
2009 Childcare and Early Years Providers Survey

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Introduction

In 1998 the Government introduced the National Childcare Strategy followed by the Ten Year Strategy for early years and childcare in 2004, the Children's Plan in 2007 and Next Steps for Early Learning and Childcare in 2009. These have led to a wide range of childcare policies and initiatives being developed. The Department for Children, Schools and Families (DCSF) requires regular information on childcare and early years' provision to allow the evaluation of these initiatives and to assess progress towards targets. This information is collected through the Childcare and Early Years' Workforce Survey series which started in 1998; the 2009 Childcare and Early Years Providers Survey was the latest in this series.

The survey collects information on the number and characteristics of providers, the characteristics of the children enrolled, workforce composition, qualifications and business operation. The 2009 survey covered both childcare (full day care, sessional, out-of-school, childminders and children's centres) and early years settings in maintained schools (nursery schools, primary schools with nursery and reception classes and primary schools with reception but no nursery classes).

Key findings

- There were 103,000 childcare and early years providers in England in 2009, 87,200 childcare providers and 15,700 early years providers in maintained schools.
- The number of full day care providers showed a continued steady increase; there were 14,100 full day care providers operating in 2009. This was an 81 per cent increase since 2001 and a two per cent increase since 2008.
- Sessional care providers declined in number by 44 per cent since 2001 and by eight per cent since 2008, to 7,800 settings.
- Following a rise in the number of after school clubs between 2001 and 2008 of 80 per cent, the number decreased by ten per cent between 2008 and 2009 to 7,900 clubs. Holiday clubs saw the largest increase since 2003 (129 per cent) although there was a slight decrease (two per cent) in the number of holiday clubs between 2008 and 2009, to 6,400 clubs.
- There were 51,000 active childminders offering childcare places in England, a decrease of nine per cent since 2008 and 12 per cent since 2005.

- There was very little change in the overall number of early years education providers in maintained schools from 2003 (16,000) to 2009 (15,700). In 2009 there were 450 nursery schools, 6,700 primary schools with nursery and reception classes and 8,600 primary schools with reception but no nursery classes.
- Full day care and out of school providers were distributed reasonably proportionately across all areas. Twenty six per cent of full day care providers were located in the 30 per cent most deprived areas, along with 31 per cent of after school clubs and 28 per cent of holiday clubs.
- Seven in ten children's centres offering on site full day care (72 per cent) were located in the 30 per cent most deprived areas.
- Childminders (18 per cent) and sessional providers (15 per cent) were the childcare provider types least likely to be situated in the 30 per cent most deprived areas.
- Nursery schools and primary schools with nursery and reception classes were disproportionately located in the 30 per cent most deprived areas (68 per cent and 43 per cent respectively). By comparison, only eight per cent of primary schools with reception but no nursery classes were located in the 30 per cent most deprived areas.
- There were 2,442,100 childcare and early years places registered with Ofsted in 2009¹; 1,671,500 in childcare providers and 770,600 in early years providers in maintained schools.
- Ofsted registered places in full day care settings increased steadily in number between 2003 and 2009. There were 647,800 places in 2009, a 50 per cent increase since 2003 and a four per cent increase since 2008.
- In 2009 there were 227,900 sessional care places, a 30 per cent decrease since 2003 (a six per cent decrease since 2008).
- Between 2008 and 2009 the number of places in after school clubs decreased for the first time since the start of the survey series, with a fall of four per cent to 272,500 places.
- There was a large increase in the number of registered places in holiday clubs between 2003 and 2009 (114 per cent increase), with the number of places levelling off since 2008 to 260,400 places in 2009.
- There were 262,900 Ofsted registered childminder places in 2009, which represents a five per cent fall from 2008. This represented a slightly lower rate of decline than the decline in the number of childminders over the same period (down nine per cent).
- The number of Ofsted registered places among early years providers in maintained schools had decreased by nine per cent since 2003 (to 770,600).

¹ Given the changes to the classification system used by the Ofsted register in September 2008, it was necessary to use an August 2008 snapshot of the Ofsted database to produce an estimate of the number of settings in 2009. These figures should therefore be treated with caution.

- Among childcare providers, childminders and holiday clubs reported the highest proportion of vacant places nationally (23 and 27 per cent respectively) while sessional settings and children's centres offering on site full day care reported the lowest (both 11 per cent).
- Nationally, 16 per cent of places were unoccupied in full day care overall. After school clubs reported a fifth of vacant places nationally (21 per cent).
- Among the early years settings in maintained schools, primary schools with reception but no nursery classes had the highest proportion of vacancies (10 per cent) while both nursery schools and primary schools with nursery and reception classes had only eight per cent vacancies.
- Between 2008 and 2009 the number of paid and unpaid staff in full day care providers rose by five per cent. The number of paid and unpaid staff in sessional providers fell by nine per cent over the same period.
- Both types of out of school provider reported a decrease in number of paid and unpaid staff. Between 2008 and 2009 staff numbers in after school clubs fell by three per cent, while the number of holiday club staff decreased by four per cent.
- In 2009, the overall numbers of paid and unpaid staff in the different types of early years settings were at similar levels to 2003 (and 2008), apart from primary schools with reception but no nursery classes where there had been a decrease of 15 per cent in staff numbers between 2003 and 2009.
- Over the same period, all types of early years providers saw an increase in the number of paid staff (up 23 per cent in nursery schools, 17 per cent in primary schools with nursery and reception classes and 10 per cent in primary schools with reception but no nursery classes) and a decrease in the number of unpaid staff (down 53, 38 and 43 per cent respectively).
- Across all providers and all paid staff types, 72 per cent of the workforce was qualified to at least level 3² and 13 per cent was qualified to at least level 6.
- In nursery schools and on site full day care in children's centres almost nine in ten staff (88 per cent) held at least a level 3 qualification. In contrast, lower proportions of staff working in sessional providers (68 per cent), after school clubs (60 per cent) and holiday clubs (63 per cent) were qualified to at least a level 3. Childminders were least likely to hold qualifications, with only 49 per cent being qualified to at least level 3.
- For all types of childcare provider, the proportion of staff qualified to at least level 3 had increased since 2008. This continues a longer-term rise since 2003.
- The proportions of staff qualified to at least level 6 had remained broadly similar in the childcare sector, although there had been an increase amongst staff in full day care settings (from five per cent in 2008 to seven per cent in 2009). This indicates gradual progress in response to Government policy

² Those qualified to 'at least level 3' are those qualified to level 3 and above.

aimed at creating opportunities for staff in full day care to achieve level 6 qualifications³.

- The Government set a target of ensuring that every full day care setting had at least one graduate, while those in the most deprived areas were to have at least two graduates. To support that aim, the Government introduced Early Years Professional Status (EYPS) to help supply a suitable cohort of graduates⁴. Overall, 22 per cent of non-local authority run full day care providers had at least one graduate with EYPS, and four per cent had at least two. There was no difference between the 30 per cent most deprived areas and other areas.⁵

Policy background

The Government's Ten Year Strategy for early years and childcare, published in December 2004, outlined a number of key principles and objectives:

- *Choice and Flexibility* - greater choice for parents in how they balance their work commitments and family life;
- *Availability* – flexible, affordable, high quality childcare for all families with children aged up to 14 who need it;
- *Quality* - high quality provision delivered by a skilled early years and childcare workforce; and
- *Affordability* – families to be able to afford flexible, high quality childcare that is appropriate for their needs.

Five years on, in 2009, the strategy was refreshed in the published *Next Steps for Early Learning and Childcare* paper, which took stock of progress since 2004 and outlined the next steps in terms of improving early learning and childcare.

The Government's vision is to ensure that every child gets the best start in life and to give parents more choice about how to balance work and family life. From September 2010, all three and four year olds will be entitled to 15 hours a week of free high quality care, for 38 weeks a year, delivered flexibly, and there will be an out

³ The Government's aim is for all full day care providers to be graduate led by 2015.

⁴ Not all graduate leaders of practice will have EYPS.

⁵ It has become apparent that figures presented here showing the numbers of staff with Early Years Professional Status (EYPS) are significantly higher than administrative figures held by the Children's Workforce Development Council (CWDC) who are responsible for the training pathways for Early Years Professionals (EYPs). This is likely to be due to a number of factors including small base sizes of EYPs in the 2009 Childcare and Early Years Providers Survey sample causing wide confidence intervals and some possible over reporting by managers who include those working toward the status in their responses. It is also possible that due to the timing of the CWDC data collections, the figures which they hold may be slightly lower than the number of EYPs who had completed their pathway at the time that the Childcare and Early Years Providers Survey interviews took place. This leads to an even wider gap between the survey figures and the administrative data that CWDC hold. In addition to these factors, it is likely that the figures have also been skewed by the fact that EYPs often work within more than one setting and the figures from this survey may have been effected by double counting – where managers in more than one setting count the same EYP as being a member of their staff. Due to this discrepancy these figures should be used with caution. Use of these figures should be limited, and caveats should be included to highlight these concerns.

of school childcare place available for all children aged three to 14 from the hours of 8am-6pm every weekday for those who need it. This will be accompanied by a package of new measures to help address the issue of affordability of childcare.

To support this, and to help improve the quality of childcare, there is to be a radical reform of the workforce. This will include improved qualifications and status of early years' and childcare workers and training opportunities for childminders and other home-based carers which enable more of them to achieve level 3 qualifications and the aim of all full day care settings being professionally led.

A Transformation Fund of £250m over the period April 2006 to April 2008 supported investment to raise the quality of the early years' workforce without undermining efforts to improve affordability. The Graduate Leader Fund (of £350 million) continued this support from April 2008, so that every full day care (FDC) private, voluntary and independent (PVI) setting should have a graduate leading practice and two graduates in FDC PVI settings in disadvantaged areas by 2015, to improve outcomes for children.

Methodology

The DCSF 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 costs of childcare that is available.

The DCSF previously carried out surveys amongst childcare and early years providers in 1998, 2001, 2003, 2005, 2006, 2007 and 2008. The 2009 Childcare and Early Years Providers Survey consisted of separate surveys for the following eight childcare and early years settings:

Childcare

- Full-day childcare – 880 interviews with full day care providers (who provide day care sessions of more than four hours for children under eight).
- Sessional childcare - 860 interviews with sessional providers (who provide day care sessions of four hours or less to children under eight).
- Out-of-school childcare - 1,580 interviews with after school club and holiday clubs that are registered with Ofsted.
- Childminders - 849 interviews with childminders (registered to look after one or more children aged under eight for a total of more than two hours a day, for reward).
- Children's centres – 711 interviews with senior managers of children's centres (children's centres are places where children under five years old and their families can receive integrated support services and information).

Early years in maintained schools

- Primary schools with nursery and reception classes – 516 interviews with early years or foundation stage co-ordinators or head teachers.
- Primary schools with reception but no nursery classes – 480 interviews with early years or foundation stage co-ordinators or head teachers.

- Nursery schools – 100 interviews with head teachers.

All interviewing was conducted by telephone using CATI (Computer Assisted Telephone Interviewing) by Kantar Operations⁶ fully trained telephone interviewers between 30th June and 12th October 2009.

Unlike in previous years where a fresh sample was drawn, in 2009 a recontact survey was conducted.

Samples of providers were drawn from childcare and early years providers who had participated in the 2007 and 2008 surveys⁷, and who had agreed to be recontacted. This was felt to be the most practical way forward in the short term given the changes in the new classification system used by Ofsted introduced in September 2008.

The results were weighted and grossed to provide national estimates. The population profiles and estimates used for the weighting and grossing were taken from the Edubase database in February 2009 for early years providers, the DCSF database of children's centres in March 2009 and a snapshot of the Ofsted database from August 2008 for childcare providers and childminders⁸.

Main findings

Characteristics of provision

- There were 103,000 childcare and early years providers in England in 2009, 87,200 childcare providers and 15,700 early years providers in maintained schools.
- The number of full day care providers showed a continued steady increase; there was an 81 per cent increase since 2001 and a two per cent increase since 2008, to 14,100 full day care providers (including 1,000 providers who offered full day care on site in children's centres).
- Sessional care providers declined in number by 44 per cent since 2001 and by eight per cent since 2008, to 7,800 providers in 2009. This drop could have been due to increasing parental demand for childcare that covers longer hours; in 2008 one in five full day care providers (18 per cent) said that they had changed from offering sessional care and most of these (70 per cent) said that they did this because of parental demand for longer hours of childcare.

⁶ Kantar Operations provide the operational resources and capabilities for all Kantar's UK companies (including TNS-BMRB).

⁷ In 2007 and 2008 the sample was drawn from the Ofsted database of registered providers, the DCSF's database of children's centres and Edubase, the DCSF database of educational establishments.

⁸ This was the most recent Ofsted data available which used the old provider type classifications (full day care, sessional and out of school). Ofsted data from September 2008 onwards does not identify these groups (only 'childcare on non-domestic premises') and would not therefore provide the population profile needed. The estimates of the total number of childcare providers and places in 2009 provided by this survey cannot be compared to the number of providers and places in 2009 on the Ofsted database. This is because the 'childcare on non-domestic premises' category on the Ofsted database includes additional provider types not covered by the survey (e.g. crèches) and excludes other provider types covered by the survey (e.g. out-of-school provision provided directly by schools themselves).

- Following a rise in the number of after school clubs between 2001 and 2008 of 80 per cent, the number decreased by ten per cent between 2008 and 2009 to 7,900 clubs. Holiday clubs saw the largest increase since 2003 (129 per cent) although there was a slight decrease (two per cent) in the number of holiday clubs between 2008 and 2009, to 6,400 clubs
- The number of registered childminders declined by three per cent from 2008 to around 63,600 in 2009. Twenty per cent of registered childminders contacted for the 2009 survey said that they were no longer working as a childminder. There were 51,000 active childminders offering childcare places in England.
- There was very little change in the overall number of early years education providers in maintained schools from 2003 (16,000) to 2009 (15,700). In 2009 there were 450 nursery schools, 6,700 primary schools with nursery and reception classes and 8,600 primary schools with reception but no nursery classes.
- Full day care and out of school providers were distributed reasonably proportionately across all areas. Twenty six per cent of full day care providers were located in the 30 per cent most deprived areas, along with 31 per cent of after school clubs and 28 per cent of holiday clubs.
- Seven in ten (72 per cent) of children's centres offering on site full day care were located in the 30 per cent most deprived areas.
- Childminders (18 per cent) and sessional providers (15 per cent) were the childcare provider types least likely to be situated in the 30 per cent most deprived areas.
- Nursery schools and primary schools with nursery and reception classes were disproportionately located in the 30 per cent most deprived areas (68 per cent and 43 per cent respectively). By comparison, only eight per cent of primary schools with reception but no nursery classes were located in the 30 per cent most deprived areas.
- Two thirds of full day care provision was privately run (66 per cent), with just one in five (22 per cent) settings run by a voluntary organisation. On site full day care provision in children's centres was less likely than other types of provision to be privately or voluntarily owned (40 per cent). This was an increase from 2008 (30 per cent), but was in line with the level of private and voluntary ownership in 2007 (39 per cent).

Places and children

- There were 2,442,100 childcare and early years places registered with Ofsted in 2009⁹; 1,671,500 in childcare providers and 770,600 in early years providers in maintained schools.
- Ofsted registered places in full day care settings increased steadily in number between 2003 and 2009. There were 647,800 places in 2009, a 50 per cent increase since 2003 and a four per cent increase since 2008.

⁹ Given the changes to the classification system used by the Ofsted register in September 2008, it was necessary to use an August 2008 snapshot of the Ofsted database to produce an estimate of the number of settings in 2009. These figures should therefore be treated with caution.

- In 2009 there were 227,900 sessional care places, a 30 per cent decrease since 2003 (a six per cent decrease since 2008).
- Between 2008 and 2009 the number of places in after school clubs decreased for the first time since the start of the survey series, with a fall of four per cent to 272,500 places.
- There was a large increase in the number of registered places in holiday clubs between 2003 and 2009 (114 per cent increase) with the number of places levelling off since 2008 to 260,400 places in 2009.
- There were 262,900 Ofsted registered childminder places in 2009 (a five per cent fall from 2008). This represented a slightly lower rate of decline than the decline in the number of childminders over the same period (down nine per cent).
- The number of Ofsted registered places among early years providers in maintained schools had decreased by nine per cent since 2003 (to 770,600)
- Since 2003 there were increases in the number of children attending all childcare settings apart from sessional providers. The number of children attending full day care providers increased by 35 per cent, by 52 per cent in after school clubs and by 40 per cent in holiday clubs.
- Between 2008 and 2009 there was an increase in the number of vacant places in all provider types except after school clubs, childminders and early years settings in maintained primary schools. The largest increases in vacancies were seen for nursery schools (up 79 per cent to 2,500 vacant places), sessional care (up 28 per cent to 25,500 vacant places) and full day care (up 22 per cent to 100,500 vacant places).
- Among childcare providers, childminders and holiday clubs reported the highest proportion of vacant places nationally (23 and 27 per cent respectively) while sessional settings and children's centres offering on site full day care reported the lowest (both 11 per cent).
- Nationally, 16 per cent of places were vacant in full day care overall. After school clubs reported a fifth of vacant places nationally (21 per cent).
- Among the early years settings in maintained schools, primary schools with reception but no nursery classes had the highest proportion of vacancies (10 per cent) while both nursery schools and primary schools with nursery and reception classes had only eight per cent vacancies.

Workforce composition

- Between 2008 and 2009 the number of paid and unpaid staff in full day care providers rose by five per cent. The number of paid and unpaid staff in sessional providers fell by nine per cent over the same period.
- Both types of out of school provider reported a decrease in number of paid and unpaid staff. Between 2008 and 2009 staff numbers in after school clubs fell by three per cent, while the number of holiday club staff decreased by four per cent.

- In 2009, the overall numbers of paid and unpaid staff in the different types of early years settings were at similar levels to 2003 (and 2008), apart from primary schools with reception but no nursery classes where there had been a decrease of 15 per cent in staff numbers between 2003 and 2009.
- Over the same period, all types of early years providers saw an increase in the number of paid staff (up 23 per cent in nursery schools, 17 per cent in primary schools with nursery and reception classes and 10 per cent in primary schools with reception but no nursery classes) and a decrease in the number of unpaid staff (down 53, 38 and 43 per cent respectively).

Qualifications

- Across all providers and all staff types, 72 per cent of the workforce was qualified to at least level 3¹⁰ (an increase from 66 per cent in 2008) and 13 per cent was qualified to at least level 6 (compared to 11 per cent in 2008).
- In the childcare sector, 73 per cent of staff in group based settings¹¹ held at least a level 3 qualification compared with 79 per cent of staff working in early years provision in maintained schools and just 49 per cent of childminders.
- In nursery schools and on site full day care in children's centres almost nine in ten staff (88 per cent) held at least a level 3 qualification. In contrast, lower proportions of staff working in sessional providers (68 per cent), after school clubs (60 per cent) and holiday clubs (63 per cent) were qualified to at least a level 3. Childminders were least likely to hold qualifications with 31 per cent not holding any relevant qualification.
- For all types of childcare provider, the proportion of staff qualified to at least level 3 had increased since 2008. This continued a longer-term rise since 2003.
- Among early years providers in maintained schools, the proportion of staff qualified to at least level 3 had increased since 2008 in both nursery schools (from 82 to 88 per cent) and primary schools with reception but no nursery classes (from 70 to 74 per cent). The proportion had remained similar in primary schools with reception and nursery classes (81 per cent in 2009). For all three provider types, there had been a long-term increase since 2003.
- The proportions of staff qualified to at least level 6 remained broadly similar in the childcare sector, although there had been an increase amongst staff in full day care settings (from five per cent in 2008 to seven per cent in 2009). This indicated gradual progress in response to Government policy aimed at creating opportunities for staff in full day care to achieve level 6 qualifications¹².
- There had been no statistically significant change in the proportions of early years staff in maintained schools qualified to at least level 6 since 2008 and the longer term pattern (since 2006) was also generally stable.

¹⁰ Those qualified to 'at least level 3' are those qualified to level 3 and above.

¹¹ For the purposes of the survey, group based settings are full day care providers, sessional providers, after school clubs, holiday clubs and children's centres providing on site full day care.

¹² The Government's aim is for all full day care providers to be graduate led by 2015.

- The Government set a target of ensuring that every full day care setting had at least one graduate, while those in the most deprived areas were to have at least two graduates. To support this aim, the Government introduced Early Years Professional Statuses (EYPS) to help supply a suitable cohort of graduates¹³. Overall, 22 per cent of non-local authority run full day care providers had at least one graduate with EYPS, and four per cent had at least two. There was no difference between the 30 per cent most deprived areas and other areas.¹⁴

Profitability

- The financial situation seemed to have worsened for most types of providers between 2003 and 2009 with lower proportions saying they had made a profit or surplus and higher proportions saying they had made a loss.
- Among childcare settings, on site full day care providers within children's centres were the least likely to have made a profit or surplus (10 per cent) and most likely to have made a loss (34 per cent). This was unchanged from 2008.
- Full day care providers as a whole were most likely to have made a profit or surplus (34 per cent), followed by sessional providers (28 per cent). The proportion of holiday and after school clubs that had made a profit or surplus was in line with 2008 (both 23 per cent).

Conclusions

Full day care providers and places continued to increase in number. A greater number of providers were registered to offer these types of care and more children attended these settings. In 2009 there was a continued shift away from sessional care and a fall in the number of childminders. There was a decrease in the number of after school clubs and holiday club settings.

The number of early years providers in maintained schools overall remained stable while the number of children attending had decreased slightly, and staff levels also decreased (driven by a fall in the number of unpaid staff).

Supervisors comprised the largest staff group in all types of childcare provider and there had been an increase in the proportion of supervisory staff employed by all provider types since 2003 (or 2006 in the case of on site full day care in children's centres). Among early years settings in maintained schools there had also been a reduction in the use of volunteers since 2003.

The proportion of staff having attained at least a level 3 qualification increased sharply between 2003 and 2006 for most childcare providers and had continued to increase at a slower rate since then. While in early years provision in maintained schools, the proportion of staff with at least a level three qualification had generally increased steadily since 2003.

There was an increase in the proportion of staff qualified to at least level 6 in full day care since 2008 (from five to seven per cent). Considering Government policy is

¹³ Not all graduate leaders of practice will have EYPS.

¹⁴ Please refer to footnote above on discrepancies with the EYPS data.

aiming to create opportunities for staff in full day care to achieve level 6 qualifications¹⁵, there appeared to have been some movement in the right direction. Across all early years providers in maintained schools there had been no increases in the level of staff qualified to at least level 6 since 2006.

Just over one-fifth (22 per cent) of non-local authority run full day care providers had at least one graduate with Early Years Professional Status (EYPS) and four per cent of settings in the 30 per cent most deprived super output areas had at least two graduates with EYPS.¹⁶

¹⁵ The Government's aim is for all full day care providers to be graduate led by 2015. Please refer to footnote above regarding discrepancies with the EYPS data..

¹⁶ Please refer to footnote above regarding discrepancies with the EYPS data.

Additional Information

The full report can be accessed at <http://www.education.gov.uk/publications/>

Further information about this research can be obtained from
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This research report was commissioned before the new UK Government took office on 11 May 2010. As a result the content may not reflect current Government policy and may make reference to the Department for Children, Schools and Families (DCSF) which has now been replaced by the Department for Education (DFE).

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