



7th November 2019, fieldwork March – July 2019

There were an estimated 72 thousand providers offering 1.7 million Ofsted registered childcare places in England in Spring 2019¹

Proportion and number of childcare providers

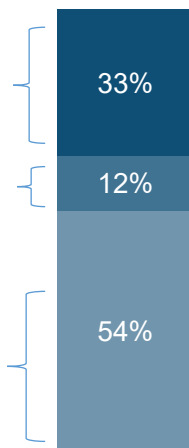
24,000 group-based providers:

- 14,700 private
- 8,600 voluntary
- 800 school/college/LA/unclassified

9,100 school-based providers:

- 8,700 school-based providers offering nursery provision
- 400 maintained nursery schools

39,400 registered childminders



Proportion and number of childcare places

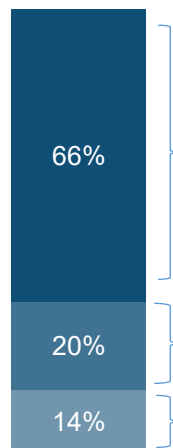
1.1 million group-based places:

- 755,000 private
- 297,700 voluntary
- 35,500 school/college/LA/unclassified

328,000 school-based nursery places:

- 291,500 school-based providers offering nursery provision
- 36,500 maintained nursery schools

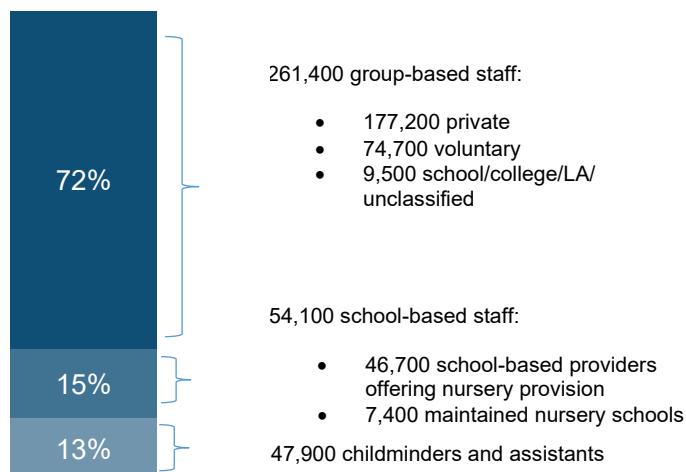
239,700 childminding places



Source: Survey of Childcare and Early Years Providers 2019

This early years provision was delivered by an estimated 363,400 staff²

Proportion and number of childcare staff



261,400 group-based staff:

- 177,200 private
- 74,700 voluntary
- 9,500 school/college/LA/unclassified

54,100 school-based staff:

- 46,700 school-based providers offering nursery provision
- 7,400 maintained nursery schools

47,900 childminders and assistants

There were an estimated 363,400 early years staff in group-based or school-based settings or working as childminders or childminding assistants. In 2018, there were an estimated 352,100 early years staff.

On average, group-based providers employed 11 members of staff. School-based providers had an average of six in their nursery provision. This was the same in 2018.

15% of childminders reported having at least one assistant. In total, there were 8,500 childminding assistants across England. In 2018, 12% of childminders reported having at least one assistant and there were 6,900 childminding assistants across England.

Source: Survey of Childcare and Early Years Providers 2019

¹These numbers are not directly comparable with previous years. The 2019 sample excluded school-based providers offering reception provision, but no nursery provision. The number of childcare places reported for school-based providers only includes the number of nursery places and, unlike 2018, excludes the number of before and after school places.

² The 2018 numbers throughout this report have been adjusted so that school-based providers offering reception provision have also been excluded in order to compare the number of childcare and early year providers in England between 2018 and 2019 accurately. As a result, some of the numbers do not match those published in the 2018 Official Statistics.

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About this release

This bulletin provides important information on childcare and early years provision in England from the Department for Education (DfE)'s Survey of Childcare and Early Years Providers. This includes representative survey data on: attendance and spare capacity within childcare settings; use of funded places; staff qualifications and pay; and the reported costs of providing childcare.

The 2019 Survey of Childcare and Early Years Providers was a mixed mode survey, that could be completed either online or on the telephone. Fieldwork took place between March and July 2019 and covered: group-based providers (private and voluntary); school-based providers (those offering nursery provision and maintained nursery schools); and childminders (see below). The sample was drawn from two sample frames: group-based providers and childminders registered with Ofsted as of July 2018 (the sampling was conducted in July 2018 to be consistent with the timing of sampling for previous years' surveys) and school-based providers from the January 2018 School Census, which was the most up-to-date sample frame for school-based providers available at the time of the survey in 2019.

Defining childcare providers

The study included:

Group-based providers (identified from the Ofsted register): childcare providers registered with Ofsted and operating in non-domestic premises. Eligible group-based provision included full day and sessional care for children below school age. The two main types of group-based providers included in this report are:

- Private group-based providers: These are private companies (both for profit and not for profit) that include employer-run childcare for employees.
- Voluntary group-based providers: These are voluntary organisations, including community groups, charities, churches or religious groups.

School-based providers (identified from the School Census). This covers nursery provision in schools. The two types of school-based providers are:

- School-based providers offering nursery provision: These are state-funded and independent schools which offer nursery classes.
- Maintained nursery schools: These are state-funded nursery schools.

Childminders (identified from the Ofsted register): Ofsted-registered childminders providing early years care and operating in domestic settings, not including those registered with an agency.

More information is provided in the technical report published alongside this release.

Comparison between 2018 and 2019 survey years

Following a DfE user consultation in 2018³, the 2019 sample excluded school-based providers offering reception provision, but no nursery provision, and only sampled and recruited providers for pre-school children aged 0 to 4. The 2018 numbers throughout this report have been adjusted so that school-based providers offering reception provision have also been excluded in order to compare the number of childcare and early year providers in England between 2018 and 2019 accurately. As a result, some of the numbers do not match those published in the 2018 Official Statistics⁴.

This report does not include analysis of any staff-level data (workforce qualifications and staff pay relating to the national living wage). This is due to differences in the data between 2018 and 2019 which may be due to differences in mode of completion and/or in sample composition rather than reflecting real world change. We hope to release staff-level findings as supplementary tables in due course.

³ Department for Education (2018). Surveys on Childcare and Early Years in England: Government consultation response. <https://www.gov.uk/government/consultations/surveys-on-childcare-and-early-years-in-england>

⁴ Department for Education (2018). Childcare and Early Years Providers Survey 2018. <https://www.gov.uk/government/statistics/childcare-and-early-years-providers-survey-2018>

Testing for statistical significance

Comparisons between the 2018 and 2019 survey years were tested for statistical significance where possible. Any differences between the 2018 and 2019 survey years have been tested for statistical significance to the 5% level. Any differences which are significant at the 5% level are sufficiently large that there is no more than a 5% probability of them occurring by chance rather than as a result of a genuine change in the underlying population. Tables 1, 5a, 5b, 12a and 12b were unable to be tested for significance because these use weighted data that have been calibrated to a known total. Tables 4a, 4b, 13, 14, 15, 20 and 21 were tested for significance. Where differences were statistically significant, this has been stated in the report. Any differences within 2019 numbers have not been tested for statistical significance.

In this publication

The following tables are included in this publication:

- Main tables
- LA Fees official statistics summary
- LA Fees tables
- Technical report

Data underlying this statistical bulletin will be available from the UK Data Service from January 2020.

Feedback

We welcome feedback on any aspect of this document at: EY.AnalysisANDResearch@education.gov.uk

Number of childcare providers and registered places

Number of providers

In 2019 there were estimated to be:

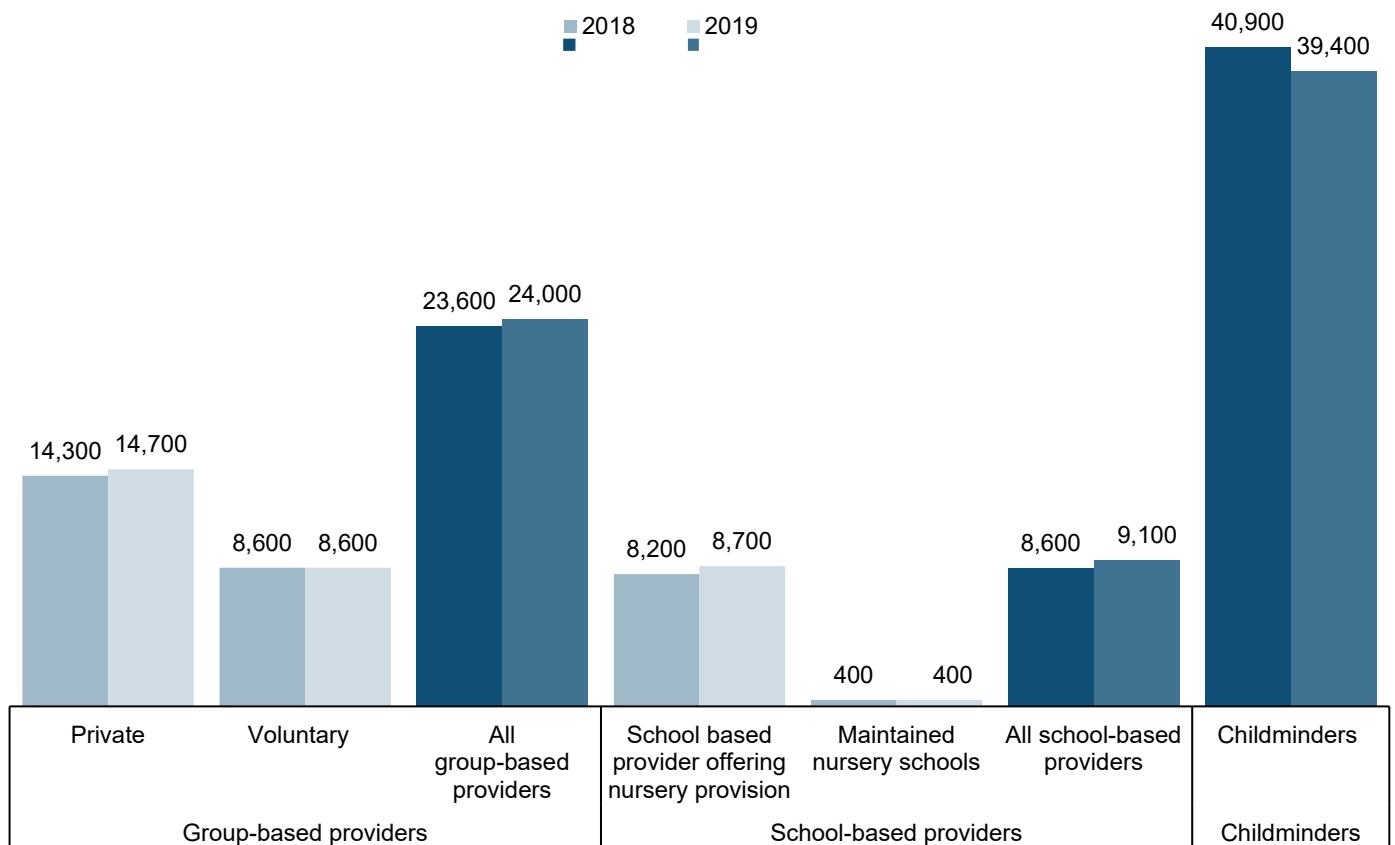
- 24,000 group-based early years providers⁵;
 - 14,700 of which were private group-based providers;
 - 8,600 of which were voluntary group-based providers;
 - 800 of which were school/college/other unclassified group-based providers⁶.
- 9,100 school-based providers;
 - 8,700 of which were school-based providers offering nursery provision;
 - 400 of which were maintained nursery schools; and
- 39,400 practising childminders (Table 1).

Figure 1 shows consistency in the estimated number of childcare and early years providers in England between 2018 and 2019. Survey estimates suggest that the overall number of providers was 72,400 in 2019 and 73,200 in 2018. The estimated number of group-based providers was 24,000 in 2019 compared with 23,600 in 2018. The estimated number of school-based providers was 9,100 in 2019 compared with 8,600. The estimated number of childminders was 39,400 in 2019 and 40,900 in 2018⁷.

⁵ The sum of the three group-based provider types comes to 24,100 when rounded. This is because figures for individual provider types have been rounded up. However, the actual estimated number of group-based early years providers is 24,001.

⁶ Group-based provider types include private, voluntary and school/college/LA/other unclassified. This third category is not presented elsewhere in this report. Figures for private and voluntary group-based provider types do not sum to the total of all group-based providers as school/college/LA/other classified are included in the total.

⁷ Differences between 2018 and 2019 have not been tested for statistical significance because they are estimated numbers based on known totals.



Source: Survey of Childcare and Early Years Providers 2018, 2019

Figure 1: Number of childcare providers and early years providers by type (rounded to the nearest 100) England, 2018 and 2019

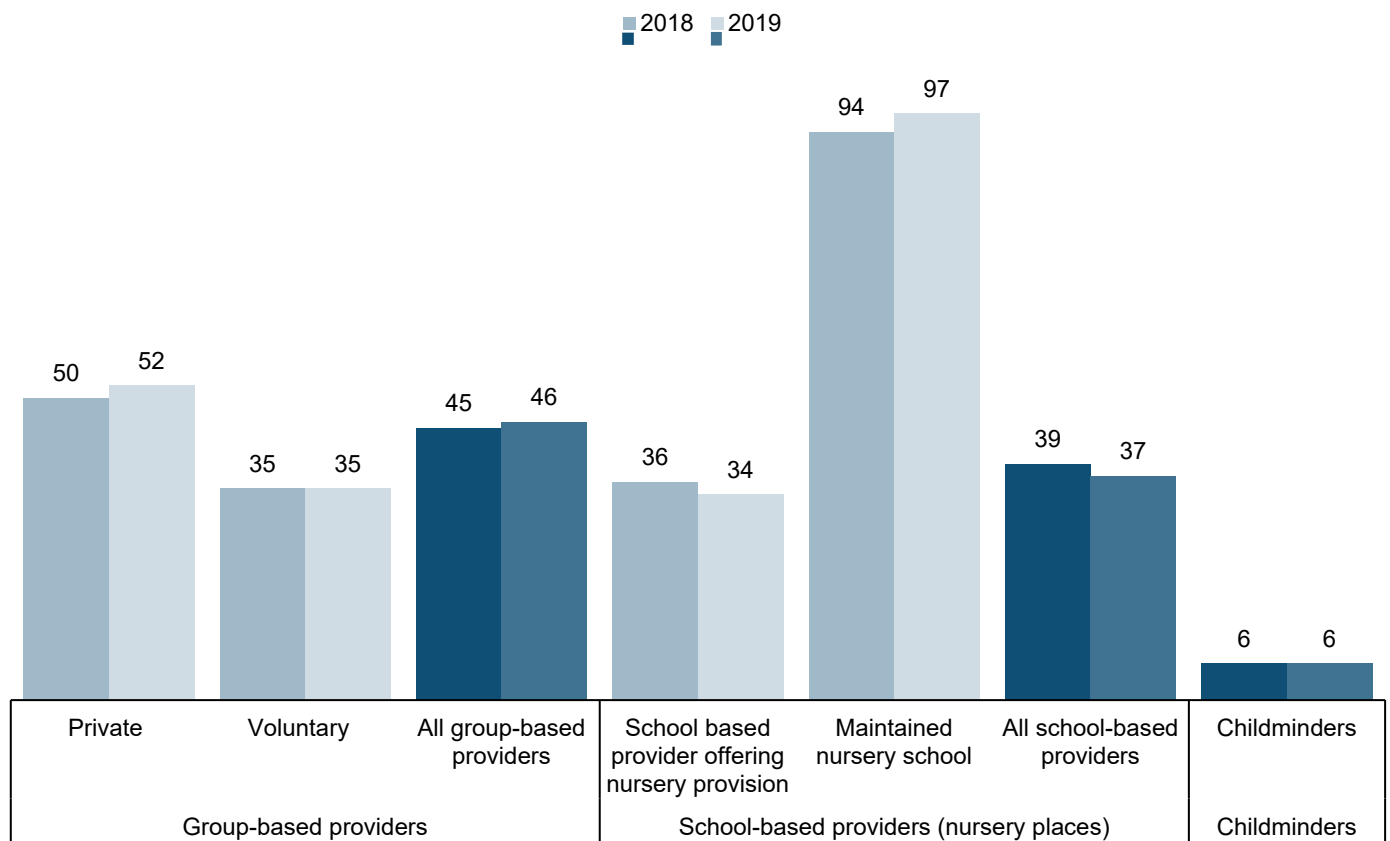
These numbers of providers are based on representative survey estimates. The number of providers is in line with the number of group-based providers and childminders on the Ofsted register (excluding those appearing only on the Voluntary Childcare Register), and the number of schools in the School Census - the three lists from which the survey sample was drawn⁸.

Number of childcare places

Figure 2 shows that, since 2018, the average number of places per provider has not changed for any type of provider. Any differences between 2018 and 2019 are not statistically significant. The average number of places in group-based providers in 2019 was 46, with private group-based providers having more registered places than voluntary group-based providers (52 and 35 respectively). The average number of nursery places in school-based providers in 2019 was 37. School-based providers offering nursery provision in 2019 had an average of 34 nursery places whilst maintained nursery schools reported having an average of 97 nursery places. Please refer to Table 4a to see the average number of before school and after school places by school-based provider type. Childminders had an average number of six registered places in 2019 (Tables 4a and 4b).

⁸ 2018/2019 figures are based on representative survey estimates grossed to the population sample frames: group-based providers and childminders registered with Ofsted in July 2017/2018 (excluding those appearing on the Voluntary Childcare Register (VCR) only) and the Schools Census collected in January 2017/2018. The sampling approach in 2019 followed the design adopted in 2018 as closely as possible. More information is available in the technical report accompanying this release.

Figure 2: Average number of registered places per provider
England, 2018 and 2019

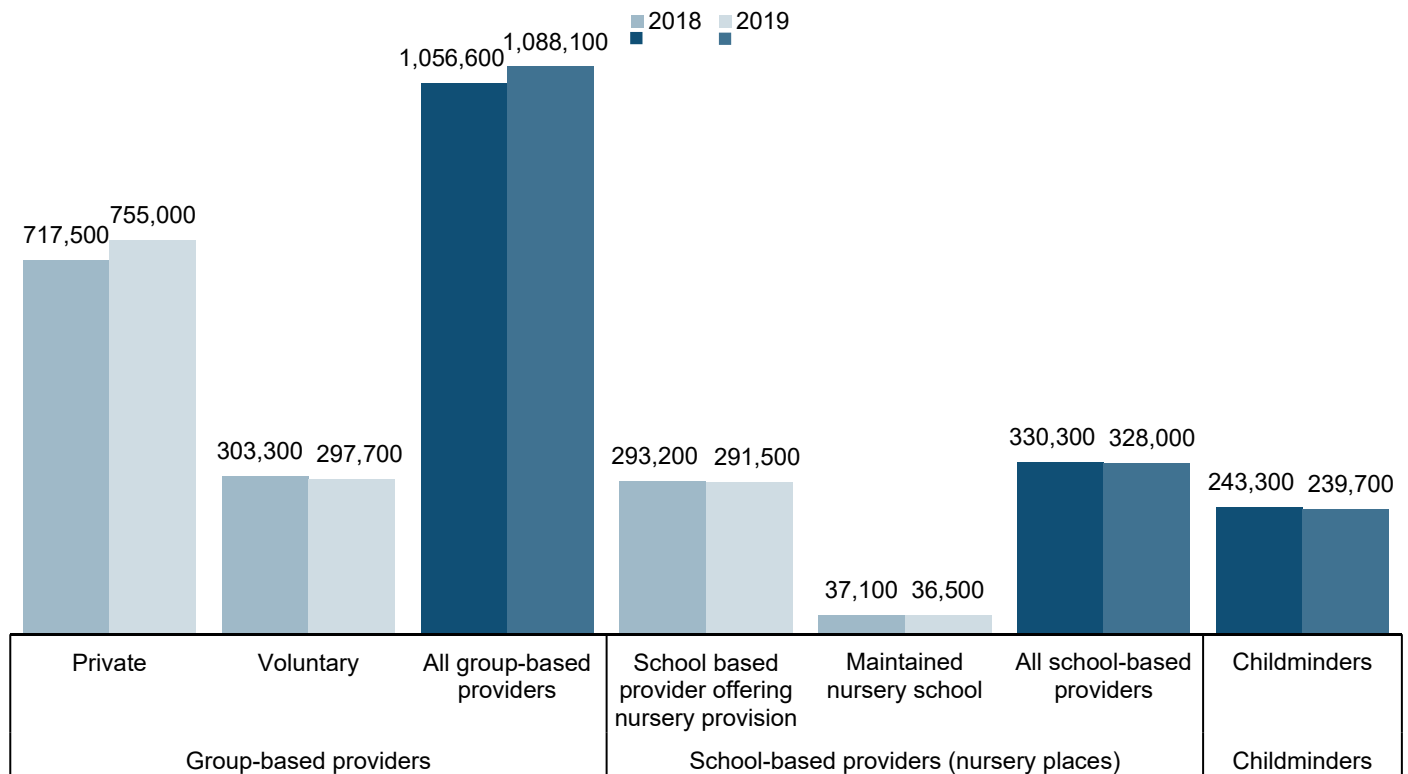


Source: Survey of Childcare and Early Years Providers 2018, 2019

Figure 3 shows that the overall number of registered childcare places in England in 2019 has remained similar to the number of registered childcare places in 2018. There were estimated to be 1,630,200 childcare places across all provider types in 2018 (when excluding those providing reception provision and excluding before and after school places), compared to 1,655,800 in 2019⁹ (Tables 5a and 5b). The number of childcare places has remained at a similar level since 2018 for all provider types, which is consistent with the stability observed in the number of providers shown in Figure 1, as well as in the average number of places per provider (Figure 2). Please refer to Table 5a to see the average number of before school and after school places by school-based provider type.

⁹ Differences between 2018 and 2019 have not been tested for statistical significance because they are estimated numbers based on known totals.

Figure 3: Total number of registered childcare places by provider type (rounded to the nearest 100)
England, 2018 and 2019



Source: Survey of Childcare and Early Years Providers 2018, 2019

Spare capacity

Any spare capacity

Providers identified how many children were booked to attend each type of provision on a particular day¹⁰ and the number of additional children they would have been willing and able to take. The majority of providers had at least some spare capacity¹¹.

For all provider types spare capacity was most common in wraparound provision¹². Among group-based providers, 86% of those offering before school provision and 84% of those offering after school provision had spare capacity in these sessions (Figure 4a, Table 7b). A slightly higher proportion of private group-based providers had spare capacity in before school sessions compared to their voluntary group-based provider counterparts (88% and 84% respectively). Regarding after school provision, 84% of both private and voluntary group-based providers had spare capacity in these sessions (Table 7b).

Almost three-quarters (73%) of group-based providers reported spare capacity in their full day nursery provision, 70% reported spare places in their morning nursery sessions and 77% reported spare places in the afternoon nursery sessions. Again, a higher proportion of private group-based providers had spare capacity in these sessions compared to voluntary group-based providers.

¹⁰ Providers were allocated to think about a specified weekday in the previous week, e.g. last Wednesday. They were asked about a randomly sampled day of week to give a representative spread of responses across weekdays.

¹¹ All figures reported for group-based providers and school-based providers include providers offering those sessions on the particular day that they were asked about. Figures for childminders include all childminders offering care on that day.

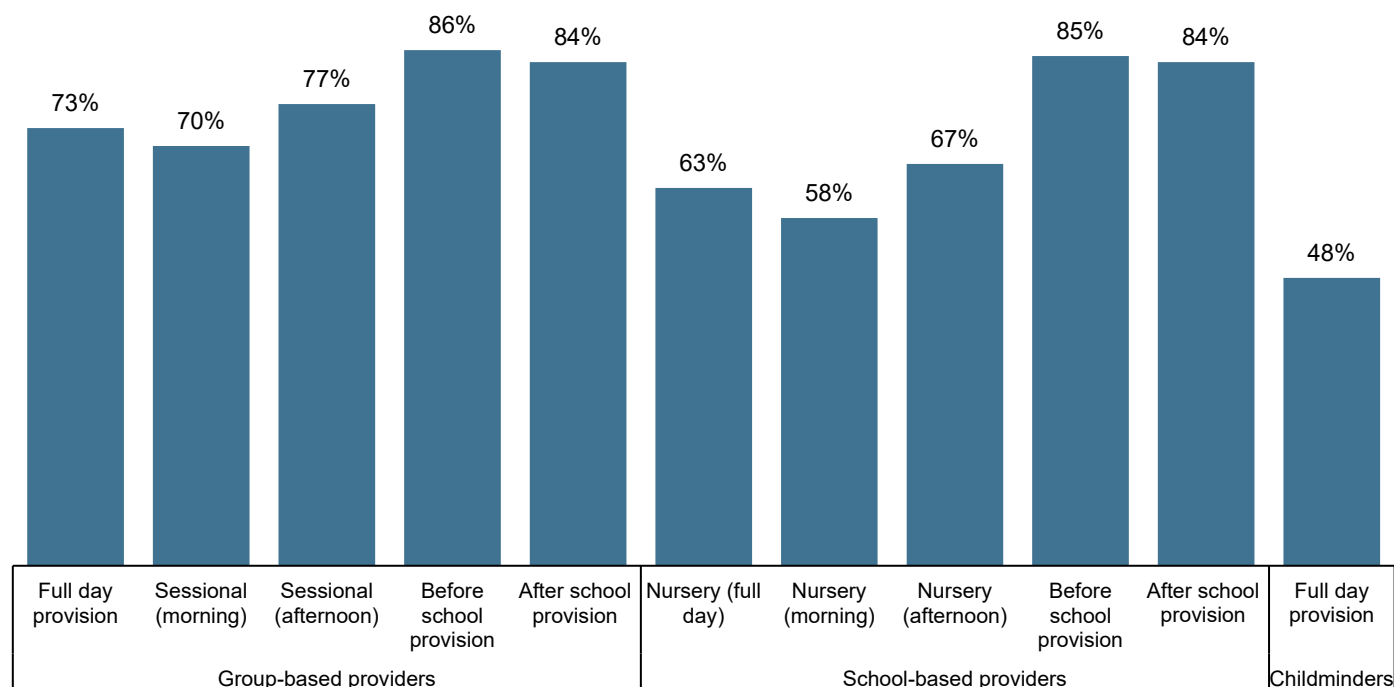
¹² Wraparound provision is defined as childcare provided outside of normal school hours, such as breakfast clubs or after school care.

Of school-based providers, 85% reported spare places in their before school provision and 84% reported spare places in their after school provision (Figure 4a, Table 7a). Of school-based providers offering nursery provision, 85% had spare capacity in their before school sessions and 84% had spare capacity in their after school sessions. This compares with maintained nursery schools of which 82% had spare capacity in before school provision and 80% in after school provision (Table 7a).

School-based providers were less likely to have spare capacity during the school day than group-based providers. Nevertheless, almost two-thirds (63%) reported having spare capacity in their full day nursery provision, 58% had spare capacity in their morning nursery sessions, and two-thirds (67%) had spare capacity in their afternoon nursery sessions. Similar proportions of school-based providers offering nursery provision, and maintained nursery schools, reported having spare capacity in their full day nursery provision, morning and afternoon nursery sessions.

Just under half (48%) of childminders reported having spare capacity¹³ (Figure 4a, Table 7b).

Figure 4a: Proportion of any spare capacity by provider type
England, 2019



Source: Survey of Childcare and Early Years Providers 2019

Proportion of available places that are spare

For group-based providers, before school sessions had the highest proportion of available places being spare, followed by after school sessions (41% and 35% respectively) (Figure 4b, Table 8b). Private providers had a higher proportion of available places that were spare (43% before school and 37% after school), compared to voluntary group-based providers (37% and 31% respectively) (Table 8b).

On average, 19% of group-based providers' full day places, 23% of their morning places and 31% of their afternoon places, were spare. Similarly, to the other sessions, private group-based providers had a higher proportion of spare places in these sessions than voluntary group-based providers.

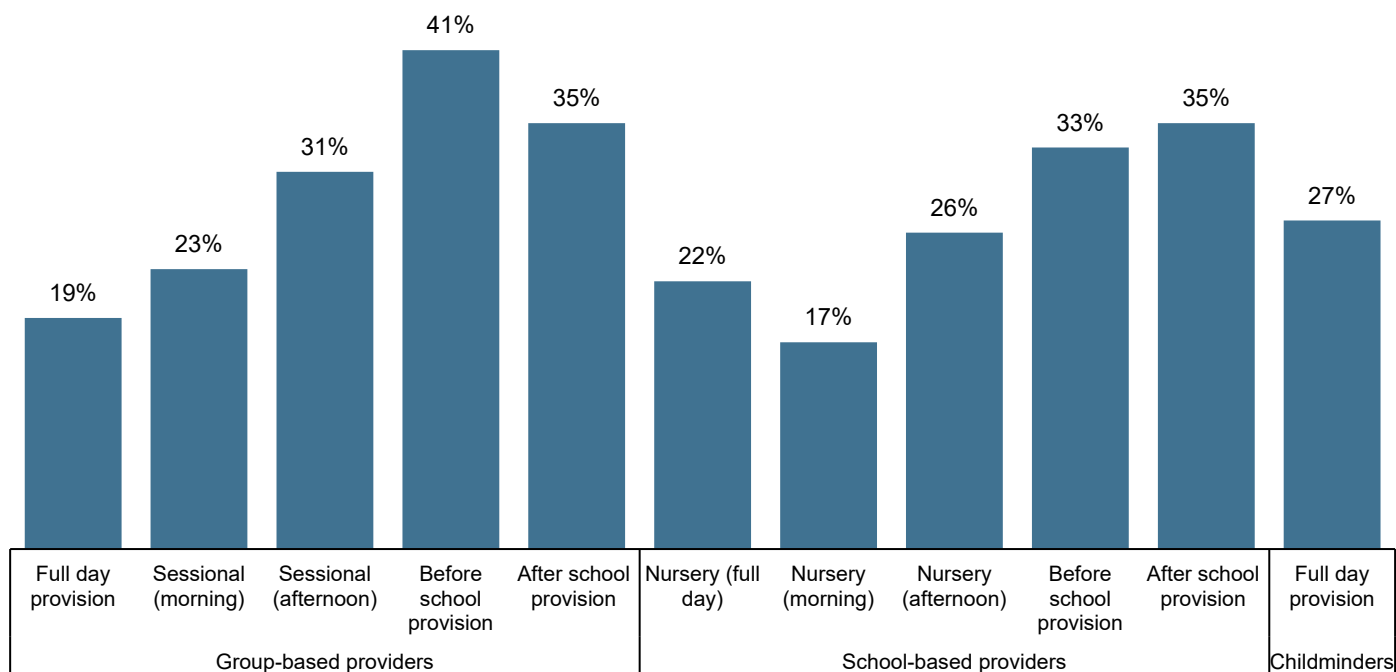
¹³ This is a decrease from 68% of childminders in 2018 reporting having spare capacity and 42% of their spaces being spare. In 2019 the question wording changed to be more aligned with the other provider types. This may explain this decrease.

For school-based providers, after school sessions had the highest proportion of available places that were spare (35%), followed by before school sessions (33%) (Figure 4b, Table 8a). Maintained nursery schools had 39% of available places spare in before school sessions and 38% in after school sessions, compared with 33% and 35% respectively for other school-based providers offering nursery provision (Table 8a).

On average, 22% of school-based nurseries' full day places, 17% of their morning places and 26% of their afternoon places were spare. In contrast with before and after school sessions, school-based providers offering nursery provision had a higher proportion of available places that were spare in these sessions compared with maintained nursery schools.

Among childminders, on average 27% of their places were spare¹⁴ (Figure 4b, Table 8b).

Figure 4b: Proportion of available places that are spare by provider type
England, 2019



Source: Survey of Childcare and Early Years Providers 2019

Both group-based and school-based providers reported more spare capacity in the afternoons than in the mornings. Both provider types also had higher peaks of spare capacity on Mondays and Fridays and were fairly evenly spread across the rest of the week (see Tables 7a, 7b, 8a, 8b, 10a, 10b, 11a, 11b).

There was also some variation in spare capacity by region (Tables 9a and 9b). Among group-based providers, those in the North East had more spare capacity than other regions. Among school-based providers, those in the South West had more spare capacity than other regions in the majority of sessions.

¹⁴ This is a decrease from 68% of childminders in 2018 reporting having spare capacity and 42% of their spaces being spare. In 2019 the question wording changed to be more aligned with the other provider types. This may explain this decrease.

Workforce

There were an estimated 363,400 staff working in the childcare and early years sector in Spring 2019 (Table 12b). In Spring 2018, there were an estimated 352,100 early years staff^{15,16}. On average (mean), group-based providers had 11 employed staff members. Private group-based providers had 12 employed members of staff and voluntary group-based providers had nine. School-based providers had six employed members of staff, with maintained nursery schools having a higher number of paid staff on average (19) than school-based providers offering nursery provision (5) (Table 13). Among childminders, 15% employed at least one childminding assistant (Table 14).

The average number of employed staff for school-based and group-based providers in 2019 was similar to 2018 (Table 13). In 2019, 15% of childminders reported employing at least one childminding assistant compared to 12% in 2018 (Table 14). This increase is statistically significant.

Early Years Educators

Early Years Educators

Early Years Educator qualifications were introduced in September 2014. They are qualifications at Level 3 (broadly equivalent to A levels) or above approved by the Department for Education as meeting the Early Years Educator criteria. If staff have an Early Years Educator qualification, they currently must have at least Level 2 qualifications in English and maths to undertake a Level 3 job role and count in the staff ratios. This does not apply to historical (pre-2014) Level 3 qualifications.

There is also an Early Years Educator Apprenticeship Standard at Level 3.

The prevalence of Early Years Educator qualifications among the Early Years workforce was similar in 2019 to previous years, with none of the changes observed year on year reaching statistical significance. In 2019, 27% of staff working in group-based providers whose highest level of qualification was Level 3 held the Early Years Educator qualification. This compares with 25% in 2018. In 2019, 31% of staff in private group-based providers whose highest level of qualification was Level 3 held the Early Years Educator qualification compared with 21% of staff in voluntary group-based providers (Table 15).

For school-based providers, in 2019, around a third (34%) of staff whose highest level of qualification was Level 3 (35% in school-based providers offering nursery and 26% in maintained nursery schools) held the Early Years Educator qualification. This is similar to the proportion in 2018 (37% in school-based providers offering nursery and 27% in maintained nursery schools).

In 2019, 37% of childminders, whose highest level of qualification was Level 3, held the Early Years Educator qualification compared with 42% in 2018.

The cost of providing childcare

Costs of provision

Information on the total annual cost of providing childcare for each provider type is given in Table 16. The highest financial outgoing for both group-based and school-based providers was employee related (see Figure 5, Table 17). For group-based providers almost three quarters (73%) of costs were attributed to staff costs including wages, National Insurance payments and pension contributions. Staff costs were 71% of reported costs for private and 77% of reported costs for voluntary group-based providers. For school-based providers, over three quarters (81%) of reported costs were attributed to staff costs (81% for those offering nursery and 79% for maintained nursery schools).

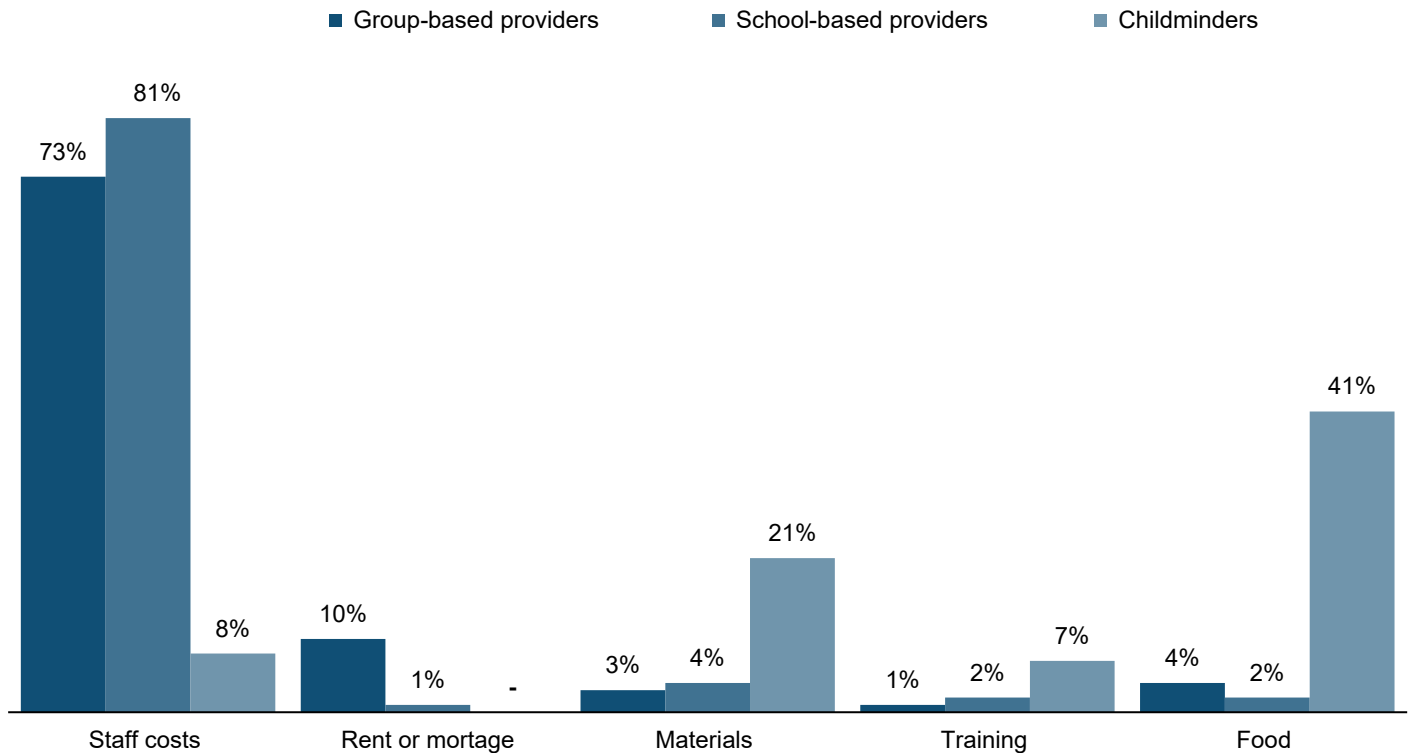
Childminder costs were calculated differently to costs for school-based and group-based providers. Staff costs reported for childminders included payment for employees only, rather than for the childminders

¹⁵ This is less than the estimated 430,500 staff working in Spring 2018 as reported in the published 2018 Official Statistics. The lower figure in this report is due to adjusting the 2018 numbers (by excluding reception provision) to allow for comparability.

¹⁶ Differences between 2018 and 2019 have not been tested for statistical significance because they are estimated numbers based on known totals.

themselves (only 15% of childminders employed a childminding assistant). Childminder costs also did not include any rent or mortgage costs. The highest reported financial outgoing for childminders was reported as food costs (41%); covering costs for children’s meals, snacks and refreshments.

Figure 5: Composition of childcare provider costs
England, 2019



Source: Survey of Childcare and Early Years Providers 2019

Fees

Among providers charging fees over the last year, one in two (53%) of all group-based providers had increased their fees for at least one age group. Private group-based providers were more likely to have increased their fees than voluntary group-based providers (59% and 45% respectively). Just under one in four school-based providers (24%), and childminders (23%), had increased their fees for at least one age group. Among school-based providers, 23% of those offering nursery provision and 36% of maintained nursery schools had increased their fees (Table 19).

Funded entitlements and Tax-Free Childcare

Entitlements

All 3 and 4 year olds in England are entitled to a defined number of hours of free childcare or early education. Some 2 year olds are also eligible to access a defined number of hours of free childcare or early education, for example if their parent or guardian receives certain benefits, or they have a statement of special educational needs¹⁷.

15 hours entitlement

All 3 and 4 year olds, and eligible 2 year olds, are entitled to 570 hours of funded early education or childcare per year. This is usually taken as 15 hours a week for 38 weeks of the year.

¹⁷ For more information on the eligibility criteria see <https://www.gov.uk/help-with-childcare-costs/free-childcare-and-education-for-2-to-4-year-olds>

30 hours entitlement

Since September 2017, the funded childcare entitlement for 3 and 4 year olds increased to 30 hours a week for working parents that meet the eligibility criteria. Parents can usually get 30 hours of funded childcare if they (and their partner, if they have one) are in work (or getting parental leave, sick leave or annual leave), and are earning at least the National Minimum Wage or Living Wage for 16 hours a week.

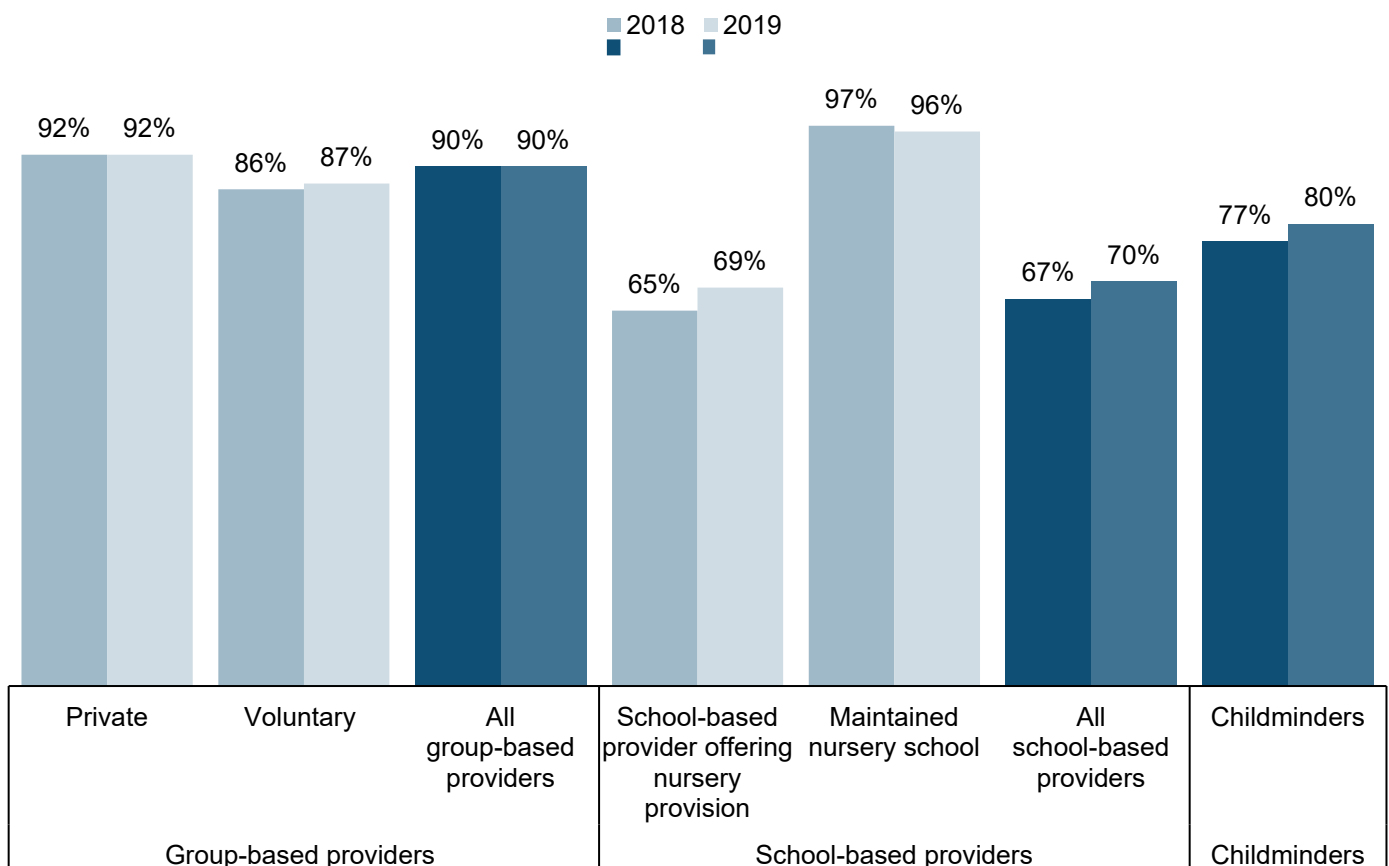
Tax-Free Childcare

Tax-Free Childcare was introduced in April 2017. Under this scheme, eligible parents¹⁸ open an online childcare account. For every £8 they pay into their account, the government will pay in an additional £2, up to a maximum of £2,000 per child per year. Parents are then able to use the account to pay for childcare costs with a registered provider.

The majority of all providers with children aged 3 to 4 registered at their setting at the time of the survey were offering¹⁹ 30 hours of funded childcare to eligible 3 and 4 year olds. Figure 6a shows that 90% of all group-based providers, 70% of all school-based providers and 80% of childminders were offering the extended Funded Entitlement in 2019 (Table 20). Differences between 2018 and 2019 are not statistically significant for any provider type.

Among group-based providers in 2019, 92% of private providers offered the 30 hours of funded childcare compared with 87% of voluntary providers. Maintained nursery school providers were more likely to offer 30 hours funding (96%) compared to school-based providers offering nursery provision (69%).

Figure 6a: Proportion of providers currently offering 30 Hours Free Entitlement
England, 2018 and 2019



Source: Survey of Childcare and Early Years Providers 2018, 2019

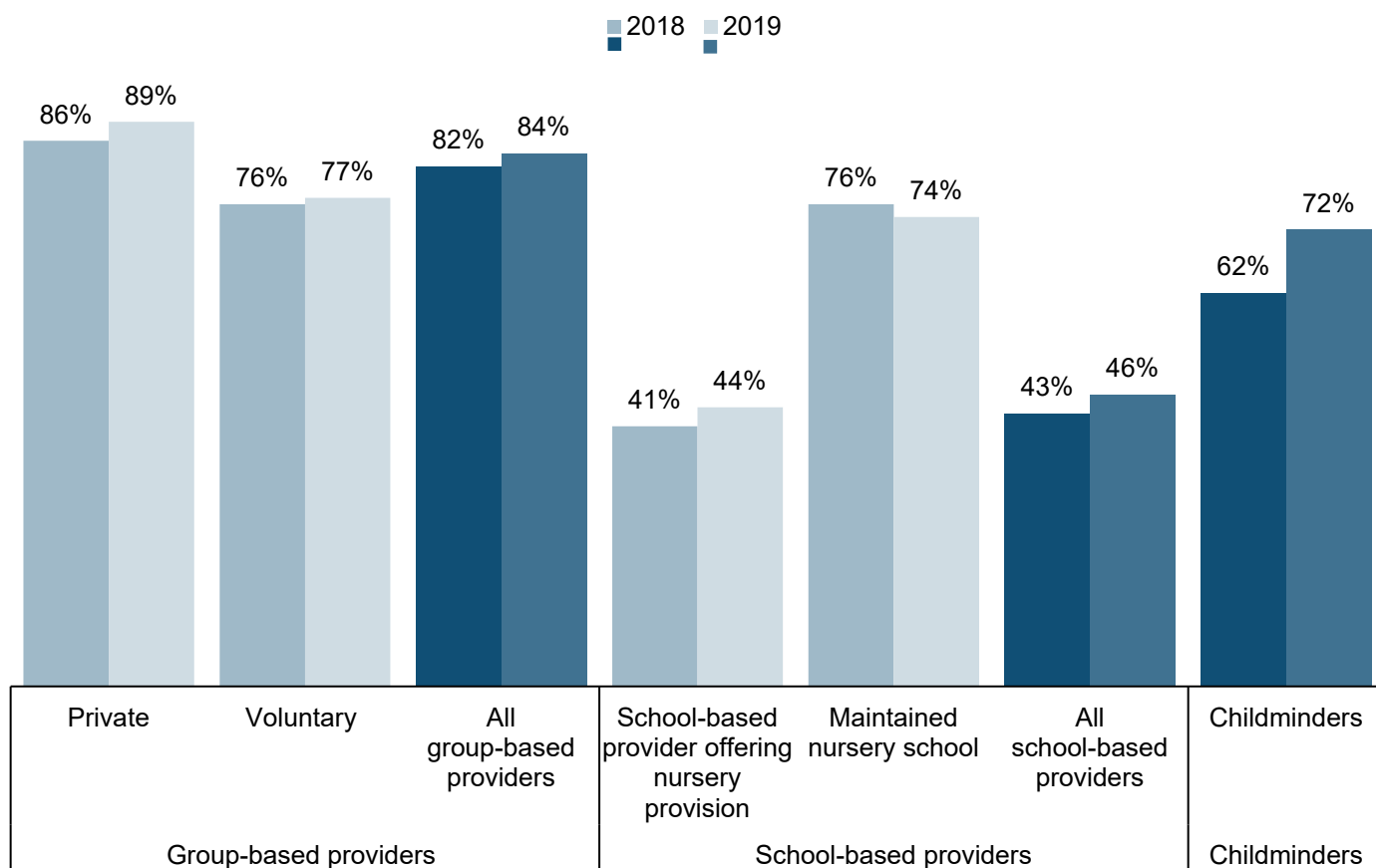
¹⁸ For more information on the eligibility criteria see <https://www.gov.uk/help-with-childcare-costs/tax-free-childcare>

¹⁹ These providers were offering, but not necessarily delivering, the 30 hours funded entitlement at the time of the survey.

In 2019, 84% of all group-based providers, 46% of all school-based providers, and 72% of childminders had signed up to receive Tax-Free childcare payments²⁰. In 2018, 82% of group-based providers, 43% of school-based providers, and 62% of childminders had signed up to receive Tax-Free childcare payment. The increase in childminders signed up is statistically significant.

Among group-based providers in 2019, private providers (89%) were more likely to have signed up to receive Tax-Free childcare payments compared to voluntary providers (77%). Among school-based providers, maintained nursery schools were more likely to have signed up to receive Tax-Free childcare payments (74%), compared to school-based providers offering nursery provision (44%) (see Figure 6b, Table 21).

Figure 6b: Proportion of providers currently signed up to receive Tax-Free Childcare
England, 2018 and 2019



Source: Survey of Childcare and Early Years Providers 2018, 2019

²⁰ These providers had signed up to receive, but were not necessarily receiving, Tax-Free Childcare payments at the time of the survey.

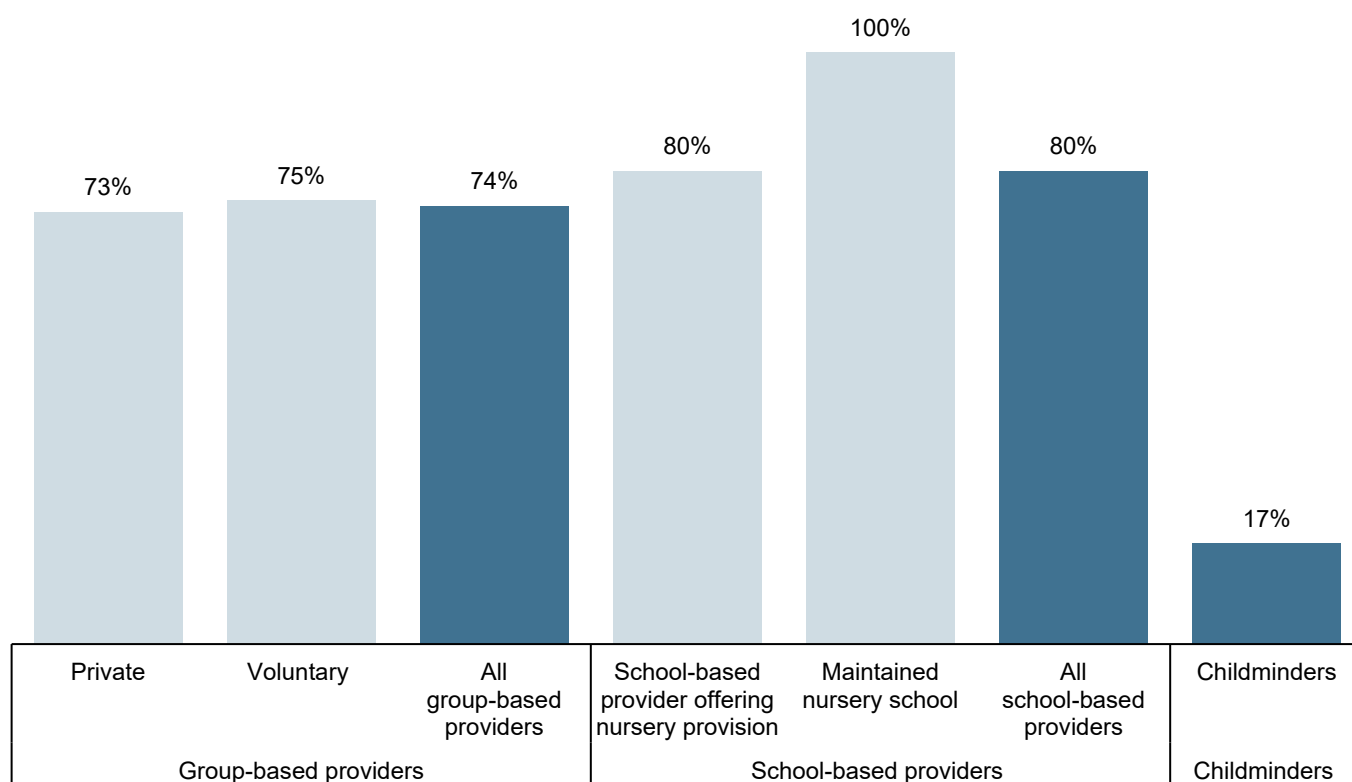
Special Educational Needs and Disabilities

Providers were asked how many of the children registered with their setting had Special Educational Needs or Disabilities (SEND). They were asked to include all such children, including both those with and those without formal support in place, as well as those who were not yet formally diagnosed but who staff had identified as potentially having SEND.

The majority of group-based (74%) and school-based providers (80%) had at least one registered child with SEND at their setting. This compares with less than one in five (17%) childminders who had at least one registered child with SEND (Figure 7, Table 22).

Group-based providers had an average (mean) of four children with SEND registered at their setting. Private group-based providers had an average of three, and voluntary group-based providers had an average of four children registered with SEND. School-based providers had an average of four children registered with SEND. All responding maintained nursery schools had at least one child with SEND registered at their setting²¹, with an average of 21 children with SEND registered. School-based providers offering nursery provision had an average of four registered children with SEND (Table 23).

Figure 7: Proportion of providers with children with SEND²¹
England, 2019



Source: Survey of Childcare and Early Years Providers 2019

²¹ It is possible that some non-responding maintained nursery schools do not have SEND children registered at their setting. These figures are based on a sample of maintained nursery schools who responded to the survey.

Accompanying tables

The following tables are available in Excel format on the department's statistics website here.

<https://www.gov.uk/government/collections/statistics-childcare-and-early-years>

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Table 21	Proportion of providers signed up to receive Tax-Free Childcare payments, 2018 and 2019
Table 22	Proportion of providers with any children with SEND registered at the setting
Table 23	Average number of children with SEND
Table 24	Gender of staff as a proportion of Early Years staff

Table 25a	Proportion of staff qualified to different levels (School-based providers), 2018
Table 25b	Proportion of staff qualified to different levels (Group-based providers and childminders), 2018
Table 25c	Proportion of staff qualified to different levels (School-based providers), 2019
Table 25d	Proportion of staff qualified to different levels (Group-based providers and childminders), 2019
Table 26	Proportion of staff aged 25 and over earning below the National Living Wage
Table 27	Ethnicity of staff as a proportion of Early Years staff
Table 28	Proportion of Early Years staff by age group

Further information is available

Information on places from the January Census collections are also available in the Provision for children under 5 years of age in England statistical release each June. This, and previous releases from the Childcare and Early Years Providers Surveys, can be found here:

<https://www.gov.uk/government/collections/statistics-childcare-and-early-years>

Official Statistics

These are Official Statistics and have been produced in line with the Code of Practice for Official Statistics.

This can be broadly interpreted to mean that the statistics:

- meet identified user needs;
- are well explained and readily accessible;
- are produced according to sound methods, and
- are managed impartially and objectively in the public interest.

The Department has a set of [statistical policies](#) in line with the Code of Practice for Official Statistics

Technical information

A technical report on the Survey of Childcare and Early Years Providers 2019 accompanies this bulletin. This provides further information on the data sources, their coverage and quality and explains the methodology used in producing the data, including how it is validated and processed.

Estimates in this bulletin have been rounded. Percentages may not add up to 100% and grossed figures may not add up to the total.

Comparisons between 2018 and 2019 were tested for statistical significance where possible. Any differences between the 2018 and 2019 survey years have been tested for statistical significance to the 5% level. Please refer to page 3 for more information on which tables were tested for significance.

Get in touch

Media enquiries

Press Office News Desk, Department for Education, Sanctuary Buildings, Great Smith Street, London SW1P 3BT.

Tel: 020 7783 8300

Other enquiries/feedback

Laura Hunnikin, Early Years Research Team, Funding and Analysis Directorate, Department for Education, Sanctuary Buildings, Great Smith Street, London, SW1P 3BT

Tel: 0207 654 6001

Email: EY.AnalysisANDResearch@education.gov.uk



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About this publication:

enquiries Laura Hunnikin, Early Years Research Team, Funding and Analysis Directorate, Department for Education, Sanctuary Buildings, Great Smith Street, London, SW1P 3BT. Tel: 0207 654 6001. Email: EY.AnalysisANDResearch@education.gov.uk

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Reference: Survey of Childcare and Early Years Providers 2019



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