall, very low proportions of paid staff in childcare settings held QTS (see table 6.21), ranging from six per cent (full day care in children's centres) to two per cent (childminders).

Taken as a proportion of paid staff who held a qualification of at least level 5, just under half (44 per cent) of staff working in sessional providers held QTS, while around one-third of staff in out of school clubs (36 per cent in after school clubs and 33 per cent in holiday clubs) held QTS. These proportions were significantly higher than the proportion of full day care staff qualified to at least level 5 who held QTS (24 per cent).

Generally these were decreases on the 2009 and 2008 proportions. However due to the general long-term increase in the proportion of staff qualified to at least level 5, this has resulted in no real change in the proportion of all staff with QTS.

	QTS (% of all staff)			QTS (% of staff with at least a level 5 qualification)		
	2010	2009	2008	2010	2009	2008
Full day care	3%	3%	2%	24%	33%	36%
<i>Full day care in children's centres</i>	6%	7%	5%	26%	34%	32%
Sessional	4%	3%	3%	44%	49%	54%
After school	5%	4%	3%	36%	42%	45%
Holiday clubs	4%	5%	5%	33%	43%	49%
Childminders	2%	2%	n/a	†	†	n/a

Base: All paid childcare staff 2010, 2009, 2008; All paid childcare staff with at least a level 5 qualification 2010, 2009, 2008.

6.9.2 Early years provision in maintained schools

Much higher proportions of paid staff in early years settings held QTS. Of all paid staff, around one in three (32 per cent) in nursery schools and around two in five in primary schools (39 per cent in primary schools with nursery and reception classes, and 43 per cent in primary schools with reception classes only) held QTS.

Of paid staff with at least a level 5 qualification, between 73 per cent (nursery schools) and 88 per cent (primary schools with nursery and reception classes) held QTS.

These figures were very similar to those obtained in the 2009 survey. Table 6.22 provides the details.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

	QTS (% of all staff)			QTS (% of staff with at least a level 5 qualification)		
	2010	2009	2008	2010	2009	2008
Nursery schools	28%	32%	29%	73%	80%	80%
Primary schools with nursery and reception classes	39%	39%	36%	88%	87%	85%
Primary schools with reception but no nursery classes	43%	41%	41%	87%	87%	87%

Base: All paid early years staff 2010, 2009, 2008; All paid early years staff with at least a level 5 qualification 2010, 2009, 2008.

6.9.3 QTS by deprivation

Table 6.23 analyses QTS in relation to the deprivation index, comparing the 30 per cent most deprived areas with the other 70 per cent least deprived areas. The figures were very similar between the two types of area; the only providers displaying a significant difference were for staff with at least a level five qualification working in full day care settings (including within children's centres), where staff in the least deprived areas were more likely to hold QTS.

	QTS (% of all staff)				QTS (% of staff with at least a level 5 qualification)			
	30% most deprived areas		70% least deprived areas		30% most deprived areas		70% least deprived areas	
Early years providers	2010	2009	2010	2009	2010	2009	2010	2009
Nursery schools	28%	33%	28%	30%	75%	78%	71%	84%
Primary schools with nursery and reception classes	38%	37%	39%	40%	89%	86%	87%	88%
Primary schools with reception but no nursery classes	39%	38%	44%	42%	83%	92%†	87%	87%
Childcare								
Full day care	3%	4%	3%	3%	19%	29%	27%	34%
<i>Full day care in children's centres</i>	5%	6%	11%	8%	19%	31%	45%	43%‡
Sessional	6%	2%	4%	4%	46%	†	43%	54%
After school clubs	5%	3%	4%	4%	†	35%‡	41%	45%
Holiday clubs	4%	4%	4%	5%	29%	41%	35%	43%
Childminders	2%	1%	2%	2%	47%	†	55%	†

Base: All paid childcare staff 2010, 2009; All paid childcare staff with at least a level 5 qualification 2010, 2009. All paid early years staff 2010, 2009; All paid early years staff with at least a level 5 qualification 2010, 2009.

6.9.4 QTS by region

Tables 6.24a and 6.24b analyse QTS by region. Figures are again shown based firstly on all paid staff, and then based only on those with at least a level 5 qualification.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

As a proportion of all paid staff, the only differences were that staff in the North East were more likely to hold QTS in both sessional and after school clubs, while staff in London were more likely to hold QTS in holiday clubs.

Regional base sizes are generally very small when analysing QTS as a proportion of paid staff qualified to at least level 5, but figures are shown in 6.24b where base sizes allow.

	East Midlands	East of England	London	North East	Yorkshire & Humberside	North West	South East	South West	West Midlands
Early years providers									
Nursery schools	31%‡	29%	25%	32%	31%‡	29%	27%	†	27%
Primary schools with nursery and reception classes	38%	34%	38%	37%	39%	42%	33%	38%	44%
Primary schools with reception but no nursery classes	40%	40%	48%‡	45%‡	41%	45%	43%	46%	48%
Childcare									
Full day care	3%	2%	4%	1%	4%	3%	4%	3%	2%
Full day care in children's centres	14%‡	8%	8%	7%	3%	5%	8%	7%	5%
Sessional	4%	3%	4%	14%	4%	5%	3%	8%	3%
After school clubs	5%	3%	5%	11%	5%	6%	3%	5%	2%
Holiday clubs	2%	3%	7%	3%	4%	4%	3%	4%	4%
Childminders	2%‡	2%	2%		1%	1%‡	5%	1%	0%‡

	East Midlands	East of England	London	North East	Yorkshire & Humberside	North West	South East	South West	West Midlands
Early years providers									
Nursery schools	†	76%‡	81%‡	71%‡	†	68%	75%‡	†	71%‡
Primary schools with nursery and reception classes	78%	91%	92%	79%	90%	85%	90%	90%	90%
Primary schools with reception but no nursery classes	90%	83%	†	†	90%	84%	88%	88%	85%‡
Childcare									
Full day care	27%‡	16%	31%	†	20%	28%	38%	27%	14%
Full day care in children's centres	†	†	37%‡	†	12%‡	21%‡	†	20%‡	20%‡
Sessional	46%‡	39%‡	42%‡	†	†	47%‡	39%	57%‡	28%‡
After school clubs	†	†	†	48%‡	22%‡	40%‡	48%‡	44%‡	25%‡
Holiday clubs	17%‡	38%‡	48%‡	†	29%	30%	35%‡	31%‡	39%‡
Childminders	†	†	†		†	†	†	†	†

Base: All paid childcare staff 2010; All paid childcare staff with at least a level 5 qualification 2010. All paid early years staff 2010; All paid early years staff with at least a level 5 qualification 2010.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

6.10 Early Years Professional Status

Paid staff in childcare settings who held a qualification of at least level 6 were asked whether they had Early Years Professional Status (EYPS). Findings are shown in Table 6.25.⁶⁶

Generally the proportion of all staff holding EYPS⁶⁷ was low across all childcare settings. This ranged from just two per cent in sessional and out of school settings to seven per cent in children's centres providing full day care. When looking at the proportion with EYPS of just those that held at least a level 6 qualification then proportions ranged from 26 per cent (in after school clubs) to 43 per cent (full day care). These proportions are very similar to 2009.

	EYP Status (% of all staff)		EYP Status (% of staff with at least a level 6 qualification)	
	2010	2009	2010	2009
	Full day care	4%	3%	43%
<i>Full day care in children's centres</i>	7%	5%	36%	37%
Sessional	2%	2%	32%	36%
After school	2%	2%	26%‡	30%
Holiday clubs	2%	3%	30%	30%

Base: All paid childcare staff 2010, 2009; All paid childcare staff with at least a level 6 qualification 2010, 2009.

6.10.1 EYP Status by deprivation

Table 6.26 shows the findings for EYPS⁶⁸ analysed by deprivation. In all types of setting the proportions holding EYPS between the 30 per cent most deprived areas and 70 per cent least deprived areas were very similar. Base sizes for many of the provider types were small and the data should be viewed bearing this in mind.

⁶⁶ It should be noted that there is an apparent discrepancy between the number of EYPs calculated by using the proportion of paid childcare staff with EYPS (e.g. in Table 6.25) with the overall numbers in the workforce (given in Table 5.1a), and the data held by the Children's Workforce Development Council, who are responsible for the EYPS programme. There are a number of possible explanations:

- 1) The wide margins of error associated with extrapolating small percentages up to population figures.
- 2) Possible over reporting by managers who include those in training for EYPS as well as those who have achieved EYPS.
- 3) There may be some double counting since we know some EYPs work in more than one setting and may therefore have been reported more than once.

It is important that these factors are understood in making any projection of EYPS numbers from data given in this survey report.

⁶⁷ Please refer to footnote above regarding discrepancies in the EYPS data.

⁶⁸ Please refer to footnote above regarding discrepancies in the EYPS data.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

	EYPS (% of all staff)				EYPS⁶⁹ (% of staff with at least a level 6 qualification)			
	30% most deprived areas		70% least deprived areas		30% most deprived areas		70% least deprived areas	
	2010	2009	2010	2009	2010	2009	2010	2009
Full day care	4%	3%	3%	3%	46%	40%‡	42%	42%
<i>Full day care in children's centres</i>	7%	5%	6%	6%	39%	36%	28%‡	39%‡
Sessional	3%	3%	2%	2%	32%	†	33%‡	33%
After school clubs	2%	2%	2%	2%	†	32%	29%‡	29%
Holiday clubs	3%	2%	2%	3%	27%‡	24%	32%	32%

Base: All paid childcare staff 2010, 2009; All paid childcare staff with at least a level 6 qualification 2010, 2009.

6.10.2 EYP Status by region

Regional analysis of EYPS⁷⁰ is provided in Tables 6.27a and 6.27b.

There was some variation by region. Sessional and after school clubs based in the North East were more likely than average to have staff holding EYPS⁷¹ (6 per cent in each provider type). Also, in full day care in children's centres, the proportion of all paid staff with EYPS was higher in the South West (16 per cent) as well as the North East (13 per cent).

Regional base sizes are generally very small when analysing EYPS⁷² as a proportion of staff qualified to at least level 6, but figures are shown in 6.27b where base sizes allow.

⁶⁹ Please refer to footnote in section 6.10 regarding discrepancies in the EYPS data.

⁷⁰ Please refer to footnote in section 6.10 regarding discrepancies in the EYPS data.

⁷¹ Please refer to footnote in section 6.10 regarding discrepancies in the EYPS data.

⁷² Please refer to footnote in section 6.10 regarding discrepancies in the EYPS data.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Table 6.27a Proportion of staff with Early Years Professional Status (% of all staff), by region									
	East Midlands	East of England	London	North East	Yorkshire & Humberside	North West	South East	South West	West Midlands
Full day care	4%	2%	3%	3%	6%	4%	2%	4%	4%
<i>Full day care in children's centres</i>	7%	5%	6%	13%	5%	7%	3%	16%	6%
Sessional	2%	1%	4%	6%	1%	2%	1%	4%	2%
After school clubs	2%	1%	1%	6%	4%	2%	2%	4%	2%
Holiday clubs	2%	2%	1%	2%	4%	2%	2%	4%	3%
Table 6.27b Proportion of staff with Early Years Professional Status (% of staff with at least a level 6 qualification), by region									
	East Midlands	East of England	London	North East	Yorkshire & Humberside	North West	South East	South West	West Midlands
Full day care	50%‡	34%‡	37%	†	46%	51%	31%	48%	55%‡
<i>Full day care in children's centres</i>	†	†	†	†	†	†	†	†	†
Sessional	†	25%‡	†	†	†	†	29%‡	31%‡	†
After school clubs	†	†	†	†	†	20%‡	†	42%‡	†
Holiday clubs	†	39%‡	13%‡	†	47%‡	32%‡	24%‡	40%‡	33%‡
<i>Base: All paid childcare staff 2010; All paid childcare staff with at least a level 6 qualification 2010.</i>									

6.11 Staff with QTS and EYP Status

Only one per cent of staff in all childcare settings had both QTS and EYPS,⁷³ with the exception of children's centres where the proportion was two per cent (see Table 6.28). As a proportion of those qualified to at least level 6, between nine per cent (children's centres) and 17 per cent (sessional settings) held both QTS and EYPS. In general these proportions were slightly lower than in 2009 (for full day care, children's centres and after school clubs). However as a proportion of all staff the proportions had not changed since 2009.

Table 6.28 Proportion of childcare staff with Qualified Teacher Status and Early Years Professional Status				
	QTS and EYP Status (% of all staff)		QTS and EYP Status (% of staff with at least a level 6 qualification)	
	2010	2009	2010	2009
Full day care	1%	1%	13%	18%
<i>Full day care in children's centres</i>	2%	2%	9%	16%
Sessional	1%	1%	17%	17%
After school	1%	1%	12%	17%
Holiday clubs	1%	2%	16%	18%
<i>Base: All paid childcare staff 2010, 2009; All paid childcare staff with at least a level 6 qualification 2010, 2009.</i>				

⁷³ Please refer to footnote in section 6.10 regarding discrepancies in the EYPS data.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Table 6.29 shows the proportion of all paid staff with both QTS and EYPS,⁷⁴ analysed by deprivation. There were no statistically significant differences for any of the various types of childcare setting.

Table 6.29 Proportion of childcare staff with Qualified Teacher Status and Early Years Professional Status, by deprivation				
	30% most deprived areas		70% least deprived areas	
	2010	2009	2010	2009
Full day care	1%	1%	1%	1%
<i>Full day care in children's centres</i>	2%	3%	1%	1%
Sessional	2%	1%	1%	1%
After school clubs	1%	1%	1%	1%
Holiday clubs	1%	1%	1%	2%

Base: All paid childcare staff 2010, 2009

Table 6.30 shows regional analysis of the proportion of all paid staff with both QTS and EYPS.⁷⁵ Staff in the North East were more likely to hold both QTS and EYPS than staff in other regions in children's centres, sessional settings and after school clubs. In holiday clubs, the proportion with both QTS and EYPS was higher in Yorkshire and Humberside, but lower in the East Midlands (three per cent in Yorkshire and Humberside and less than one per cent in East Midlands).

⁷⁴ Please refer to footnote in section 6.10 regarding discrepancies in the EYPS data.

⁷⁵ Please refer to footnote in section 6.10 regarding discrepancies in the EYPS data.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Table 6.30 Proportion of childcare staff with Qualified Teacher Status and Early Years Professional Status, by region									
	East Midlands	East of England	London	North East	Yorkshire & Humberside	North West	South East	South West	West Midlands
Full day care	1%	1	1%	*	2%	2%	1%	1%	*
Full day care in children's centres	3% †	1%	2%	7%	*	1%	*	4%	2%
Sessional	1%	1%	1%	5%	*	2%	1%	2%	1%
After school clubs	1%	1	*	4%	1%	1%	1%	2%	1%
Holiday clubs	*	1%	1	1%	3%	1%	1%	1%	2%
<i>Base: All paid childcare staff 2010</i>									

6.12 Qualifications being worked towards

Tables 6.31, 6.32a and 6.32b show the qualifications being worked towards by all paid staff for each specific type of provider.

In general, paid staff working for early years providers in maintained schools were less likely to be working towards a qualification than those in childcare settings. This may reflect the fact that early years staff tended to be qualified already to a high level (as discussed earlier in this chapter). Around one in five paid staff in nursery schools were working towards a qualification (18 per cent), while lower proportions were working to a qualification in primary schools (11 per cent in both types of primary schools).

Paid staff in full day care settings and holiday clubs were more likely than those in other childcare settings to be working towards a qualification (30 per cent for full day care and holiday clubs and 31 per cent within children's centres). One in four (25 per cent) paid staff were working towards a qualification in after school clubs and one in five in sessional care (22 per cent) and 18 per cent of childminders.

Staff in children's centres offering full day care were most likely to be working to a level 6 qualification, but in all other childcare settings the most common qualification to be working towards was level 3.

Across many groups there has been a slight decline since 2009 in the proportion of staff working towards qualifications. In full day care the proportion working towards a qualification had fallen from 35 per cent in 2009 to 31 per cent in 2010, in children's centres the proportion had fallen from over the same period, and in sessional care the proportion had fallen from 27 per cent to 22 per cent. There had also been a fall in primary schools with nursery classes (from 14 per cent in 2009 to 11 per cent in 2010). The proportions for all other groups have remained similar to 2009. It is perhaps unsurprising that the proportion of staff working towards a qualification had fallen in full day care and sessional settings, given that such high proportions of staff in these settings already held qualifications (and particularly at level 3 and above).

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Table 6.31 Relevant qualifications being worked towards by all paid early years staff															
	Nursery schools					Primary schools with nursery and reception classes					Primary schools with reception but no nursery classes				
	2010	2009	2008	2007	2006	2010	2009	2008	2007	2006	2010	2009	2008	2007	2006
Level 1	0%	0%	0%	*	*	*	*	*	*	*	*	*	*	*	*
Level 2	1%	1%	2%	2%	2%	1%	1%	1%	1%	2%	1%	1%	2%	1%	1%
Level 3	5%	4%	6%	4%	5%	3%	4%	3%	4%	3%	3%	4%	3%	3%	2%
Level 4	3%	2%	1%	3%	3%	1%	2%	1%	2%	1%	1%	1%	*	1%	1%
Level 5	3%	4%	3%	5%	5%	2%	2%	2%	3%	2%	2%	2%	3%	3%	3%
Level 6 or above	6%	4%	6%	7%	7%	4%	5%	5%	3%	4%	4%	5%	4%	4%	3%
Other	0%	0%	N/A	0%	N/A	0%	0%	N/A	0%	N/A	0%	0%	N/A	0%	N/A
Don't know	2%	1%	2%	1%	2%	5%	3%	4%	2%	3%	6%	7%	4%	3%	4%
Not working towards a qualification	80%	83%	79%	77%	76%	84%	83%	84%	82%	83%	83%	80%	83%	82%	84%
All working towards a qualification	18%	16%	20%	22%	22%	11%	14%	12%	14%	13%	11%	13%	13%	12%	12%

Base: All paid early years staff 2010, 2009, 2008, 2007, 2006.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Table 6.32a Relevant qualifications being worked towards by all paid childcare staff															
	Full day care					Full day care in children's centres					Sessional				
	2010	2009	2008	2007	2006	2010	2009	2008	2007	2006	2010	2009	2008	2007	2006
Level 1	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*
Level 2	2%	3%	3%	4%	4%	1%	1%	2%	2%	3%	2%	3%	3%	5%	5%
Level 3	10%	10%	11%	14%	12%	6%	6%	8%	9%	8%	10%	11%	11%	13%	12%
Level 4	5%	9%	7%	7%	4%	6%	7%	6%	8%	5%	2%	4%	3%	3%	3%
Level 5	7%	7%	4%	4%	2%	8%	8%	6%	8%	4%	4%	4%	2%	3%	1%
Level 6 or above	8%	7%	5%	3%	2%	9%	12%	10%	9%	6%	4%	3%	3%	2%	1%
Other	*	*	*	1%	1%	*	*	1%	1%	3%	1%	*	*	1%	1%
Don't know	1%	1%	3%	2%	2%	4%	2%	5%	3%	3%	2%	*	2%	3%	2%
Not working towards a qualification	68%	64%	66%	65%	73%	65%	62%	62%	60%	67%	76%	72%	74%	70%	75%
<i>All working towards a qualification</i>	31%	35%	31%	31%	24%	30%	36%	32%	36%	27%	22%	27%	24%	27%	22%
<i>Base: All paid childcare staff 2010 (module B), 2009, 2008 (module B), 2007 (module B),, 2006 (module B), All childminders 2010, 2009, 2008, 2007, 2006.</i>															

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Table 6.32b Relevant qualifications being worked towards by all paid childcare staff															
	After school clubs					Holiday clubs					Childminders				
	2010	2009	2008	2007	2006	2010	2009	2008	2007	2006	2010	2009	2008	2007	2006
Level 1	*	*	*	*	*	*	*	*	*	*	*	*	1%	1%	*
Level 2	4%	5%	5%	6%	6%	3%	4%	4%	6%	7%	1%	1%	1%	2%	1%
Level 3	11%	11%	14%	14%	14%	11%	11%	12%	13%	13%	10%	12%	14%	16%	13%
Level 4	3%	4%	3%	5%	3%	4%	4%	3%	5%	5%	2%	2%	2%	1%	2%
Level 5	3%	4%	2%	3%	1%	6%	3%	3%	3%	1%	3%	3%	2%	1%	1%
Level 6 or above	5%	4%	4%	3%	3%	7%	7%	6%	7%	7%	2%	2%	1%	*	1%
Other	1%	*	1%	1%	1%	1%	*	1%	1%	2%	0%	0%	N/A	0%	0%
Don't know	2%	2%	4%	3%	4%	5%	4%	4%	5%	6%	2%	3%	3%	2%	3%
Not working towards a qualification	71%	70%	67%	65%	68%	64%	66%	66%	59%	59%	80%	76%	75%	78%	79%
<i>All working towards a qualification</i>	25%	28%	28%	31%	27%	30%	29%	29%	34%	33%	18%	21%	22%	21%	17%

Base: All paid childcare staff 2010 (module B), 2009, 2008 (module B), 2007 (module B),, 2006 (module B), All childminders 2010, 2009, 2008, 2007, 2006.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

6.12.1 Qualification worked towards by deprivation

Tables 6.33, 6.34a and 6.34b show the proportion of staff working towards qualifications, analysed by deprivation.

For all early years groups, staff were more likely to be working towards a qualification in the 30 per cent most deprived areas than in the 70 per cent least deprived areas. As discussed in chapter 6.4, there is currently no significant difference in the levels of qualification in early years settings in the more and less deprived areas. As such, it is likely that qualification levels in the 30 per cent most deprived areas will begin to outstrip those in the less deprived areas if current studying trends continue.

In sessional care, staff in the 30 per cent most deprived areas were more likely than those in other areas to be working towards a qualification (26 per cent compared with 21 per cent). Staff working in after school clubs were also more likely to be working towards a qualification in the 30 per cent most deprived areas (29 per cent compared with 24 per cent in other areas). Childminders too were more likely to be working towards a qualification if they were based in the 30 per cent most deprived areas than in other areas (25 per cent compared with 16 per cent).

Table 6.33 Relevant qualifications being worked towards by all paid early years staff, by deprivation

	Nursery schools				Primary schools with nursery and reception classes				Primary schools with reception but no nursery classes			
	30% most deprived areas		70% least deprived areas		30% most deprived areas		70% least deprived areas		30% most deprived areas		70% least deprived areas	
	2010	2009	2010	2009	2010	2009	2010	2009	2010	2009	2010	2009
Level 1	0%	0%	0%	0%	0%	*	*	*	1%	0%	*	*
Level 2	1%	2%	1%	*	1%	1%	1%	1%	*	*	1%	1%
Level 3	4%	3%	5%	8%	4%	5%	2%	3%	2%	7%	3%	4%
Level 4	3%	2%	2%	2%	1%	1%	*	2%	3%	2%	1%	1%
Level 5	4%	4%	2%	5%	2%	2%	2%	2%	4%	2%	1%	2%
Level 6 or above	7%	4%	4%	5%	5%	5%	4%	5%	5%	5%	4%	5%
Other	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Don't know	2%	*	2%	2%	4%	4%	6%	2%	7%	3%	6%	7%
Not working towards a qualification	77%	86%	84%	78%	83%	82%	84%	84%	77%	80%	84%	81%
All working towards a qualification	20%	14%	14%	20%	13%	14%	10%	14%	16%	17%	10%	13%

Base: All paid early years staff 2010, 2009.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Table 6.34a Relevant qualifications being worked towards by all paid childcare staff, by deprivation

	Full day care				Full day care in children's centres				Sessional			
	30% most deprived areas		70% least deprived areas		30% most deprived areas		70% least deprived areas		30% most deprived areas		70% least deprived areas	
	2010	2009	2010	2009	2010	2009	2010	2009	2010	2009	2010	2009
Level 1	*	0%	*	*	*	*	0%	0%	*	*	*	*
Level 2	1%	3%	2%	3%	1%	1%	2%	2%	2%	4%	2%	3%
Level 3	9%	9%	10%	10%	6%	7%	7%	6%	9%	12%	10%	11%
Level 4	4%	7%	5%	9%	6%	7%	6%	8%	3%	8%	2%	3%
Level 5	8%	7%	6%	7%	10%	9%	3%	7%	6%	5%	3%	4%
Level 6 or above	9%	8%	7%	6%	8%	14%	12%	10%	6%	4%	4%	3%
Other	*	*	*	*	*	*	1%	0%	1%	1%	*	*
Don't know	3%	1%	1%	1%	4%	2%	3%	2%	4%	0%	1%	*
Not working towards a qualification	66%	65%	68%	64%	65%	61%	67%	65%	69%	63%	77%	73%
All working towards a qualification	31%	34%	31%	35%	31%	37%	29%	33%	26%	34%	21%	25%

Base: All paid childcare staff 2010 (module B), 2009.

Table 6.34b Relevant qualifications being worked towards by all paid childcare staff, by deprivation

	After school clubs				Holiday clubs				Childminders			
	30% most deprived areas		70% least deprived areas		30% most deprived areas		70% least deprived areas		30% most deprived areas		70% least deprived areas	
	2010	2009	2010	2009	2010	2009	2010	2009	2010	2009	2010	2009
Level 1	*	*	*	*	0%	*	*	*	1%	1%	*	*
Level 2	3%	4%	4%	5%	2%	3%	3%	4%	3%	1%	*	1%
Level 3	13%	14%	10%	10%	9%	9%	12%	12%	13%	18%	9%	11%
Level 4	1%	6%	3%	3%	5%	7%	3%	3%	2%	3%	2%	2%
Level 5	3%	4%	3%	4%	7%	3%	5%	4%	3%	4%	3%	3%
Level 6 or above	9%	5%	4%	4%	9%	7%	6%	7%	5%	3%	2%	3%
Other	3%	*	1%	*	1%	*	1%	*	0%	0%	0%	0%
Don't know	2%	3%	2%	1%	5%	3%	5%	5%	3%	4%	2%	3%
Not working towards a qualification	66%	65%	73%	73%	64%	68%	65%	66%	72%	67%	82%	78%
All working towards a qualification	29%	32%	24%	26%	31%	28%	30%	29%	25%	29%	16%	19%

Base: All paid childcare staff 2010 module B, 2009.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

6.12.2 Working towards a qualification by region

Regional analysis of the proportion of staff working towards a qualification is shown in Table 6.35.

Generally there was not a lot of variation by region. But there were a few exceptions. In primary schools, the proportion working towards a qualification were highest in the North East (14 per cent in primary schools with reception and nursery classes and 18 per cent in primary schools with reception but no nursery classes). In sessional settings, the proportion working towards a qualification was highest in the East of England (28 per cent), while in after school clubs this was in the South West (34 per cent).

	East Midlands	East of England	London	North East	Yorkshire & Humberside	North West	South East	South West	West Midlands
Early years providers									
Nursery schools	16%‡	21%	19%	15%	13%‡	16%	16%	†	16%
Primary schools with nursery and reception classes	9%	8%	12%	10%	10%	14%	10%	13%	10%
Primary schools with reception but no nursery classes	12%	11%	13%‡	12%‡	9%	18%	13%	7%	11%
Childcare									
Full day care	28%	32%	30%	27%‡	32%	24%	30%	30%	30%
<i>Full day care in children's centres</i>	†	40%‡	28%	†	24%‡	35%	†	†	31%‡
Sessional	23%	28%	19%	17%‡	19%	27%	20%	26%	19%
After school clubs	20%	24%	25%‡	35%‡	23%‡	25%	34%	22%	25%
Holiday clubs	28%	32%	29%‡	22%‡	34%	35%	28%	30%	28%
Childminders	15%‡	16%	22%		14%	23%‡	20%	19%	13%‡

Base: All paid childcare staff 2010 module B, All paid early years staff 2010, All childminders 2010.

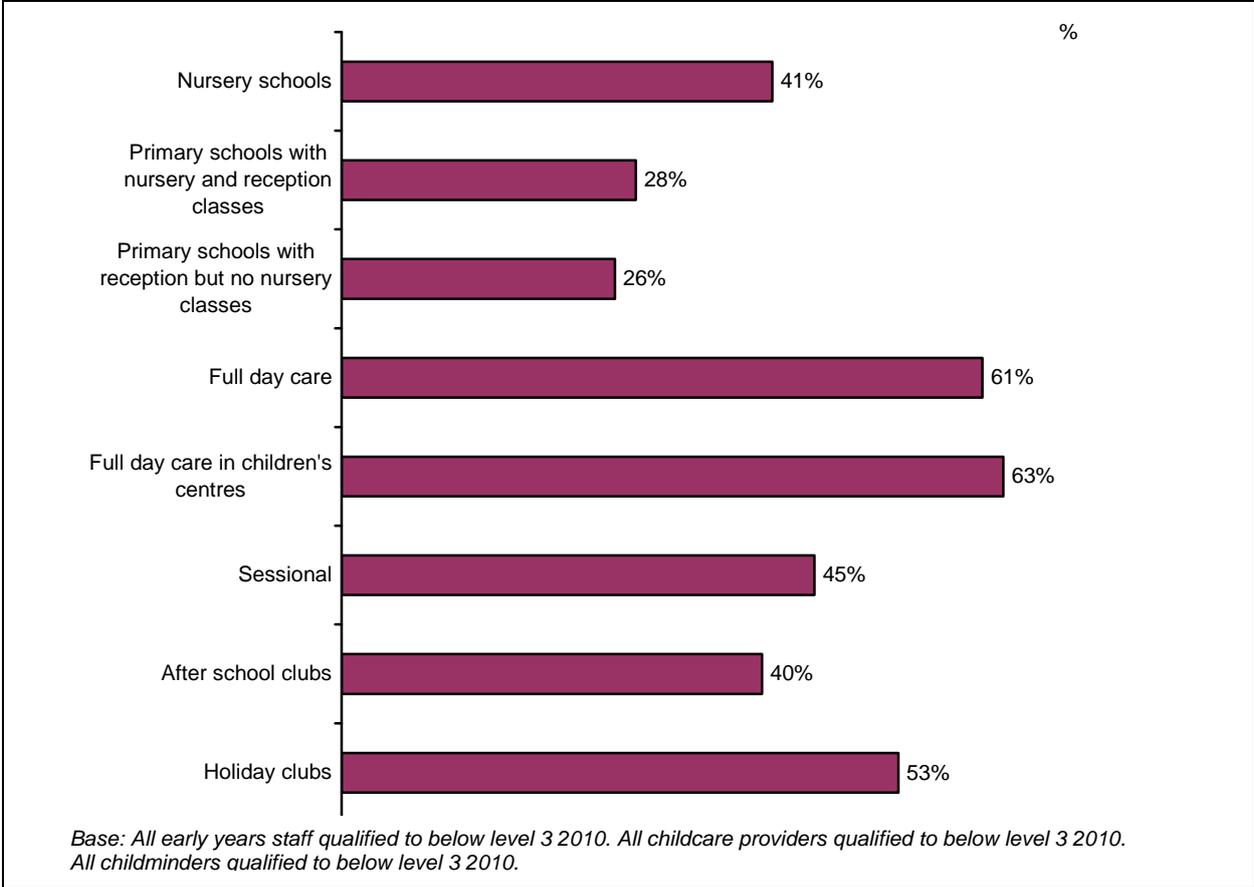
6.12.3 Proportion of staff qualified to below level 3 working towards a higher qualification

Chart 6.1 shows the proportion of paid staff qualified to below level 3 who were working towards a qualification of level 3 or higher. The proportion was highest amongst staff working in full day care settings (61 per cent, and 63 per cent amongst staff in full day care children's centres). About half of holiday club staff (53 per cent) qualified below level 3 were working towards a qualification at level 3 or higher, 45 per cent of sessional and 40 per cent of after school clubs. Four in ten (41 per cent) nursery school staff qualified below level 3 were working towards a qualification at level 3 or higher, but slightly lower proportions were

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

working towards this in primary schools with nursery and reception classes (28 per cent) and primary schools with reception but no nursery classes (26 per cent). It should be noted that staff in early years settings do tend to be qualified to a higher level than childcare settings.

Chart 6.1 Proportion of paid staff qualified to below level 3 who are working towards a relevant qualification of level 3 or higher



6.13 NVQ Assessors

Respondents were asked if the senior manager in childcare settings or the early years coordinator in early years provision in maintained schools was an NVQ assessor. The results are shown in table 6.36.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

	2010	2008
Full day care	11%	16%
<i>Full day care in children's centres</i>	13%	18%
Sessional	5%	7%
After school clubs	8%	10%
Holiday clubs	13%	13%
Nursery schools	8%	8%
Primary schools with nursery and reception classes	5%	5%
Primary schools with reception but no nursery classes	2%	4%
<i>Base: All senior managers in childcare providers 2010, 2008. All early years coordinators in maintained schools 2010, 2008.</i>		

About one in ten senior managers in holiday clubs (13 per cent), full day care providers in children's centres (13 per cent), holiday clubs (13 per cent), full day care provision overall (11 per cent, a decrease from 16 per cent in 2008) and after school clubs (eight per cent) were NVQ assessors. One in twenty senior managers at sessional providers were NVQ assessors.

In early years settings in maintained schools, lower proportions of early years coordinators were NVQ assessors compared with senior managers in childcare providers. Specifically, eight per cent of early years coordinators in nursery schools were NVQ assessors, five per cent in primary schools with nursery and reception classes and two per cent in primary schools reception but no nursery classes.

The proportion of senior managers that were NVQ assessors had decreased in both full day care settings (from 16 per cent in 2008 to 11 per cent in 2010) and sessional settings (7 per cent in 2008 and 5 per cent in 2010).

6.14 Providers with at least one graduate member of staff

Full day care providers which were not run by a local authority were asked how many graduate staff they currently had that held Early Years Professional Status (EYPS). The previous Government set a target of ensuring that every full day care setting would have at least one graduate with EYPS, while those in the most deprived areas were to have at least two graduates. This target is not applicable under the current Government, but there is still a focus on increasing the proportion of settings with EYPS staff.

Overall, there had been an increase from 2008 to one in four (25 per cent) full day care providers who had at least one graduate with EYPS, while six per cent had at least two (an increase from four per cent in 2008). There was no difference between the 30 per cent most deprived areas and other areas.

While only one in four had at least one graduate with EYPS, chart 6.4 will show that there is progress towards increasing the number of settings achieving this.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Chart 6.2 Number of graduates with EYP Status in non-LA run full day care settings

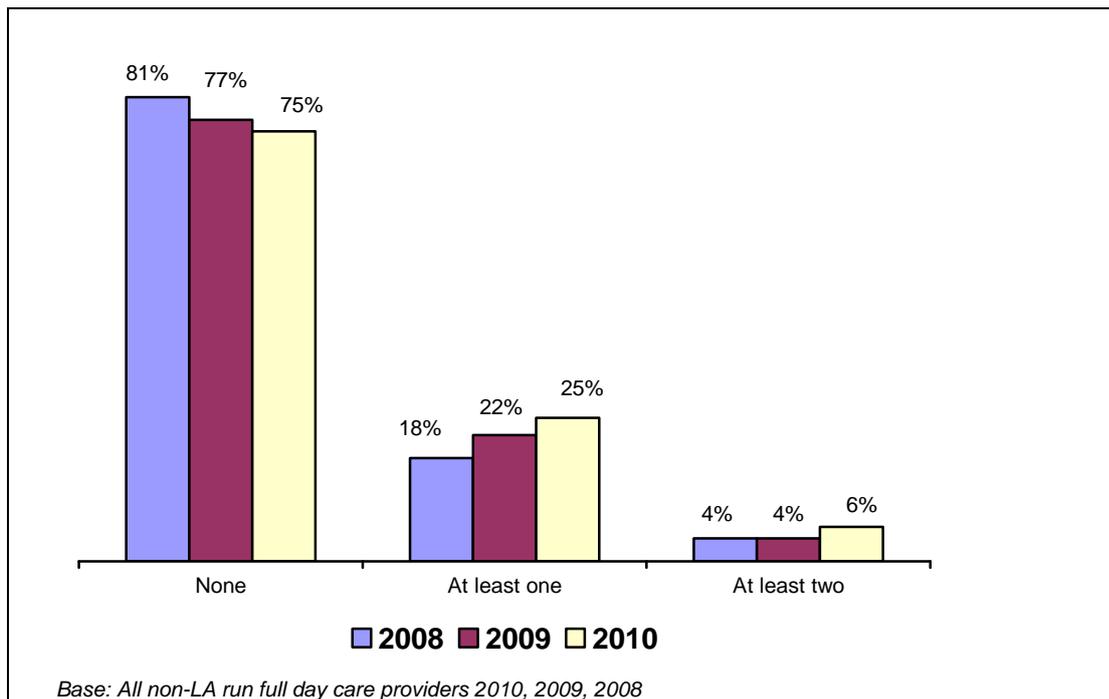
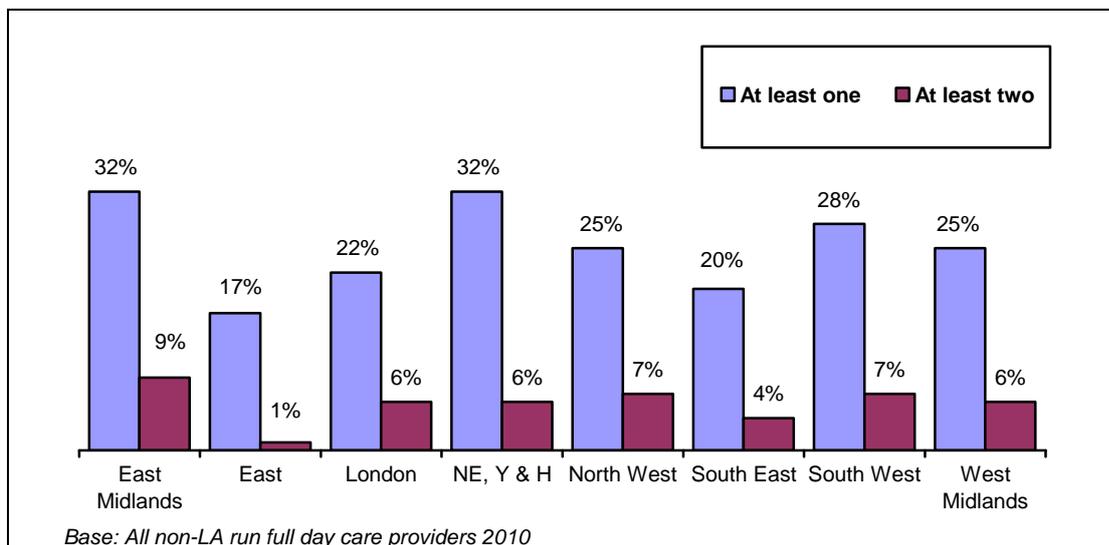


Chart 6.3 provides analysis by region. Providers were most likely to have at least one graduate with EYPS in the East Midlands and the North East, Yorkshire and Humberside (both 32 per cent). Settings were less likely to have a graduate with EYPS in the East of England (17 per cent) and the South East (20 per cent). Only one per cent of settings in the East of England had at least two graduates with EYPS.

Chart 6.3 Number of graduates with EYP Status in non-LA run full day care settings, by region



N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

6.15 Graduate staff working towards EYP Status

Amongst the providers that were not run by a local authority and did not have any graduate staff with EYPS, around half (52 per cent) had at least one member of staff working towards EYPS and 13 per cent had at least two. This was slightly higher in the 30 per cent most deprived areas (54 per cent) than in other areas (47 per cent). Providers in the 30 per cent most deprived areas were also more likely to have at least two members of staff working towards EYPS (18 per cent compared with 11 per cent). Details are shown in Chart 6.4

Chart 6.4 Number of staff working towards EYP Status, in non-LA run full day care settings with no graduates with EYP Status

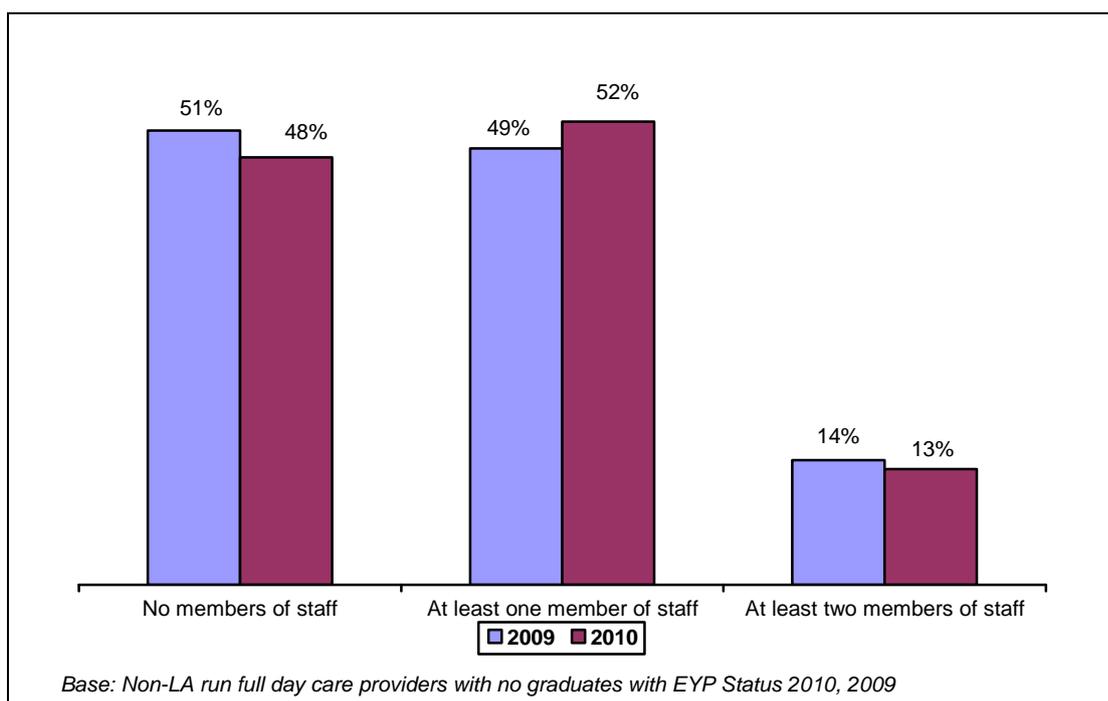


Chart 6.5 shows regional analysis of the number of staff working towards EYPS. There was a pretty even split by region, although those in the North West (60 per cent) were more likely to have someone working towards EYPS than those in the South West (42 per cent). Those in the South West (six per cent) and East Midlands (nine per cent) were least likely to have at least two members of staff working towards EYPS.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Chart 6.5 Number of staff working towards EYP Status, in non-LA run full day care settings with no graduates with EYP Status, by region



N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

7. Training

This chapter focuses on training provision. In particular it explores what proportion of childminders and staff involved in early years provision have received training, whether providers have training plans and budgets in place, and views on current levels of training. This chapter also includes a section covering the Graduate Leader Fund, which was still in place at the time of the survey, but was discontinued in March 2011.⁷⁶ Group based childcare providers were not asked the majority of the questions about training covered in this chapter – these providers were only asked about the Graduate Leader Fund.

7.1 Training provision in early years provision in maintained schools

As shown in table 7.1, nearly all early years providers helped their staff to receive training in 2010 (ranging from 97 per cent in primary schools with reception but no nursery classes to 99 per cent in nursery schools). This is consistent with the levels seen in previous years. Table 7.1 also shows the types of training each provider helps their staff to receive. As in previous years, all of the three types of early years provider were most likely to help staff get first aid training, with levels increasing between 2008 and 2010 for both of the primary school provider types (from 31 to 39 per cent for primary schools with reception and nursery classes, and from 30 to 40 per cent for primary schools with reception but no nursery classes).

Both primary school provider types also saw an increase between 2008 and 2010 in the proportion helping staff to get health and safety, child protection, and early years/foundation stage training. However, there were decreases in the provision of IT and literacy/numeracy training for both these primary school providers.

Nursery schools were more likely than the other two types of early years provider to train their staff in first aid, child protection, health and safety, SEN/disability/inclusion, curriculum, food hygiene and management and business skills. In nursery schools there was an increase in the proportion of staff receiving SEN/Disability/Inclusion training (from 21 per cent in 2008 to 30 per cent in 2010).

⁷⁶ In place of the Graduate Leader Fund, there are now Quality Supplement payments available through the Early Years Single Funding Formula.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Table 7.1 Proportion of providers in maintained schools that help staff to receive training and the type of training they help staff to receive

	Nursery schools				Primary schools with nursery and reception classes				Primary schools with reception but no nursery classes			
	2010	2008	2007	2006	2010	2008	2007	2006	2010	2008	2007	2006
Helped staff receive training	99%	99%	99%	98%	98%	98%	98%	97%	97%	98%	99%	94%
First Aid	47%	46%	32%	30%	39%	31%	19%	25%	40%	30%	23%	30%
Childcare training including course on creative play	38%	34%	40%	40%	38%	35%	35%	40%	34%	30%	33%	41%
Health & Safety	34%	26%	24%	16%	17%	12%	8%	10%	19%	9%	10%	9%
Child protection	30%	27%	18%	20%	18%	11%	10%	12%	19%	13%	11%	12%
SEN/Disability/Inclusion	30%	21%	20%	23%	20%	20%	18%	19%	22%	18%	18%	20%
Early years/foundation stage	26%	19%	11%	8%	24%	19%	11%	9%	26%	15%	14%	10%
Food hygiene	20%	16%	12%	9%	6%	5%	3%	5%	4%	3%	3%	3%
Management/business skills	16%	15%	9%	14%	11%	9%	6%	8%	7%	10%	5%	9%
Curriculum	12%	19%	19%	11%	6%	10%	8%	5%	7%	7%	7%	4%
Professional development	9%	13%	8%	9%	8%	8%	5%	4%	9%	7%	6%	3%
Speech and language	6%	6%	6%	3%	8%	11%	9%	3%	9%	7%	11%	2%
Risk assessment	6%	N/A	N/A	N/A	5%	N/A	N/A	N/A	4%	N/A	N/A	N/A
IT	4%	8%	6%	3%	2%	5%	7%	4%	4%	7%	9%	6%
Behaviour management	3%	6%	1%	1%	2%	4%	4%	4%	4%	8%	6%	5%
Literacy and numeracy	2%	4%	1%	1%	5%	9%	7%	6%	3%	10%	10%	6%
Teaching assistant	0%	0%	1%	0%	1%	1%	1%	1%	2%	2%	2%	2%
Equal opportunities	0%	0%	1%	0%	0%	0%	*	0%	0%	0%	*	0%

Base: All early years providers who helped staff get training in 2010, 2008, 2007, 2006.

7.2 Training plans and budgets

Table 7.2 displays the proportion of early years providers with a specific training plan and the proportion with a specific training budget.

Table 7.2 Whether provider has a specific training plan or training budget												
	Nursery schools				Primary schools with nursery and reception classes				Primary schools with reception but no nursery classes			
	2010	2008	2007	2006	2010	2008	2007	2006	2010	2008	2007	2006
Have a training plan	80%	80%	79%	82%	53%	52%	44%	50%	47%	44%	45%	39%
Have a training budget	94%	97%	97%	98%	34%	34%	33%	34%	31%	28%	38%	33%

Base: All early years providers 2010, 2008, 2007, 2006.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Eight in ten (80 per cent) nursery schools had written training plans, while nearly all (94 per cent) had a training budget in 2010. Primary schools with nursery and reception classes were more likely than primary schools with reception but no nursery classes to state that they had a training plan (53 versus 47 per cent respectively). There was, however, little difference in the proportion having a training *budget* for the two primary school provider types (34 per cent for primary schools with reception and nursery classes versus 31 per cent for primary schools with reception but no nursery classes).

In 2010, the proportion of early years providers who had a training budget and training plan was very similar to the level seen in 2008, for all three provider types.

Early years providers within the 30 per cent most deprived areas were more likely to have a training budget than providers in the 70 per cent least deprived areas (nursery schools 97 per cent compared with 89 per cent; primary schools with reception but no nursery 38 per cent compared with 30 per cent; and primary schools with reception and nursery 36 per cent compared with 33 per cent).

7.3 Training for childminders

All childminders are legally required to complete a local authority approved pre-registration course within six months of starting childminding.⁷⁷ Almost nine in ten (87 per cent) childminders had attended a preparatory training course when they first registered as a childminder. This is a slight increase compared to the level seen in previous years (84 per cent in 2008, 83 per cent in 2007 and 83 per cent in 2006). This proportion differed by region, with childminders in the East Midlands less likely than those in other regions to have been on a preparatory course (73 per cent) - this was also the case in 2008 and 2007. At least eight in ten childminders in all other regions had attended a preparatory course and the highest levels were found in the South East and East of England (91 and 90 per cent respectively).

Three-quarters (77 per cent) of those who attended a preparatory course said it had lasted for longer than one working day (i.e. at least eight hours). Just four per cent said the course had lasted less than four hours and 11 per cent said it lasted for between four and seven hours. This is very similar to the distribution in previous years.

Table 7.3 shows the proportion of childminders receiving training in the past 12 months, and the number of days training each received.

⁷⁷ In addition to the pre-registration course, childminders must also complete a first aid course which includes training in first aid for infants and young children. This should be completed within six months of commencing childminding.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Table 7.3 Amount of training in last 12 months amongst Childminders					
	2010	2008	2007	2006	2005
Have had some training	75%	80%	68%	64%	66%
Number of days:					
None	20%	16%	28%	30%	34%
1-5 days	41%	45%	40%	38%	36%
6-10 days	17%	18%	12%	13%	12%
11-15 days	6%	6%	6%	5%	6%
16 or more days	11%	11%	10%	8%	13%
Don't know	5%	4%	4%	6%	2%
Mean number of days	8 days	9 days	7 days	6 days	9 days
<i>Base: All childminders 2010, 2008, 2007, 2006, 2005</i>					

Three-quarters (75 per cent) of childminders had undertaken some training in the last 12 months, which marks a decrease from 2008 (80 per cent), but remains a higher proportion than was recorded in 2007 and previous years. The decrease since 2008 may reflect the tendency for less experienced childminders to have left the sector over this period, meaning that the more experienced childminders (who would typically have fewer training requirements) account for a greater proportion of the total childminder provision in 2010. In 2010 around 61 per cent of active childminders had more than five years experience, compared to 54 per cent in 2008.

On average in 2010 childminders had received eight days of training in the last 12 months, compared with a mean of nine days in 2008 and seven days in 2007.

7.4 Views on current levels of training

As shown in table 7.4, the majority of respondents thought that the level of training they received was *about right* in 2010. A very similar proportion (just below nine in ten) thought this was the case in each of the different early years settings. Amongst all three types of early years providers, about one in ten respondents felt that the level of training was *too little*, which maintains the levels found in 2008.

Eight in ten (79 per cent) childminders felt the level of training was appropriate, 13 per cent said it was too little and six per cent felt it was too much. There was a slight decline in the proportion of childminders thinking they had too much training, reflecting the slightly lower average amount of training attended by childminders in 2010.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

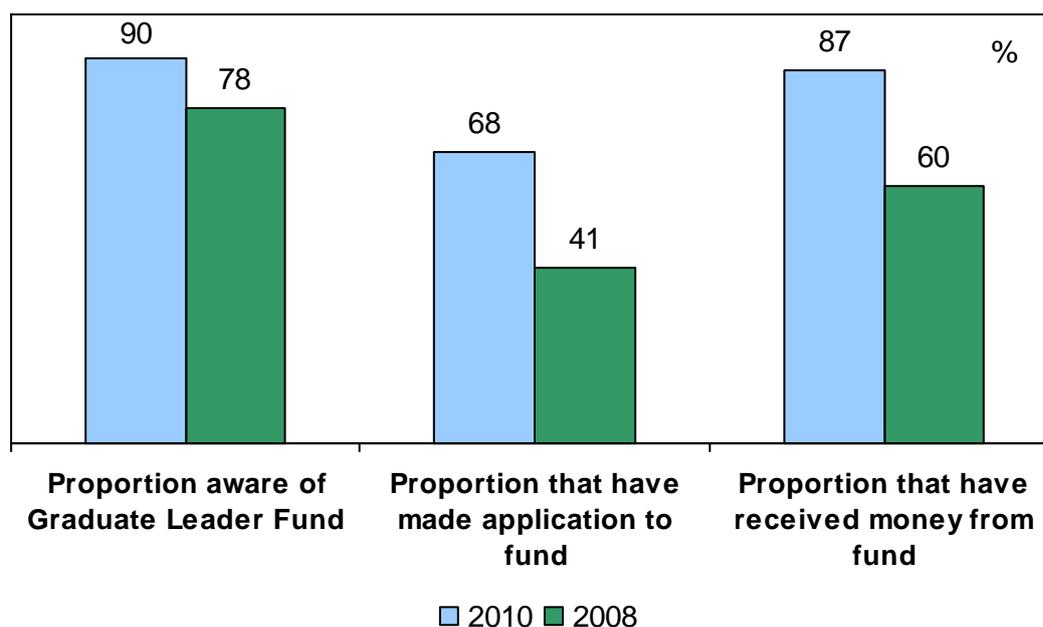
	Childminders		Nursery schools		Primary schools with nursery and reception classes		Primary schools with reception but no nursery classes	
	2010	2008	2010	2008	2010	2008	2010	2008
Too little	13%	13%	10%	9%	10%	10%	9%	9%
About right	79%	76%	88%	89%	86%	86%	88%	86%
Too much	6%	10%	*	*	1%	1%	1%	1%
Don't know	2%	2%	2%	2%	4%	3%	2%	4%

Base: All childminders who had received training in last 12 months 2010, 2008. All early years providers 2010, 2008.

7.5 Graduate Leader Fund

The Graduate Leader Fund superseded the Transformation Fund in April 2008 and was still active at the time of the 2010 survey. Its purpose was to improve the quality of the early years (and childcare) provision by increasing the level of graduates or Early Years Professional (EYP) within private, voluntary and independent sector full day care childcare settings.⁷⁸

Chart 7.1 Awareness of, applications to and awards made by the Graduate Leader Fund



Base: All full day care 2010/2008

Base: All full day care aware of Graduate Leader Fund 2010/2008

Base: All full day care that applied for money 2010/2008

⁷⁸ The Graduate Leader Fund (GLF) has subsequently been discontinued and, in its place, there are now Quality Supplement payments available through the Early Years Single Funding Formula.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

All full day care settings were asked whether they had heard of the Graduate Leader Fund, to which nine in ten respondents (90 per cent) said that they had heard of the scheme (an increase from 78 per cent in 2008). There was relatively little variation in the level of awareness by region, with the highest levels being seen in Yorkshire and Humberside and the South East (93 per cent for both) and the lowest level in the North West (87 per cent).

Large full day care providers (with 40 or more children attending) were more likely to say they had heard of the Graduate Leader Fund than the smaller providers with less than 40 children (92 per cent compared with 86 per cent).

Seven in ten (68 per cent) respondents who had heard of the Graduate Leader Fund said the full day care setting they worked in had applied for money via the scheme – an increase from 41 per cent in 2008. There was some variation by region, with settings in Yorkshire and Humberside most likely to have applied for funding (75 per cent) and settings in the East Midlands least likely to have done so (60 per cent). Settings in the 30 per cent most deprived areas were more likely than settings in the 70 per cent least deprived areas to have applied for funding (73 per cent compared with 67 per cent). The larger settings (with 40 or more children), as well as having higher awareness of the fund, were more likely to have applied for funding than was the case for smaller settings (73 per cent versus 60 per cent).

Respondents were also asked whether they had received any money from the fund. Almost nine in ten (87 per cent) respondents whose settings had applied to the fund had received money from it, compared to only 60 per cent in 2008. Respondents who had not received funding from the scheme were asked why this was the case. A third (32 per cent) of respondents said the reason they had not received the money was because they were still waiting for a decision (compared to 48 per cent in 2008 – perhaps an indication that the speed of application handling improved over time). Three in ten (29 per cent) respondents said they had been accepted but had not yet received the money and a fifth (22 per cent) of respondents that they had been turned down.

Respondents who had not heard of the Graduate Leader Fund, or who had heard of the scheme but not applied for money through it, were asked whether they had received any other funding from a Local Authority to help employ someone with Early Years Professional Status. Nine per cent of respondents had received such funding (very similar to the level seen in 2008) and once again there was some variation by region. Full day care settings in the North East were most likely to have received other Local Authority funding (16 per cent) while settings in Yorkshire and Humberside were least likely (three per cent).

Settings which had not received any such funding from a Local Authority were asked how interested they would be in applying for money to help train up an existing member of staff to Early Years Professional Status or to recruit someone with this qualification. Four-fifths (80 per cent) said that they would be interested, with 46 per cent very interested and 34 per cent fairly interested. The level of interest varied by region, with London most likely to be very interested (62 per cent) and the South West least likely to be very interested (34 per cent). For-profit organisations were also more likely to say they were very interested than not-for-profit organisations (51 versus 41 per cent respectively). Settings within the 30 per cent most deprived areas were more likely to say they were very interested than providers in the 70 per cent least deprived areas (55 versus 44 per cent respectively).

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

8. Recruitment and retention

This chapter discusses recruitment and retention within the childcare and early years sectors. It focuses on staff vacancies, the level of recruitment by each type of provider, the recruitment level by staff type, methods of recruitment, problems with recruitment, the time taken for providers to fill vacancies, length of service and staff losses. The questions in this chapter were not asked in the shortened questionnaire which was used in 2009 – as such, all historical comparisons are made with the 2008 data point and with the preceding years.

8.1 Staff vacancies

Table 8.1 shows the number of staff vacancies for all childcare provider types and the proportion of providers actively trying to recruit.

Full day care settings in children's centres were the most likely childcare provider to be actively recruiting (23 per cent), followed by full day care in general (18 per cent). Sessional providers were least likely to be actively recruiting (eight per cent). Across all childcare provider types there has been a slight decline in the proportion of providers reporting that they are actively recruiting since 2008, with the overall total falling from 20 per cent in 2008 to 14 per cent in 2010. The largest decrease was for children's centres, where the proportion actively trying to recruit fell from 40 per cent to 23 per cent over this period. The total number of staff vacancies fell from 11,700 to 9,600 between 2008 and 2010.

Table 8.1 Number of childcare staff vacancies and proportion of providers actively recruiting						
	Full day care	Full day care in children's centres	Sessional	After school clubs	Holiday clubs	Total
	No.	No.	No.	No.	No.	No.
Senior managers	350	30	60	250	300	950
Supervisory staff	2,300	150	350	600	700	4,000
Other paid staff	2,200	200	450	750	1,200	4,700
Total	4,900	400	900	1,600	2,200	9,600
<i>Base: Module B childcare providers actively trying to recruit 2010</i>						
Proportion actively trying to recruit	18%	23%	8%	11%	17%	14%
<i>Base: Module B childcare providers 2010.</i>						

As shown in table 8.2, the proportion actively recruiting in nursery schools (15 per cent) was higher than both primary schools with nursery and reception classes (eight per cent) and primary schools with reception but no nursery classes (six per cent). The proportion of early

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

years providers actively recruiting had fallen for all three types of setting since 2008, with the overall proportion declining from 13 per cent in 2008 to seven per cent in 2010.

	Nursery schools		Primary schools with nursery and reception classes		Primary schools with reception but no nursery classes		Total	
	2010	2008	2010	2008	2010	2008	2010	2008
	No.	No.	No.	No.	No.	No.	No.	No.
Head teachers	10	10	40	100	40	100	90	250
Qualified early years teachers	20	50	200	400	150	250	400	700
Nursery nurses	20	50	80	350	40	30	150	450
Other paid early years support staff	20	50	150	300	150	400	300	700
Total	70	150	500	1,100	350	800	950	2,100
<i>Base: Early years providers actively trying to recruit 2010, 2008.</i>								
Proportion actively trying to recruit	15%	24%	8%	15%	6%	11%	7%	13%
<i>Base: Early years provision in maintained schools 2010, 2008.</i>								

8.2 Level of recruitment

The number of staff recruited in the twelve months prior to the survey is shown in table 8.3a (childcare providers) and table 8.3b (early years providers) for each specific type of provider.

Across most childcare providers between 2008 and 2010 there was a decrease in the number of staff recruited, with the exception of after school clubs where the figures increased (though these may have been impacted by the change in sampling approach in 2010, with the increase in the estimated number of after school club providers serving to boost the estimate of recruited staff numbers).

In 2010, 36,400 members of staff were recruited at full day care providers (down from 41,000 in 2008) with an average of two members of staff recruited per setting (again, a decrease from the average of three per setting that was seen in 2008). Within full day care in children's centres 1,500 staff were recruited in 2010 (an average of two members of staff per setting).

Among sessional providers an average of one member of staff was recruited per setting, with 8,600 members of staff recruited overall in 2010 (down from 10,200 in 2008).

The number of holiday club staff recruited in 2010 was 15,700. This was a slight decrease from 2008 (16,000) despite the number of providers increasing. Again the change in sampling may have impacted on this data but, if anything, it would have served to increase the estimated number of recruited staff, so this decline in recruitment appears to be genuine (and, if anything, an under-estimate of the true scale of the fall). There was an average of two members of staff recruited per holiday club setting in 2010.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

	2010		2008		2007		2006	
	No.	Average per setting	No.	Average per setting	No.	Average per setting	No.	Average per setting
Full day care	36,400	2	41,000	3	37,400	2	29,600	2
<i>Full day care in children's centres</i>	1,500	2	2,900	3	3,800	3	2,700	4
Sessional	8,600	1	10,200	1	9,500	1	10,500	1
After school clubs	13,700	1	12,000	1	17,400	2	11,400	2
Holiday clubs	15,700	2	16,000	2	16,000	3	20,600	3

Base: Module B childcare providers 2010, 2008, 2007, 2006.

	2010		2008	
	No.	Average per setting	No.	Average per setting
Nursery schools	650	2	800	2
Primary schools with nursery and reception classes	8,900	1	8,500	1
Primary schools with reception but no nursery classes	5,200	1	5,300	1

Base: Early years provision in maintained schools 2010, 2008.

Table 8.3b shows the number of staff recruited in early years providers. There was a slight decrease between 2008 and 2010 in the number of staff recruited in nursery schools (from 800 to 650 staff members). The figures for primary schools with reception but no nursery classes remained very stable between 2008 and 2010 (5,300 and 5,200 respectively). The number of staff recruited in primary schools with reception but no nursery classes increased slightly from 8,500 in 2008 to 8,900 in 2010.

Tables 8.4 and 8.5 display the proportion of childcare and early years providers that recruited at least one member of staff, as well as showing the total number of staff recruited by each staff type.

⁷⁹ Table 8.3b excludes the recruitment of Headteachers/early years co-ordinators for both 2008 and 2010. This question was not asked in 2010 and therefore has been excluded from both years to ensure comparability.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

The proportion of settings recruiting senior managers had decreased slightly for most childcare provider types. In full day care settings in 2010 there had been a decrease to eight per cent (around 1,300 people) compared with 10 per cent (1,400 people) in 2008. Full day care within children's centres had decreased to 11 per cent (around 80 people) in 2010 compared with 15 per cent in 2008 (150 people).

For sessional providers the proportion recruiting senior managers had remained at five per cent between 2008 and 2010. Within out of school providers, the proportion of after school clubs recruiting senior managers in 2010 had decreased to eight per cent from 10 per cent in 2008 and in holiday clubs the proportion fell to eight per cent from 12 per cent in the same period.

In so far as concerns the recruitment of supervisor level staff, the decreases in 2010 were more pronounced for full day care settings (46 per cent in 2010, down from 54 per cent in 2008). Full day care settings based in children's centres saw a larger decrease still (55 per cent, down from 68 per cent). The proportion of settings recruiting supervisor level staff remained stable in the other childcare settings.

Recruitment of other paid support staff in full day care settings was also lower in 2010 than in 2008, with the proportion of full day care settings recruiting at this level decreasing from 71 per cent to 64 per cent. Full day care settings in children's centres saw a fall from 66 per cent to 56 per cent, while sessional providers dropped from 52 per cent to 42 per cent. The proportion of after school and holiday clubs recruiting at this level was more stable.

Table 8.4 Proportion of childcare providers that have recruited and number of staff recruited, by staff type

	Full day care		<i>Full day care in children's centres</i>		Sessional		After school clubs		Holiday clubs	
	%	No.	%	No.	%	No.	%	No.	%	No.
Senior managers	8%	1,300	11%	80	5%	400	8%	750	7%	550
Supervisors	46%	15,400	55%	800	32%	4,100	39%	6,400	43%	6,700
Other paid support staff	64%	19,800	56%	650	42%	4,000	55%	6,700	61%	8,500

Base: Module B childcare providers 2010, senior managers 2010

Across all early years providers the proportion recruiting qualified early years teachers had increased slightly from 2008. For nursery schools it rose from 38 to 43 per cent, for primary schools with nursery and reception classes from 42 to 48 per cent and for primary schools with reception but no nursery classes from 27 to 32 per cent.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

	Nursery schools		Primary schools with nursery and reception classes		Primary schools with reception but no nursery classes	
	%	No.	%	No.	%	No.
Qualified early years teachers	43%	200	48%	3,900	32%	2,200
Qualified nursery nurses	35%	250	28%	2,100	16%	900
Other paid early years support staff	44%	200	41%	2,900	30%	2,100

Base: Early years provision in maintained schools 2010

8.2.1 Recruitment rates

Table 8.6a and 8.6b show the average recruitment rates for all childcare and early years providers. The recruitment rate gives the number recruited as a proportion of all those who would have been employed at the beginning of the twelve-month period covered by the survey. If no new staff have been recruited then the recruitment rate will be equal to zero, regardless of the number of leavers.⁸¹

Across all childcare providers, recruitment rates had fallen in 2010 – perhaps an indication of staff in this sector being more inclined to stay in their current positions rather than changing jobs in difficult economic times. Out of school providers had the highest recruitment rates, with holiday clubs at 36 per cent and after school clubs at 30 per cent.

	2010	2008	2007	2006	2005
Full day care	27%	42%	38%	22%	37%
<i>Full day care in children's centres</i>	24%	42%	42%	36%	N/A
Sessional	19%	24%	27%	19%	21%
After school clubs	30%	40%	64%	26%	N/A
Holiday clubs	36%	49%	60%	46%	N/A

Base: Module B childcare providers 2010, 2008, 2007, 2006, 2005.

There were no marked differences in the recruitment rates amongst early years providers between 2008 and 2010. The recruitment rate for both nursery schools and primary schools

⁸⁰ Table 8.5 excludes the recruitment of Headteachers/early years co-ordinators as this question was not asked in 2010.

⁸¹ For a full explanation of how the recruitment rate is calculated please see the Technical Report.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

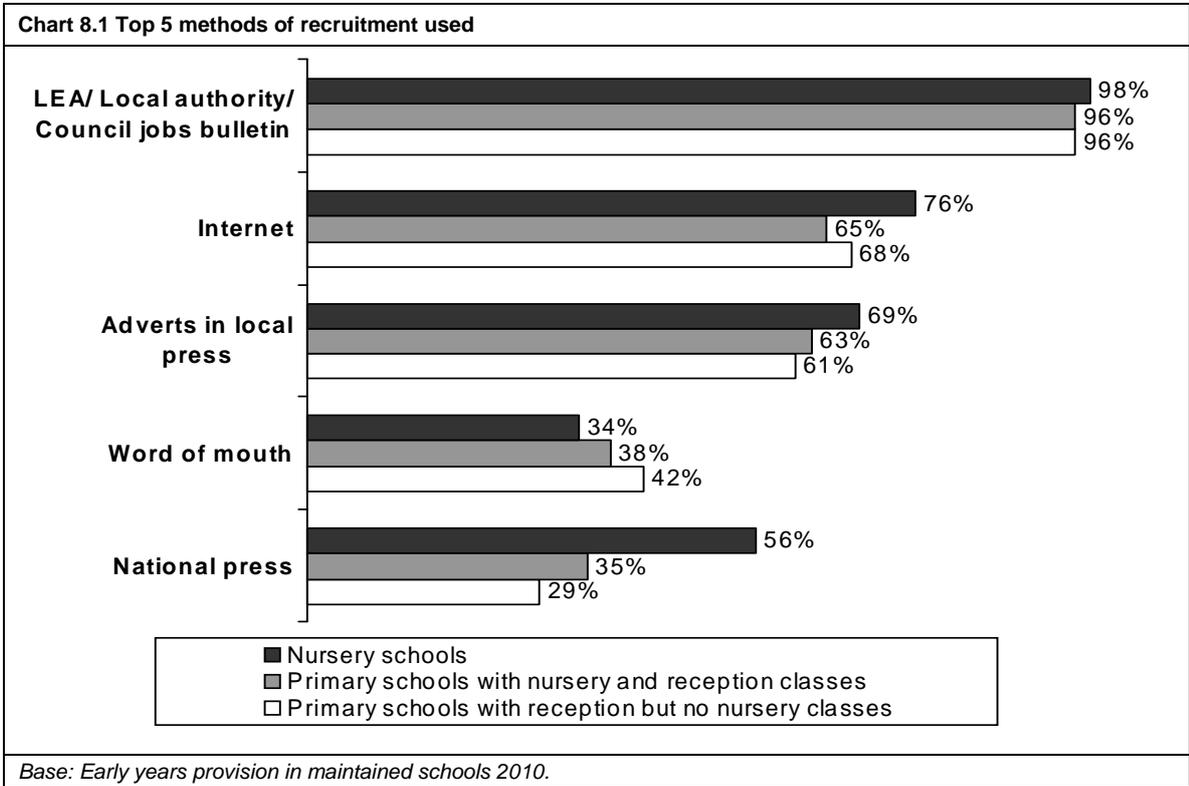
with reception but no nursery classes was 14 per cent, while it was slightly higher for primary schools with reception and nursery classes at 18 per cent.

	2010	2008
Nursery schools	14%	16%
Primary schools with nursery and reception classes	18%	18%
Primary schools with reception but no nursery classes	14%	16%

Base: Early years provision in maintained schools 2010, 2008

8.3 Recruitment methods

Early years providers in maintained schools⁸³ were asked which methods, if any, they used for recruiting staff. Chart 8.1 shows the top five methods of recruitment used by providers.



⁸² The recruitment rate in Table 8.6b excludes the recruitment of Headteachers/early years co-ordinators for both years as this question was not asked in 2010.

⁸³ These questions were not asked of childcare providers.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

As has been the case in previous years, nearly all early years providers reported using LEA/local authority/council jobs bulletins in 2010 (98 per cent of nursery schools, 96 per cent of primary schools with nursery and reception classes and 96 per cent of primary schools with reception but no nursery classes in 2010 compared to 98, 95 and 94 per cent respectively in 2008).

The second most widely used method to recruit staff was the internet (76 per cent of nursery schools, 65 per cent of primary schools with nursery and reception classes and 68 per cent of primary schools with reception but no nursery classes in 2010 compared to 68, 64 and 67 per cent respectively in 2008). For all early years providers, the internet is now the second most regularly used method of recruitment, overhauling advertisements in the local press which were the second most popular recruitment channel in 2008.

Adverts in the local press were the third most commonly used method to recruit staff in 2010, though the proportion of early years providers using this medium has decreased significantly since 2008 (used by 69 per cent of nursery schools, 63 per cent of primary schools with nursery and reception classes and 61 per cent of primary schools with reception but no nursery classes in 2010 compared to 82, 73 and 73 per cent respectively in 2008).

Comparing 2008 and 2010, as well as the differences mentioned above, there has been a fall in the proportion of all early years providers using the national press and in the proportion using word of mouth to recruit staff. This applies to all three early years settings; nursery schools (from 57 to 56 per cent and from 41 to 34 per cent respectively); primary schools with reception and nursery classes (from 40 to 35 per cent and from 45 to 38 per cent respectively); and primary schools with reception but no nursery classes (from 35 to 29 per cent and from 51 to 42 per cent).

8.4 Problems with recruitment

Early years providers⁸⁴ were asked to what extent they had experienced difficulty in recruiting paid staff over the twelve months prior to when the survey was conducted. Nursery schools were most likely to report that they had experienced either a fair amount or a great deal of difficulty (14 per cent), followed by primary schools with nursery and reception classes (seven per cent) and primary schools with reception but no nursery (four per cent). These proportions were similar to those seen in 2008, though both nursery schools and primary schools with nursery and reception classes showed a directional decrease.⁸⁵

⁸⁴ These questions were not asked of childcare providers.

⁸⁵ A 'directional decrease' whilst not statistically significant, may serve as an early indicator of a new trend. Comment has only been passed on non-significant changes in cases where it is felt that they could be early indicators of future change.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

	Nursery schools		Primary schools with nursery and reception classes		Primary schools with reception but no nursery classes	
	%	No.	%	No.	%	No.
A great deal	6%	20	3%	200	1%	70
A fair amount	8%	30	4%	300	3%	250
Not very much	11%	50	9%	600	5%	400
Not at all	55%	200	60%	4,100	55%	4,700
Not applicable/haven't tried recruiting	19%	80	23%	1,500	36%	3,100
Don't know	1%	0	*	20	*	30

Base: Early years provision in maintained schools 2010.

8.4.1 Type of staff that settings had difficulty recruiting

Early years providers⁸⁶ who experienced difficulties recruiting paid staff were then asked which types of staff they have had difficulty recruiting. The base sizes for this question were small, meaning that it was not possible to report on nursery schools and primary schools with reception but no nursery classes.⁸⁷

For primary schools with nursery and reception classes they most commonly experienced difficulty trying to recruit qualified early years teachers (71 per cent). Twenty-seven per cent had difficulty recruiting nursery nurses, a fifth (21 per cent) senior managers, and around one in ten had difficulty in recruiting support staff for children with special needs (12 per cent).

8.4.2 Types of difficulties

Early years providers⁸⁸ who had experienced difficulty recruiting early years staff were also asked about the types of problems which they had encountered. Again caution must be taken with these results due to small base sizes⁸⁹ and unfortunately, once again, the base sizes of both nursery schools and primary schools with reception but no nursery classes are too small to report on.

As in 2008, the most common difficulties primary schools with nursery and reception classes encountered when recruiting staff was with the number of applicants. Two-fifths (39 per cent) reported that there were 'too few applicants', 36 per cent reported 'no qualified applicants' and 33 per cent that there were 'too few applicants with the right experience'. This was

⁸⁶ These questions were not asked of childcare providers.

⁸⁷ 26 nurseries, 53 primary schools with nursery and reception classes and 30 primary schools with reception but no nursery classes reported having difficulty recruiting staff.

⁸⁸ These questions were not asked of childcare providers.

⁸⁹ 26 nurseries, 53 primary schools with nursery and reception classes and 30 primary schools with reception but no nursery classes reported having difficulty recruiting staff

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

followed by 'candidates wanting different hours to those offered' (three per cent) and 'location' (two per cent).

8.5 Time taken to fill vacancies

In early years providers⁹⁰ where there were no current vacancies, respondents were asked how long it took on average to fill a vacancy, results are shown in table 8.8 and are relatively similar to those in 2008.

In general nursery schools tended to take longer to fill vacancies than either of the primary schools settings. Only around a quarter of nursery schools (23 per cent) expected to fill vacancies within a month, compared to around four in ten of each of the primary school settings which held this expectation.

	Nursery schools			Primary schools with nursery and reception classes			Primary schools with reception but no nursery classes		
	2010	2008	2007	2010	2008	2007	2010	2008	2007
Within one month	23%	24%	24%	40%	37%	33%	41%	40%	43%
Between one and two months	53%	54%	49%	48%	45%	49%	46%	42%	43%
Three months or longer	21%	14%	21%	8%	9%	10%	7%	8%	6%

Base: All early years providers who do not currently have any vacancies for which they are actively trying to recruit 2010, 2008, 2007.

⁹⁰ These questions were not asked of childcare providers.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

8.6 Average length of service

The average length of service of staff working in childcare providers is shown in table 8.9.⁹¹

	2010	2008	2007	2006
Full day care	5 years and 8 months	4 years and 9 months	4 years and 3 months	5 years and 2 months
<i>Full day care in children's centres</i>	4 years and 10 months	<i>4 years and 5 months</i>	<i>3 years and 6 months</i>	<i>3 years and 10 months</i>
Sessional	6 years and 10 months	6 years and 3 months	6 years and 2 months	6 years and 6 months
After school clubs	5 years	4 years and 2 months	3 years and 9 months	4 years and 4 months
Holiday clubs	5 years and 3 months	4 years	4 years	4 years and 3 months

Base: All paid childcare staff 2010, 2008, 2007, 2006.

As in previous years, sessional providers continued to have the longest average length of service among the childcare providers (at six years and ten months). Full day care settings in children's centres continued to have the shortest average length of service (at four years and ten months), though this is likely to be connected with the fact that many children's centres have been opened relatively recently.

Among all childcare providers the average length of service had increased from 2008. The change in sampling method should again be borne in mind when it comes to comparing the 2010 data with the 2008 data – particularly for after school and holiday clubs.

Table 8.10 shows the proportion of childcare staff in each length of service. As was the case in 2008, sessional settings have proportionally more staff with 10 or more years of experience than any of the other childcare (22 per cent). Holiday clubs were the least likely to have very new members of staff, with only five per cent of their workforce having been with them for less than a year.

⁹¹ This question was not asked of early years providers in 2010. The question relates to the length of service in the specific setting rather than length of service in the childcare sector overall.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

	Less than a year	Between 1 and 5 years	Between 5 and 10 years	Between 10 and 15 years	More than 15 years
Full day care	13%	45%	26%	8%	6%
<i>Full day care in children's centres</i>	11%	60%	17%	4%	5%
Sessional	13%	37%	26%	10%	12%
After school clubs	18%	46%	22%	7%	4%
Holiday clubs	5%	48%	21%	8%	4%

Base: All paid childcare staff 2010

8.7 Annual staff losses

As shown in table 8.11, the number of nursery schools which had seen at least one member of staff leave in the preceding 12 months had increased from 38 per cent in 2008 to 49 per cent in 2010, the absolute number of staff leaving nursery settings (see table 8.12) remained stable at 300.

After school clubs saw a fall from 66 per cent to 41 per cent in the number experiencing staff departures and, whilst the change in sampling approach must be considered, it does appear that there has been a genuine decrease in the proportion of such settings experiencing departures. The total number of departures in after school clubs has increased from 5,600 in 2008 to 6,900 in 2010, though this is partly driven by the increase in the total number of such settings recorded under the new sampling method.

⁹² This question was not asked of early years providers in 2010

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

	2010	2008	2007	2006
Full day care	59%	63%	62%	62%
<i>Full day care in children's centres</i>	54%	64%	61%	57%
Sessional	44%	40%	40%	38%
After school clubs	41%	66%	48%	48%
Holiday clubs	52%	54%	53%	54%
Nursery schools	49%	38%	33%	45%
Primary schools with nursery and reception classes	33%	27%	28%	24%
Primary schools with reception but no nursery classes	21%	17%	17%	14%

Base: All paid childcare staff (module B) 2010, 2008, 2007, 2006. All paid early years staff 2010, 2008, 2007, 2006.

Table 8.12 shows the number of annual staff losses and the average annual number of staff losses per setting.

	Total number of staff losses	Average number of staff losses per setting
Full day care	20,200	1
<i>Full day care in children's centres</i>	750	1
Sessional	5,400	1
After school clubs	6,900	1
Holiday clubs	7,900	1
Nursery schools	300	1
Primary schools with nursery and reception classes	2,700	*
Primary schools with reception but no nursery classes	2,100	*
Total	45,600	1

Base: All paid childcare staff (module B) 2010. All paid early years staff 2010.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Table 8.13 displays the average turnover rate for all childcare and early years providers. The turnover rate gives the number of staff that have left as a proportion of all staff who would have been employed at the start of the twelve month period covered by the survey. If no staff have left their employment, the turnover rate will be zero. If staff have left yet none have been recruited, the turnover rate will fall.⁹³

Out of school providers had the highest turnover rates of all providers, with holiday clubs experiencing a 14 per cent turnover rate and after school clubs a 13 per cent rate. These were followed by full day care (12 per cent) and sessional care (11 per cent). Turnover rates for the majority of childcare providers had fallen slightly since 2008.

As in previous years the lowest turnover rates were to be found amongst the three early years settings, at around six per cent each – a level very similar to that seen in 2008.

Table 8.13 Turnover rate for childcare and early years providers					
	2010	2008	2007	2006	2005
Full day care	12%	16%	15%	13%	17%
<i>Full day care in children's centres</i>	8%	13%	11%	11%	N/A
Sessional	11%	11%	11%	10%	11%
After school clubs	13%	15%	23%	15%	N/A
Holiday clubs	14%	23%	22%	22%	N/A
Nursery schools	6%	6%	5%	8%	N/A
Primary schools with nursery and reception classes	6%	5%	6%	5%	N/A
Primary schools with reception but no nursery classes	5%	5%	5%	6%	N/A
<i>Base: Module B childcare providers 2010, 2008, 2007, 2006, 2005. Early years provision in maintained schools 2010, 2008, 2007, 2006, 2005.</i>					

8.8 Destination of staff who left

Early years providers in maintained schools⁹⁴ who reported that staff had left their employment were asked where these staff had moved on to. Table 8.14 summarises this information - these results should be treated with a degree of caution due to the relatively low base sizes⁹⁵ (as well as the fact that the onward destination of some leavers was unknown).

⁹³ For a full explanation of how the turnover rate is calculated please refer to the Technical Report.

⁹⁴ These questions were not asked of childcare providers.

⁹⁵ 95 nurseries, 154 primary schools with reception but no nursery classes and 256 primary schools with reception and nursery classes.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Across the three early year providers, similar proportions reported that the staff who had left were still working in the childcare or early education sector (57 per cent of staff from nursery schools, 55 per cent of staff from primary schools with nursery and reception classes and 50 per cent of staff from primary schools with reception but no nursery classes). This marks a decrease from the levels seen in 2008.

It is striking that the proportion of providers reporting that staff had left with no other job to go to had increased for all three early years settings. In nursery schools this proportion had risen from 27 per cent in 2008 to 40 per cent in 2010, in primary schools with nursery and reception classes it rose from 25 per cent to 32 per cent; and in primary schools with reception but no nursery classes the proportion increased from 15 per cent to 31 per cent.⁹⁶

Table 8.14 Proportion of early years providers that have had staff leave their job to work in specific sectors

	Nursery schools‡				Primary schools with nursery and reception classes				Primary schools with reception but no nursery classes			
	2010	2008	2007	2006	2010	2008	2007	2006	2010	2008	2007	2006
Left to work elsewhere in childcare and early years sector	57%	64%	59%	62%	55%	61%	60%	55%	50%	57%	54%	46%
Left to work outside the childcare and early years sector	5%	11%	11%	16%	9%	11%	11%	14%	8%	18%	11%	23%
Left without obtaining another job	40%	27%	31%	16%	32%	25%	22%	19%	31%	15%	25%	27%

Base: All early years providers who have at least one member of staff leave in the previous 12 months 2010, 2008, 2007, 2006.

8.9 Employment growth rate

Table 8.15 shows the average employment growth rates for all childcare and early years providers. The employment growth rate gives the number of additional staff recruited as a proportion of those employed at the start of the twelve-month period covered by the survey. If the number of staff that left was equal to the number of staff recruited then the employment growth rate will be zero. If more staff have been recruited than the number who left, then the employment growth rate will be greater than zero. If a larger number of staff have left than were recruited the employment growth rate will be negative.⁹⁷

All provider types had experienced a drop in the growth rate between 2008 and 2010, with the exception of the two primary school settings and the holiday clubs, which remained essentially stable over this period. However, there was still a positive growth rate for all

⁹⁶ The question wording is 'How many paid early years staff (qualified and unqualified), not including agency, freelance or supply staff, have left your employment in the past 12 months?'. As such, it should capture those made redundant as well as those leaving voluntarily.

⁹⁷ For a full explanation of how the employment growth rate is calculated please refer to the Technical Report.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

providers. Full day care in children's centres experienced the biggest decline from 2008 to 2010 (from 33 to 16 per cent). The growth rate of full day care in general had also decreased over the same period (27 to 15 per cent).

Out of school providers had the highest employment growth rate of all of the childcare provider types, albeit lower than that in 2008. In 2010 holiday clubs had an employment growth rate of 23 per cent and for after school clubs it was 18 per cent (again, the change in sampling method should be considered when looking at these results).

Sessional providers had the lowest employment growth rates (nine per cent) of all the childcare providers and had seen a decline from 14 per cent in 2008.

Primary schools with nursery and reception classes had the highest growth rate amongst the early years settings (20 per cent, compared to 13 per cent for primary schools with reception but no nursery classes and 12 per cent for nursery schools).

	2010	2008	2007	2006	2005
Full day care	15%	27%	23%	10%	20%
<i>Full day care in children's centres</i>	16%	33%	31%	25%	N/A
Sessional	9%	14%	16%	9%	8%
After school clubs	18%	25%	41%	11%	N/A
Holiday clubs	23%	26%	37%	23%	N/A
Nursery schools	12%	16%	16%	17%	N/A
Primary schools with nursery and reception classes	20%	19%	20%	17%	N/A
Primary schools with reception but no nursery classes	13%	15%	16%	17%	N/A
<i>Base: Module B childcare providers 2008, 2007, 2006, 2005. Early years provision in maintained schools 2010, 2008, 2007, 2006.</i>					

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

9. Income and expenditure

This chapter discusses childcare providers' incomings and outgoings, including average fees charged, providers' total average income, profitability, and the proportion of places which need to be filled for providers to break even.

This chapter applies to childcare settings only; these questions are not asked of early years providers in maintained settings, as they do not charge parents fees.

9.1 Deposits or registration fees

Childcare providers⁹⁸ were asked whether they charged a deposit and whether they charged a registration fee. Since 2007 the questions relating to deposits and registration fees have been asked separately. Previously these questions were asked in a different way, meaning comparisons with years prior to 2007 are not possible.

The proportions of providers that charged these fees, along with amounts charged, are set out below in tables 9.1a and 9.1b.

	Full day care			<i>Full day care in children's centres</i>			Sessional		
	2010	2008	2007	2010	2008	2007	2010	2008	2007
Proportion of providers who charged a deposit	48%	52%	48%	40%	38%	39%	25%	21%	18%
Proportion of providers who charged a registration fee	33%	33%	29%	11%	14%	15%	21%	21%	22%
Average deposit charged	£84	£88	£62	£112†	£87†	£54†	£47	£42	£32
Average registration fee charged	£35	£32	£35	†	†	†	£22	£14	£12

Bases: Module B childcare providers 2010, 2008, 2007. Module B providers who charge a deposit 2010, 2008, 2007. Module B providers who charge a registration fee 2010, 2008, 2007.

⁹⁸ NB to reduce interview length, the sample was split into two roughly equal groups which answered differing sets of questions at certain points in the questionnaire. Specific questions relating to financial matters were generally asked only of those respondents allocated to either one or the other of these two groups ('module A' respondents or 'module B' respondents). The two groups have similar profiles, avoiding the risk of skews being introduced – however, it does mean that the base sizes for the financial questions were, generally speaking, lower than for those on other topics. See Appendix 2 for full details of base sizes.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Table 9.1b Proportion of providers who charged a deposit, registration fees and average deposits and registration fees charged									
	After school clubs			Holiday clubs			Childminders		
	2010	2008	2007	2010	2008	2007	2010	2008	2007
Proportion of providers who charged a deposit	18%	18%	17%	33%	29%	24%	36%	30%	30%
Proportion of providers who charged a registration fee	22%	18%	16%	23%	21%	18%	1%	1%	1%
Average deposit charged	£44	£42	£32	£54	£37	£48	£98⁹⁹	£90	£83
Average registration fee charged	£17	£13	£14	£24	£16	£21	†	†	†

Bases: Module B childcare providers 2010, 2008, 2007. All module B providers who charge a deposit 2010, 2008, 2007. All module B providers who charge a registration fee 2010, 2008, 2007.

Among those who did charge a deposit, between 15 per cent and 33 percent of all types of provider were unwilling or unable to say how much the deposit was (with the exception of sessional providers, where only six per cent were unable or unwilling to do so). As such, data on average deposits should be treated with caution.

As in 2007 and 2008, full day care providers were the most likely group to charge a deposit and the most likely to charge a registration fee. Approximately half (48 per cent) of full day care providers charged a deposit in 2010 and a third (33 per cent) charged a registration fee. Childminders were the only group to show a significant change in the proportion charging a deposit; 36 per cent in 2010 compared to 30 per cent in 2008.

For-profit organisations were more likely to charge a deposit or registration fee than not-for-profit organisations, with the exception of full day care providers in children's centres where there was no significant difference (though the low base size for this provider group means these figures should be treated with caution). Where base sizes were large enough to allow analysis, it was apparent that for-profit organisations were also likely to charge a higher fee than their not-for-profit counterparts, both for registration and as a deposit.

⁹⁹ The mean value for those childminders charging a fixed rate deposit in 2010 was around £98. This is high considering that 44 per cent charged £50 or less. This indicates the mean value has been skewed by a few providers who charged high deposits and as such this figure should be treated with caution. For those providers who charged a proportion of the fee as a deposit instead of charging a fixed price, the average deposit was £45.

A similar pattern was seen in 2008 where the average fixed rate deposit was £90, with 50 per cent charging £50 or less. For those 2008 childminders who charged a proportion of the fee as a deposit instead of charging a fixed price, the average deposit was £51.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

	Full day care		<i>Full day care in children's centres</i>		Sessional		After school clubs		Holiday clubs	
	Profit	Not for profit	Profit	Not for profit	Profit	Not for profit	Profit	Not for profit	Profit	Not for profit
Proportion of providers who charged a deposit	61%	28%	34%‡	44%‡	31%	22%	26%	10%	38%	25%
Proportion of providers who charged a registration fee	37%	25%	6%‡	13%‡	21%	21%	22%	21%	27%	19%
Average deposit charged	£89	£65	†	†	†	£34	£52	£26	£58	£40
Average registration fee charged	£42	£20	†	†	†	£20	£22‡	†	£30	†

Bases: Module B childcare providers 2010. All module B providers who charge a deposit. All module B providers who charge a registration fee.

9.2 Fees

Data relating to fees was derived from a number of variables and may be prone to distortion. These figures should be used as an indicative guide only. All average fee data quoted exclude cases where respondents said they charged nothing, and exclude cases where the respondent could not or would not answer unless stated otherwise.¹⁰⁰

The extent to which providers vary their fees, the reasons for varying them, and the units in which fees are charged are reported below, shown by provider type.

	Full day care	<i>Full day care in children's centres</i>	Sessional	After school clubs	Holiday clubs	Childminders
2010	48%	48%	21%	34%	38%	34%
2008	53%	61%	20%	39%	39%	37%
2007	47%	60%	15%	34%	38%	36%
2006	53%	56%	15%	37%	40%	38%

Base: Module B childcare providers 2010, 2008, 2007. Module A childcare providers 2006. Childminders 2010, 2008, 2007, 2006.

The proportion of providers who varied their fees in 2010 was generally lower than the proportion who did so in 2008, particularly in the case of full day care providers in children's centres where the proportion decreased from 61 per cent to 48 per cent.

¹⁰⁰ For details of how fees data was derived, please see the Technical Report.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Full day care providers in general, as well as those based in children's centres, were the two groups most likely to vary their fees from child to child, with 48 per cent of each doing so in 2010. Sessional providers remained the least likely group to vary their fees, with one fifth (21 per cent) saying they did this.

Eighty one per cent of full day care providers who varied their fees said they did so based on the age of the child. After school clubs were the least likely to cite child age as the basis for fee variation, with 16 per cent giving this as a reason. Along with childminders, after school clubs were the most likely group to vary fees based on the number of siblings enrolled at the setting (68 per cent of after schools clubs and 67 per cent of childminders).

Sessional providers showed a more even spread of reasons for varying fees, with age of child the most popular reason (53 per cent), followed by the number of siblings enrolled (37 per cent) and the number of hours per week that a child attended (30 per cent).

The results for all providers are shown in table 9.4. They were broadly in line with the corresponding 2008 data, except for holiday clubs where there was a significant rise in the proportion of providers who varied their fees based on the age of the child and a fall in the number who did so based on the number of siblings enrolled and parental income. Due to changes in sampling method for this group between 2008 and 2010, these changes should be treated with caution.

	Full day care	Full day care in children's centres	Sessional	After school clubs	Holiday clubs	Childminders
Age of the child	81%	77%‡	53%	16%	51%	26%
Number of siblings enrolled	51%	36%‡	37%	68%	57%	67%
Number of hours per week	43%	60%‡	30%	45%	35%	39%
Whether in receipt of a local authority grant	28%	39%‡	29%	15%	19%	8%
Time of day	16%	13%‡	5%	11%	12%	25%
What the fees covered	13%	8%‡	8%	11%	10%	30%
Parent's income	7%	13%‡	14%	16%	10%	10%

Base: All module B childcare providers that vary fees 2010.

In most cases the units providers used to charge parents in 2010 were broadly similar to 2008.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

The most common unit used by full day care providers to charge parents was per half day or session (37 per cent), followed by per day (26 per cent) and per hour (23 per cent). Smaller proportions of full day care providers charged by the week (seven per cent), by the month (three per cent) or by the term (1 per cent). There was a similar pattern for full day care providers in children's centres, with 42 per cent charging by the half day or session, 27 per cent by the day and 20 per cent by the hour.

As expected, sessional providers remain the group most likely to charge by the session (70 per cent), but this has reduced from 87 per cent in 2008, with a greater proportion now charging by the hour; 18 per cent in 2010 compared to five per cent in 2008. Other units were rarely used, with only four per cent of sessional providers charging by the day, three per cent by the week and one per cent by the term. Two per cent said there was no charge for their services.

After school clubs were most likely to charge by the half day or session (68 per cent), followed by per hour (16 per cent) and per day (eight per cent). Only three per cent charged per week; the same proportion as said they charged no fee at all.

For holiday clubs the most common unit was per half day or session (38 per cent), closely followed by per day (31 per cent). Markedly less common was charging by the hour (15 per cent) or the week (eight per cent) or monthly (one per cent), while three per cent of holiday clubs charged nothing.

Eight in ten childminders (80 per cent) charged by the hour, with 13 per cent charging by the day, four per cent by the week, and just two per cent by the half day or session. These figures were virtually identical to those seen in 2008 and show that childminders remain the most flexible providers in terms of payment, with most of them allowing parents to pay for the actual hours of childcare they need rather than for fixed blocks of time.

9.2.1 Average fees charged

Table 9.5 shows the average hourly fees charged by each provider type, as well as detailing how fees vary according to the type of ownership. As in previous years, after school clubs and holiday clubs were not asked what hourly fees they charged.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

	Full day care		<i>Full day care in children's centres</i>		Sessional	
	2010	2008	2010	2008	2010	2008
Overall mean average hourly fee	£3.70	£3.50	<i>£4.10</i>	£3.30	£3.00	£2.30
Private	£4.00	£3.70	<i>†</i>	<i>†</i>	£3.40	£2.50
Voluntary	£3.20	£2.70	<i>†</i>	<i>†</i>	£2.90	£2.20
Local authority	£3.30†	£3.10†	£4.10†	£3.30	<i>†</i>	<i>†</i>
Schools/colleges	<i>†</i>	£3.80†	<i>†</i>	<i>†</i>	<i>†</i>	<i>†</i>
Other	<i>†</i>	<i>†</i>	<i>†</i>	<i>†</i>	<i>†</i>	<i>†</i>

Base: Module B childcare providers 2010, 2008

The average fees providers charged rose for all groups asked, regardless of ownership types, between 2008 and 2010. Full day care providers continued to charge more per hour (£3.70) than sessional providers (£3.00), but the gap narrowed in 2010. Full day care providers in children's centres charged £4.10 on average in 2010, an increase from £3.30 in 2008.

Childminders reported charging an average of £3.80 per hour; a small increase since 2008 when they reported charging £3.60.

Whilst small base sizes mean the figures should be treated as indicative only, it appears that private providers of both full day care and sessional care were likely to charge higher average hourly rates than organisations that were run on a voluntary basis.

9.2.2 Average fees in deprived areas

Table 9.6 shows average hourly fees split by level of deprivation.

	Full day care		<i>Full day care in children's centres</i>		Sessional		Childminders	
	2010	2008	2010	2008	2010	2008	2010	2008
Overall mean average hourly fee	£3.70	£3.50	£4.10	£3.30	£3.00	£2.30	£3.80	£3.60
30% most deprived areas	£3.50	£3.60	£4.00	£3.20	£2.50	£2.10†	£3.70	£3.70
70% least deprived areas	£3.80	£3.40	<i>†</i>	£3.50†	£3.10	£2.40	£3.80	£3.50

Base: Module B childcare providers 2010, 2008. Childminders 2010, 2008.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Average fees varied based on the deprivation level of the area in which a provider was based. In 2010 all provider types surveyed charged more if they were based in the 70 per cent least deprived areas than was the case for those based in the 30 per cent most deprived areas. In contrast, the 2008 data showed full day care providers and childminders in the 30 per cent most deprived areas charging marginally more than their counterparts in the 70 per cent least deprived areas.

Sessional providers showed the greatest variation in fees in 2010, with those in the 30% most deprived areas charging only £2.50 per hour, whilst those in the 70% least deprived areas charged £3.10.

9.2.3 Average fees by Government Office Region

Table 9.7 shows average hourly fees by Government Office Region (GOR). Low base sizes mean that table 9.7 should be used for indicative purposes only.

Full day care providers in London were the most expensive by some margin, charging well above the national average for one hour of childcare (£4.70 compared to the national average of £3.70). Full day care providers in the East Midlands and the West Midlands charged the lowest rate nationally.

The data suggests a similar pattern for sessional providers and childminders, with London clearly the most expensive region, followed by the South East and the East.

	Full day care	Full day care in children's centres	Sessional	Childminders
Overall mean average hourly fee	£3.70	£4.10	£3.00	£3.80
East Midlands	£3.20‡	†	£2.80‡	£3.20‡
East	£3.60	†	£3.10	£4.00
London	£4.70	†	£3.60‡	£4.70
North East	†	†	†	£3.30 ¹⁰¹
Yorkshire & Humberside	£3.50‡	†	£2.80‡	£3.30
North West	£3.50	†	£2.50‡	£3.30‡
South East	£3.80	†	£3.60	£4.10
South West	£3.60	†	£2.80‡	£3.70
West Midlands	£3.30	†	£2.60‡	£3.30‡

Base: Module B childcare providers 2010. Childminders 2010.

¹⁰¹ The North East and Yorkshire & Humberside were considered as a single region for Childminders, so these figures represent the combined average for those regions

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

9.2.4 Average fees by qualification of the senior manager

Table 9.8 shows the average hourly fee charged by settings, depending on whether their senior manager held a level six or above qualification or not.

	Full day care	Full day care in children's centres	Sessional
Overall mean average hourly fee	£3.70	£4.10	£3.00
Senior manager with Level 5 qualification or below	£3.70	£3.90†	£3.00
Senior manager with a level six or above qualification	£3.70	£4.30†	£3.00

Base: Module B childcare providers 2010. Childminders 2010.

Low base sizes mean that data in table 9.8 can only be used for indicative purposes, but it suggests that the qualification level of the senior manager has no significant impact on the fees charged. This is in line with findings from the 2008 survey.

9.2.5 Average fees for a child by age

Table 9.9 shows average hourly fees for a child by age and type of provider. It should be noted that the base sizes of fees for children aged 18 months are small for sessional providers and childminders, and these figures should therefore be viewed with caution.

	Full day care	Full day care in children's centres	Sessional	Childminders
Overall mean average hourly fee	£3.70	£4.10	£3.00	£3.60
Fees for a child aged 18 months	£4.10	£4.10	£3.10†	£3.20†

Base: Childcare providers and childminders who have children less than 2 years old enrolled and whose fees vary 2010.

Fees for a child aged 3 years old	£3.60	£4.00	£2.90	†
-----------------------------------	-------	-------	-------	---

Base: Childcare providers and childminders who have children aged 3 years old enrolled and whose fees vary 2010.

Due to low base sizes, only limited data was collected. However, as an indicative guide, the data suggests that all full day care and sessional providers charge higher fees for younger children, as has been the case in previous years.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

9.3 Changes to fees

Table 9.10 shows the proportion of childcare providers raising their fees over different timeframes. As per the footnote, changes to the timings of the survey mean that year on year comparisons for data relating to increased fees in the past six months should be treated with caution.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

	Full day care				<i>Full day care in children's centres</i>				Sessional				After school clubs				Holiday clubs				Childminders			
	2010	2008	2007	2006	2010	2008	2007	2006	2010	2008	2007	2006	2010	2008	2007	2006	2010	2008	2007	2006	2010	2008	2007	2006
Never changed fees	5%	4%	9%	2%	8%	13%	22%	19%	5%	8%	7%	1%	17%	10%	18%	6%	10%	7%	10%	8%	24%	24%	30%	31%
Increased fees in the last six months ¹⁰²	40%	34%	33%	33%	32%	44%	39%	39%	49%	17%	28%	19%	28%	27%	25%	26%	31%	33%	27%	31%	17%	16%	18%	17%
Increased fees in the last year	69%	76%	72%	76%	65%	66%	65%	66%	68%	57%	64%	61%	47%	63%	52%	61%	54%	59%	61%	63%	36%	37%	37%	35%
Increased fees in the last two years	88%	91%	86%	92%	84%	78%	72%	72%	84%	80%	84%	86%	72%	81%	73%	84%	77%	78%	80%	81%	60%	63%	57%	56%

Base: Module A childcare providers 2010, 2008, 2007, 2006. Childminders 2010, 2008, 2007, 2006.

¹⁰² The 2010 survey was conducted throughout the autumn term, meaning that any providers who increase their fees on an annual basis at the start of the academic year would all have fallen into the 'Increased fees in the last six months' category in 2010. They would not necessarily have done so in the 2008 survey, when interviewing began earlier in the year. As such, year on year comparisons for past six month increases will not yield directly comparable results.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

The proportion of full day care settings increasing their fees in the past 12 months was lower in 2010 than in 2008, though the majority did still increase the amount they were charging (69 per cent in 2010 compared to 76 per cent in 2008). A similar proportion of sessional providers had increased their fees in the past year (69 per cent), but holiday clubs (54 per cent), after school clubs (47 per cent) and childminders (36 per cent) were less likely to have raised their fees over the preceding 12 months.

9.4 Income from fees

Table 9.11 shows mean and median income from parent fees. These figures must be treated with caution due to the significant proportions who refused or were unable to provide fees data. These respondents have been excluded when averages have been calculated.¹⁰³ Any setting claiming not to charge fees was also excluded from the averages. The figures that are reported have been derived from a number of variables and therefore may be prone to distortion.¹⁰⁴ They should only be used as an indicative guide.

As has been the case in previous years, full day care settings of all types received by far the highest average annual income from fees, with full day care providers in children's centres receiving more than full day care providers generally. Sessional providers and childminders continued to receive the least income from fees, though the recorded fee income for sessional providers did increase significantly, from £14,400 in 2008 to £25,300 in 2010. Holiday club providers also showed a large increase since 2008 (but due to changes in sampling method the changes in the data for holiday and after school clubs, in particular, should be treated with caution). These figures largely reflect the differences between different types of provider in terms of the number of places they offer, their opening hours and the services that they offer.

	Full day care	Full day care in children's centres	Sessional	After school clubs	Holiday clubs	Childminders
Mean income from fees						
2010	£127,400	£172,800	£25,300	£50,200	£82,700	£11,100
2008	£167,000	£137,400	£14,400	£40,300	£45,700	£9,800
2007	£151,800	£138,100	£13,800	£31,500	£47,000	£8,700
2006	£133,500	£123,600	£14,900	£33,800	£42,200	£8,400
Median income from fees						
2010	£50,000	£150,800	£9,300	£26,500	£31,200	£9,700
2008	£120,000	£116,000	£7,500	£22,800	£19,300	£8,700
2007	£100,000	£118,300	£6,600	£19,900	£22,800	£7,700
2006	£96,000	£100,000	£5,200	£20,000	£18,000	£7,300
Base: Module A childcare providers providing fee income data 2010, 2008, 2007, 2006. Childminders providing fee income data 2010, 2008, 2007, 2006.						

¹⁰³ The following proportions of respondents did not provide fee data: 32 per cent of full day care providers; 40 per cent of full day care providers in children's centres; 21 per cent of sessional providers; 31 per cent of after school clubs; 40 per cent of holiday clubs; and 18 per cent of childminders.

¹⁰⁴ For information on the variables used please refer to the Technical Report.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

As in 2008, providers set up as for-profit organisations reported a higher income from fees than was reported by not-for-profit organisations. This applied to all care types with the exception of full day care providers operating in children's centres.

9.5 Awareness of childcare vouchers

The childcare voucher scheme is a government initiative that enables employers and/or parents to purchase tax-free vouchers with which to pay for childcare. Employers have to sign up to the scheme and providers are under no obligation to accept them. Parents are allowed to take up to £55 worth of childcare vouchers per week.¹⁰⁵

Table 9.12 shows that awareness of childcare vouchers remained high in 2010, ranging from 99 per cent of full day care providers in children's centres to 93 per cent of childminders. 2010 was the first year in which awareness was in excess of 90 per cent for all care groups.

Amongst those aware of childcare vouchers, willingness to accept vouchers either increased slightly or remained broadly the same for all groups. Sessional providers remained the least likely group to accept them (76 per cent), with full day care providers in children's centres the most likely (96 per cent)

Very few providers said they did not accept vouchers but, of those who did, between a third (33 per cent of full day care) and a half (54 per cent of childminders) said they would consider doing so in the future. The small base sizes involved mean that data relating to future acceptance of vouchers should be treated with caution for most groups.

¹⁰⁵ The employee's child or children for whom the childcare voucher is provided is eligible up to 1 September following their 15th birthday or 1 September following their 16th birthday if he or she is disabled. Childcare vouchers are exempt from employee tax and National insurance contributions if the qualifying conditions are met, up to a limit of £55 per week, or £243 a month. For more information see: <http://www.hmrc.gov.uk/childcare/>

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Table 9.12 Awareness of childcare vouchers																								
	Full day care				<i>Full day care in children's centres</i>				Sessional				After school clubs				Holiday clubs				Childminders			
	2010	2008	2007	2006	2010	2008	2007	2006	2010	2008	2007	2006	2010	2008	2007	2006	2010	2008	2007	2006	2010	2008	2007	2006
% of providers who had heard of childcare vouchers	98%	99%	97%	94%	99%	100%	98%	98%	94%	87%	86%	83%	96%	95%	92%	90%	98%	96%	93%	89%	93%	89%	90%	84%
<i>Base: Module B childcare providers 2010, 2008, 2007, module A childcare providers 2006. Childminders 2010, 2008, 2007, 2006.</i>																								
% of providers who accepted childcare vouchers	94%	95%	90%	90%	96%	97%	91%	87%	76%	71%	67%	55%	88%	84%	82%	73%	88%	85%	76%	68%	83%	79%	72%	64%
<i>Base: All module B providers who have heard of childcare vouchers 2010, 2008, 2007, module A providers who have heard of vouchers 2006. All childminders who have heard of childcare vouchers 2010, 2008, 2007, 2006.</i>																								
% of providers who would consider accepting them in the future	33%‡	†	59%	61%	†	†	55%	51%	36%	45%‡	50%	43%	40%‡	32%‡	46%	45%	50%‡	46%‡	42%	34%	54%	56%	55%	60%
<i>Base: All module B providers who do not accept childcare vouchers 2010, 2008, 2007, module A providers who don't accept vouchers 2006. All childminders who do not accept childcare vouchers 2010, 2008, 2007, 2006.</i>																								

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

9.6 Fees paid by employers

Around nine in ten full day care providers, full day care providers in children's centres, after school clubs and holiday clubs had at least part of their fees paid for by parents' employers. Childminders were less likely to receive part of their fees in this way (72 per cent), though the proportion increased from 63 per cent in 2008, continuing the longer term upwards trend for this group. Whilst the increases for childminders have been strong over the past four years, further progress is needed in order to achieve parity with most group based providers. The fact that childminders still lag behind the other types of provider, could either suggest that employers do not currently recognise the value of childminders as much as other types of provider, or could point to the need for a greater understanding and acceptance of voucher payments on the part of childminders themselves. Sessional providers were the least likely group to receive part of their fees from parent's employers with 61 per saying they did so, up from 51 per cent in 2008.

	2010	2008	2007	2006
Full day care	87%	86%	85%	70%
<i>Full day care in children's centres</i>	89%	89%	82%	58%
Sessional	61%	51%	44%	28%
After school clubs	87%	81%	77%	62%
Holiday clubs	89%	87%	81%	65%
Childminders	72%	63%	55%	29%

Base: All module A providers who accept childcare vouchers 2010, 2008, 2007, 2006. All childminders who accept childcare vouchers 2010, 2008, 2007, 2006.

Table 9.14 shows that full day care providers had the highest average number of children that had at least part of their fees paid for by direct payments or voucher payments by parents' employers at 19 children per setting. Childminders had the lowest average number at two children per setting, reflecting the smaller scale of their provision. If the total average number of places in each setting is taken into account (as some providers are larger than others), it is apparent that full day care settings and childminders had the highest proportion of children whose fees were paid for by direct payments or voucher payments, while sessional providers and full day care providers in children's centres had the lowest proportion of children paid for in this way.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

	Full day care	Full day care in children's centres	Sessional	After school clubs	Holiday clubs	Childminders	Total
Total number of children	215,000	5,300	15,200	50,800	61,000	63,900	405,900
Average number of children per setting	19	10	5	8	12	2	8

Base: All module B providers who have children where some of the fees are paid by parent's employer 2010. All childminders who have children whose childcare was paid for by a parent's employer 2010.

9.7 Income

9.7.1 Income from local authorities and central government

Caution must be taken with the income data as a significant proportion of respondents refused or were unable to provide income data. Figures that were recorded have been derived from a number of variables and therefore may be prone to distortion.¹⁰⁶ They should be used as an indicative guide only. Some respondents perceived Sure Start funding as an 'other' source of funding rather than as funding from local authorities and central government (see table 9.17). The figures in table 9.15 may therefore understate the proportion of settings receiving funding from local authorities and central government – particularly for those settings providing full day care in children's centres.

As in previous years, full day care providers, full day care providers in children's centres and sessional providers were the groups most likely to have received funding from local authorities and central government. Sessional groups were the most likely to receive at least some funding in this way (74 per cent) while childminders were least likely (five per cent). The proportion of after school clubs and holiday clubs receiving LA funding was also relatively low (20 per cent and 33 per cent respectively).

	Full day care	Full day care in children's centres	Sessional	After school clubs	Holiday clubs	Childminders
Received funding from LAs and central government	59%	51%	74%	20%	33%	5%
Received no funding from LAs and central government	9%	7%	8%	57%	37%	87%
Unable/unwilling to say how much money received from LAs and central government ¹⁰⁷	32%	42%	18%	23%	29%	8%

Base: Module A childcare providers 2010. Childminders 2010.

¹⁰⁶ For details of how income data were derived, please refer to the Technical Report.

¹⁰⁷ Or did not provide enough information to derive an annual sum.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Table 9.16 shows that mean and median income from local authorities and central government varied widely between provider types. These figures are based only on those who received funding and were able to quantify the amount. Again, it should be noted that some respondents perceived Sure Start funding as an ‘other’ source of funding rather than as income from local authorities and central government (see table 9.17). As such, the figures in table 9.16 are likely to understate the value of funding received from local authorities and central government – particularly for those settings providing full day care in children’s centres.

Looking at median income in 2010, full day care providers in children’s centres continued to receive by far the largest income from local authorities and central government (£114,000 compared to the next highest median income of £38,000 for full day care providers overall). Childminders had the lowest median income from local and central government (£2,300), as one would expect bearing in mind the relatively small scale of their provision.

Mean and median income from local authority and government funding increased for all groups between 2008 and 2010, the only exception being a decline in median holiday club income from £25,000 in 2008 to £20,000 in 2010 (though the changes to the sampling method mean this decrease should be viewed with caution).

Table 9.16 Average income received from local authorities and central government						
	Full day care	Full day care in children’s centres	Sessional	After school clubs	Holiday clubs	Childminders
Mean local authority and central government income						
2010	£56,000	£197,600	£47,500	£45,500	£72,200	£3,800
2008	£41,900	£181,500	£33,800	£16,100	£59,900	£2,800
2007	£39,900	£128,200	£29,100	£17,800	£49,000	£2,200
2006	£40,100	£159,600	£34,800	£23,700	£33,000	£3,600
Median local authority and central government income						
2010	£38,000	£114,000	£32,000	£14,000	£20,000	£2,300
2008	£30,000	£104,900	£27,500	£5,400	£25,000	£1,200
2007	£24,000	£61,000	£24,900	£6,000	£15,000	£1,200
2006	£24,000	£40,000	£22,600	£6,000	£13,000	£2,900
<i>Base: Module A childcare providers providing government funding data 2010, 2008, 2007, 2006. Childminders providing government funding data 2010, 2008, 2007, 2006.</i>						

9.7.2 Income from other sources

Providers were asked if they had any other sources of income (other than fees and income from local authorities and central government) and, if so, what they were. The results are shown in table 9.17.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Table 9.17 Other sources of income (most frequently mentioned)						
	Full day care	Full day care in children's centres	Sessional	After school clubs	Holiday clubs	Childminders
No other sources of income	54%	49%	31%	77%	63%	92%
Fundraising	34%	23%	60%	15%	20%	*
Grants	3%	4%	3%	1%	5%	0%
Sure Start ¹⁰⁸	3%	19%	2%	1%	3%	1%
Neighbourhood Nursery Initiative	*	2%	*	0%	1%	0%
<i>Base: Module A childcare providers 2010. Childminders 2010.</i>						

Slightly more than half of full day care providers (54 per cent) said that fees and/or central and local government funding were their only source of income. A third (34 per cent) of full day care providers supplemented their income with fundraising, an increase from 28 per cent in 2008.

However, only one quarter (23 per cent) of full day care providers specifically operating in children's centres had conducted fundraising activities. A fifth (19 per cent) of full day care providers in children's centres erroneously identified Sure Start funding as an 'other' source of income, rather than as a source of income stemming from local authorities and central government. The fact that this proportion is higher for settings in children's centres than it is for other types of provider is to be expected bearing in mind the higher level of Sure Start funding that settings in children's centres receive.

Sessional providers were the group most likely to supplement their funding from fees and/or local and central government with other sources of income. Sixty per cent of sessional providers received additional income from fund raising, while only three in ten (31 per cent) said they relied solely on funding from fees and/or local and central government.

Two thirds (63 per cent) of holiday clubs and three quarters (77 per cent) of after school clubs said fees and/or central and local government funding were their only sources of income. A fifth (20 per cent) of holiday clubs received income from fundraising, as did 15 per cent of after school clubs.

Unsurprisingly, a higher proportion of providers set up as not-for-profit or charities had generated income through fundraising activities than those set up as for-profit organisations. This applied to all provider types except full day care in children's centres, where there was no significant difference.

Childminders were the most likely to say they had no other sources of income (92 per cent) relating to their childminding. All childminders were also asked whether they supplemented

¹⁰⁸ Whilst Sure Start is actually a government funded source of income, it is evidently not seen as such by some providers.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

their income from childminding with other non-childminding sources and 17 per cent said that they did. Childminders with fewer children on their books were more likely to supplement their income than those looking after a larger number of children (22 per cent of those with only one or two children on their books supplemented their incomes, compared to 14 per cent of those with seven or more).

Table 9.18 shows the mean and median amounts received from other sources amongst those providers that were able or willing to state an amount. The proportion of providers who were unable to say how much they received from other sources was substantial for all provider types, as shown in the bottom row of the table. Again it should be noted that some respondents perceived Sure Start funding as an 'other' source of funding rather than as funding from local authorities and central government (see table 9.17). As such, the figures in table 9.18 are likely to overstate the value of funding received from other sources – particularly for those settings providing full day care in children's centres.

As was the case in 2008, children's centres that received income from other sources had the highest average (£13,600).¹⁰⁹ While childminders receiving income from other sources had the highest median amount (£3,100), it should be remembered that only a small proportion of childminders fell into this group – only 17 per cent supplemented their childminding income with income from other sources.

¹⁰⁹ As seen earlier in the chapter, some full day care providers in children's centres think of Sure Start funding as separate from government funding. This may explain the relatively high level of 'other' funding for these providers.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Table 9.18 Average income received from other sources, excluding those who received nothing from this source¹¹⁰						
	Full day care	<i>Full day care in children's centres</i>	Sessional	After school clubs	Holiday clubs	Child- minders
Mean income from other sources						
2010	£4,600	£13,600	£4,200	£8,000	£9,800	£5,300
2008	£5,300	£12,600	£3,100	£6,400	£11,600	£7,000
2007	£5,200	£7,500	£3,200	£4,800	£8,700	£4,800
2006	£4,300	£21,900	£2,400	£8,700	£12,100	£4,000
Median income from other sources						
2010	£1,800	£3,000	£1,500	£1,800	£1,800	£3,100
2008	£2,000	£2,500	£1,500	£500	£2,400	£5,300
2007	£1,400	£2,400	£1,400	£1,000	£2,000	£3,900
2006	£1,000	£11,000	£1,000	£600	£3,000	£3,500
<i>Base: Module A childcare providers providing income from other sources data 2010, 2008, 2007, 2006. Childminders providing income from other sources data 2010, 2008, 2007, 2006.</i>						
Unable to say how much received from other sources in 2010	7%	14%	8%	5%	8%	4%
<i>Base: Module A childcare providers 2010, 2008, 2007, 2006. Childminders 2010, 2008, 2007, 2006.</i>						

¹¹⁰ It should be noted that there is a degree of overclaim in these figures as some respondents perceive Sure Start funding as an 'other' source of income, rather than as a source stemming from local authorities and central government.

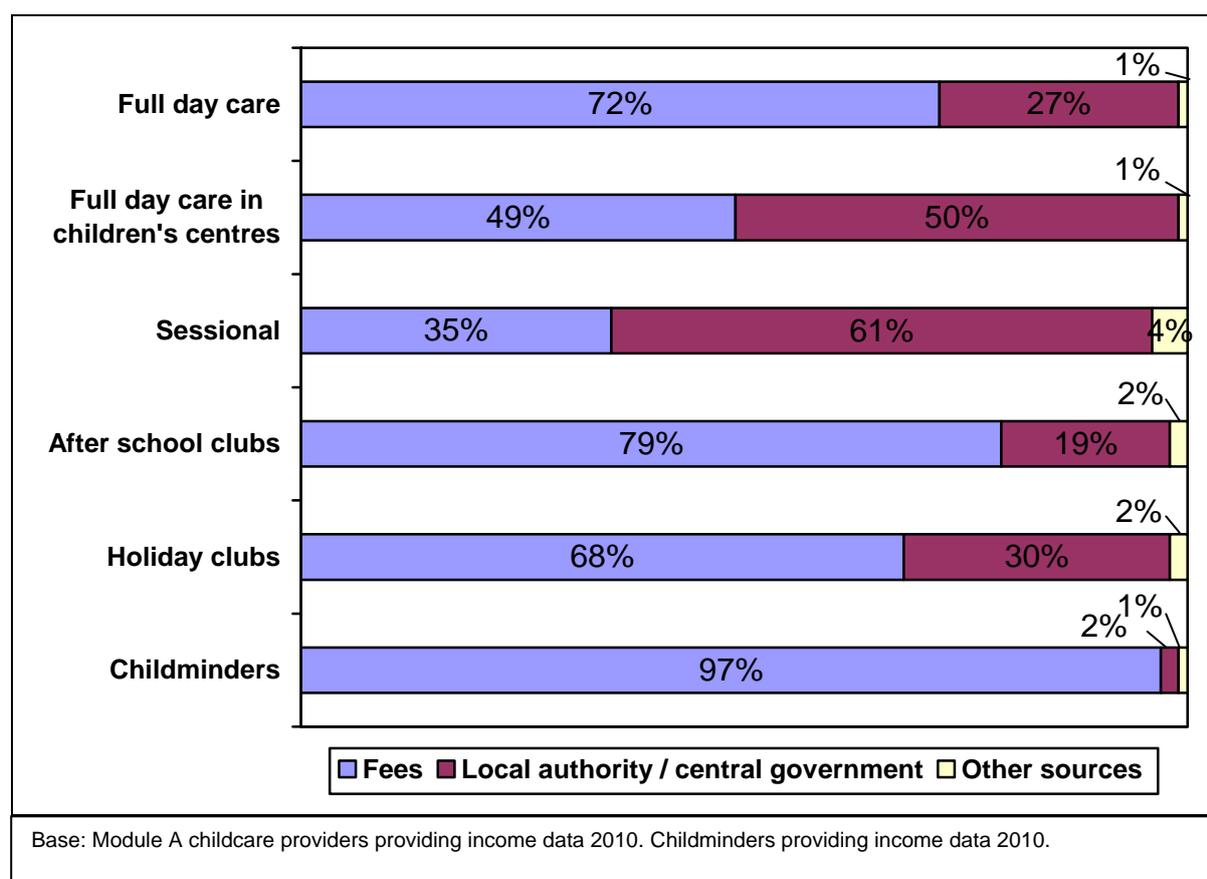
N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

9.7.3 Total income

Caution must be taken with all income data as significant proportions of respondents refused or were unable to provide this information. The figures have been derived from a number of variables and therefore may be prone to distortion.¹¹¹ They should only be used as an indicative guide.

Chart 9.1 shows the proportions of childcare providers' overall income that came from each source of income.

Chart 9.1 Sources of income as a percentage of total income



Full day care providers were heavily dependent on fees in 2010, with 72 per cent of their income coming from that source. However, this is a lower level than was seen in 2008 (83 per cent) and local authority/central government funding has increased from 17 per cent to 27 percent over the same period.

¹¹¹ For details of how income data were derived, please see section 5.1 of the Technical Report.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

As was the case in 2008, local authority/central government funding in 2010 was key for both full day care in children's centres (accounting for 50 per cent of total income) and sessional providers (61 per cent). In contrast, out of school providers were heavily reliant on fees as their main source of income, accounting for 79 per cent of the total income for after school clubs and 68 per cent for holiday clubs.

As was the case in 2008, childminders were almost totally reliant on fees, with 97 per cent of their income coming from that source (96 per cent in 2008).

Table 9.19 shows the average total income that providers received, broken down by the average income from each source. These average income figures have been calculated excluding answers of don't know and refused but, unlike all other income figures quoted in this chapter, they include those who received nothing from the source, in order to allow us to sum the income components to calculate an overall income figure.

	Full day care	Full day care in children's centres	Sessional	After school clubs	Holiday clubs	Childminders
Fees	£126,300	£170,000	£24,500	£48,700	£75,800	£11,100
Local Authority	£48,300	£173,400	£43,100	£12,000	£34,000	£200
Other sources	£1,600	£3,300	£2,500	£1,000	£1,800	£100
Total income						
2010	£176,200	£346,700	£70,100	£61,700	£111,600	£11,400
2008	£202,400	£299,000	£47,500	£45,300	£63,400	£10,100
2007	£188,100	£257,600	£42,700	£40,800	£72,700	£9,000
2006	£167,100	£267,600	£45,700	£39,600	£53,200	N/A
<i>Base: Module A childcare providers providing income data. Childminders providing income data.</i>						

Full day care providers within children's centres had the highest average income at £346,700, followed by the full day sector as a whole at £176,200. Whilst they still had the second highest average income, full day care providers were the only group to see their income decrease since 2008, with average income falling by £26,200. Holiday clubs reported the third highest average income (£111,600). These providers had a higher average number of places than the other types of providers, which may explain the higher income from fees, and their higher overall income compared with after school and sessional providers.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Childminders received an annual income of £11,400 from all sources in the twelve months prior to the 2010 survey. They were also asked for their net income from childminding after Tax and National Insurance deductions - however, in 2010 over a quarter (27 per cent) were unable or unwilling to answer this question (13 per cent answered don't know and 14 per cent refused to answer). With such a high proportion not providing an answer, the data on childminders net incomes should be treated with caution. Of those childminders that did answer, 17 per cent had taken home £2,500 or less and 36 per cent had taken home £5,000 or less. Only 26 per cent had taken home over £10,000. The average net income for childminders for the 12 months prior to the survey was £7,500 - very much in line with the average net income of £7,400 seen in 2008, but still a significant reduction on the 2007 figure of £11,100.

9.8 Breaking even

Providers were asked what proportion of their registered places they needed to fill in order to break even. As table 9.20 shows, high proportions were either unwilling or unable to give an answer and as such the data should be treated with caution.

	Full day care	Full day care in children's centres	Sessional	After school clubs	Holiday clubs	Childminders ¹¹²
1-25%	3%	1%	3%	8%	7%	7%
26-50%	11%	6%	14%	23%	21%	26%
51-75%	25%	13%	24%	25%	22%	15%
76-100%	32%	41%	36%	21%	19%	5%
Proportion of providers who could not give an answer	27%	38%	23%	22%	28%	37%

Base: Module A childcare providers 2010. Childminders 2010.

Full day care providers, full day care providers in children's centres and sessional providers typically needed a greater proportion of their places to be occupied in order to break even than was the case for after school clubs, holiday clubs and childminders.

The average proportion of registered places providers said that they needed to fill in order to break even showed relatively little variation for all groups between 2008 and 2010, as Table 9.21 shows. However, there was an increase for childminders, from 50 per cent in 2008 to 58 per cent in 2010.

¹¹² For childminders, the question asked about the number of their available places that they need to fill in order to earn the minimum income they are prepared to accept. As such, a proportion of the respondents (10 per cent) said 'none' – an indication that, for a small minority of childminders, the need to bring money in from childminding isn't deemed essential.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Table 9.21 Average (mean) proportion of places needing to be filled in order to break even						
	Full day care	Full day care in children's centres	Sessional	After school clubs	Holiday clubs	Childminders
2010	70%	79%	70%	58%	57%	58%
2008	72%	76%	73%	62%	58%	50%
2007	70%	78%	73%	62%	59%	52%
2006	74%	78%	76%	68%	66%	53%

Base: Module A childcare providers 2010, 2008, 2007, 2006. Childminders 2010, 2008, 2007, 2006.

9.9 Profitability

Tables 9.22a and 9.22b show the proportion of providers reporting that they made a profit or surplus, covered their costs or operated at a loss.¹¹³

With the exception of full day providers operating in children's centres, slightly less than one third of childcare providers reported making a profit or surplus (33 per cent of full day care providers, 30 per cent of after school clubs, 29 per cent of holiday clubs and 28 per cent of sessional providers). This figure was lower for full day care providers in children's centres (11 per cent). These figures were in line with those reported in 2009, with the exception of after school and holiday clubs, both of which saw a slight increase in profitability – again this may be linked to the change in sampling approach in 2010.

The full day care and sessional groups were the only provider types to show an increase in the proportion of settings operating at a loss, rising from 13 per cent to 19 per cent for full day care and from 15 per cent to 20 per cent for sessional care. These represent the highest loss making levels seen for these two groups since the survey began. It is possible that this trend is related to the change in sampling method in 2010, but bearing in mind the economic backdrop to the survey, they are likely to be genuine shifts.

¹¹³ For-profit organisations were asked if they had made a profit and not-for-profit organisations were asked if they had made a surplus.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Table 9.22a Profitability															
	Full day care					Full day care in children's centres					Sessional				
	2010	2009	2008	2007	2006	2010	2009	2008	2007	2006	2010	2009	2008	2007	2006
Made a profit or surplus	33%	34%	34%	30%	30%	11%	10%	10%	7%	12%	28%	28%	32%	30%	25%
Covering costs	33%	34%	33%	33%	32%	35%	37%	34%	24%	28%	46%	51%	43%	47%	53%
Operating at a loss	19%	13%	16%	18%	16%	33%	34%	34%	52%	37%	20%	15%	16%	14%	15%
Don't know	14%	18%	18%	19%	21%	21%	19%	21%	17%	23%	6%	6%	9%	9%	8%

Base: Module A childcare providers 2010, 2009, 2008, 2007, 2006.

Table 9.22b Profitability										
	After school clubs					Holiday clubs				
	2010	2009	2008	2007	2006	2010	2009	2008	2007	2006
Made a profit or surplus	30%	23%	24%	24%	25%	29%	23%	25%	27%	19%
Covering costs	40%	44%	39%	42%	43%	36%	43%	41%	39%	48%
Operating at a loss	20%	22%	24%	24%	17%	23%	23%	26%	24%	24%
Don't know	10%	11%	12%	11%	14%	12%	11%	8%	10%	9%

Base: Module A childcare providers 2010, 2009, 2008, 2007, 2006.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Tables 9.23a and 9.23b show provider profitability by level of deprivation. In 2010 all types of provider operating in the 70 per cent least deprived areas were more likely to report a profit or surplus than their counterparts in the 30 per cent most deprived areas. This was also the case in 2009.

Due to the low base size, it is not possible to report on the profitability of full day care providers in children's centres located in the 70 per cent least deprived areas, but there was no significant change in the profitability of these providers in the 30 per cent most deprived areas.

In 2009, the proportion of full day care, sessional and holiday club providers making a loss in was relatively similar in the 30% most deprived areas and in the 70% least deprived areas – however, this was no longer the case in 2010. In 2010, for all of these providers, the proportion of loss making settings in the most deprived areas had become significantly higher than the proportion in the less deprived areas. This would seem to indicate that such providers in the less affluent areas are finding it harder to weather the difficult economic conditions than those in the better off areas.

Table 9.23a Provider profitability by deprivation												
	Full day care				<i>Full day care in children's centres</i>				Sessional			
	30% most deprived areas		70% least deprived areas		30% most deprived areas		70% least deprived areas		30% most deprived areas		70% least deprived areas	
	2010	2009	2010	2009	2010	2009	2010	2009	2010	2009	2010	2009
Made a profit or surplus	30%	26%	35%	37%	10%	8%	†	16%‡	21%	21%	29%	29%
Covering costs	28%	38%	35%	32%	34%	35%	†	40%‡	42%	54%	47%	50%
Operating at a loss	24%	15%	17%	13%	33%	40%	†	20%‡	27%	14%	19%	15%
Don't know	17%	21%	13%	18%	23%	17%	†	24%‡	10%	10%	5%	6%

Base: Module A childcare providers 2010, 2009.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

	After school clubs				Holiday clubs			
	30% most deprived areas		70% least deprived areas		30% most deprived areas		70% least deprived areas	
	2010	2009	2010	2009	2010	2009	2010	2009
Made a profit or surplus	17%	12%	34%	28%	21%	12%	33%	27%
Covering costs	45%	46%	39%	43%	38%	48%	35%	41%
Operating at a loss	27%	30%	18%	19%	26%	23%	21%	23%
Don't know	11%	12%	9%	10%	15%	17%	11%	8%

Base: Module A childcare providers 2010, 2009.

Table 9.24 shows the proportion of all childcare providers (not including childminders) that made a profit or a loss in a given region.

As was the case in 2009, the North East reported the highest proportion of childcare providers making a loss (30 per cent) and the smallest proportion making a profit (23 per cent) in 2010. However, the proportion of settings in the North East making a profit had risen from 16 per cent in 2009.

In all other regions, between a quarter and a third of providers made a profit, ranging from 26 per cent in London and the East Midlands to 35 per cent of providers in the South East. With the exception of the North East, the proportion of providers reporting a financial loss varied relatively little from region to region, ranging from 15 to 22 per cent in 2010.

Government Office Region	Proportion of all providers who made a profit in the last 12 months		Proportion of all providers who made a loss in the last 12 months	
	2010	2009	2010	2009
	East Midlands	26%	26%	20%
East	34%	30%	22%	18%
London	26%	26%	21%	17%
North East	23%	16%	30%	29%
Yorkshire & Humberside	33%	30%	20%	14%
North West	32%	29%	20%	19%
South East	35%	33%	19%	16%
South West	28%	33%	22%	18%
West Midlands	30%	25%	15%	16%

Base: Module A childcare providers 2010, 2009.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Table 9.25 shows profitability by region and provider type – base sizes for most regions are small, so caution should be exercised in the interpretation of these results.

Of all the provider types, full day care settings based in the East were the most likely to have made a profit or surplus (46 per cent). They were followed by after school clubs based in the West Midlands (40 per cent).

After school clubs based in the East were the most likely group to report making a loss (37 per cent). Providers of sessional care were more likely to report that they were covering costs, rather than making a profit or loss, regardless of the region in which they operated.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Table 9.25 Provider by Government Office Region

	Full day care			Full day care in children's centres			Sessional			After school clubs			Holiday clubs		
	Made a profit or surplus	Covering costs	Operating at a loss	Made a profit or surplus	Covering costs	Operating at a loss	Made a profit or surplus	Covering costs	Operating at a loss	Made a profit or surplus	Covering costs	Operating at a loss	Made a profit or surplus	Covering costs	Operating at a loss
East Midlands	28% [‡]	37% [‡]	21% [‡]	†	†	†	26% [‡]	48% [‡]	17% [‡]	†	†	†	38% [‡]	26% [‡]	14% [‡]
East	46% [‡]	29% [‡]	19% [‡]	†	†	†	30%	44%	17%	25% [‡]	28% [‡]	37% [‡]	26% [‡]	41% [‡]	14% [‡]
London	29%	36%	19%	†	†	†	31% [‡]	40% [‡]	23% [‡]	†	†	†	16% [‡]	55% [‡]	22% [‡]
North East, Yorkshire & Humberside	33% [‡]	23% [‡]	21% [‡]	†	†	†	22% [‡]	42% [‡]	30% [‡]	37% [‡]	38% [‡]	17% [‡]	21% [‡]	29% [‡]	32% [‡]
North West	35% [‡]	31% [‡]	18% [‡]	†	†	†	23% [‡]	45% [‡]	27% [‡]	31% [‡]	43% [‡]	14% [‡]	37% [‡]	29% [‡]	24% [‡]
South East	36%	33%	19%	†	†	†	38%	41%	18%	30% [‡]	44% [‡]	16% [‡]	37% [‡]	34% [‡]	24% [‡]
South West	29%	36%	23%	†	†	†	24% [‡]	51% [‡]	20% [‡]	26% [‡]	44% [‡]	20% [‡]	31% [‡]	34% [‡]	25% [‡]
West Midlands	30% [‡]	42% [‡]	13% [‡]	†	†	†	†	†	†	40% [‡]	38% [‡]	17% [‡]	28% [‡]	41% [‡]	19% [‡]

Base: Module A childcare providers 2010

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

9.10 Expenditure

Providers were asked how much they spent in total on outgoings; that is the total amount spent on premises costs, wages and any other expenses such as food, play equipment and other consumables.

Caution must be taken with the results as all figures have been derived from a number of variables and therefore may be prone to distortion. In addition, large proportions of providers were unable to give an answer, refused to provide the information or did not provide enough information for us to be able to derive an annual sum. Therefore these results should be treated as an indicative guide only and should not be directly compared with any data on income shown earlier.¹¹⁴

For each provider type, the median and mean averages were calculated and these varied considerably from one another (see table 9.26). The median gives an average that is not affected by outliers whereas the mean takes into account all values (although extreme outliers were capped as part of the data processing stage).

Full day care providers in children's centres had the highest mean and median annual outgoings. They also paid the most for the premises they used. Full day care providers as a whole also had a higher expenditure than other provider types, which is to be expected as they tend to operate for longer periods of the year than other provider types and have relatively large numbers of children attending.

	Full day care	<i>Full day care in children's centres</i>	Sessional	After school clubs	Holiday clubs
Expenditure on the use of the premises	£17,600	£21,600	£6,200	£8,300	£14,800
Total annual mean expenditure ¹¹⁶	£157,600	£323,000	£54,500	£53,400	£92,700
Total annual median expenditure ¹¹⁷	£70,000	£224,500	£36,000	£14,300	£42,500

Bases: Module A childcare providers providing premises cost information. Module A childcare providers providing total expenditure information 2010.

Childminders were also asked to give their total expenditure in relation to childminding (total spent on food, play equipment, and other consumables), excluding the cost of premises. The

¹¹⁴ Providers that did not provide an answer or that gave an answer of zero were excluded from the analysis.

¹¹⁵ This is the amount spent on premises costs, wages and any other expense such as food, play equipment, other consumables.

¹¹⁶ Excluding answers of zero, 'don't know' and refusals.

¹¹⁷ Excluding answers of zero, 'don't know' and refusals.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

average amount spent was £3,900 in 2010.¹¹⁸ If childminders also paid rent or made mortgage re-payments they were asked how much they paid; in 2010 the average annual amount spent on rent or mortgage re-payments was £6,900.¹¹⁹

¹¹⁸ This was the mean excluding answers of zero, answers of 'don't know' and 'refusal' answers. The median in 2010 was £2,600, which marked an increase from £2,100 in 2008.

¹¹⁹ Excluding answers of zero, answers of 'don't know' and 'refusal' answers. The median in 2010 was £6,200.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Appendix 1 – Additional tables

Additional Tables - Chapter 3

	2010		2009		2008		2007		2006	
	30% most deprived areas	70% least deprived areas	30% most deprived areas	70% least deprived areas	30% most deprived areas	70% least deprived areas	30% most deprived areas	70% least deprived areas	30% most deprived areas	70% least deprived areas
	No.	No.								
Full day care	4,300	12,400	3,700	10,500	4,000	9,900	4,000	9,500	3,500	9,200
<i>Full day care in children's centres</i>	600	200	750	300	700	300	750	200	550	†
Sessional	1,600	6,700	1,200	6,600	1,500	7,000	1,500	7,300	1,400	8,200
After school clubs	2,400	7,100	2,400	5,500	2,600	6,200	2,500	6,000	2,200	5,400
Holiday clubs	2,400	5,300	1,800	4,600	1,800	4,700	1,800	4,000	2,200	4,200
Childminders	9,200	38,200	9,200	41,800	11,200	45,000	10,600	49,200	10,800	47,000
Childcare total	19,900	69,600	18,300	69,000	21,700	73,100	21,200	76,200	19,200	71,000
Nursery schools	250	150	300	†	250	150	300	150	250	200
Primary schools with nursery and reception classes	2,800	3,900	2,900	3,800	3,300	3,400	3,000	3,800	3,200	3,500
Primary schools with reception but no nursery classes	850	7,700	700	7,900	900	7,800	1,200	7,700	1,000	8,000
Early years total	3,900	11,800	3,800	11,900	4,500	11,400	4,500	11,700	4,500	11,700

Base: Childcare providers 2010, 2009, 2008, 2007, 2006. Early years provision in maintained schools 2010, 2009, 2008, 2007, 2006.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Table 3.3a Distribution of providers by Government Office Region									
	Full day care	<i>Full day care in children's centres</i>	Sessional	After school clubs	Holiday clubs	Child-minders	Nursery schools	Primary schools with nursery and reception classes	Primary schools with reception but no nursery
	No.	No.	No.	No.	No.	No.	No.	No.	No.
Total number of providers	16,700	800	8,300	9,500	7,700	47,400	400	6,700	8,600
East Midlands	1,300	#	750	850	800	4,100	#	500	1,000
East	1,700	70	1,200	900	750	5,600	#	600	1,100
London	2,400	150	1,100	1,200	900	8,200	80	1,300	300
North East	2,100	150	900	1,500	1,200	6,500	#	1,600	1000
Yorkshire & Humberside									
North West	2,300	150	950	1,600	1,100	5,400	70	1,100	1,000
South East	3,000	60	1,600	1,200	1,100	9,300	50	500	1,800
South West	2,000	50	950	950	800	4,400	#	250	1,500
West Midlands	1,800	90	850	1,300	1,000	4,000	60	900	800

Base: Childcare providers 2010. Early years provision in maintained schools 2010.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

	Full day care					Full day care in children's centres					Sessional				
	2010	2009	2008	2007	2006	2010	2009	2008	2007	2006	2010	2009	2008	2007	2006
Total number of providers	16,700	14,100	13,800	13,600	12,700	800	1,000	1,000	1,000	700	8,300	7,800	8,500	8,700	9,700
Private or Voluntary	14,900	12,400	12,000	11,500	11,200	250	400	300	350	250	7,900	7,400	7,900	8,200	9,300
<i>Private</i>	9,800	9,300	9,000	8,700	8,200	150	200	#	150	#	2,600	2,200	2,500	2,500	2,700
<i>Voluntary</i>	5,000	3,100	3,000	2,800	3,000	150	#	200	200	#	5,300	5,200	5,400	5,700	6,600
Maintained	1,800	1,400	1,500	1,700	1,300	550	550	700	550	400	550	350	500	550	450
<i>Local Authority</i>	1,000	#	700	800	700	450	500	600	450	350	350	#	#	#	#
<i>School/college</i>	800	#	800	900	600	90	#	#	#	#	200	#	#	#	#
<i>Other</i>	250	#	400	#	250	#	#	#	#	#	100	#	#	#	#

Base: Childcare providers 2010, 2009, 2008, 2007, 2006.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Table 3.5d Distribution of childcare providers by ownership										
	After school clubs					Holiday Clubs				
	2010	2009	2008	2007	2006	2010	2009	2008	2007	2006
Total number of providers	9,500	7,900	8,800	8,400	7,700	7,700	6,400	6,500	5,800	6,400
Private or Voluntary	6,300	5,400	5,900	5,700	5,800	5,800	4,700	4,700	4,400	4,650
<i>Private</i>	3,700	2,900	3,300	3,500	2,500	3,700	2,400	2,500	2,400	2,300
<i>Voluntary</i>	2,600	2,500	2,600	2,200	3,300	2,100	2,300	2,200	1,900	2,300
Maintained	3,300	2,400	2,700	2,700	1,700	2,000	1,500	1,600	1,500	1,500
<i>Local Authority</i>	700	#	800	650	900	750	900	900	800	1,200
<i>School/college</i>	2,600	1,900	2,000	2,100	900	1,200	600	600	700	#
<i>Other</i>	50	#	#	#	#	100	#	#	#	#
<i>Base: Childcare providers 2010, 2008, 2007, 2006.</i>										

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Additional Tables - Chapter 4

	Full day care	Full day care in children's centres	Sessional	After school clubs	Holiday clubs	Childminders	Nursery schools	Primary schools with nursery and reception classes ¹²⁰	Primary schools with reception but no nursery classes
	No.	No.	No.	No.	No.	No.	No.	No.	No.
Total number of places	716,700	40,300	251,000	368,100	349,400	245,100	25,300	491,800	308,400
East Midlands	60,300	1,500	24,800	31,400	31,800	22,100	2,000	29,200	37,900
East	75,200	4,700	36,400	28,700	34,300	30,000	2,500	37,600	37,300
London	99,200	7,900	35,600	58,800	61,000	38,300	5,100	125,800	16,600
North East, Yorkshire & Humberside	101,600	8,300	26,800	57,400	47,800	35,900	4,000	110,000	32,100
North West	105,900	8,000	29,500	59,000	50,700	28,700	4,100	76,500	32,600
South East	126,500	3,200	47,600	54,100	47,300	45,100	3,200	34,300	75,200
South West	70,800	2,600	25,700	31,100	34,600	23,200	1,100	11,600	49,300
West Midlands	77,200	4,100	24,700	47,500	42,200	21,700	3,300	67,000	27,400

Base: Childcare providers 2010. Early years provision in maintained schools 2010.

	Full day care					Full day care in children's centres				
	2010	2009	2008	2007	2006	2010	2009	2008	2007	2006
Total number of places	716,700	647,800	620,700	596,500	544,200	40,300	50,600	50,000	51,100	37,700
Private or Voluntary	626,400	567,500	535,600	510,200	477,900	13,000	18,900	14,200	17,700	14,300
Private	464,200	466,900	436,700	417,300	379,400	5,900	9,800	5,300	8,300	7,000
Voluntary	162,300	100,600	98,900	92,900	99,700	7,100	9,100	8,900	9,300	7,400
Maintained	83,800	63,400	62,900	67,200	54,300	27,800	30,300	34,600	31,100	21,900
Local Authority	46,200	28,200	29,800	32,600	30,600	23,300	26,400	29,600	27,100	18,800
School/college	37,500	35,200	33,100	34,600	24,000	4,500	3,900	5,000	4,000	3,300
Other	14,400	16,100	26,100	14,500	14,500	1,100	1,200	1,700	2,700	1,700

Base: Childcare providers 2010, 2009, 2008, 2007, 2006.

¹²⁰ Data are not available for primary schools with nursery and reception classes in the North East and North West regions as an insufficient number of interviews were achieved in these areas. Data are also not available for primary schools with nursery and reception classes in Yorkshire & Humberside as this region was grouped with the North East and North West to ensure that national figures were representative. For further details please see the Technical Report.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

	After school clubs					Holiday Clubs				
	2010	2009	2008	2007	2006	2010	2009	2008	2007	2006
Total number of places	368,100	272,500	282,700	259,900	260,100	349,400	260,400	262,600	230,300	263,900
Private or Voluntary	239,400	187,300	193,600	176,100	200,500	254,000	184,100	183,500	163,100	181,200
<i>Private</i>	<i>135,500</i>	<i>107,300</i>	<i>111,800</i>	<i>113,700</i>	<i>90,100</i>	<i>169,000</i>	<i>97,000</i>	<i>105,800</i>	<i>97,000</i>	<i>97,500</i>
<i>Voluntary</i>	<i>103,900</i>	<i>80,000</i>	<i>81,800</i>	<i>62,500</i>	<i>110,700</i>	<i>84,900</i>	<i>87,100</i>	<i>77,800</i>	<i>66,100</i>	<i>83,600</i>
Maintained	130,900	81,400	84,500	84,600	56,300	98,800	63,800	67,700	65,700	71,200
<i>Local Authority</i>	<i>25,900</i>	<i>18,700</i>	<i>27,900</i>	<i>19,600</i>	<i>31,400</i>	<i>45,200</i>	<i>43,000</i>	<i>42,000</i>	<i>39,700</i>	<i>56,700</i>
<i>School/college</i>	<i>105,000</i>	<i>62,700</i>	<i>56,500</i>	<i>65,000</i>	<i>25,300</i>	<i>53,600</i>	<i>20,800</i>	<i>25,700</i>	<i>26,000</i>	<i>14,500</i>
<i>Other</i>	<i>1,200</i>	<i>6,900</i>	<i>6,600</i>	<i>4,600</i>	<i>3,500</i>	<i>6,000</i>	<i>12,800</i>	<i>13,300</i>	<i>6,000</i>	<i>12,400</i>

Base: Childcare providers 2010, 2009, 2008, 2007, 2006

	Sessional					
	2010	2009	2008	2007	2006	2005
Total number of places	251,000	227,900	243,500	248,100	278,300	265,400
Private or Voluntary	238,500	216,700	226,800	232,000	265,700	229,200
<i>Private</i>	<i>91,200</i>	<i>67,900</i>	<i>71,400</i>	<i>70,200</i>	<i>83,000</i>	<i>81,700</i>
<i>Voluntary</i>	<i>147,300</i>	<i>148,800</i>	<i>155,400</i>	<i>161,700</i>	<i>183,500</i>	<i>49,300</i>
Maintained	17,200	10,300	14,200	15,400	12,800	11,300
<i>Local Authority</i>	<i>10,200</i>	<i>5,600</i>	<i>7,700</i>	<i>8,600</i>	<i>9,600</i>	<i>7,200</i>
<i>School/college</i>	<i>6,900</i>	<i>4,700</i>	<i>6,500</i>	<i>6,800</i>	<i>3,200</i>	<i>4,100</i>
<i>Other</i>	<i>2,600</i>	<i>2,000</i>	<i>3,800</i>	<i>3,300</i>	<i>700</i>	<i>8,300</i>

Base: Childcare providers 2010, 2009, 2008, 2007, 2006, 2005.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Table 4.20a Number of places by age of child					
	Full day care	<i>Full day care in children's centres</i>	Sessional	After school clubs	Holiday clubs
	No.	No.	No.	No.	No.
Under 2 years old	192,200	11,700	16,100	11,000	33,300
2 years old	270,100	16,400	87,200	13,200	38,100
3 years old	326,400	18,300	150,200	22,400	42,100
4 years old	109,400	5,700	44,500	48,200	35,800
5 to 7 years old	26,700	1,400	7,100	180,000	118,700
8 to 10 years old	18,700	850	4,500	182,300	101,200
11 years or older	2,200	70	1,400	23,600	32,200

Base: Childcare providers 2010.

Table 4.20b Proportion of places by age of child					
	Full day care	<i>Full day care in children's centres</i>	Sessional	After school clubs	Holiday clubs
Under 2 years old	20%	22%	5%	2%	8%
2 years old	29%	30%	28%	3%	9%
3 years old	35%	34%	48%	5%	10%
4 years old	12%	10%	14%	10%	9%
5 to 7 years old	3%	3%	2%	37%	30%
8 to 10 years old	2%	2%	1%	38%	25%
11 years or older	*	*	*	5%	8%

Base: Childcare providers 2010.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Table 4.20c Number of providers by proportion of black and minority ethnic (BME) origin												
	Full day care				Full day care in children's centres				Sessional			
	2010	2008	2007	2006	2010	2008	2007	2006	2010	2008	2007	2006
None	3,300	2,600	2,700	2,300	50	100	100	100	2,500	2,500	3,000	3,300
1 to 5%	4,200	4,000	3,800	3,800	150	200	250	200	1,500	2,100	2,100	2,700
6 to 10%	2,700	2,200	2,100	2,000	100	150	150	100	1,400	1,500	1,300	1,400
11% or more	6,100	4,700	4,600	4,100	450	550	450	350	2,800	2,200	2,300	2,300
Don't know	350	200	400	200	#	#	#	#	100	100	100	50

Base: Childcare providers 2010, 2008, 2007, 2006. Early years provision in maintained schools 2010, 2008, 2007, 2006

Table 4.20d Number of providers by proportion of black and minority ethnic (BME) origin												
	After school clubs				Holiday clubs				Childminders			
	2010	2008	2007	2006	2010	2008	2007	2006	2010	2008	2007	2006
None	2,400	2,100	2,100	1,900	1,600	1,300	1,100	1,200	32,300	38,200	43,000	40,000
1 to 5%	1,800	1,900	1,500	1,700	1,400	1,100	1,000	900	900	1,000	800	1,200
6 to 10%	1,500	1,300	1,500	1,200	1,000	1,100	900	1,100				
11% or more	3,500	3,200	3,200	2,700	3,100	2,500	2,500	2,600	13,500	16,400	15,600	15,500
Don't know	250	300	200	300	450	500	400	450	750	600	500	450

Base: Childcare providers 2010, 2008, 2007, 2006. Early years provision in maintained schools 2010, 2008, 2007, 2006

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Table 4.20e Number of providers by proportion of children of black and minority ethnic (BME) origin												
	Nursery schools				<i>Primary schools with nursery and reception classes</i>				Primary schools with reception but no nursery classes			
	2010	2008	2007	2006	2010	2008	2007	2006	2010	2008	2007	2006
None	#	#	#	#	900	900	1,000	1,000	3,200	4,100	3,900	4,400
1 to 5%	80	50	100	100	1,600	1,600	1,600	1,700	1,400	1,300	1,700	1,700
6 to 10%	50	50	50	50	800	800	900	900	1,500	1,400	1,400	1,400
11% or more	250	250	250	250	3,000	3,000	3,000	2,600	2,300	1,800	1,800	1,500
Don't know	#	#	#	#	350	400	200	240	100	100	150	100

Base: Childcare providers 2010, 2008, 2007, 2006. Early years provision in maintained schools 2010, 2008, 2007, 2006.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Additional Tables - Chapter 5

	Full day care		<i>Full day care in children's centres</i>		Sessional		After school clubs		Holiday clubs	
	No.	%	No.	%	No.	%	No.	%	No.	%
Total staff	213,300	100%	12,900	100%	65,400	100%	72,100	100%	83,300	100%
Senior manager	16,500	8%	800	6%	7,900	12%	9,600	13%	7,700	9%
Supervisors	113,000	52%	7,100	54%	30,000	46%	35,500	48%	39,500	46%
Other paid childcare staff	59,500	28%	3,600	27%	16,700	25%	21,700	29%	26,300	31%
Students on placements	20,100	9%	1,400	11%	6,100	9%	4,000	5%	6,100	7%
Volunteers	6,600	3%	350	3%	5,000	8%	3,200	4%	5,800	7%

Base: Childcare providers 2010.

	Private		Voluntary		Local Authority		School/college		Other	
	No.	%	No.	%	No.	%	No.	%	No.	%
Total paid staff	123,200	100%	41,200	100%	13,000	100%	8,900	100%	4,200	100%
Senior managers	9,700	8%	4,900	12%	1,000	8%	800	9%	250	6%
Supervisors	73,800	60%	23,800	58%	8,600	66%	5,800	62%	2,700	63%
Other paid staff	40,100	32%	12,500	30%	3,500	26%	2,800	29%	1,300	31%

Base: All paid staff in full day care providers 2010.

	Private		Voluntary		Local Authority		School/college		Other	
	No.	%	No.	%	No.	%	No.	%	No.	%
Total paid staff	1,600	100%	2,200	100%	6,600	100%	#	†	#	†
Senior managers	150	8%‡	150	6%‡	450	7%	#	†	#	†
Supervisors	950	58%‡	1,400	62%‡	4,100	61%	#	†	#	†
Other paid staff	550	34%‡	700	31%‡	2,200	33%	#	†	#	†

Base: All paid staff in full day care in children's centres 2010.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Table 5.6g Numbers and proportions of paid staff by staff level and ownership: sessional

	Private		Voluntary		Local Authority		School/college		Other	
	No.	%	No.	%	No.	%	No.	%	No.	%
Total paid staff	20,100	100%	31,900	100%	2,000	100%‡	#	†	#	†
Senior managers	2,500	13%	4,900	16%	300	16%‡	#	†	#	†
Supervisors	11,200	56%	17,000	53%	1,400	68%‡	#	†	#	†
Other paid staff	6,300	32%	10,000	31%	350	16%‡	#	†	#	†

Base: All paid staff in sessional providers 2010.

Table 5.6h Numbers and proportions of paid staff by staff level and ownership: after school clubs

	Private		Voluntary		Local Authority		School/ college		Other	
	No.	%	No.	%	No.	%	No.	%	No.	%
Total paid staff	27,000	100%	17,600	100%	5,300	100%‡	16,900	100%	#	†
Senior managers	3,700	14%	2,700	15%	600	11%‡	2,700	16%	#	†
Supervisors	14,800	55%	8,400	47%	2,000	37%‡	10,600	62%	#	†
Other paid staff	8,600	32%	6,800	38%	2,800	52%‡	3,800	22%	#	†

Base: All paid staff in after school clubs 2010.

Table 5.6i Numbers and proportions of paid staff by staff level and ownership: holiday clubs

	Private		Voluntary		Local Authority		School/college		Other	
	No.	%	No.	%	No.	%	No.	%	No.	%
Total paid staff	37,600	100%	18,100	100%	7,600	100%‡	10,100	100%	#	†
Senior managers	3,700	10%	2,000	11%	750	10%‡	1,300	13%	#	†
Supervisors	20,700	55%	9,600	53%	4,300	56%‡	5,200	51%	#	†
Other paid staff	13,500	36%	6,600	36%	2,600	34%‡	3,600	36%	#	†

Base: All paid staff in holiday clubs 2010.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

	Nursery schools		Primary schools with nursery and reception classes		Primary schools with reception but no nursery classes	
	No.	%	No.	%	No.	%
All staff	6,000	100%	68,400	100%	53,200	100%
Head teacher/Early years or foundation stage co-ordinator	400	7%	6,600	10%	8,300	17%
Early years teachers	1,100	18%	14,600	22%	8,200	17%
Nursery nurses	2,300	38%	16,400	25%	7,300	15%
Early years support staff	1,100	18%	13,400	20%	10,700	22%
Students on placements	800	13%	8,200	12%	5,100	10%
Volunteers	400	7%	7,000	11%	9,700	20%

Base: Early years provision in maintained schools 2010.

	Private	Voluntary	Local Authority	School	Other
Full day care	28%	16%	67%	52%	60%
<i>Full day care in children's centres</i>	42%	57%	79%	69%	68%
Sessional	9%	10%	38%	26%	15%
After school clubs	11%	12%	16%	17%	8%
Holiday clubs	16%	13%	27%	16%	12%

Base: Childcare providers 2010.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Table 5.8b Proportion of providers using agency staff by Government Office Region

	East Midlands	East of England	London	North East	Yorkshire and Humberside	North West	South East	South West	West Midlands
Full day care	15%	22%	46%		28%	27%	24%	25%	29%
<i>Full day care in children's centres</i>	†	†	79%‡		61%‡	77%‡	†	†	†
Sessional	16%	5%	13%		16%	15%	5%	11%	16%
After school clubs	16%‡	17%	22%		8%	11%	6%	10%	17%
Holiday clubs	11%	15%	24%		14%	13%	14%	12%	22%
Nursery school	†	†	†		†	†	†	†	†
Primary schools with nursery and reception classes	53%‡	39%‡	72%		58%	62%	60%‡	†	60%‡
Primary schools with reception but no nursery classes	43%‡	37%	†		42%‡	60%‡	51%	46%	†

Base: Childcare providers 2010. Early years provision in maintained schools 2010.

Table 5.8c Proportion of providers using agency staff by area deprivation and population density

	Area Deprivation		Population density		
	30% most deprived	70% least deprived	Low	Medium	High
Full day care	39%	24%	17%	26%	37%
<i>Full day care in children's centres</i>	70%	63%‡	†	73%‡	71%
Sessional	21%	9%	10%	7%	14%
After school clubs	20%	10%	10%	14%	15%
Holiday clubs	19%	14%	9%	19%	19%
Nursery school	79%	60%‡	†	†	75%
Primary school with nursery and reception classes	68%	53%	46%	57%	67%
Primary school with reception but no nursery classes	54%‡	46%	41%	52%	59%

Base: Childcare providers 2010. Early years provision in maintained schools 2010.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Table 5.14a Hours worked (mean) by type of provider and staff type in 2006, 2007, 2008, 2009 and 2010: childcare providers

	Full day care					Full day care in children's centres					Sessional				
	2010	2009	2008	2007	2006	2010	2009	2008	2007	2006	2010	2009	2008	2007	2006
All paid staff	32	34	34	33	33	34	34	34	34	34	22	19	19	18	17
Senior managers	35	37	36	37	37	36	37	36	37	37	25	24	24	23	22
Supervisory staff	34	36	35	35	35	35	35	35	35	35	23	20	20	19	18
Other paid childcare staff	30	32	31	30	30	32	32	32	32	31	18	15	16	14	13

Base: All paid childcare staff 2010, 2009, 2008, 2007, 2006.

Table 5.14b Hours worked (mean) by type of provider and staff type in 2006, 2007, 2008, 2009 and 2010: childcare providers

	After school clubs					Holiday clubs				
	2010	2009	2008	2007	2006	2010	2009	2008	2007	2006
All paid staff	22	19	18	18	19	30	29	27	29	27
Senior managers	27	25	24	24	26	34	34	33	35	34
Supervisory staff	23	19	19	19	20	32	30	29	30	28
Other paid childcare staff	18	15	15	14	15	26	26	23	26	24

Base: All paid childcare staff 2010, 2009, 2008, 2007, 2006.

Table 5.14c Hours worked (mean) in childcare providers by staff level; type of ownership and profit making status: full day care

	Private	Voluntary	Local authority	School/college	Other	Profit	Not-for-profit
All paid staff	35	25	32	34	34	35	27
Senior managers	37	31	34	36‡	†	38	32
Supervisory staff	36	27	33	35	34‡	36	29
Other paid childcare staff	32	21	30	31	33‡	32	23

Base: All paid staff in full day care providers 2010.

Table 5.14d Hours worked (mean) in childcare providers by staff level; type of ownership and profit making status: full day care in children's centres

	Private	Voluntary	Local authority	School/college	Other	Profit	Not-for-profit
All paid staff	34	34	34	34	†	34	34
Senior managers	37‡	36‡	36	†	†	36	36
Supervisory staff	35	34	34	35‡	†	35	35
Other paid childcare staff	33	31	32	33‡	†	32	32

Base: All paid staff in full day care in children's centres 2010.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Table 5.14e Hours worked (mean) in childcare providers by staff level; type of ownership and profit making status: sessional

	Private	Voluntary	Local authority	School/college	Other	Profit	Not-for-profit
All paid staff	24	20	27	29	22‡	25	20
Senior managers	27	24	†	†	†	28	24
Supervisory staff	26	20	27	30‡	†	26	21
Other paid childcare staff	21	16	†	†	†	22	17

Base: All paid staff in sessional providers 2010.

Table 5.14f Hours worked (mean) in childcare providers by staff level; type of ownership and profit making status: after school clubs

	Private	Voluntary	Local authority	School/college	Other	Profit	Not-for-profit
All paid staff	27	19	16	20	†	25	20
Senior managers	32	24	27‡	24	†	30	24
Supervisory staff	29	20	18	20	†	26	22
Other paid childcare staff	24	15	10‡	16	†	21	16

Base: All paid staff in after school clubs 2010.

Table 5.14g Hours worked (mean) in childcare providers by staff level; type of ownership and profit making status: holiday clubs

	Private	Voluntary	Local authority	School/college	Other	Profit	Not-for-profit
All paid staff	33	26	29	26	31‡	32	26
Senior managers	36	30	33‡	31	†	36	32
Supervisory staff	34	28	31	29	†	34	28
Other paid childcare staff	29	23	23	20	†	29	22

Base: All paid staff in holiday clubs 2010.

Table 5.15a Hours worked (mean) by area deprivation

	30% most deprived areas	70% least deprived areas
Full day care	34	32
<i>Full day care in children's centres</i>	34	33
Sessional providers	26	21
After school clubs	25	21
Holiday clubs	31	30
Nursery schools	32	29
Primary schools with nursery and reception classes	30	28
Primary schools with reception but no nursery classes	29	26

Base: Childcare providers 2010. Early years provision in maintained schools 2010.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Table 5.17c Average pay (mean) by staff type and type of ownership: full day care					
	Private	Voluntary	Local authority	School/ college	Other
All paid staff	£7.50	£8.00	£10.40	£9.30	£10.50
Senior managers	£10.30	£10.20	£15.50	£14.10‡	†
Supervisors	£7.90	£8.30	£10.70	£9.40	£10.80‡
Other paid staff	£6.30	£6.50	£8.40	£7.50	£9.00‡

Base: All paid staff in full day care providers 2010.

Table 5.17d Average pay (mean) by staff type and type of ownership: full day care in children's centres					
	Private	Voluntary	Local authority	School/ college	Other
All paid staff	£8.80	£9.20	£12.00	£11.70	†
Senior managers	£13.30‡	£15.30‡	£17.80	†	†
Supervisors	£9.50	£9.30	£12.70	£13.00‡	†
Other paid staff	£6.70	£7.50	£9.40	£7.80‡	†

Base: All paid staff in full day care in children's centres 2010.

Table 5.17e Average pay (mean) by staff type and type of ownership: sessional					
	Private	Voluntary	Local authority	School/ college	Other
All paid staff	£7.60	£7.50	£11.80	£11.90	£12.90‡
Senior managers	£9.70	£9.20	†	†	†
Supervisors	£7.90	£7.60	£11.60	£11.90‡	†
Other paid staff	£6.50	£6.60	†	†	†

Base: All paid staff in sessional providers 2010.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Table 5.17f Average pay (mean) by staff type and type of ownership: after school clubs

	Private	Voluntary	Local authority	School/ college	Other
All paid staff	£7.60	£7.60	£8.90	£10.10	†
Senior managers	£10.10	£10.30	£13.00‡	£13.50	†
Supervisors	£7.80	£7.80	£9.30	£10.70	†
Other paid staff	£6.30	£6.60	£7.10‡	£7.50	†

Base: All paid staff in after school clubs 2010.

Table 5.17g Average pay (mean) by staff type and type of ownership: holiday clubs

	Private	Voluntary	Local authority	School/ college	Other
All paid staff	£8.10	£8.70	£10.90	£11.70	£9.20‡
Senior managers	£11.50	£11.30	£13.50‡	£14.20	†
Supervisors	£8.50	£9.30	£11.70	£11.40	†
Other paid staff	£6.90	£7.10	£8.80	£11.60	†

Base: All paid staff in holiday clubs 2010.

Table 5.17h Average (mean) hourly pay by staff type and area deprivation - childcare

	Full day care		<i>Full day care in children's centres</i>		Sessional		After school clubs		Holiday clubs	
	30% most deprived areas	70% least deprived areas	30% most deprived areas	70% least deprived areas	30% most deprived areas	70% least deprived areas	30% most deprived areas	70% least deprived areas	30% most deprived areas	70% least deprived areas
All paid staff	£8.30	£7.80	£11.00	£10.80	£8.50	£7.70	£9.40	£7.80	£9.50	£8.80
Senior managers	£11.70	£10.50	£16.80	£15.40‡	£10.60	£9.40	£12.40	£10.80	£13.60	£11.30
Supervisors	£8.50	£8.20	£11.50	£11.60	£9.00	£7.80	£10.00	£8.00	£9.50	£9.20
Other paid staff	£6.70	£6.50	£8.60	£7.90	£6.30	£6.80	£6.90	£6.70	£8.20	£7.70

Base: All paid staff in childcare settings 2010.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Table 5.17i Average (mean) pay by profit making status and qualification of senior manager: full day care

	Profit making status		Qualification of senior manager	
	Not-for-profit	For Profit	Not graduate led	Graduate led
All paid staff	£8.20	£7.80	£7.80	£8.50
Senior managers	£10.80	£10.70	£10.30	£12.50
Supervisors	£8.60	£8.20	£8.10	£8.90
Other paid staff	£6.70	£6.50	£6.50	£6.80

Base: All paid staff in full day care providers 2010.

Table 5.17j Average (mean) pay by profit making status and qualification of senior manager: full day care in children's centres

	Profit making status		Qualification of senior manager	
	Not-for-profit	For Profit	Not graduate led	Graduate led
All paid staff	£10.60	£11.50	£9.70	£11.80
Senior managers	£15.30	£17.80	£14.00	£18.50
Supervisors	£11.00	£12.30	£10.10	£12.70
Other paid staff	£8.10	£8.80	£7.60	£8.90

Base: All paid staff in full day care in children's centres 2010.

Table 5.17k Average (mean) pay by profit making status and qualification of senior manager: sessional

	Profit making status		Qualification of senior manager	
	Not-for-profit	For Profit	Not graduate led	Graduate led
All paid staff	£7.80	£7.90	£7.60	£9.00
Senior managers	£9.50	£10.10	£9.20	£11.90
Supervisors	£7.90	£8.20	£7.60	£9.70
Other paid staff	£6.70	£6.60	£6.70	£6.50

Base: All paid staff in sessional providers 2010.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Table 5.17i Average (mean) pay by profit making status and qualification of senior manager: after school club

	Profit making status		Qualification of senior manager	
	Not-for-profit	For Profit	Not graduate led	Graduate led
All paid staff	£8.50	£8.10	£7.70	£9.90
Senior managers	£11.00	£11.40	£10.30	£15.00
Supervisors	£9.10	£8.30	£7.80	£10.60
Other paid staff	£6.90	£6.60	£6.60	£7.00

Base: All paid staff in after school clubs 2010.

Table 5.17m Average (mean) pay by profit making status and qualification of senior manager: holiday club

	Profit making status		Qualification of senior manager	
	Not-for-profit	For Profit	Not graduate led	Graduate led
All paid staff	£8.80	£9.10	£8.50	£10.80
Senior managers	£11.60	£12.40	£11.40	£14.30
Supervisors	£9.40	£9.20	£8.70	£11.20
Other paid staff	£7.20	£8.20	£7.50	£9.10

Base: All paid staff in holiday clubs 2010.

Table 5.18a Average (mean) hourly pay by staff type and area deprivation – early years

	Nursery classes		Primary schools with nursery and reception classes		Primary schools with reception but no nursery classes	
	30% most deprived areas	70% least deprived areas	30% most deprived areas	70% least deprived areas	30% most deprived areas	70% least deprived areas
All paid staff	£14.40	£14.20	£14.40	£14.70	£14.20	£14.80
Early years coordinator	£28.00	£28.00	£24.00	£23.00	£21.00‡	£22.00
Early years teachers	£21.80	£21.90	£19.50	£20.30	£19.70‡	£19.80
Nursery Nurses	£11.40	£11.20	£11.10	£10.80	£10.20‡	£10.10
Other paid childcare staff	£9.60	£9.10	£9.20	£8.70	£9.50‡	£9.10

Base: All paid staff in early years settings in maintained schools 2010.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Appendix 2 – Unweighted base sizes

Childcare providers 2010: Full day care (1802); Full day care in children's centres (337); Sessional (1314); After school clubs (1034); Holiday clubs (1091).

Childcare providers 2009: Full day care (880); Full day care in children's centres (250); Sessional (860); After school clubs (847); Holiday clubs (733).

Childcare providers 2008: Full day care (2,006); Full day care in children's centres (388); Sessional (1,138); After school clubs (1,229); Holiday clubs (728).

Childcare providers 2007: Full day care (2,000); Full day care in children's centres (509); Sessional (1,139); After school clubs (1,183); Holiday clubs (732).

Childcare providers 2006: Full day care (3,322); Sessional (1,172); After school clubs (969); Holiday clubs (756).

Childcare providers 2005: Full day care (1,171); Sessional (1,007).

Childcare providers 2003: Full day care (850); Sessional (850); After school clubs (850); Holiday clubs (850).

Childcare providers 2001: Full day care (850); Sessional (868); After school clubs (850).

All childcare providers who have not expanded in last 12 months (2010): Full day care (685); Full day care in children's centres (147); Sessional (749); After school clubs (372); Holiday clubs (416).

All childcare providers who have not expanded in last 12 months (2009): Full day care (749); Full day care in children's centres (216); Sessional (767); After school clubs (742); Holiday clubs (632).

All children's centres 2010: (1738).

All children's centres 2009: (711).

All children's centres 2008: (1123).

All children's centres 2007: (509).

All full day care, full day care in children's centres and sessional providers 2010: (1802); (337); (1314).

All full day care, full day care in children's centres and sessional providers 2009: (880); (250); (860).

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

All full day care, full day care in children's centres and sessional providers 2008: (2,006); (388); (1,138).

All full day care, full day care in children's centres and sessional providers 2007: (2,000); (509); (1,139).

Childcare providers with 3 and 4 year olds 2010: Full day care (1762); Full day care in children's centres (314); Sessional (856); After school clubs (791); Holiday clubs (797)

Childcare providers with 3 and 4 year olds 2009: Full day care (856); Full day care in children's centres (236); Sessional (850); After school clubs (611); Holiday clubs (453)

All respondents in childcare surveys 2010: (5,578).

All respondents in childcare surveys 2009: (3,570).

All respondents in childcare surveys 2008: (5,489).

All respondents in childcare surveys 2007: (5,563).

All paid childcare staff 2010: Full day care (9,815); Full day care in children's centres (1,867); Sessional (6,288); After school clubs (4,649); Holiday clubs (5,609).

All paid childcare staff 2009: Full day care (4,934); Full day care in children's centres (1,394); Sessional (4,160); After school clubs (3,797); Holiday clubs (3,739).

All paid childcare staff 2008: Full day care (11,376); Full day care in children's centres (2,191); Sessional (5,568); After school clubs (5,344); Holiday clubs (3,572).

All paid childcare staff 2007: Full day care (11,693); Full day care in children's centres (2,382); Sessional (5,590); After school clubs (5,123); Holiday clubs (3,667).

All paid childcare staff including childminders 2010: Full day care (9,815); Full day care in children's centres (1,867); Sessional (6,288); After school clubs (4,649); Holiday clubs (5,609); Childminders (900).

All paid childcare staff including childminders 2009: Full day care (4,934); Full day care in children's centres (1,394); Sessional (4,160); After school clubs (3,797); Holiday clubs (3,739); Childminders (849).

All paid childcare staff including childminders 2008: Full day care (11,376); Full day care in children's centres (2,191); Sessional (5,568); After school clubs (5,344); Holiday clubs (3,572); Childminders (850).

All paid childcare staff including childminders 2007: Full day care (11,693); Full day care in children's centres (2,382); Sessional (5,590); After school clubs (5,123); Holiday clubs (3,667); Childminders (845).

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

All paid childcare staff 2006: Full day care (19,264); Full day care in children's centres (1,502); Sessional (5,714); After school clubs (4,578); Holiday clubs (3,869).

All paid childcare staff 2005: Full day care (6,532); Sessional (4,776); Out of school (5,041).

All paid childcare staff 2003: Full day care (9,567); Sessional (4,812); After school clubs (4,898); Holiday clubs (6,359).

All paid staff in full day care providers 2010: (9,815).

All paid staff in full day care providers 2009: (4,934).

All paid staff in full day care providers 2008: (11,376).

All paid staff in full day care providers 2007: (11,693).

All paid staff in full day care in children's centres 2010: (1,867).

All paid staff in full day care in children's centres 2009: (1,394).

All paid staff in full day care in children's centres 2008: (2,191).

All paid staff in full day care in children's centres 2007: (2,382).

All paid staff in sessional providers 2010: (6,288).

All paid staff in sessional providers 2009: (4,160).

All paid staff in sessional providers 2008: (5,568).

All paid staff in sessional providers 2007: (5,590).

All paid staff in after school clubs 2010: (4,649).

All paid staff in after school clubs 2009: (3,797).

All paid staff in after school clubs 2008: (5,344).

All paid staff in after school clubs 2007: (5,123).

All paid staff in holiday clubs 2010: (5,609).

All paid staff in holiday clubs 2009: (3,739).

All paid staff in holiday clubs 2008: (3,572).

All paid staff in holiday clubs 2007: (3,667).

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Module B childcare providers 2010: Full day care (995); Full day care in children's centres (173); Sessional (707); After school clubs (573); Holiday clubs (595).

Module B childcare providers 2008: Full day care (1,098); Full day care in children's centres (199); Sessional (492); After school clubs (648); Holiday clubs (390).

Module B childcare providers 2007: Full day care (1,070); Full day care in children's centres (208); Sessional (622); After school clubs (628); Holiday clubs (346).

Module B childcare providers 2006: Full day care (1,702); Full day care in children's centres (533); Sessional (611); After school clubs (511); Holiday clubs (393).

Module B childcare providers 2005: Full day care (615); Sessional (513).

Childcare providers 30% most deprived areas 2010: Full day care (443); Full day care in children's centres (245) Sessional (224); After school clubs (272); Holiday clubs (334).

Childcare providers 30% most deprived areas 2009: Full day care (221); Full day care in children's centres (250) Sessional (122); After school clubs (244); Holiday clubs (199).

Childcare providers 30% most deprived areas 2008: Full day care (557); Full day care in children's centres (423) Sessional (193); After school clubs (344); Holiday clubs (198).

Childcare providers 30% most deprived areas 2007: Full day care (568); Full day care in children's centres (372) Sessional (183); After school clubs (334); Holiday clubs (219).

Childcare providers 30% most deprived areas 2006: Full day care (896); Full day care in children's centres (164); Sessional (1,172); After school clubs (273); Holiday clubs (251).

Childminders 2010: (900).

Childminders 2009: (849).

Childminders 2008: (850).

Childminders 2007: (845).

Childminders 2006: (723).

Childminders 2005: (1,132).

Childminders 2003: (850).

All childminders who have not expanded in the last 12 months 2010: (753).

All childminders who have not expanded in the last 12 months 2009: (730).

All children childminders look after in typical week 2010: (4,215).

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

All children childminders look after in typical week 2009: (4,009).

All children childminders look after in school holidays 2010: (2,803).

All children childminders look after in school holidays 2009: (2,609).

All childminders who look after 3 and 4 year olds 2010: (164).

All childminders who look after 3 and 4 year olds 2009: (101).

All paid childcare staff with at least a level 6 qualification 2010: Full day care (880); Full day care in children's centres (398); Sessional (425); After school clubs (382); Holiday clubs (517).

All paid childcare staff with at least a level 6 qualification 2009: Full day care (384); Full day care in children's centres (222); Sessional (210); After school clubs (260); Holiday clubs (344).

All paid childcare staff with at least a level 5 qualification 2010: Full day care (1,327); Full day care in children's centres (514); Sessional (583); After school clubs (562); Holiday clubs (757).

All paid childcare staff with at least a level 5 qualification 2009: Full day care (588); Full day care in children's centres (300); Sessional (305); After school clubs (351); Holiday clubs (474).

All paid childcare staff with at least a level 5 qualification 2008: Full day care (902); Full day care in children's centres (367); Sessional (353); After school clubs (425); Holiday clubs (387).

All paid childcare staff (module B) 2010: Full day care (5,447); Full day care in children's centres (937); Sessional (3,405); After school clubs (2,602); Holiday clubs (3,042).

All paid childcare staff (module B) 2008: Full day care (6,156); Full day care in children's centres (1,113); Sessional (2,439); After school clubs (2,782); Holiday clubs (1,899).

All paid childcare staff (module B) 2007: Full day care (6,267); Full day care in children's centres (1,223); Sessional (3,097); After school clubs (2,697); Holiday clubs (1,705).

All paid childcare staff (module B) 2006: Full day care (9,794); Full day care in children's centres (553); Sessional (2,974); After school clubs (4,489); Holiday clubs (2,005).

Module A childcare providers 2010: Full day care (807); Full day care in children's centres (164); Sessional (607); After school clubs (461); Holiday clubs (496).

Module A childcare providers 2008: Full day care (907); Full day care in children's centres (181); Sessional (360); After school clubs (581); Holiday clubs (338).

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Module A childcare providers 2007: Full day care (930); Full day care in children's centres (187); Sessional (517); After school clubs (555); Holiday clubs (386).

Module A childcare providers 2006: Full day care (1,620); Full day care in children's centres (119); Sessional (561); After school clubs (458); Holiday clubs (363).

All senior managers in childcare providers 2010: Full day care (1,765); Full day care in children's centres (332); Sessional (1,241); After school clubs (1,004); Holiday clubs (1,065).

All senior managers in childcare providers 2009: Full day care (871); Full day care in children's centres (247); Sessional (817); After school clubs (810); Holiday clubs (708).

All senior managers in childcare providers 2008: Full day care (1,958); Full day care in children's centres (380); Sessional (1,066); After school clubs (1,136); Holiday clubs (706).

All senior managers in childcare providers 2007: Full day care (1,955); Full day care in children's centres (392); Sessional (1,027); After school clubs (1,106); Holiday clubs (697).

All senior managers in childcare providers 2006: Full day care (3,209); Full day care in children's centres (209); Sessional (1,032); After school clubs (908); Holiday clubs (725).

All senior managers in childcare providers 2003: Full day care (850); Sessional (868); Out of school (no base size available).

All supervisors in childcare providers 2010: Full day care (4,876); Full day care in children's centres (928); Sessional (3,132); After school clubs (2,253); Holiday clubs (2,692).

All supervisors in childcare providers 2009: Full day care (2,422); Full day care in children's centres (722); Sessional (2,031); After school clubs (1,813); Holiday clubs (1,752).

All supervisors in childcare providers 2008: Full day care (5,403); Full day care in children's centres (1,109); Sessional (2,574); After school clubs (2,414); Holiday clubs (1,600).

All supervisors in childcare providers 2007: Full day care (5,350); Full day care in children's centres (8,466); Sessional (2,483); After school clubs (2,338); Holiday clubs (1,661).

All supervisors in childcare providers 2006: Full day care (9,073); Full day care in children's centres (609); Sessional (2586); After school clubs (2,060); Holiday clubs (1,756).

All supervisors in childcare providers 2003: Full day care (5,384); Sessional (1,967); Out of school (no base size available)

All other paid childcare staff 2010: Full day care (3,174); Full day care in children's centres (607); Sessional (1,915); After school clubs (1,422); Holiday clubs (1,852).

All other paid childcare staff 2009: Full day care (1,641); Full day care in children's centres (425); Sessional (1,312); After school clubs (1,174); Holiday clubs (1,279).

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

All other paid childcare staff 2008: Full day care (4,015); Full day care in children's centres (702); Sessional (1,928); After school clubs (1,794); Holiday clubs (1,266).

All other paid childcare staff 2007: Full day care (3,893); Full day care in children's centres (731); Sessional (1,884); After school clubs (1,679); Holiday clubs (1,309).

All other paid childcare staff 2006: Full day care (6,168); Full day care in children's centres (391); Sessional (1,935); After school clubs (1,510); Holiday clubs (1,295).

All other paid childcare staff 2003: Full day care (3,333); Sessional (1,995); Out of school (no base size available).

Early Years provision in maintained schools 2010: Nursery schools (196); Primary schools with nursery and reception classes (795); Primary schools with reception but no nursery classes (711).

Early Years provision in maintained schools 2009: Nursery schools (100); Primary schools with nursery and reception classes (516); Primary schools with reception but no nursery classes (480).

Early Years provision in maintained schools 2008: Nursery schools (179); Primary schools with nursery and reception classes (561); Primary schools with reception but no nursery classes (579).

Early Years provision in maintained schools 2007: Nursery schools (201); Primary schools with nursery and reception classes (755); Primary schools with reception but no nursery classes (640).

Early Years provision in maintained schools 2006: Nursery schools (188); Primary schools with nursery and reception classes (535); Primary schools with reception but no nursery classes (513).

Early Years provision in maintained schools 2003: Nursery schools (200); Primary schools with nursery and reception classes (850); Primary schools with reception but no nursery classes (850).

Early years provision in maintained schools 30% most deprived areas 2010: Nursery schools (112); Primary schools with nursery and reception classes (321); Primary schools with reception but no nursery classes (77).

Early years provision in maintained schools 30% most deprived areas 2009: Nursery schools (64); Primary schools with nursery and reception classes (206); Primary schools with reception but no nursery classes (43).

Early years provision in maintained schools 30% most deprived areas 2008: Nursery schools (108); Primary schools with nursery and reception classes (270); Primary schools with reception but no nursery classes (59).

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Early years provision in maintained schools 30% most deprived areas 2007: Nursery schools (126); Primary schools with nursery and reception classes (304); Primary schools with reception but no nursery classes (88).

Early years provision in maintained schools 30% most deprived areas 2006: Nursery schools (107); Primary schools with nursery and reception classes (262); Primary schools with reception but no nursery classes (513).

All early years providers who look after 3 and 4 year olds: Nursery schools (95); Primary schools with nursery and reception classes (485); Primary schools with reception but no nursery classes (432).

All respondents in early years survey 2010: (1,702).

All respondents in early years survey 2009: (1,096).

All respondents in early years survey 2008: (1,319).

All respondents in early years survey 2007: (1,596).

All paid staff in all nursery schools 2010: (1,169).

All paid staff in all nursery schools 2009: (608).

All paid staff in all nursery schools 2008: (1,071).

All paid staff in all nursery schools 2007: (1,181).

All paid staff in all primary schools with nursery and reception classes 2010: (4,224).

All paid staff in all primary schools with nursery and reception classes 2009: (2,771).

All paid staff in all primary schools with nursery and reception classes 2008: (2,923).

All paid staff in all primary schools with nursery and reception classes 2007: (4,025).

All paid staff in all primary schools with reception but no nursery classes 2010: (2,550).

All paid staff in all primary schools with reception but no nursery classes 2009: (1,651).

All paid staff in all primary schools with reception but no nursery classes 2008: (1,930).

All paid staff in all primary schools with reception but no nursery classes 2007: (2,148).

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

All paid early years staff 2010: Nursery schools (1,169); Primary schools with nursery and reception classes (4,224); Primary schools with reception but no nursery classes (2,550).

All paid early years staff 2009: Nursery schools (608); Primary schools with nursery and reception classes (2,771); Primary schools with reception but no nursery classes (1,651).

All paid early years staff 2008: Nursery schools (1,071); Primary schools with nursery and reception classes (2,923); Primary schools with reception but no nursery classes (1,930).

All paid early years staff 2007: Nursery schools (1,181); Primary schools with nursery and reception classes (4,025); Primary schools with reception but no nursery classes (2,148).

All paid early years staff 2006: Nursery schools (1,107); Primary schools with nursery and reception classes (2,688); Primary schools with reception but no nursery classes (1,593).

All paid early years staff 2003: Nursery schools (2,518); Primary schools with nursery and reception classes (8,623); Primary schools with reception but no nursery classes (5,315).

All other early years coordinators / head teachers in early years providers in maintained schools 2010: Nursery schools (195); Primary schools with nursery and reception classes (777); Primary schools with reception but no nursery classes (691).

All other early years coordinators / head teachers in early years providers in maintained schools 2009: Nursery schools (100); Primary schools with nursery and reception classes (497); Primary schools with reception but no nursery classes (458).

All other early years coordinators / head teachers in early years providers in maintained schools 2008: Nursery schools (179); Primary schools with nursery and reception classes (545); Primary schools with reception but no nursery classes (550).

All other early years coordinators / head teachers in early years providers in maintained schools 2007: Nursery schools (201); Primary schools with nursery and reception classes (748); Primary schools with reception but no nursery classes (622).

All other early years coordinators / head teachers in early years providers in maintained schools 2006: Nursery schools (186); Primary schools with nursery and reception classes (497); Primary schools with reception but no nursery classes (431).

All other early years coordinators / head teachers in early years providers in maintained schools 2003: (No base size available).

All qualified early years teachers in early years providers in maintained schools 2010: Nursery schools (345); Primary schools with nursery and reception classes (1,252); Primary schools with reception but no nursery classes (629).

All qualified early years teachers in early years providers in maintained schools 2009: Nursery schools (182); Primary schools with nursery and reception classes (817); Primary schools with reception but no nursery classes (373).

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

All qualified early years teachers in early years providers in maintained schools 2008: Nursery schools (317); Primary schools with nursery and reception classes (837); Primary schools with reception but no nursery classes (517).

All qualified early years teachers in early years providers in maintained schools 2007: Nursery schools (342); Primary schools with nursery and reception classes (1,124); Primary schools with reception but no nursery classes (500).

All qualified early years teachers in early years providers in maintained schools 2006: Nursery schools (322); Primary schools with nursery and reception classes (773); Primary schools with reception but no nursery classes (398).

All qualified early years teachers in early years providers in maintained schools 2003: (No base size available).

All nursery nurses in early years providers in maintained schools 2010: Nursery schools (386); Primary schools with nursery and reception classes (1,220); Primary schools with reception but no nursery classes (494).

All nursery nurses in early years providers in maintained schools 2009: Nursery schools (195); Primary schools with nursery and reception classes (804); Primary schools with reception but no nursery classes (297).

All nursery nurses in early years providers in maintained schools 2008: Nursery schools (352); Primary schools with nursery and reception classes (899); Primary schools with reception but no nursery classes (346).

All nursery nurses in early years providers in maintained schools 2007: Nursery schools (397); Primary schools with nursery and reception classes (1,173); Primary schools with reception but no nursery classes (385).

All nursery nurses in early years providers in maintained schools 2006: Nursery schools (373); Primary schools with nursery and reception classes (844); Primary schools with reception but no nursery classes (299).

All nursery nurses in early years providers in maintained schools 2003: (No base size available).

All other early years support staff in early years providers in maintained schools 2010: Nursery schools (243); Primary schools with nursery and reception classes (995); Primary schools with reception but no nursery classes (736).

All other early years support staff in early years providers in maintained schools 2009: Nursery schools (131); Primary schools with nursery and reception classes (653); Primary schools with reception but no nursery classes (523).

All other early years support staff in early years providers in maintained schools 2008: Nursery schools (224); Primary schools with nursery and reception classes (684); Primary schools with reception but no nursery classes (629).

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

All other early years support staff in early years providers in maintained schools 2007: Nursery schools (241); Primary schools with nursery and reception classes (980); Primary schools with reception but no nursery classes (641).

All other early years support staff in early years providers in maintained schools 2006: Nursery schools (226); Primary schools with nursery and reception classes (574); Primary schools with reception but no nursery classes (465).

All other early years support staff in early years providers in maintained schools 2003: (No base size available).

All paid early years staff with at least a level 5 qualification 2010: Nursery schools (584); Primary schools with nursery and reception classes (2,111); Primary schools with reception but no nursery classes (1,354).

All paid early years staff with at least a level 5 qualification 2009: Nursery schools (307); Primary schools with nursery and reception classes (1,345); Primary schools with reception but no nursery classes (824).

All paid early years staff with at least a level 5 qualification 2008: Nursery schools (504); Primary schools with nursery and reception classes (1,371); Primary schools with reception but no nursery classes (943).

All paid early years staff with at least a level 5 qualification 2007: Nursery schools (575); Primary schools with nursery and reception classes (1,825); Primary schools with reception but no nursery classes (1,097).

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Appendix 3 – Glossary

Attendees: as some children may attend a setting on a part-time basis, it is possible that the number of attendees may exceed the number of registered places (as two part-time children attending on different days or at different times would effectively occupy a single registered place).

Disability: the Disability Discrimination Act (DDA) defines a disabled person as someone who has a “*physical or mental impairment that has a substantial and long-term adverse effect on his or her ability to carry out normal day-to-day activities*”¹²¹. For the purposes of the survey, it was made clear that children with Special Educational Needs (SEN) should be counted as having a disability.

Index of Multiple Deprivation (IMD): measures deprivation at the “*small area level*”¹²² and is used to define the 30 per cent most deprived and 70 per cent least deprived areas referred to throughout the report. The index analyses a number of defined characteristics of deprivation (including Income deprivation, Employment deprivation, Health deprivation and disability, Education, skills and training deprivation, Barriers to Housing and Services, Living environment deprivation and Crime). More deprived areas will experience a higher number of these characteristics of deprivation.

NVQ Assessors: appropriately qualified and experienced childcare staff can apply to become NVQ Assessors, for which they are required to complete a further training course. NVQ Assessors assess on-site and can assess their own staff or those working in other settings.

NVQ qualifications: are work based qualifications. Candidates are assessed on the job by a qualified NVQ Assessor, who may be a line manager or an external Assessor if the manager is not a qualified NVQ Assessor¹²³.

Ownership: the term ownership refers to the type of organisation responsible for owning and managing a provider. For the purposes of the report, five different ownership scenarios have been used. These are Private (owner/manager or part of a group or chain), Voluntary (church, charity or committee), Local Authority, School/College and Other (hospitals and other answers that could not be included in any of the existing categories). In a small proportion of cases, a single setting under joint ownership may fall into more than one of these categories.

Population density: is based on the number of people per hectare (ha = 10,000 square meters). Areas of low population density have up to 10 people per ha; areas of medium density have 11-24 people per ha and; areas of high density have 25 or more people per ha. Areas with lower population densities are generally more rural than those with high densities.

¹²¹ http://www.direct.gov.uk/en/DisabledPeople/RightsAndObligations/DisabilityRights/DG_4001069

¹²² <http://www.communities.gov.uk/documents/communities/pdf/131209.pdf>

¹²³ http://www.edexcel.org.uk/VirtualContent/64456/Edexcel_NVQ_guidance_for_candidates.pdf

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Registered places: as part of their registration process, Ofsted inform providers of the maximum number of children they can look after – this defines their number of registered places. This is based on ages of children and number of staff.

Registered provision: any person who is rewarded for looking after children under eight for more than two hours a day must register with Ofsted. If the provider is planning to offer early years education, they are also inspected for the quality of the provision by Ofsted.

Settings (maintained): Maintained settings include Nursery schools, Primary schools with reception but no nursery classes and Primary schools with reception and nursery classes. They have different characteristics to other providers, as they are funded by Local Authorities and there is no charge to parents for using them.

Settings (types of): the survey focuses on a number of different types of childcare setting:

- **Full day care:** defined as facilities that provide on-site day care for children under five for a continuous period of four hours or more in any day, in premises which are not domestic premises.
- **Sessional care:** defined as facilities where children under five attend day care for no more than five sessions a week, each session being less than a continuous period of four hours in any day. Where two sessions are offered in any one day, there is a break between sessions with no children in the care of the provider.
- **After school clubs:** defined as facilities providing after school activities or childcare during term time to school aged children aged under eight, for more than two hours in any day and more than five days a year.
- **Holiday clubs:** defined as facilities providing holiday activities or childcare during any school holidays to school aged children aged under eight, for more than two hours in any day and more than five days a year.
- **Children’s centres:** defined as centres providing a variety of advice and support for parents and carers. Their services are available from pregnancy through to the time when a child goes into reception class at primary school. For the purposes of this survey, analysis has focused on any full day care provision offered by these establishments on site¹²⁴.
- **Childminders:** defined as individuals registered with Ofsted to look after one or more children under the age of eight to whom they are not related, on domestic premises, for reward and for a total of more than two hours in any day.
- **Nursery schools:** these “provide education for children under the age of five and over the age of two¹²⁵.” Maintained nursery schools generally accept children in term time.
- **Primary schools with reception but no nursery classes:** some primary schools are able to admit four and five year old children into a reception class. Such classes operate throughout the school year.

¹²⁴ http://www.direct.gov.uk/en/Parents/Preschooldevelopmentandlearning/NurseriesPlaygroupsReceptionClasses/DG_173054

¹²⁵ <http://www.edubase.gov.uk/glossary.xhtml?letter=N>

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

- **Primary schools with reception and nursery classes:** some primary schools offer both nursery and reception classes, and again, these operate throughout the school year.

Staff (seniority): the survey focuses on a number of different types of staff:

- **Senior manager:** the person with overall responsibility for managing the provision in a setting.
- **Qualified early years teachers:** hold qualified teacher status (QTS), a requirement for anyone who wants to teach in a maintained school in England and Wales. An undergraduate degree and some form of teacher training is compulsory for new QTS recipients.
- **Supervisory staff:** are defined as those who are qualified to supervise a group of children on their own. They do not necessarily supervise other members of staff.
- **Nursery nurses:** meet the same criteria as supervisory staff, but are based in maintained settings (and do not hold QTS).
- **Other paid childcare staff / Other paid early years support staff:** are defined as other members of paid staff who are not qualified to supervise a group of children on their own but who are involved in running the childcare / early years sessions. These may include classroom assistants or other support staff.
- **Childminders:** are not required to hold any formal qualifications but must complete a local authority approved training course and a first aid course appropriate to infants and children within six months of beginning working as a childminder. They are also obliged to keep up to date first aid certificates.

N.B. As detailed in Chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

OSR17/2011 Main research report

ISBN: 978-1-78105-002-6

September 2011