Survey of Childcare and Early Years Providers
England 2016

Research report

February 2017

Kantar Public (formerly TNS BMRB)

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Acknowledgements

Chapter 1 Introduction

1.1 Study objectives

The government is committed to preparing children for school and providing great childcare that helps parents return to work.[1] High quality formal early years education has also been shown to have a positive impact on children's later educational outcomes and social-behavioural development[2].

The Department for Education (DfE)'s Childcare and Early Years Providers survey provides important information on the main characteristics of childcare and early years provision in England. The study seeks to collect representative data on: attendance and spare capacity within childcare settings; usage and future plans of funded places; staff qualifications and pay; and explores the cost and profitability of providing childcare.

Note on comparability with previous Providers Surveys

The 2016 Childcare and Early Years Providers Survey (CEYPS) is the latest in a series of approximately biennial surveys of the childcare sector conducted on behalf of the Department for Education and its predecessors[3]. The 2016 survey underwent an extensive redesign in response to changes in the sector and to better meet the Department's needs. In addition to a full questionnaire redesign, the group-based provider definitions have been updated, some data are now collected across the different provisions offered by a setting and some different data are collected, for example, on school-based providers' wraparound provision. This means findings are not comparable with previous surveys and the 2016 survey creates a new benchmark for future tracking.

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[1] Department for Education, More Great Childcare, 2013.
[2] More information is available at:
https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/455670/RB455_Effective_pre-school_primary_and_secondary_education_project.pdf.pdf
[3] More information is available at: https://www.gov.uk/government/collections/statistics-childcare-and-early-years

1.2 Research context

The 2016 Childcare and Early Years Providers Survey was undertaken in the context of some key developments in the childcare sector.

In terms of funded hours, the survey was conducted at an early point in the government's planning for the introduction of 30 hours of funded childcare for working parents of 3 and 4 year olds. Interviewing for the survey took place between March and July 2016, which was approximately 14-18 months before national roll-out is planned for September 2017. As such the survey provides an important baseline.

At the time of the survey there was uncertainty within the childcare sector about how the funded 30 hours would affect businesses. Since then there have been 3 key developments: first, the Childcare Act 2016[4] and its associated Regulations were approved by Parliament (in March 2016) offering clarity about the legal framework; second, the Department for Education has publicly consulted on its plans for a new, fairer funding formula due to be implemented in April 2017[5]; finally, the Department has announced £50m of capital projects to support the creation of new 30 hours childcare places[6] which Local Authorities were invited to bid for from 21 June 2016.

Looking at qualifications, over the past few years the government has been working to improve the quality of the workforce by updating the Early Years Foundation Stage (EYFS) statutory framework and improving existing qualifications. This includes initiatives such as Early Years Educators, to provide more robust level 3 qualifications[7]. At the time of fieldwork, to count in staff to child ratios, level 3 staff holding the Early Years Educator qualification must have also achieved GCSEs in English and maths at grade C or above or accepted equivalent[8]. In the 2016 survey the way in which qualifications were asked about was amended to reflect the Department's priorities.

The introduction of the National Living Wage[9] in April 2016 was likely to have impacted on the childcare sector and some of the responses given.

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[4] Childcare Act 2016, see: http://www.legislation.gov.uk/ukpga/2016/5/enacted
[5] Early Years Funding: Changes to funding for three- and four-year olds, see: https://www.gov.uk/government/consultations/early-years-funding-changes-to-funding-for-3-and-4-year-olds
[6] Early Years Capital Fund 2017, see https://www.gov.uk/guidance/early-years-capital-fund-2017
[7] For an explanation of different qualification levels, including level 3, see: https://www.gov.uk/what-different-qualification-levels-mean/overview
[8] More information is available at: http://www.education.gov.uk/eypqd/GCSEs.shtml
[9] More information is available at: https://www.livingwage.gov.uk/

1.3 Research Design

Kantar Public (formerly TNS BMRB) conducted a quantitative survey with childcare and early years providers using computer-assisted telephone interviewing (CATI). Fieldwork for the mainstage quantitative survey took place between March and July 2016 and in total, 9,945 interviews were conducted.

As noted above, the survey was extensively redesigned for 2016 to reflect the changing childcare market and better meet DfE's needs. This included substantial changes to the questionnaire, and the groups reported on, which means that the vast majority of results are not comparable with previous years of the survey[10]. To reduce the interview duration and burden on respondents, each provider was asked a core set of questions and then allocated to a variant of the survey. School-based providers and childminders answered 1 of 2 survey variants. The first primarily focused on the workforce and the second on finances. Group-based providers answered 1 of 3 survey variants, with the first focussing on a variety of policy related issues such as funded places and expansion and investment plans, the second focussing on the workforce and the third on finances.

The study was split into the 3 different surveys based on the 3 sampling frames outlined below, each of which are analysed separately.

Group-based providers

These are Ofsted registered childcare providers that operate on non-domestic premises. A request was made to Ofsted to provide information for all records in the "childcare on non-domestic premises" category from their July 2015 database.[11] After checking for duplication of records a stratified random sampling approach was used to select records[12] (using region, local authority, register type, ownership status, maximum number of places and postcode as the sample strata) for a screening survey. This screening survey collected contact details, information on days of the week that providers were open and confirmed whether they operated during term time. The selected sample was checked to ensure that the selection was representative of the entire population of non-domestic childcare providers.

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[10] Previous surveys can be found at: https://www.gov.uk/government/collections/statistics-childcare-and-early-years

[11] For the latest datasets and further information please see: https://www.gov.uk/government/collections/early-years-and-childcare-statistics

[12] A further 1,238 records were sampled and issued for the screener in order to maximise the response and sample frame for the main survey

The survey asked group-based providers about several different types of provision that they offered:

- early years full day provision for children below school age
- sessional provision – in order to find out more about the types of provision offered the survey defined 2 separate types of sessional provision
    1. Fixed sessional provision for children below school age where each session has a fixed start and end time. Where more than one session is delivered in one day there is a change of children between sessions
    2. Flexible sessional provision for children below school age, where session times can vary by child
- before school sessions for children under the age of 8 in term time
- after school sessions for children under the age of 8 in term time

Providers were asked questions about children in attendance, funded places and fees for the types of provision they offered within their setting. To ensure the questionnaire length was not overly burdensome for providers, those who offered both full day provision and sessional provision were only asked about full day provision. That means that where we report on sessional providers, it is those who offer sessional provision, but not full day provision.

Other questions about special educational needs and disabilities (SEND),[13] staffing, costs and income were asked about the setting as a whole.

In total 6,221 interviews were completed with group-based providers.

School-based providers

This includes reception and nursery provisions (maintained nursery schools are included within analysis of the nursery provisions). The sample was taken from the January 2015 School Census and supplemented with further information (such as contact details) from Edubase.

Independent schools with a lowest age of 4 or 5 were identified as "reception only" and those with a lowest age of between 0-3 were identified as being nursery and reception.

If a random sample from this population was selected without any controls in place then the majority of the sample would consist of reception provisions. As nursery provision is a key priority for this survey it was agreed with DfE to disproportionately sample to increase

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[13] Due to length the SEND data are not discussed in this report. They are included in the datasets published alongside this report.

the number of interviews conducted with "maintained nursery schools" and those that offer both "reception and nursery" so that the number of interviews about nurseries was maximised. The sample design was aimed to balance achieving the maximum sample with those that have a nursery while still providing robust estimates at the overall level. Reception and nursery provisions are reported on separately throughout.

In 2016 the survey also collected information about before school provision and after school provision operated solely by the school, or in partnerships with other schools.

In total 2,280 interviews were completed with school-based providers. There were 1666 interviews with primary schools with nursery and reception provision, 377 with primary schools with reception provision but no nursery and 237 with maintained nursery schools.

Childminders

The survey interviewed childminders who were on the Ofsted register of childminders and who confirmed they were still practising childminders at the time of interview. For the first time the survey also asked about any childminding assistants that they employed.

A request was made to Ofsted to provide information for all registered childminders. Data was provided from the July 2015 database of registered childminders in 2 stages. The first stage provided anonymised individual level data from which a sample of childminders was selected. Stage 2 provided personalised records for selected childminders. There were a small number of providers that were removed as they were only on the Voluntary Childminders Register.[14]

The sample was sorted by region, local authority, postcode, register type, number of places and time elapsed since registration and then checked to ensure that the selection was representative of the entire population of childminders. Following the selection the sample was again sorted by these criteria and systematically allocated to 1 of the 2 questionnaire variants[15] and to answer specific questions about a specific weekday.

The sample did not include any childminders who were registered with a childminder agency.

In total there were 1,444 interviews with childminders.

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[14] Providers solely on the voluntary register have been excluded from the CEYPS historically as this category mainly includes those only providing for children aged 8 and over, activity based care (sports, drama or art clubs) and care provided in the child's home such as nannies, au pairs or home based care for disabled children.

[15] More information on the questionnaire variants is provided in the technical report.

The questionnaire went through several iterative processes of testing, with 5 semi-structured scoping interviews in May and June 2015, 12 cognitive interviews in September and October 2015 and 562 pilot interviews in December 2015. Following each stage a report was provided to DfE and meetings were held to discuss the questionnaire. More on this process and how it impacted on the survey can be found in the technical report.

1.4 Analysis and reporting

The results for group-based providers, school-based providers and childminders are described separately in this report due to differences in the populations. Within the sample groups, subgroup analyses have been conducted to explore differences based on attributes such as region or the number of paid staff. The assessment of deprivation is based on the Income Deprivation Affecting Children Index, using a split of the 30% most deprived / 70% least deprived to be consistent with the categories used during the implementation of Sure Start children's centres. The official ONS classification is used to define rural and urban areas.[16]

The following should be borne in mind when reading this report:

- percentages for single-response questions do not always add up to exactly 100% due to the effect of rounding
- unless otherwise stated, all differences reported are statistically significant to the 95% confidence level. This means that we can be 95% confident that they are genuine differences, rather than variations occurring by chance
- zero per cent is indicated in tables using '-' and figures above zero but below 0.5 per cent are indicated using '*'
- a result with a base size of fewer than 100 should be interpreted with caution and the findings should be viewed as indicative only
- where respondents can give multiple responses to a question, the sum of the individual responses may be greater than 100%. Furthermore, the percentages in the tables do not always add up to 100% due to rounding
- where averages are presented they include the mean and median value. In a small number of cases extreme values were removed from the calculations.[17] Additionally, in a small number of cases in this report, the median value is higher than the mean. This typically means that the data is skewed towards smaller

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[16] https://www.gov.uk/government/collections/rural-urban-classification
[17] See section 6.2 of the technical report.

values. This has occurred in cross-breaks with small base sizes which as noted above should be interpreted with caution

- due to the change in sample definitions and questionnaire design it is not possible to compare the data to previous Childcare and Early Years Providers Surveys[18]

Population estimates

In the tables, either grossed up figures or percentages are provided. The grossed up figures are based on the total numbers of providers registered with Ofsted in July 2015 for group-based providers and childminders, and the Schools Census collected in January 2015 for school-based providers. These grossed up figures are not exact, and like the percentages reported, are subject to margins of error. In the report text, where appropriate, these are presented as (x%; n) where x% is the proportion of providers giving a certain response in the survey and n is the grossed population figure based on this percentage.

As an example of how the grossed up figures are calculated - there are a total of 25,500 group-based non-domestic providers, in the survey 62% of these respondents reported offering full day provision so it can be inferred that this is equivalent to 15,800 (0.62 x 25,500) non-domestic providers.

Numbers of providers and staff have been rounded throughout the report. Figures have been rounded to the nearest 100 if they are greater than 1,000, to the nearest 50 if the number is between 100 and 999, and the nearest 10 if the number is below 100.

Please refer to the survey technical report for full details of the survey design and methodology.

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[18] Previous surveys can be found at: https://www.gov.uk/government/collections/statistics-childcare-and-early-years

Glossary

Provider definitions used in this survey[19]

Childminders	All childminders included in the survey are registered with Ofsted.[20] Childminders must hold an up to date paediatric first aid certificate, be DBS checked and complete an introductory childcare course.
Group-based providers	Childcare providers operating in non-domestic premises (selected from the Ofsted register of non-domestic childcare providers).
School-based providers: Maintained nursery schools	Sampled from the School Census, these are Local Authority schools that provide education and other services to children under 5 and their families. They form 2% of the weighted school-based provider sample. In this report, unless stated otherwise, maintained nursery schools are included with the analysis of the nursery provisions (see below), together described as school-based nurseries.
School-based providers: Primary schools with nurseries	School nurseries provide for children before they start compulsory education. These are sampled from the School Census and make up 52% of the weighted school-based sample.
School-based providers: Primary schools with reception provision	Reception is the first year of infant school in England and Wales providing early education for pupils typically aged between 4 and 5. In line with legal requirements, nearly all school-based providers offered reception provisions (98%), the only exception being maintained nursery schools. The sample includes independent as well as maintained settings.

Care definitions used in this survey

Group-based definition: Full day provision	Early years full day provision for children below school age.
Group-based definition: Fixed sessional provision	Fixed sessional provision for children below school age where each session has a fixed start and end time. Where more than 1

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[19] In contrast to the previous 2013 providers survey children's centres were not included in the sample.
[20] The sample does not include childminders registered with a childminding agency.

	session is delivered in 1 day there is a change of children between sessions.
Group-based definition: Flexible sessional provision	Flexible sessional provision for children below school age, where session times can vary by child.
Wraparound provision: Before-school provision	Before school sessions for children under the age of 8 in term time. These would be run at least 4 days a week, and would have at least some element of childcare as their purpose, rather than solely focussing on a single activity such as football or music.
Wraparound provision: After-school provision	After school sessions for children under the age of 8 in term time. These would be run at least 4 days a week, and would have at least some element of childcare as their purpose, rather than solely focussing on a single activity such as football or music.
Holiday provision	Holiday activities or childcare for children under the age of 8 during any school holidays. This would be for at least 5 hours in any day and 5 days a week, and would also be for at least 1 week per year.

Glossary of terms

Attendees	The survey collects data on the total number of children attending on a specified randomly-sampled day of week. 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 2 part-time children attending on different days or at different times would effectively occupy a single registered place).
Early Years Pupil Premium (EYPP)	DfE introduced EYPP in April 2015 to provide additional funding for 3 and 4 year olds from disadvantaged backgrounds to help prepare young children for schooling. The childcare provider applies for EYPP funding from their Local Authority and receives approximately £300 per year for each eligible child.
Index of Multiple Deprivation (IMD)	IMD 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. This report identifies differences between the 30% most deprived and 70% least deprived areas.
Offering provision for children under 8	In some places in the survey the questionnaire specifically asks about provision for children under the age of 8. This definition is included to match the sampling criteria as most providers caring for children under 8 years old must register with Ofsted or as applicable, a childminder agency, unless the law states otherwise. The survey includes check questions to ensure that providers also offer early years provision.
Ownership	The term ownership refers to the type of organisation responsible for owning or managing a setting. For the purposes of the report, 5 different ownership groupings have been used. These are private (owner/manager, part of a group or chain and employer run settings); voluntary (voluntary or community group, church, charity or committee run settings); 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 appear in more than one of these categories.
Registered places	Ofsted records data on the maximum number of places offered by each setting on the Early Years Register and, where applicable, on the compulsory part of the Childcare Register. This information is checked whenever inspectors conduct registration, inspection or other types of visit to a given setting. Providers must be able to demonstrate to inspectors that they understand the maximum number of places they may offer and the factors that influence this number (e.g. child to staff ratios) and operate within those limits.

Chapter 2 Provider characteristics

This chapter provides an overview of the number of providers and availability of childcare in England, based on representative survey estimates.

Key findings

- Based on representative survey estimates[21] in 2016 there were 25,500 group-based providers, 17,900 school-based providers and 46,600 practising childminders in England[22]

- Almost all (96%) group-based providers were open 5 days a week and for the full academic term (93%). Twenty-eight per cent were open during both term-time and during school holidays

- More than half (55%) of all group-based providers were open Monday to Friday from 8:30am or earlier to 5:30pm or later. This equates to 14,000 group-based providers that can offer childcare to parents throughout a standard working week during term time

- A quarter (27%) of all school-based providers were open from 8:30am or earlier to 5:30pm or later. This equates to 4,900 school-based providers offering provision for a standard working week during term time

- Over half of all childminders (54%) offered provision Monday to Friday from 8:30am or earlier until 5:30pm or later, meaning there are 25,300 childminders offering provision throughout a standard working week during term time

- It was less common for providers to offer childcare later in the evening. Only 7% of group-based providers and 1% of school-based providers closed between 6:01pm and 6:30pm. Two per cent of group-based providers and 1% of school-based providers closed at 6:31pm or later

- Childminders were more likely to work later in the evening, with 13% ending their provision between 6:01pm and 6:30pm and 6% finishing after 6.30pm

- There is little childcare provision during the weekend. Just 2% of group-based providers and 1% of school-based providers offered childcare during the weekend A slightly higher proportion (8%) of childminders provided weekend provision[23]

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[21] These are grossed to the population sample frames which were providers registered with Ofsted in July 2015 for group-based providers and childminders and the Schools Census collected in January 2015. These were the most up-to-date sample-frames available at the time of the survey.
[22] This does not include childminders working with childminder agencies who do not need to register with Ofsted and were therefore not represented on the childminder sample frame.
[23] Each provider type was asked if they provide weekend care for children under the age of 8.

2.1 Total number and characteristics of providers

Based on representative survey estimates grossed to the population sample frame in total in England in 2016 there were currently active:

- 25,500 group-based providers[24]
- 17,900 school-based providers[25]
- 46,600 registered childminders[26]

2.1.1 Group-based provider characteristics

The majority (68%) of group-based providers had been operating for 10 or more years, although one in six (16%) had been open for less than 5 years.

One in five (22%) were part of a chain. This was much more common among for profit organisations than not for profit organisations and charities (31%, compared with 8%). Figure 2.1 shows the breakdown of the number of settings in a chain for providers in a chain.

Figure 2.1 Number of settings in group-based provider chains
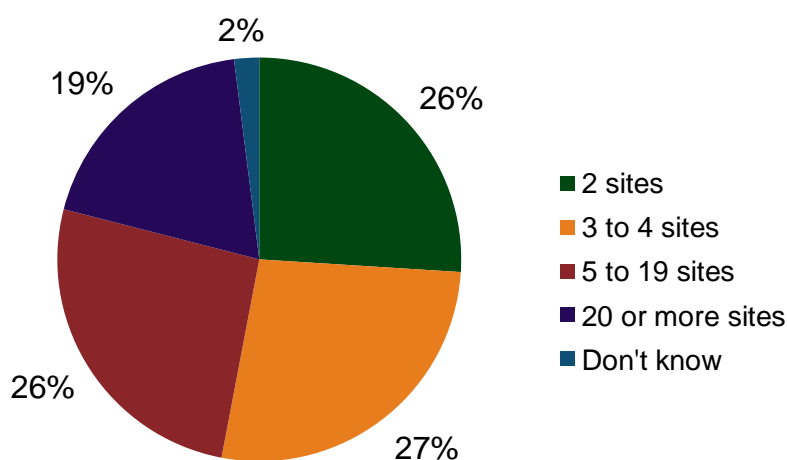
Base: Group-based respondents where setting is part of a chain (1439)
Source: And, including your own site, how many branches
are there in this chain?

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[24] Providers registered with Ofsted as a childcare provider on non-domestic premises in July 2015.
[25] Based on the Schools Census collected in January 2015.
[26] Based on childminders registered with Ofsted in July 2015. The sample frame did not include childminders working with childminder agencies as they do not need to register with Ofsted.

Group-based providers are highly diverse in the types of provision that they offer. The definitions of provision used in this survey are shown in table 2.1 along with the proportion of group-based providers that offer each type of provision.

Table 2.1 Type of group-based provision offered

Provision definition	% of group-based settings offering type of provision	Number of group-based providers in England
Full day provision - Early years full day care for children below school age	62%	15,800
Fixed sessional provision for children below school age where each session has a fixed start and end time[27]	69%	17,600
Flexible sessional provision for children below school age, where session times can vary by child	47%	12,100
Before school sessions for children under the age of 8 in term time[28]	25%	6,400
After school sessions for children under the age of 8 in term time[29]	29%	7,400
Holiday activities or childcare for children under the age of 8 during any school holidays[30]	29%	7,300
Base (unweighted) - all respondents	6221	

Source: Which of the following types of care does [organisation name] provide?

[27] Where more than 1 session is delivered in 1 day there is a change of children between sessions.
[28] Run for at least 4 days a week, and have some element of childcare as their purpose, rather than solely focussing on a single activity such as football or music.
[29] Run for at least four days a week, and have some element of childcare as their purpose, rather than solely focussing on a single activity such as football or music.
[30] Run for at least 5 hours in any day and 5 days a week, and run for at least 1 week per year.

2.1.2 School-based provider characteristics

Table 2.2 shows the breakdown of school-based providers. These are explained below.

Table 2.2 Whether schools offer nursery or reception provision

Type of provision offered by school	% of schools	Number in England
Maintained nursery schools	2%	400
Reception provision, and not nursery provision	46%	8,200
Nursery and reception provision	52%	9,300
Base (unweighted) - All respondents	2,280	

Source: School Census and Q24 And does [school name] offer nursery classes?

Maintained nursery schools are local authority schools that provide education and other services to children under 5 and their families. As shown in table 2.2, just 2% of the weighted sample consisted of maintained nursery schools, in line with their incidence in the school-based provider population. Maintained nursery schools were more common in more deprived areas, with 5% of school-based providers in the 30% most deprived areas being maintained nursery schools, compared with 1% of schools in the 70% least deprived areas.[31] Of all the maintained nursery schools, 59% were in the 30% most deprived areas and 41% were in the 70% least deprived areas.

Reception is the first year of infant school in England providing early education for pupils typically aged between 4 and 5. In line with legal requirements, nearly all school-based providers offered reception provision (98%), the only exception being maintained nursery schools. Of the schools that offered reception provision, three in ten (30%) allowed children to attend on a part-time basis throughout the whole academic year, while seven in ten (68%) did not.[32]

More than half (54%) of school-based providers offered nursery provision. Schools in the 30% most deprived areas were much more likely than those in the 70% least deprived areas to offer nursery provision (79%, compared with 45%).

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[31] Low base size, n=96.
[32] The survey asked, "do you allow children in your reception classes to attend on a part time basis throughout the whole academic year?" It did not collect details of whether this was am / pm or starting at different term dates.

2.1.3 School-based wraparound provision

Over half of schools offered before school provision (55%) and over a third (36%) offered after school provision. Taken together, before school provision and after school provision is termed "wraparound" care. Figure 2.2 shows a breakdown of the combinations of before and after school provision offered by different types of schools.

As shown in figure 2.2, both before and after school provision is more commonly offered by school-based providers with nurseries - 41% of maintained nursery schools and 36% of schools with a nursery, compared with 27% of schools with no nursery. However, schools with nurseries were more likely to offer before school provision and no after school provision (26%) than maintained nursery schools (8%).

Figure 2.2 also compares wraparound provision (where before or after school provision is offered) by area of deprivation and shows that it is more common for schools in the 70% least deprived areas to offer neither before nor after school provision than those in the 30% most deprived (44% compared with 35% respectively). This is likely to be related to the fact that nursery provision is more common in the 30% most deprived areas.

Figure 2.2 Combinations of before and after school provision offered by different types of schools
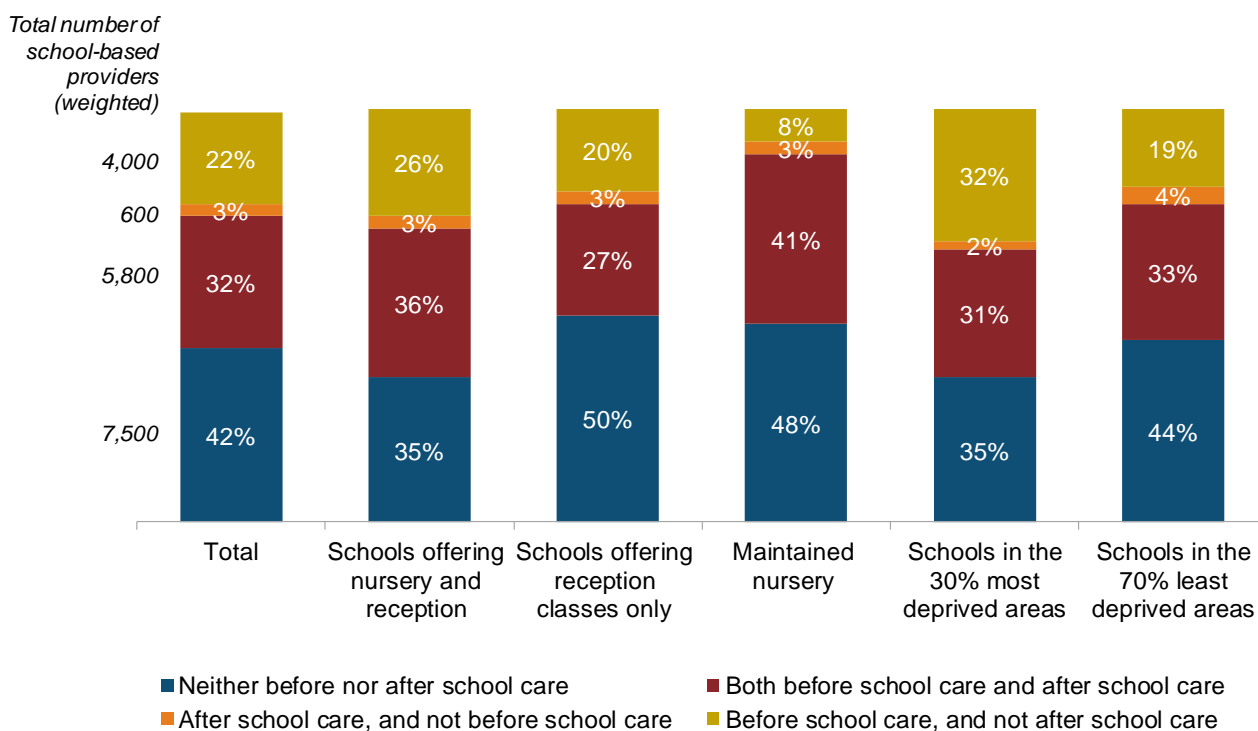
Base: All school-based providers (2,280)

Source: Does your school provide before school sessions for children under the age of 8 in term time? Does your school provide after school sessions for children under the age of 8 in term time?

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2.1.4 Childminder characteristics

One in five childminders (20%) worked with other registered childminders or childminding assistants. This was more common among childminders with 7 or more registered places (58% of these work with other childminders or assistants, compared with 15% of those with 6 or less registered places).

2.2 Availability of provision across the day

Providers were asked what time of day they opened and what time they closed on a reference day.[33] This information is used in this section to identify how many hours providers are open during the day.

In summary, group-based full day providers and childminders were most commonly open for 10 hours or more. Two-thirds (65%) of group-based full day providers were open for 10 to 11 hours and 4% were open for more than 11 hours. Amongst childminders, half (52%) were open for 10 to 11 hours and one in ten (10%) were open for more than 11 hours.

The majority of reception (95%) and nursery provisions (58%) were open for 6 to 6.59 hours, although close to a quarter (23%) of nursery provisions were open for less than 4 hours.

Looking across all their provision including wraparound provision, schools were typically open for 6 to 6.59 hours (39%) or 7 to 7.59 hours (24%). One in ten schools (11%) were open for 9 to 9.59 hours and one in five schools (20%) were open for 10 to 11 hours (with just 1% open more than 11 hours).

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[33] Providers were randomly assigned a day of week to answer questions about.

2.2.1 Group-based provider operating hours

Group-based settings were asked what time they opened and closed. Tables 2.3 and 2.4 show the length of day by the different types of provision. In summary:

- the majority (69%) of group-based settings that offered full day provision were open for 10 hours or more on the randomly selected reference weekday (65% were open 10 to 11 hours and 4% were open for more than 11 hours)

- providers that offered sessional provision were most commonly open for 6 to 6.59 hours (45%)

- before school provision most commonly ran for 1 to 1.29 hours (52%)

- after school provision sessions tended to be longer, with 45% of providers running it for between 2.30 to 2.59 hours, and a further 30% for 3 to 3.29 hours

Table 2.3 Hours open per day – group-based day provision

Number of hours settings are open	% of group-based settings offering full day provision	% of group-based settings offering sessional provision but not full day provision
Less than 3.00 hours	*	3%
3.00 - 3.59 hours	1%	25%
4.00 - 4.59 hours	*	5%
5.00 - 5.59 hours	1%	6%
6.00 - 6.59 hours	14%	45%
7.00 - 7.59 hours	4%	8%
8.00 - 8.59 hours	2%	1%
9.00 - 9.59 hours	8%	1%
10.00 – 11 hours	65%	5%
More than 11 hours	4%	*%
Base (unweighted) - All respondents offering a particular type of provision and able to answer about their opening hours	*3,955*	*1,841*

Source: What time did your [provision] start on [reference day]? What time did your [provision] finish on that [reference day]?

Table 2.4 Hours open per day – wraparound provision

Number of hours settings are open	% of group-based settings offering before school provision	% of group-based settings offering after school provision
Less than 1.00 hour	18%	1%
1.00 - 1.29 hours	52%	2%
1.30 - 1.59 hours	25%	2%
2.00 - 2.29 hours	3%	12%
2.30 - 2.59 hours	*	46%
3.00 – 3.29 hours	1%	30%
3.30 – 3.59 hours	*	3%
4.00 hours or more	-	3%
Base (unweighted) - All respondents offering a particular type of provision and able to answer about their opening hours	*1,369*	*1,672*

Source: What time did your [provision] start on [reference day]? And what time did your [provision] finish on that [reference day]?

2.2.2 School-based provider operating hours

School-based settings were asked about their opening hours (see table 2.8 below).

- The majority of reception (95%) and nursery provisions (58%) were open for 6 to 6.59 hours, although close to a quarter (23%) of nursery provisions were open for less than 4 hours

- Similar to group-based providers, the majority (95%) of before school sessions lasted between 1 to 1.29 hours

- After school provision in schools tended to be available for 2 to 2.29 hours (74%). This is a little shorter than in group-based providers, where 46% of after-school sessions ran for 2.30 to 2.59 hours and 30% ran for 3 to 3.29 hours

- Across all their provisions, schools were typically open for 6 to 6.59 hours (39%) or 7 to 7.59 hours (24%). Nevertheless, one in ten schools (11%) were open for 9 to 9.59 hours and one in five schools (20%) were open for 10 to 11 hours and 1% for more than 11 hours

Table 2.8 Opening hours for before and after school provision

Number of hours schools are open	% of schools that offer before school provision	% of schools that offer after school provision
Less than 1.00 hour	-	-
1.00 - 1.29 hours	95%	15%
1.30 - 1.59 hours	-	-
2.00 - 2.29 hours	*	74%
2.30 - 2.59 hours	-	-
3.00 hours or more	5%	11%
Base (unweighted) - All respondents offering a particular type of provision	*640*	*809*

Source: What time did your [provision] start on [reference day]? And what time did your [provision] finish on that [reference day]?

2.2.3 Childminders' operating hours

Childminders were asked about the opening hours for their childminding provision. As shown in figure 2.3 the majority of childminders (62%) were open for 10 hours or more, with 52% open for 10 to 11 hours and 10% open for more than 11 hours.

Figure 2.3 Childminders' opening hours
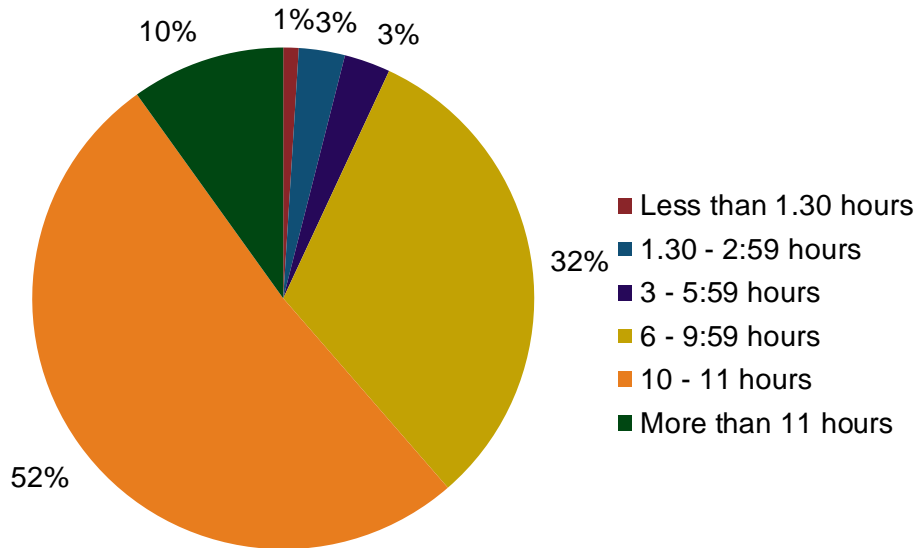
Base: All childminders (1,444)
Source: What time did your childminding start/finish on that [reference day]?

2.2.4 Extended hours of provision

This section looks at providers' opening and closing hours across all the provisions they offer.[34]

As shown in figure 2.4, group-based (65%) and school-based (67%) providers most commonly opened at 8am or later while childminders tended to have an earlier start (61% opened before 8am).

Figure 2.4 Opening hours, by type of provider
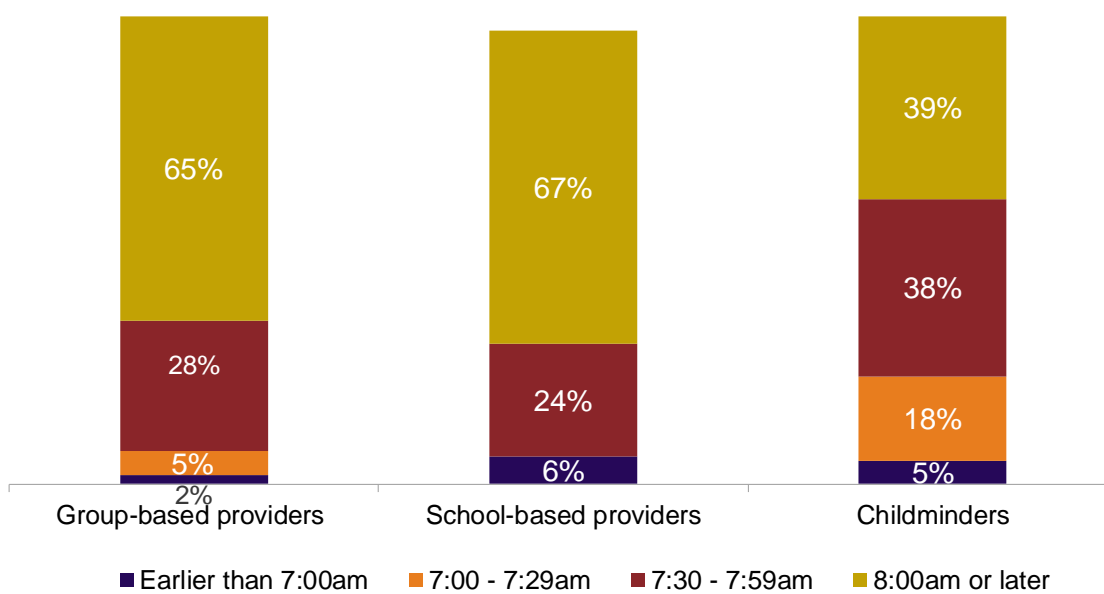
Base: All group-based providers (6,221), all school-based providers (2,280), all childminders (1,444).

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[34] This takes into account if a provider offers multiple provisions and looks at their "full" opening hours. For example, if a school-based provider offers nursery classes, before school classes and after school classes, these figures look at the earliest opening hour of any of these three provisions and the latest closing hour of any of these three provisions.

As shown in figure 2.5, there was little childcare provision after 6pm, with 91% of group-based, 98% of school-based, and 81% of childminders finishing by 6pm. Childminders were more likely to be open after 6.30 (6%).[35]

As mentioned in sections 2.2.1 and 2.2.3, childminders typically offered childcare for a longer period of time than group-based providers. While 13% of group-based full day providers offered provision for 11 hours or more, this was the case for one in five (20%) childminders.

Figure 2.5 Closing hours, by type of provider
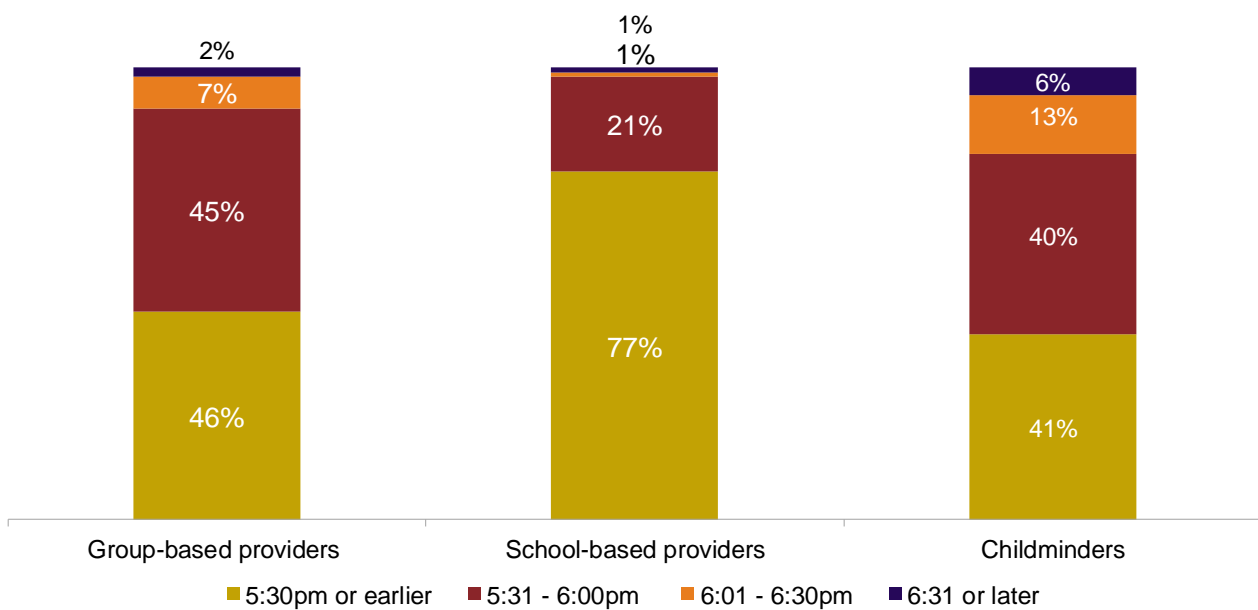
Base: All group-based providers (6,221), all school-based providers (2,280), all childminders (1,444).

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[35] One per cent of childminders were open from 7.01-7.30pm and 1% were open 7.31pm or later. One per cent of each of group-based and school-based providers were open 7.31pm or later.

2.3 Availability of provision across the week

For the first time, the survey collected information on days of the week that providers offered childcare. This is shown in figure 2.6 below. In summary:

- almost all group-based providers (96%) and school-based providers (98%) were open 5 days a week (Monday to Friday)

- three-quarters (75%) of childminders were open 5 days a week from Monday to Friday and 8% offered weekend provision for children under 8

- just 2% of group-based providers, 1% of school-based providers and 8% of childminders offered weekend provision for children under the age of 8. For childminders this was twice as common in the 30% most deprived areas as in the least deprived areas (14% compared with 7%)

As shown in figure 2.6, while group-based and school-based childcare was fairly consistent across weekdays, childminders opening days varied across the week, with a greater level of provision Monday to Thursday than on Fridays. Childminders in the 30% most deprived areas were more likely to be open 5 days a week, Monday to Friday, than those in less deprived areas (84%, compared with 72%).

Figure 2.6 Availability of provision across the week, by type of provider
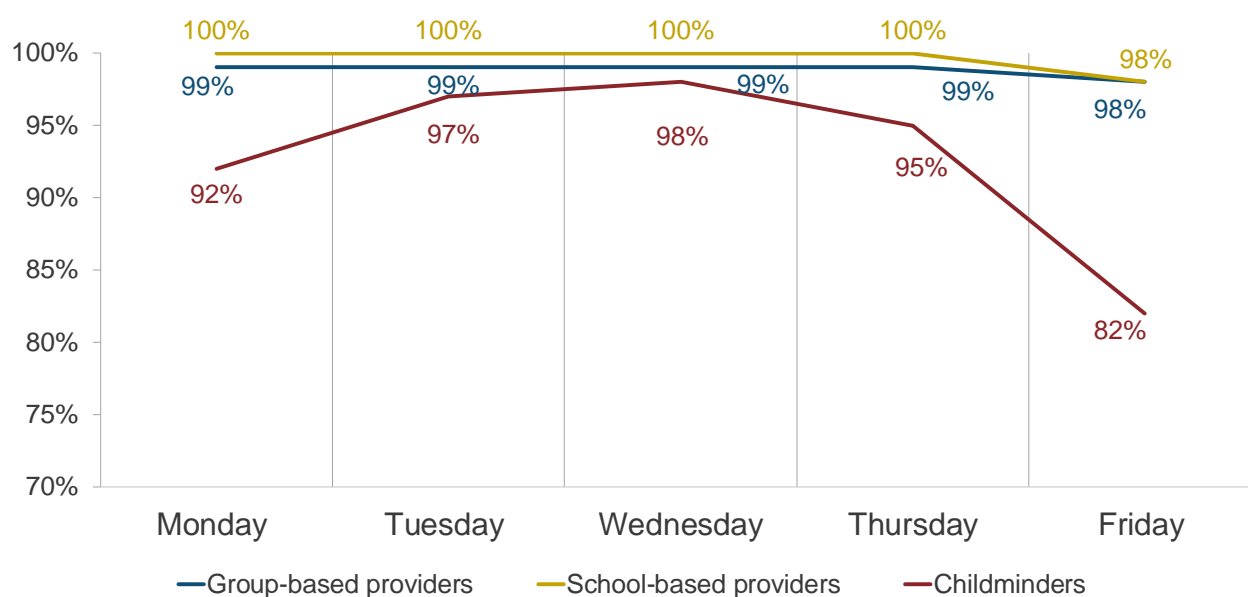
Base: All group-based providers (6,221) All school-based providers (2,280) All childminders (1,444)
Source: And what days do you typically open during term-time? Which specific days do you typically open in term-time?

2.4 Availability of provision across the year

Providers were asked about their provision during holidays:

- three in ten (29%) group-based providers offered holiday activities for children under the age of 8. This was more common in the 30% most deprived areas (34%) than in the 70% least deprived areas (27%)

- overall, 12% of school-based providers offered holiday activities for children under 8. This was more common in the 70% least deprived areas than in the 30% most deprived areas (13%, compared with 9%)

- the majority of childminders (88%) were open both during term-time and school holidays.

As shown in figure 2.7 providers that were open in school holidays provision were more likely to be open during the summer and Easter holidays and less likely to be open during the Christmas holidays.

Figure 2.7 Holiday provision by type of provider
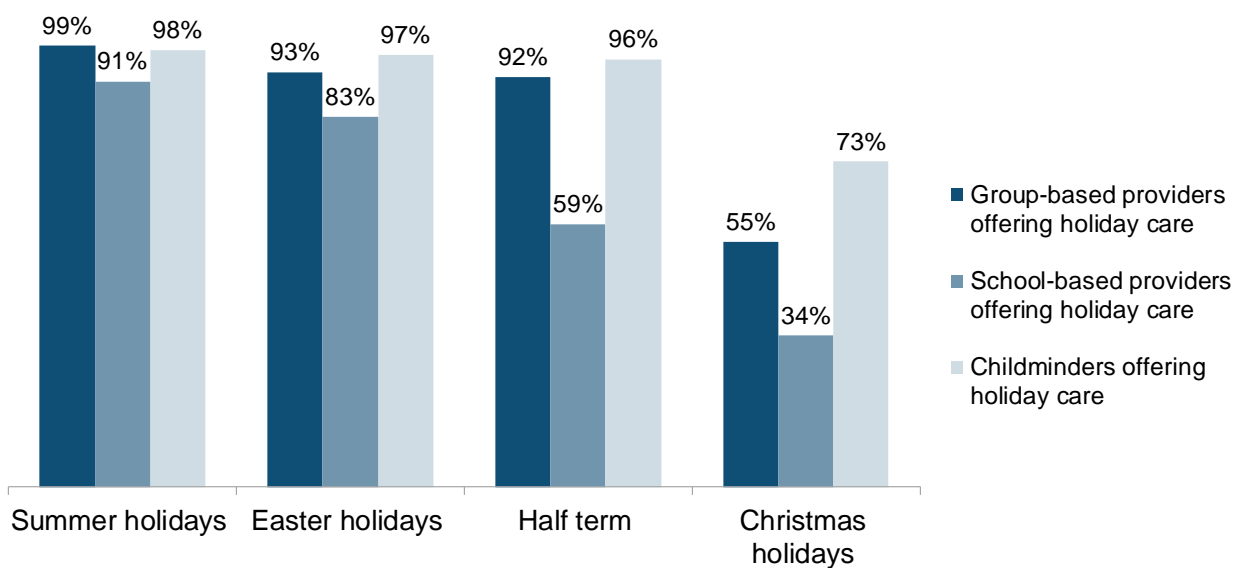
Base: Variant 1 group-based respondents who offer holiday care (295); Variant 1 school-based respondents who offer holiday care (179), Variant 1 childminders who offer holiday care (768)
Source: Do you offer holiday provision in…

Chapter 3 Childcare attendance and capacity

This chapter looks at the number of registered places and number of children booked to attend. It also looks at spare capacity based on how many extra children the providers were willing and able to look after.[36] Section 3.3 also explores these patterns by region, day of week and Ofsted rating.

Key findings

- Based on representative survey estimates the largest number of spare places was in group-based full day provision, which had 139,200 spare places, and 75% of providers with spare capacity

- Group-based sessional providers (not offering full day provision) and school-based reception were more likely to be running at full capacity, with around half of providers unable to offer spare places (52% each)

- School-based providers were larger in London than other regions for most types of provision, as were sessional group-based providers. These London based providers also had the least spare capacity

- While London had almost consistently the lowest spare capacity, there tended to be less significant variation in capacity across the other regions, with a few exceptions:

  o the North East was the region with most spare capacity in group-based full day provision (28%), before school (50%) and after school provision (41%)

  o the South West had most spare capacity in group-based before school provision (50%), school-based nursery provision in the afternoon (29%) and school-based wraparound provision (37% for before school and 38% for after school), but was the region with the least capacity for group-based full day provision (19%)

- Based on representative survey estimates around half of childminders had spare capacity, averaging 1 spare place per provider

- In most school-based provision and in group-based sessional provision (for those not offering full day provision) attendance was higher in the 30% most deprived areas:

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[36] Providers were asked about the number of additional children they would have been willing and able to look after as this was found to be the most intuitive way of enquiring after spare capacity. However, in this section additional children is considered to be interchangeable with additional places and a place could be occupied by more than 1 child.

- in school-based provision in the 30% most deprived areas, on average there were 44 and 46 children booked to attend reception and nursery, respectively, compared with 34 and 36 in the 70% least deprived. The same pattern was true for before school provision[37]

- in group-based sessional provision there were, on average, 34 children booked to attend in the 30% most deprived areas, compared with 27 in the 70% least deprived areas

- In wraparound provision in group-based providers, there was higher attendance in the 70% least deprived areas than in the 30% most deprived areas. In before and after school provision on average there were 14 and 18 children booked to attend in the 70% least deprived areas, respectively, compared with 10 and 13 in the 30% most deprived areas

3.1 Registered places

Based on representative survey estimates, there were, in total, 3,092,100 Ofsted registered childcare places[38] across all types of provision in England.[39] Schools accounted for 53% of places, 39% were offered by group-based providers and childminders offered the remaining 9%. Tables A.1 and A.2 in appendix 1 provide more detail on registered places by provider type and region.

Aside from maintained nursery schools[40] group-based settings were, on average, the largest providers. The average number of registered places for each provider is summarised below:

- 48 registered places per group-based setting

- 42 registered places in school-based providers' reception provision[41]

- 37 registered places in school-based providers' nursery provision

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[37] Note that some providers will have just 1 group and others more than 1.
[38] For childminders the survey specified that this was children under the age of 8. This is because childminders must register Ofsted or a childminder agency if they wish to look after children under 8 for more than 2 hours a day in England.
[39] Numbers are based on representative survey estimates grossed to the population sample frames which were: providers registered with Ofsted in July 2015 for group-based providers and childminders; and the Schools Census collected in January 2015. These were the most up-to-date sample-frames available at the time of the survey.
[40] Base: maintained nurseries = 237.
[41] Note that some schools have more than 1 reception class in their setting so this is a mean across the settings rather than the mean number of children per reception class.

- This was higher in maintained nursery schools at 84, compared with 34 in nurseries in primary schools
- 6 registered places per childminder

For school-based providers and childminders, the highest average number of registered places was in London; for group-based providers it was the North-West. For group-based and school-based providers, the 30% most deprived areas had a higher number of places on average.

3.1.1 Group-based providers

Based on representative survey estimates there were almost 1.2 million Ofsted registered places offered by group-based providers. Six in ten (61%) were in providers managed privately, three in ten (30%) in voluntarily run settings, 4% in those managed by the local authority, 4% in those managed by a school or college, and 4% had other management.[42]

The average number of registered places per group-based provider was 48. Local Authority and privately managed providers had more registered places on average, with 58 and 52, respectively. Voluntarily managed providers had the lowest average number of registered places among group-based providers, at 40.

The North-West had the highest average number of registered places (53), higher than the South-West (44), London (45), East (46), South-East (46), and West Midlands (47). There was a higher average number of registered places per setting in the 30% most deprived areas at 51 (compared with 46 in the 70% least deprived areas).

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[42] Providers were able to select more than one response.

Figure 3.1 Average number of registered places by region - group-based providers
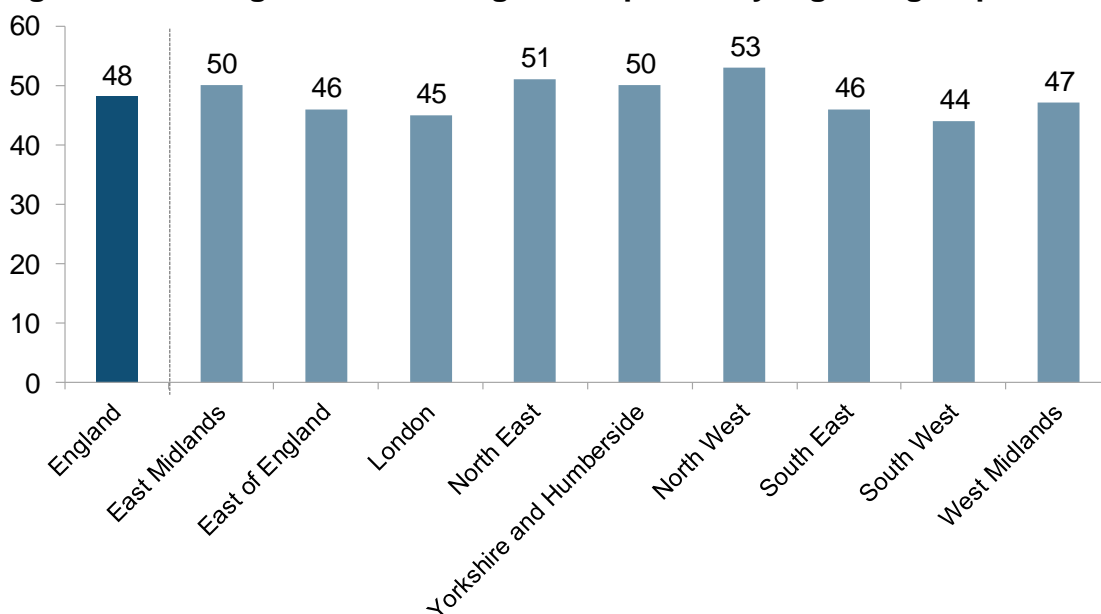
Base: All group-based providers (6,221)
Source: Thinking about your whole setting and all of the childcare you offer, how many Ofsted registered places do you have in total?

3.1.2 School-based providers

Reception

Based on representative survey estimates there were 734,000 registered places in school-based reception provision and an average of 42 per provider. Reception provision in London averaged 60 registered places, higher than in all other regions. As with group-based providers, there was a higher average number of registered places per setting in the 30% most deprived areas, at 47, compared with 40 in the 70% least deprived areas.

Nursery

Based on representative survey estimates there were 352,600 registered places in school-based nursery provision. The average number of registered places in school-based nurseries was 37. This was higher in maintained nursery schools at 84, compared with 34 in nurseries in primary schools. As with reception provision, nursery provision in London had a higher number of registered places than all other regions, averaging 43 registered places. The 30% most deprived areas had an average of 40 registered places per school-based provider, compared with 34 in the 70% least deprived areas.

Before and after school

Based on representative survey estimates in school-based settings, there were 327,000 registered places in before school provision and 212,200 registered places in after school provision. This difference is related to school-based providers being more likely to offer before school provision (55%) than after school provision (36%) (this is discussed in section 2.1.3) rather than the size of these provisions. The average number of registered places was the same in before school provision and after school provision at 36 places in each type of provision.

In before school provision, registered places were the highest in the North-East at 44. The 30% most deprived areas had an average of 41 places in before school provision, again higher than the 70% least deprived areas where the average was 34. In after school provision, London and the North-East had the highest number of registered places, 51 and 46 respectively.

3.1.3 Childminders

Based on representative survey estimates across England there were 267,600 Ofsted registered places for children under 8[43] offered by childminders. Six in ten (58%) childminders had 6 registered places, in line with the maximum if 1 childminder is present, and 30% had fewer than 6 registered places. Twelve per cent reported that they had more than 6 registered places.[44] Childminders in London had an average of 5 registered places, lower than all other regions. There was no difference by level of deprivation.

3.2 Children booked to attend

Providers were asked about the number of children booked to attend the various types of childcare they offered on a particular day. Providers were randomly sampled to answer questions about a specific day of the week. This ensured the data collected was representative of childcare throughout the week, and based on actual attendance rather than just 'a typical day'.[45] It also allows comparison of attendance and capacity by day of week (see appendix 1, tables A.3, A.4, A.5 and A.6).

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[43] Childminders must register Ofsted or a childminder agency if they wish to look after children under 8 for more than 2 hours a day in England.
[44] Fourteen per cent of childminders worked with a childminding assistant - see section 4.1.3.
[45] If providers were not able to answer about their allocated day they could answer about another day of their choice. Almost all (94%) answered about the day that they were allocated randomly.

As might be expected, the number of children attending could be lower than the number of registered places if the setting was operating at less than full capacity. However, it should also be noted that the number of children attending may, in some cases, have been greater than the number of registered places, as 2 or more part-time children can share a single place on a given day.

In contrast to registered places, there was on average:

- 35 children attending full day provision per group-based setting, 29 attending sessional provision (in providers not also offering full day provision[46]), 13 in before school provision and 17 in after school provision

- 39 children attending school-based providers' reception provision[47]

- 40 children attending school-based providers' nursery provision

    - this was higher in maintained nursery schools at 92, compared with 38 in nurseries in primary schools

- 3 children looked after by childminders throughout the day

School-based providers had higher attendance in the 30% most deprived areas than the 70% least deprived areas. The same was true for school-based nursery and reception provision. In wraparound provision in group-based providers, attendance was higher in the 70% least deprived areas.

In most types of provision in school-based providers, there was higher attendance in London than any other region, as with sessional provision in group-based providers. In school-based and group-based providers, there was higher attendance in most wraparound provision in the North-West.

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[46] Fifty-five per cent of group-based providers offered both full day care and sessional care. In order to reduce the burden on those who offered both full day care and sessional care the survey only asked about children in attendance for one of these types of care, and where full day care was offered questions were asked about full day care.
[47] Note that some schools have more than reception class in their setting so this is a mean across settings rather than the mean number of children per reception class.

3.2.1 Group-based providers

Based on survey estimates the total number of children booked to attend full day provision was 555,600 per day, with an average of 35 children per provider. Amongst providers who offered sessional provision but not full day provision, 220,800 under-school age children attended on the particular day, averaging 29 per provider. There were fewer children in wraparound provision, with before school provision averaging 13 booked places each day, and after school provision 17.

Figure 3.2 Booked places on a reference day - group-based providers

		Total booked to attend	Mean number of children
After school	7% / 31% / 24% / 19% / 9% / 5% / 3%	122,400	17
Before school	9% / 40% / 24% / 14% / 6% / 3%	82,900	13
Sessional	5% / 24% / 34% / 16% / 10% / 6% / 4%	220,800	29
Full day care	7% / 17% / 21% / 17% / 13% / 14% / 8%	555,600	35

■ No children   ■ 1 - 9 children   ■ 10 - 19 children   ■ 20 - 29 children
■ 30 - 39 children   ■ 40 - 49 children   ■ 50 - 69 children   ■ 70+ children
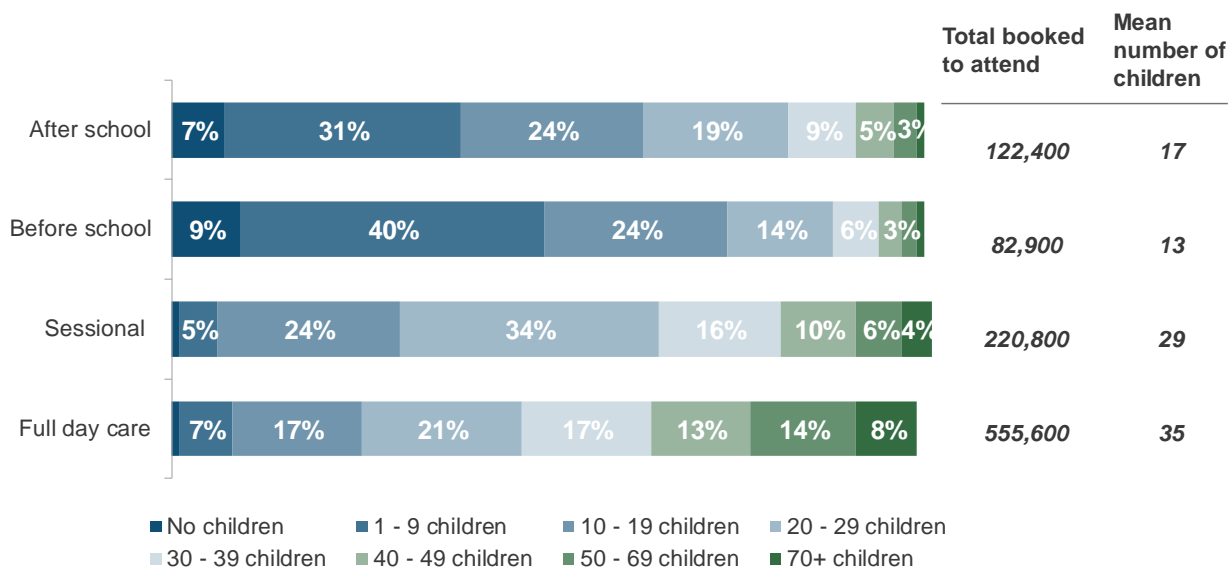
Base: full day care (3968), sessional (1858), before school (1564), after school (1784)
Source: How many children were booked to attend your [provision type] on that [reference day]?

Group-based attendance by index of deprivation

Figure 3.3 compares the average number of children booked to attend each of the types of provision offered by group-based providers between the 30% most deprived and 70% least deprived areas. There were, on average, more children booked to attend sessional provision in the 30% most deprived areas than the 70% least deprived, but in wraparound provision there were fewer children booked to attend in the 30% most deprived areas.

Figure 3.3 Booked places by index of deprivation - group-based providers
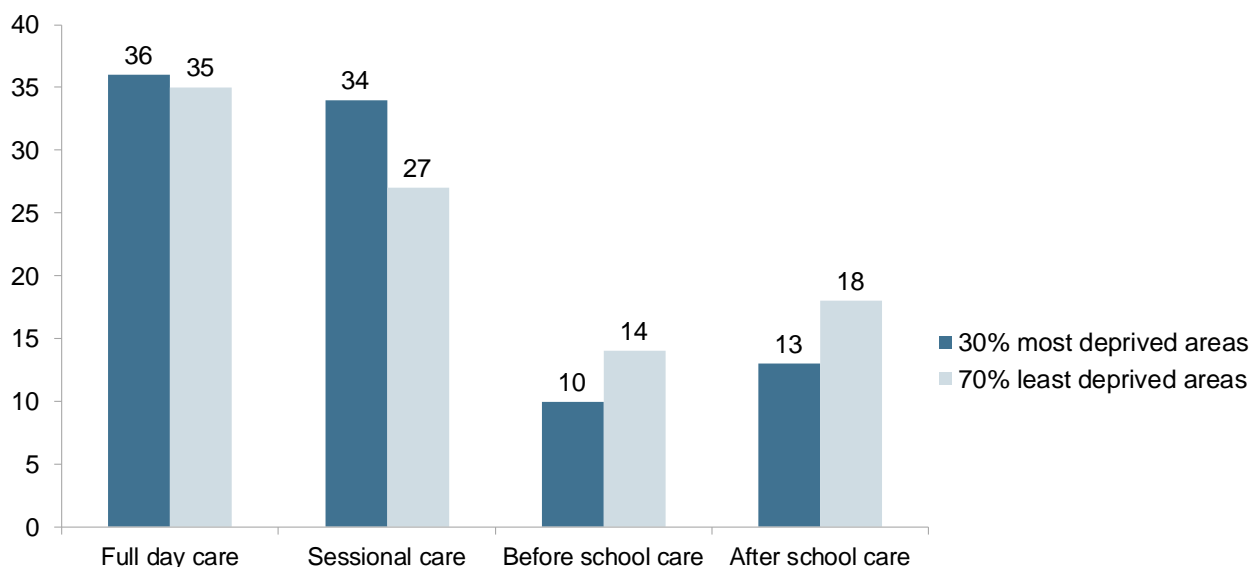
Base: All group-based providers (6,221) offering full day care (3968) sessional care but not full day care (1858) before school care (1564) and after school care (1784)

Source: How many under school-aged children were booked to attend your [full day care/sessional] provision on that [reference day]?
How many children were booked to attend your [before school/after school] provision on that [reference day]?

Group-based attendance by region

There were no significant differences by region in full day provision.

In sessional provision London providers had the highest average number of booked places at 34, with 17% of providers having 50 or more children attending.

In before school provision the North-West had a higher mean number of booked places than all other regions, with 17. In contrast, London had an average of 14 places per provider, although it did have the greatest proportion of providers with 50 or more children attending (7%). In after school provision, as with before school provision, the North-West had higher attendance than other regions, an average of 20 booked places.

38

3.2.2 School-based providers

Based on representative survey estimates there were 672,000 children booked to attend reception provision, averaging 39 per provider. Meanwhile, 381,200 children were booked to attend nursery provision, an average of 40 per provider, and within that 38,700 children booked to attend maintained nursery schools (92 per provider).

Across all school-based providers, 211,600 children were booked to attend before school and 142,600 after school provision, an average of 23 and 24 per provision respectively. As for registered places (discussed in section 3.1.2) this reflects the fact that a larger proportion of school-based providers offer before school provision (55%) than after school (36%).

Figure 3.4 Booked places on a reference day - school-based providers

	Total booked to attend	Mean number of children
After school	142,600	24
Before school	211,600	23
Nurseries	381,200	40
Reception	672,000	39

After school: 2%, 19%, 26%, 21%, 15%, 5%, 5%, 3%
Before school: 3%, 18%, 24%, 18%, 14%, 7%, 5%, 3%
Nurseries: 8%, 10%, 23%, 15%, 13%, 18%, 11%
Reception: 9%, 16%, 13%, 21%, 9%, 20%, 11%

Legend: No children, 1 - 9 children, 10 - 19 children, 20 - 29 children, 30 - 39 children, 40 - 49 children, 50 - 69 children, 70+ children
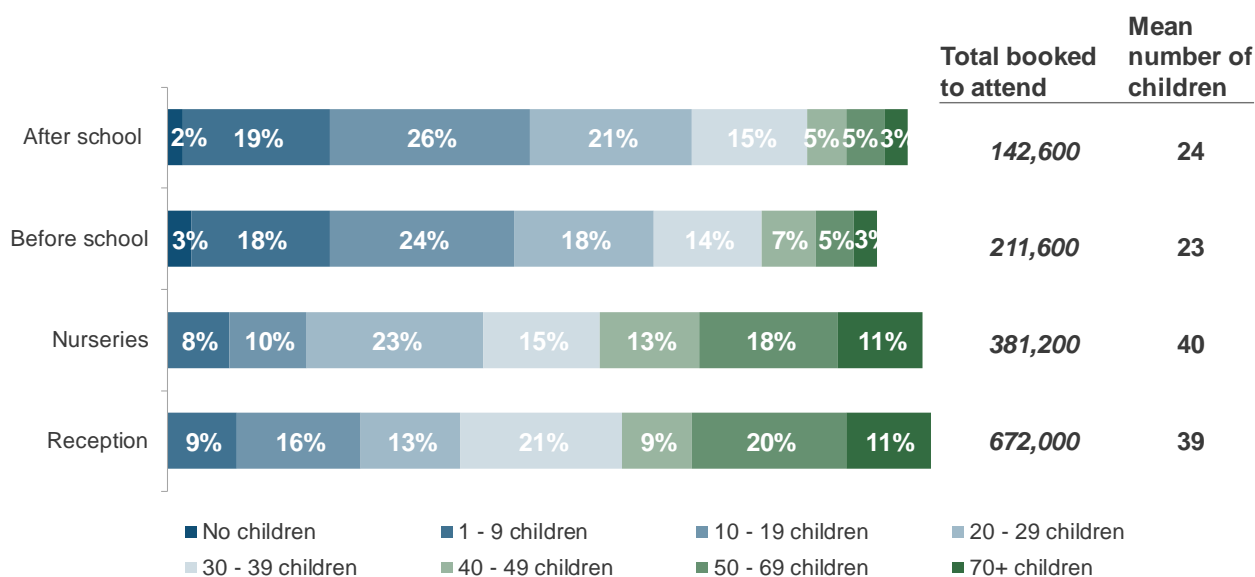
Base: reception (2,037), nurseries (1,886), before school (1,300), after school (831)
Source: How many children were booked to attend your [provision type] on that [reference day]?

School-based attendance by index of deprivation

As shown in figure 3.5, with the exception of after school provision, across the different types of school-based provision on average there were more children booked to attend in the 30% most deprived areas than the 70% least deprived.

Figure 3.5 Booked places by index of deprivation - school-based providers
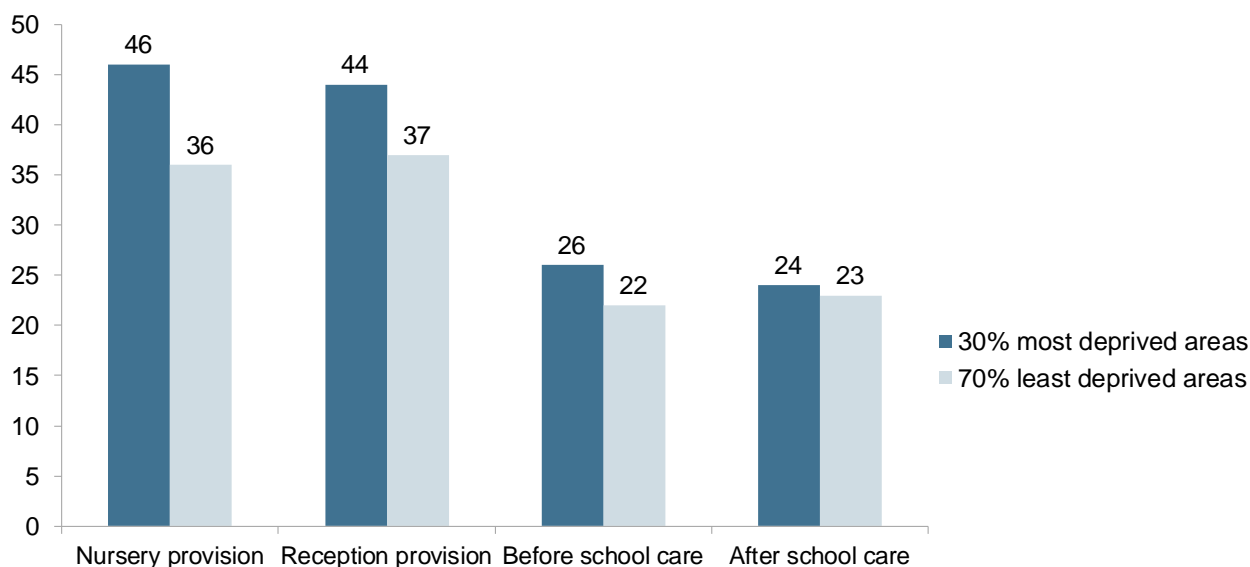
Base: All school-based providers running nursery classes (1886) reception classes (2037) before school care (1300) and after school care (831)
Source: How many under school-aged children were booked to attend your [nursery/reception] provision on that [reference day]?
How many children were booked to attend your [before school/after school] provision on that [reference day]?

School-based attendance by region

London providers had the most children attending most types of provision, largely due to a higher proportion of large providers with 50 or more children attending:

- in reception provision 55% of London-based providers had 50 or more children booked to attend (and 26% had more than 70 children booked to attend) and an average of 56 children per provider (compared with 39 across all regions)

- in nursery provision 41% of London providers had 50 or more children booked to attend and an average of 47 children per provider (compared with 40 across all regions)

- in after school 20% of London providers had 50 or more children booked to attend and an average of 33 per provider (compared with 24 across all regions)

The exception was before school provision, where the North-East and North-West had the highest average attendance with, respectively, 29 and 27 children booked to attend (compared with 23 across all regions). London was slightly above average, with an average of 26 per provider.

3.2.3 Childminders

Childminders had, on average, 3 under-school aged children booked to attend throughout the day, which, based on representative survey estimates equates to 121,400 booked places per typical day across the sector. On average, they had 2 school-aged children booked to attend their before and after school provision. There were no significant differences by index of deprivation or region.

Figure 3.6 Booked places on a reference day – childminders

	Total booked to attend	Mean number of children
After school: No children 25%, 1 child 17%, 2 children 20%, 3 children 15%, 4 children 10%, 5 children or more 14%	121,400	3
Before school: No children 36%, 1 child 18%, 2 children 19%, 3 children 11%, 4 children 7%, 5 children or more 9%	80,300	2
Throughout the day: No children 12%, 1 child 15%, 2 children 21%, 3 children 33%, 4 children 9%, 5 children or more 10%	105,400	2

Legend: ■ No children ■ 1 child ■ 2 children ■ 3 children ■ 4 children ■ 5 children or more

Base: all childminders (1,444)
Source: How many different under school-aged children were booked to attend your childminding provision on that [reference day]?
How many, if any, school-aged children were booked to attend your childminding provision before they went to school?
How many, if any, school-aged children were booked to attend your childminding provision after they had been to school?

3.3 Spare capacity

In addition to being asked about the number of children booked to attend on a particular day, providers were asked about their spare capacity. This was defined in the questionnaire as the number of extra children they would have been willing and able to take on the reference day. Providers were prompted to take into account ratio requirements, space available and number of spare places across their provision as a whole.[48]

Spare capacity has been calculated based on 2 questions for each type of provision:

1. The number of children booked to attended the type of provision
2. The number of extra children the provider would have been willing and able to take for that type of provision

In this section the following estimations are discussed:

- the proportion of providers with spare capacity – this is all providers that state 1 or more child at the second question. Providers giving 0 are identified as having no spare capacity

- the average % spare capacity – this is calculated by dividing the number of children given at question 2 above by the number of children in question 1 with the mean calculated across all providers for each provision type

- the average number of spare places – this is the number given at question 2, with the mean calculated across all providers for each provision type

- total number of spare places – this takes the average number of spare places per provider and grosses it to the population sample frame[49] to give an estimation of the number of spare places across the sector

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[48] While providers have a maximum number of places they can legally offer, this often does not reflect the maximum number of children that they would actually consider accepting, which involves a range of factors, including ad hoc assessments (this was mentioned by providers during the development phases of the study in scoping and cognitive testing interviews). This method of questioning aims to understand the actual level of potential spare capacity that childcare providers feel they would realistically be willing to offer to parents and carers.

[49] Providers registered with Ofsted in July 2015 for group-based providers and childminders; and the Schools Census collected in January 2015.

Tables 3.1 – 3.3 summarise spare places across the sector for each of the provision types. It should again be noted that in order to keep the survey to a manageable length providers that offered full day provision answered about their full day provision only. Providers only answered about their sessional provision if they did not offer full day provision. Consequently spare capacity totals for the sector as a whole cannot be provided (for example, providers that offer full day provision could have additional spare capacity in their sessional provision but they were not asked about this). It should also be borne in mind that more than 1 child can occupy a place, if for example, they attend on a part-time basis.

3.3.1 Group-based providers' spare capacity

Across group-based settings, before school (85%) and after school (81%) providers were most likely to have spare capacity. Three-quarters (75%) of full day provision providers had spare capacity. Less than half (45%) of sessional providers (that did not offer full day provision) had spare capacity.[50]

Table 3.1 Spare capacity summary - group-based providers

	Full day provision	Sessional provision (throughout the day)	Before school provision	After school provision
% providers with spare capacity	75%	45%	82%	79%
Average % spare capacity	20%	13%	43%	36%
Average no. of spare places per provider	9	5	8	8
Total no. of spare places	139,200	36,900	51,400	54,700
Unweighted base	3,968	1,858	1,564	1,784

Source: How many [Full Day Provision & Sessional Provision: under school-aged] children were booked to attend your [provision type] on that [reference day]? How many extra children would you have been willing and able to take in your [provision type] on that day?

Full day provision

Across England there were 139,200 additional full day provision places that were spare (that providers would have been willing and able to offer), the majority of which were in privately managed providers (105,600). Twenty-three per cent of providers had no spare capacity for children in full day provision. Providers with more than 75 registered places were most likely to have spare capacity.

Sessional provision

There were 36,900 spare spaces in sessional provision throughout the day. When asked about the number attending in the morning and the number attending in the afternoon, allowing for overlap between the 2[51], there were 20,100 in morning sessions and 23,900 in afternoon sessions. Across all sessions, it was the voluntary providers that were most likely to have spare capacity. Across all sessional provision, the largest providers were most likely to have spare capacity.

Of the providers offering sessional provision throughout the day, 45% had spare capacity. Voluntarily managed settings had the most spare spaces (18,400) and privately managed had a further 16,500 available.

Close to six in ten (57%) of sessional providers offering morning sessions had spare capacity, with 12,000 spare spaces available in voluntarily managed providers. On average, 11% of available places were spare places in the most deprived areas, compared with 14% in the least deprived areas. Forty-two per cent of sessional providers had no extra places for morning sessions.

Fifty-three per cent of sessional providers offering afternoon sessions had spare capacity. The majority of the spare capacity was again in voluntarily managed settings (14,600). Thirty-six per cent of providers had no spare capacity for afternoon sessions (not shown on table 3.1).

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[51] As sessional provision, particularly flexible sessional provision does not necessarily have consistent start and finish times across the sector, the questionnaire specified that if a session started before lunchtime and ended after lunchtime it should be counted in both the morning and the afternoon. Providers were asked to only count different children for each of the morning and afternoon (i.e. the same child might be counted in both the morning and the afternoon if they attended sessions in the morning and afternoon; but not more than once in either the morning or afternoon, if, for example, they attended multiple sessions in either the morning or afternoon).

Before and after school provision

There were 51,400 spare places in before school provision offered by group-based providers, and 82% of providers had spare capacity. There were no significant differences by deprivation or size of provider. Across England, privately managed providers could offer places for an additional 31,100 children and voluntarily managed providers could take 14,900 more children. Overall in before school provision, there was an average of 43% spare capacity.

In after school provision offered by group-based providers there were 54,700 spare places. Again, there were no significant differences by deprivation or size of provider. Privately managed providers could take an additional 32,600 places and voluntarily managed providers could take 15,700 more places. Overall, for after school provision, there was an average of 36% spare capacity.

3.3.2 School-based providers' spare capacity

Tables 3.2 summarises spare capacity across the different school-based providers. Note that spare capacity in reception provision is not directly comparable with that in other types of providers because 3 year olds and some 4 year olds are not yet eligible for reception, and because parents' school choices are not driven by the same market pressures as decisions about pre-school provision.

Table 3.2 Spare capacity summary: school-based

	Reception	Nursery (morning)	Nursery (afternoon)	Nursery (whole day)	Before school provision	After school provision
% providers with spare capacity	47%	56%	63%	41%	72%	74%
Average % spare capacity	11%	13%	24%	14%	32%	31%
Average no. of spare places per provider	3	4	6	4	11	10
Total no. of spare places	59,800	30,700	48,300	7,000	95,500	58,200
Unweighted base	2,037	1521	1521	365	1,300	831

Source: How many [Nursery and Reception Provision: under school-aged] children were booked to attend your [provision type] on that [reference day]? How many extra children would you have been willing and able to take in your [provision type] on that day?

Reception

There were 59,800 spare places in reception provision, accounting for 11% of the total available reception places in England. Independent schools' reception provision tended to have more spare capacity per provider, averaging 6 spare places per provider compared with an overall average of 3.

Nursery

There were 30,700 spare places in nursery provision in the morning, 48,300 spare places in the afternoon and 7,000 spare places for the whole day, accounting for 13%, 24% and 14% of total available places, respectively. Independent schools had more spare places per provider - for example, for the whole day they had 6 spare places on average, compared with 4 spare places in non-independent schools.

Before school and after school

There were 95,500 spare places in before school provision and 58,200 in after school provision in schools. This equates to 32% and 31% of all available places for before and after school provision, respectively. Rural schools tended to have more spare capacity in their before and after school provision, with four in ten (42% and 41%) available places as spare capacity, respectively.

3.3.3 Childminders' spare capacity

There were 27,900 spare places for under school-aged children amongst childminders, an average of 1 spare place per provider. Half (50%) of childminders had no spare capacity in the morning, 20% had space for 1 additional child, and 19% space for 2 more. Forty-five per cent had no additional capacity in the afternoon, 28% had 1 additional space, and 14% had space for 2 more children. One in four of all available childminding spaces were spare places in both the morning and the afternoon (26% for both).

Table 3.3 Spare capacity summary - childminders

	Morning only	Afternoon only	Throughout the day
% childminders with spare capacity	50%	55%	54%
Average % spare capacity	26%	26%	24%
Average no. of spare places per childminder	1	1	1
Total no. of spare places	11,100	11,400	27,2900
Unweighted base	353	353	907

Source: How many under school-aged children were booked to attend your [provision type] on that [reference day]? How many extra children would you have been willing and able to take in your [provision type] on that day?

3.3.4 Spare capacity by region

Across most types of provision, London had the lowest spare capacity, except for childminders. There were also several types of provision where spare capacity was low in the East of England. For group-based provision, the North East often had the most spare capacity. The South West had the most spare capacity in school-based providers. Figures 3.7, 3.8 and 3.9 summarise the proportion of spare capacity by region.

Group-based providers

There was an average of 20% spare capacity across full day provision in group-based providers. The North East had the most spare capacity in full day provision (28%), and London (19%), the South East (18%) and the South West (19%) had least spare capacity. Of the providers offering sessional provision throughout the day, there was an average of 13% spare capacity. The North West and South West had proportionally more spare capacity (16% and 15% respectively), while London and East of England had the least at 10%.

For wraparound provision, the percentage of spare capacity was higher across all regions than other types of group-based provision. For before school provision, there was most spare capacity in the North East (50%) and South West (50%) and for after school provision, there was most spare capacity in London (40%) and the North East (41%). The East of England had lowest spare capacity for before and after school provision (41% and 31% respectively). For full detail of capacity by region refer to appendix 1, tables A.7 to A.10.

Figure 3.7 Average % spare capacity by region - group-based providers

Spare capacity is calculated by dividing the number of extra places that the provision was willing and able to take by all available places for that provision. Note that the reverse of spare capacity is the occupancy rate. For example, in the North East there was 28% spare capacity in full day provision, or a 72% occupation rate.

North
East
FDC 28%
SC 13%
BC 50%
AS 41%

North
West
FDC 21%
SC 16%
BS 38%
AS 34%

Yorkshire
& Humberside
FDC 22%
SC 16%
BC 41%
AS 33%

East Midlands
FDC 21%
SC 15%
BS 44%
AS 37%

West Midlands
FDC 20%
SC 11%
BS 39%
AS 34%

East of England
FDC 19%
SC 10%
BS 41%
AS 31%

London
FDC 19%
SC 10%
BS 49%
AS 40%

South East
FDC 18%
SC 12%
BS 48%
AS 38%

South West
FDC 19%
SC 15%
BS 50%
AS 38%

Key:

FDC	Full Day Care
SC	Sessional (throughout the day)
BS	Before School
AS	After School

School-based providers

For school-based providers, there was 14% spare capacity in nursery provision for the whole day, 13% in the morning and 24% in the afternoon. For both morning and afternoon, London had the lowest spare capacity (9% and 18% respectively) and there was little variation across the other regions for the morning. The South West had the most spare capacity in the afternoon (29%).

In reception provision, there was overall an average of 11% spare capacity, with limited variation regionally, although London had the lowest spare capacity at 6%.The most spare capacity in reception provision was in Yorkshire and Humberside (14%) and the South West (13%).

In wraparound provision, the South West had the highest spare capacity (37% for before school and 38% for after school). The lowest spare capacity in before and after school provision was in the East of England (27% and 26% respectively) and London (both 27%). For full detail of capacity by region refer to appendix 1, tables A.11 to A.15.

Figure 3.8 Average % spare capacity by region - school-based providers

Spare capacity is calculated by dividing the number of extra places that the provision was willing and able to take by all available places for that provision.

North East
NUR 13%/23%
REC 10%
BS 27%
AS 35%

North West
NUR 15%/29%
REC 11%
BS 34%
AS 33%

Yorkshire & Humberside
NUR 14%/24%
REC 14%
BS 34%
AS 37%

East Midlands
NUR 15%/24%
REC 10%
BS 33%
AS 37%

West Midlands
NUR 14%/23%
REC 12%
BS 32%
AS 28%

East of England
NUR 12%/24%
REC 10%
BS 27%
AS 26%

London
NUR 9%/18%
REC 6%
BS 27%
AS 27%

South East
NUR 15%/24%
REC 10%
BS 31%
AS 24%

South West
NUR 15%/29%
REC 13%
BS 37%
AS 38%

Key:

NUR   Nursery classes

REC   Reception classes

BS   Before School

AS   After School
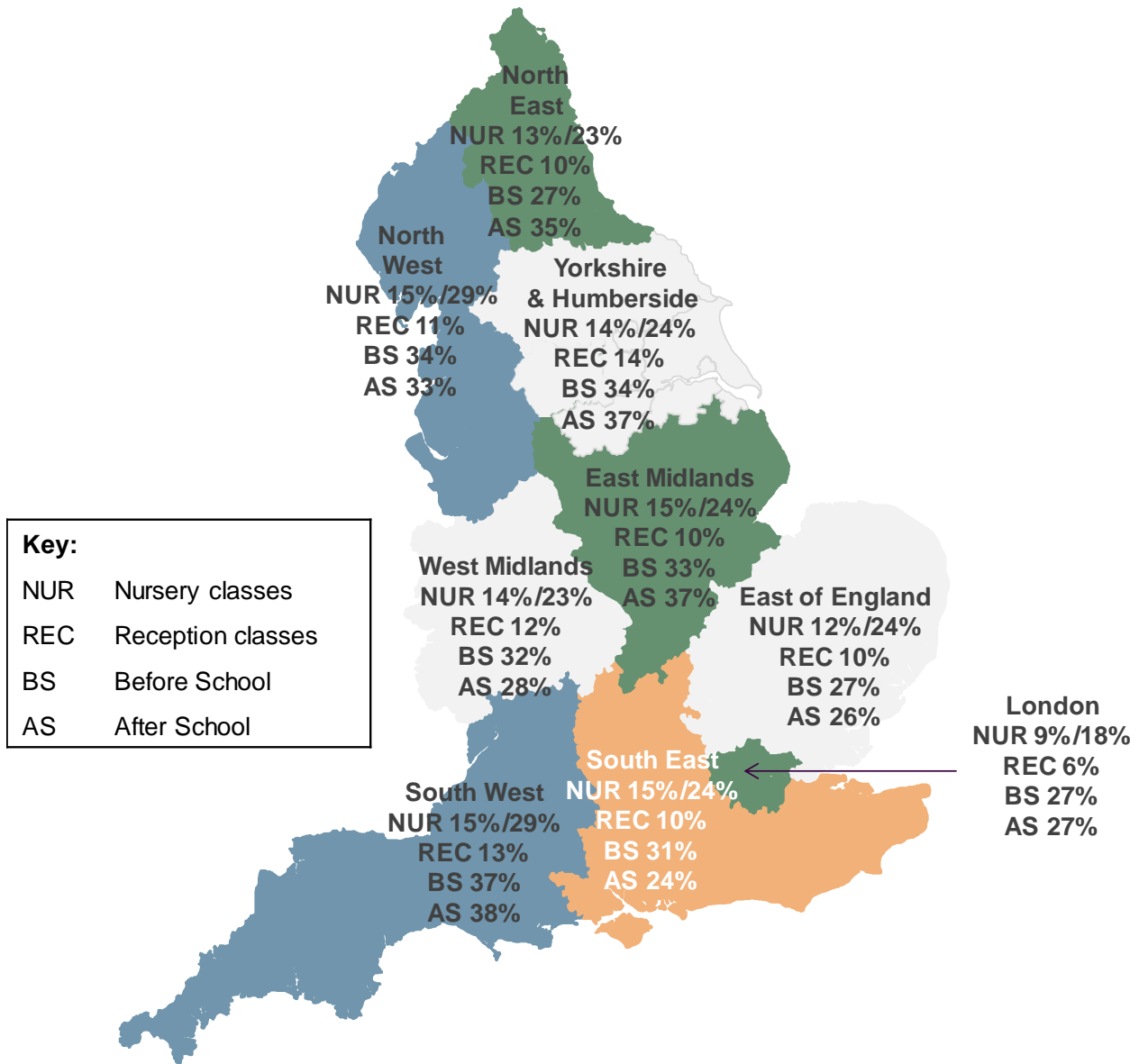
Childminders

London and the East Midlands had the most spare capacity (27%) in childminders throughout the day. The South East had the least spare capacity (21%). Full details of capacity by region is provided in appendix A.16.

Figure 3.9 Average % spare capacity by region - childminders (throughout the day)

Spare capacity is calculated by dividing the number of extra places that the childminder was willing and able to take throughout the day by all their available places.
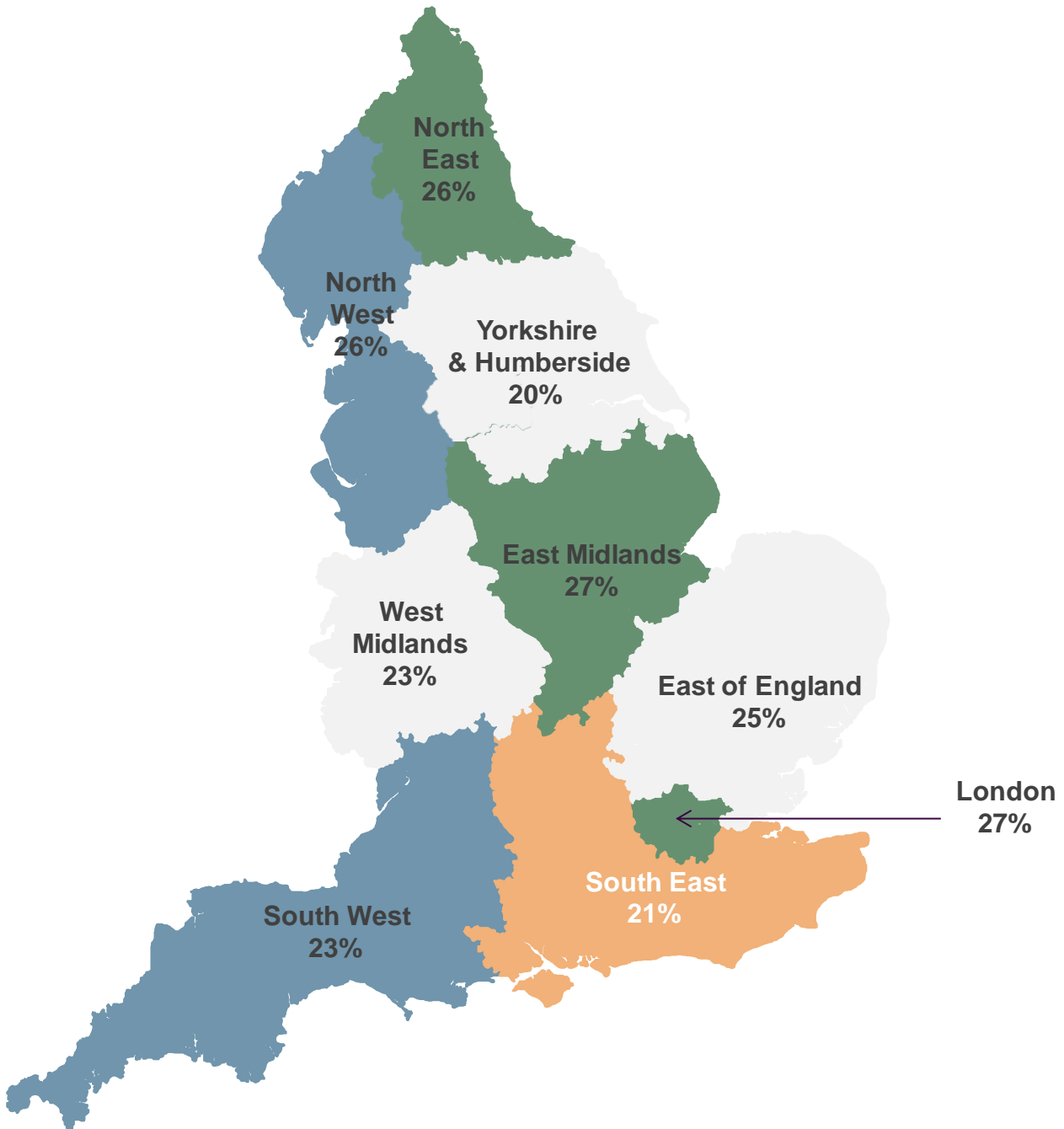
3.3.5 Spare capacity by day of week

Across the provider types, there was limited variation in capacity across the days of the week aside from in full day provision and wraparound provision in group-based providers:

- in full day provision there were slightly higher levels of capacity on Fridays, with 79% of providers with spare capacity, compared with 75% average across the week (refer to appendix A.3)

- in sessional provision extra space was fairly consistent across the days of the week (appendix A.4)

- in before school provision there was more likely to be spare capacity on Fridays (50%), (appendix A.5)

- in after school provision, as with before school provision, there was slightly more capacity on Fridays (42% of all available places), (appendix A.6)

For school-based providers, there was no significant variation in reception capacity throughout the week. In school-based nursery provision, there was more likely to be spare capacity on Mondays than the rest of the week, with 51% of providers saying they had spare capacity.

For childminders, there was no significant difference in capacity across the week.

3.3.4 Spare capacity by Ofsted rating

As shown in table 3.4, across all types of group-based provision, there was less spare capacity in providers rated 'Outstanding' by Ofsted than those rated less highly.

Table 3.4 Average % of spare capacity by Ofsted rating - group-based providers

	Total	Grade 1 : Outstanding	Grade 2 : Good	Grade 3 or 4 : Satisfactory / Requires improvement Inadequate
Full day provision	20%	16%	20%	26%
Unweighted base	3,968	744	2,839	193
Sessional provision (throughout the day)	13%	10%	13%	*19%*
Unweighted base	1,858	330	1,348	*88*
Before school provision	43%	39%	44%	*41%*
Unweighted base	1,564	273	1,108	*88*
After school provision	36%	33%	36%	37%
Unweighted base	1,784	297	1,237	121

Source: How many [Full Day Provision & Sessional Provision: under school-aged] children were booked to attend your [provision type] on that [reference day]? How many extra children would you have been willing and able to take in your [provision type] on that day?

For school-based providers, there were no significant differences in capacity by Ofsted rating. For childminders, the base size is too low to analyse by Ofsted rating.

Chapter 4 Workforce composition and qualifications

This chapter looks at the number, qualifications and pay of childcare staff in England in 2016.

Key findings

- In 2016, based on representative survey estimates there were 270,600 paid members of staff in group-based providers, with an average of 11 per setting, 83,500 paid members of staff in reception provisions and 51,500 paid members of staff in nursery provisions (an average of 5 per setting in each of these)

    - a large part of the difference in average number of staff by provider type is explained by the age of children attending and the corresponding child to staff ratios required. Nurseries averaged 2 children per setting aged 2 years or younger[52], whereas group-based settings that offered full-day provision averaged 16 children aged 2 years or younger, and those who offered sessional provision but not full-day provision averaged 6 children aged 2 or younger

- Eight in ten (79%) group-based staff, 77% of nursery staff and 74% of reception staff directly involved in delivering childcare and early education provision had at least a level 3 early years qualification. This compares with 69% of childminders[53]

- Staff in school-based providers were more likely to be highly qualified than those in group-based providers or childminders. Four in ten (39%) staff in reception and 29% of staff in nursery provisions were qualified to at least level 6. This compares with 10% of group-based provider staff and 8% of childminders[54]

- One in six (17%) group-based staff,[55] and 10% of those aged 25 or over[56] received hourly pay below the National Living Wage (£7.20). This compares with 2% of nursery staff aged 25 or over and 1% of reception staff aged 25 or over[57]

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[52] Although the regulatory ratios are different for children aged 2 and aged under 2, the analysis is not broken down to these age bands due to very low numbers of children aged under 2 in nursery (0.13 on average) and because the ratio requirements change more distinctly after age 2.
[53] Note that as the survey was redesigned in 2016 it is not possible to compare these results with previous childcare providers surveys.
[54] This is equivalent to 13,700 nursery staff having a level 6 qualification and 33,000 reception staff having a level 6 qualification.
[55] Excludes those saying don't know
[56] Excludes those saying don't know
[57] Excludes those saying don't know.

4.1 Paid members of staff

4.1.1 Group- and school-based permanent paid members of staff

Based on representative survey estimates in total in England in 2016 there were:[58]

- 270,600 paid members of staff at group-based providers, with an average of 11 per setting [59]

- 83,400 paid staff delivering reception provision in England, with an average of 5 per school.[60] There was fewer staff on average at independent schools (4), which tended to have fewer children attending their reception than non-independent schools (28 compared with 43 respectively)

- 51,500 paid staff delivering nursery provision in England, with an average of 5 per school.[61] Within this, there were 7,000 paid members of staff in maintained nursery schools, with an average of 17 per setting

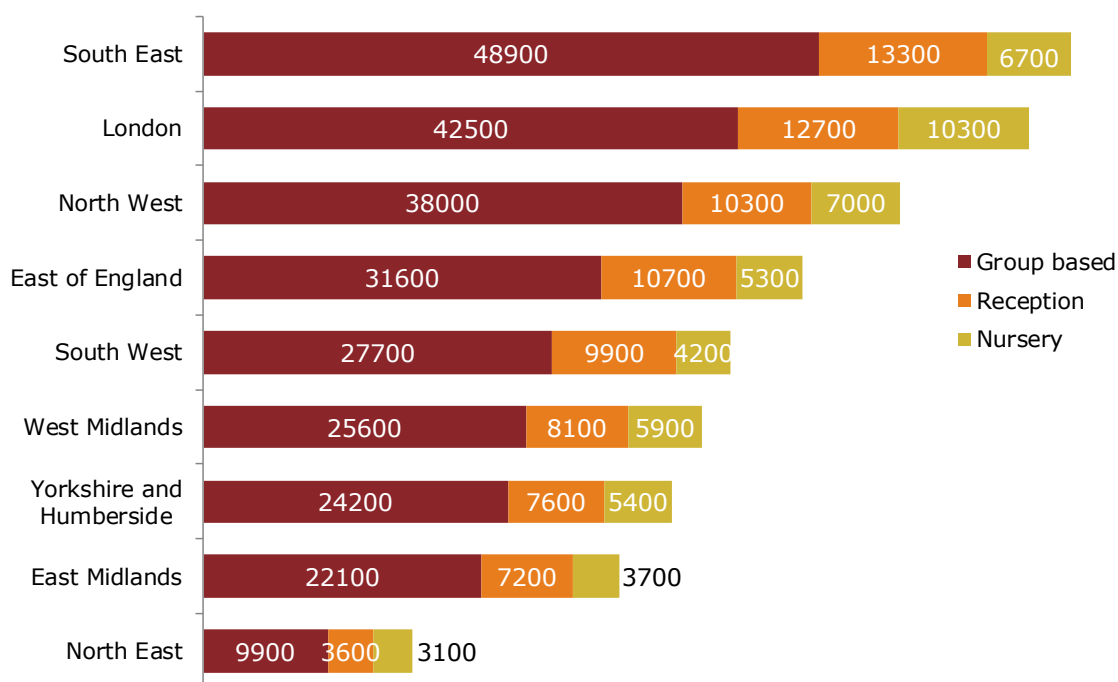This is broken down by region in figure 4.1.

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[58] All numbers exclude apprentices.
[59] Providers registered with Ofsted as a childcare provider on non-domestic premises in July 2015.
[60] Based on the Schools Census collected in January 2015.
[61] Based on the Schools Census collected in January 2015.

Figure 4.1: Total number of paid staff by region – group and school-based

Base: *Group based providers in* South East (1105), London (751), North West (812), East of England (786), South West (781), West Midlands (642), Yorkshire and Humberside (573), East Midlands (549), North East (222).
Reception class providers in South East (234), London (262), North West (335), East of England (203), South West (159), West Midlands (225), Yorkshire and Humberside (255), East Midlands (199), North East (171).
Nursery providers in South East (174), London (289), North West (325), East of England (187), South West (102), West Midlands (218), Yorkshire and Humberside (236), East Midlands (174), North East (187).

Source: Excluding apprentices, how many paid staff are involved in the delivery of your provision?

4.1.2 Group- and school-based temporary members of staff

Providers were also asked if they employed any temporary members of staff:

- a third (33%) of group-based providers employed any temporary members of staff, which amounts to 21,300 temporary staff employed across group-based providers

- a quarter (25%) of all reception provisions employed any temporary staff, equating to 6,800 temporary staff in reception provisions across the sector. It was less common to use temporary staff in reception provisions in independent schools (9%)

- one in three (35%) nursery provisions employed any temporary staff; a total of 5,800 in nurseries across the sector

For each provider type, it was more common to employ temporary staff in larger settings.

4.1.3 Childminders and childminder assistants

As detailed in chapter 3, based on representative survey estimates in 2016 there were 46,600 childminders currently registered with Ofsted and practising in England. For the first time, in 2016 the survey asked childminders about childminding assistants. Around one in seven (14%) childminders had an assistant who worked for them, and usually it was just 1. In total 9% of childminders had one assistant and 5% had 2 or more. This equates to 9,200 childminding assistants across England. The likelihood of having an assistant was higher for those who looked after more children. Half (50%) of childminders with 7 or more registered places had an assistant compared with 9% of childminders with 5 or 6 places and 6% of those with fewer than 5 places.

4.2 Apprentices and unpaid members of staff in group and school-based providers

Group-based and school-based providers were also asked how many apprentices and unpaid members of staff worked in their setting.

4.2.1 Group- and school-based apprentices

Based on representative survey estimates in England in 2016:

- A third (33%) of group-based providers employed one or more apprentices. In total there were 15,000 apprentices helping with the delivery of group-based provision. Employing an apprentice was more common in privately-run settings (46%) than those run by a voluntary organisation (17%) or Local Authority (16%)

- 7% of reception provisions had an apprentice involved in delivering their reception provision, with 1,600 in total across the sector. This was less common in London (3%)

- 9% of nurseries overall had an apprentice involved in delivering their reception provision, equating to 1,100 in total. It was more common to have an apprentice in maintained nursery schools (22%)

4.2.2 Group- and school-based unpaid volunteers (including students)

Based on representative survey estimates in England in 2016:

- Half (48%) of group-based settings used unpaid members of staff such as volunteers or placement students, with 25,800 helping with the delivery of group-based provision across the sector. In settings that used unpaid volunteers there was an average of 2 per setting

- A similar proportion (47%) of school-based providers used unpaid volunteers in their reception provisions. This is equivalent to a total of 16,800 unpaid volunteers, with an average of 1 per reception provision

- 44% of all nurseries had unpaid volunteers (including placement students). This amounts to 7,100 unpaid volunteers, with an average of 1 per nursery

It was less common to use unpaid volunteers in independent schools (24% using any volunteers). It was also slightly less common to use unpaid volunteers in schools with both reception and nursery provisions (42%). The need for additional staff may be mitigated by the fact that half of these schools said that some staff work in both reception and nursery provisions.

4.2.3 School wraparound provision

As discussed in chapter 2, 55% of all school-based providers offered before school provision and 36% offered after school provision. Looking at the numbers of different types of staff:

- six in ten (59%) schools that offered any before or after school provision had 1-4 paid employees[62], with 4 members of staff on average overall. This equates to 44,600 school wraparound staff across England. There were slightly more members of staff on average in wraparound provision at maintained nursery schools (6)

- just over one in five (22%) had any temporary staff within their wraparound provision (a total of 5,100 temporary staff in wraparound provision at schools)

- 7% used any unpaid volunteers

- 4% had an apprentice (typically just 1) helping deliver their wraparound provision

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[62] One in three (34%) had 5-10 and 5% had 10 or more.

4.3 Highest UK early years qualifications achieved

The next section of this report looks at the staff qualifications amongst paid staff, including the proportion of staff with graduate level qualifications, and the proportion of those below graduate level with Early Years Educator qualifications. As in previous provider surveys in 2016 the survey only takes into account UK Early Years qualifications which are relevant to working with young people and children. However, the list of qualifications was updated for the 2016 survey to reflect current qualifications, which means the results to the 2016 survey are not comparable with previous waves.

4.3.1 Highest UK early years qualification

Figure 4.2 summarises the proportion of staff that held an early years qualification at level 3 or above, and at level 6 for the different providers. Staff in school-based providers were more likely to be highly qualified than those in group-based providers or childminders. Four in ten (39%) staff in reception provisions and three in ten (29%) staff in nursery provisions were qualified to at least level 6, compared with 10% in group-based providers and 8% of childminders.

Figure 4.2 Highest UK early years qualification achieved – all providers
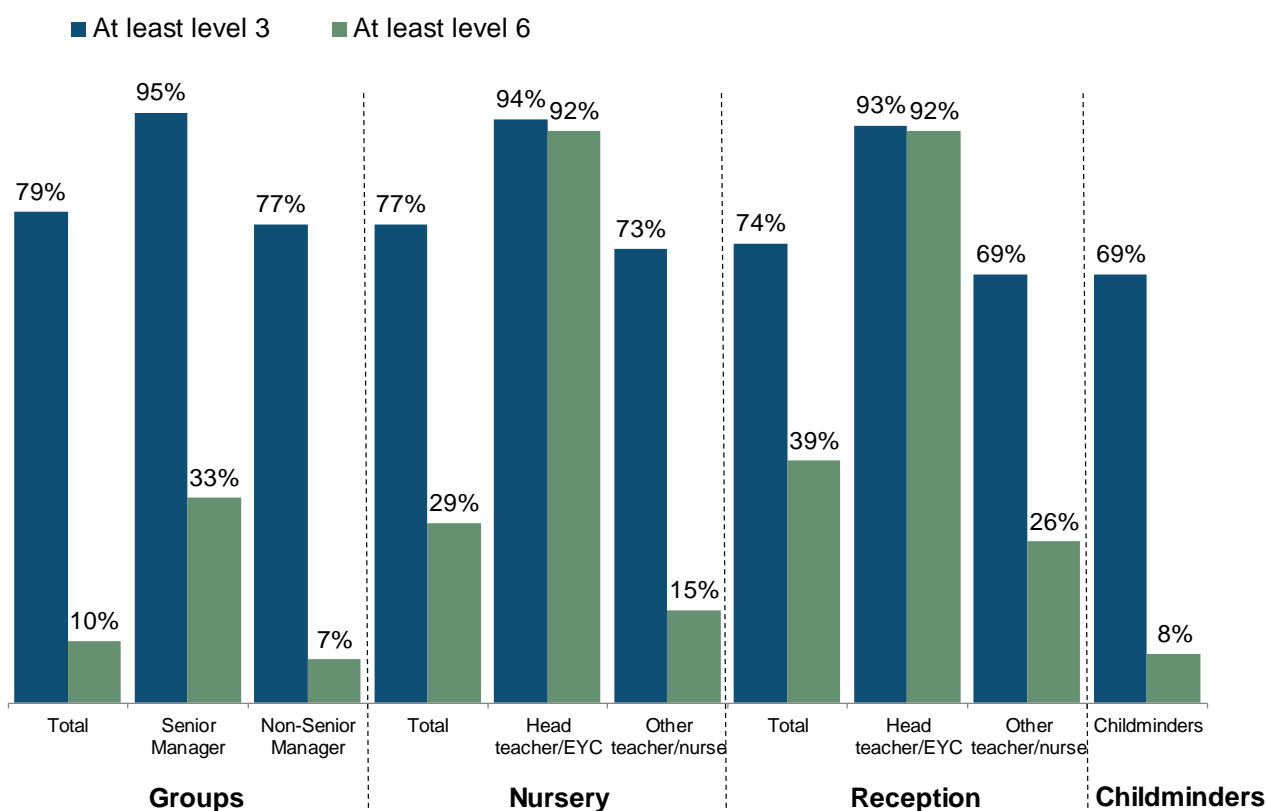
Base: Group based providers (2612) included in variant 2 survey
Reception class providers (2802) and nursery providers (1750) included in variant 1 survey, childminders (1,444)

Source: What is the highest level of early years qualification [staff member] holds?

60

4.3.2 Highest qualification and Ofsted rating

As well as being asked about the qualification level of all senior managers and non-senior staff, providers were asked what their setting's current Ofsted rating was.

Figures 4.3 and 4.4 overleaf show the data for group-based and school-based staff. The bars are colour coded by Ofsted rating, with each bar showing the proportion of staff qualified to the stated level. Figure 4.4 shows a clear pattern in group-based providers whereby providers with a higher Ofsted rating were much more likely to have a more highly qualified senior manager. The same pattern is true of non-senior staff, although it is less defined. This will be in part related to fewer non-senior staff having a higher level early years qualification.

Figure 4.4, which follows figure 4.3, shows that the same pattern is not true for schools (the small differences shown are not statistically significant). As the majority of head teachers / early years co-ordinators had a degree level early years qualification it would be more difficult to differentiate by qualification level. A greater proportion of non-senior school-based staff had higher level early years qualifications than group-based non-senior staff.

Figure 4.5 shows these same data for childminders. As for group-based providers there appears to be a relationship between the level of childminders' qualifications and their Ofsted rating, although in this case the pattern moves from those with no early years qualification to those with level 1, 2 and 3. Fewer childminders were qualified to level 4 and above than in group-based and school-based settings.

Figure 4.3 Staff's highest level of qualification by Ofsted rating – group-based
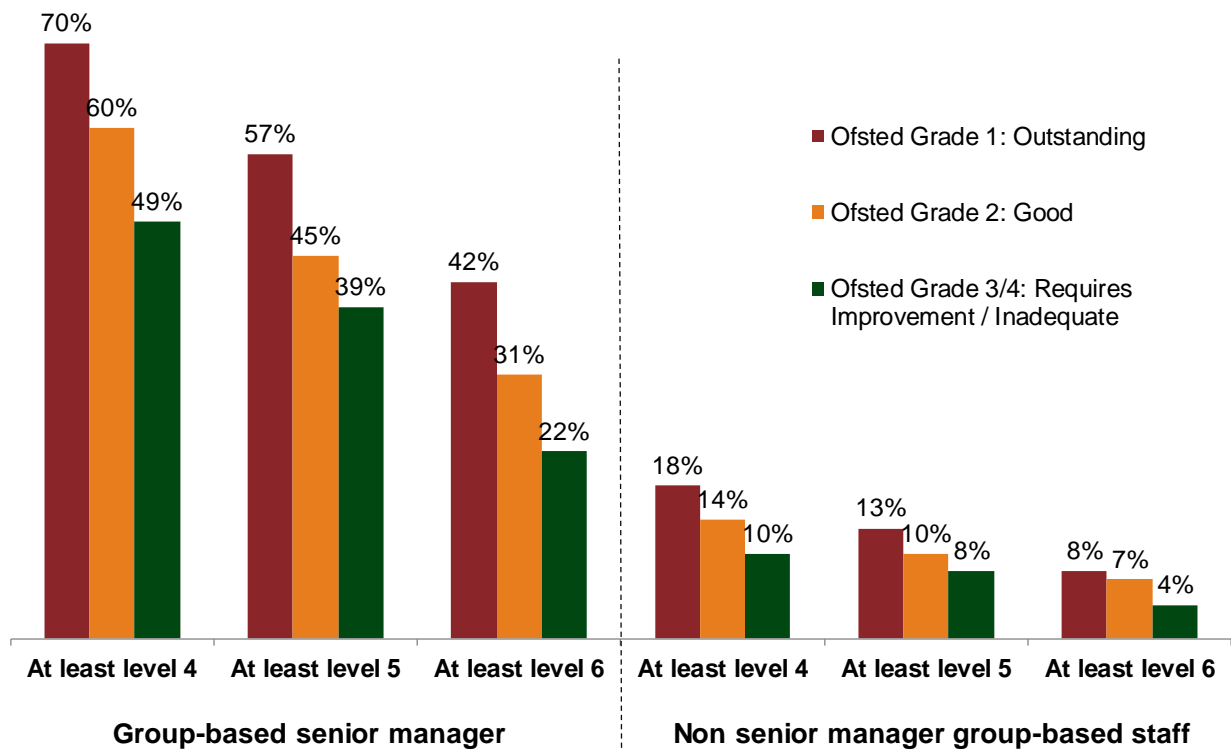
Base: Group-based providers who were asked staff loop variant of the survey.
Senior manager in setting: Ofsted Grade 1 (466), Grade 2 (1859) Grade 3/4 (141);
Other staff in setting Ofsted Grade 1 (1628), Grade 2 (6288) Grade 3/4 (459)
Source: What is the level of the highest early years qualification the manager holds?
What is your current Ofsted rating?

Figure 4.4 Staff's highest level of qualification by Ofsted rating – school-based
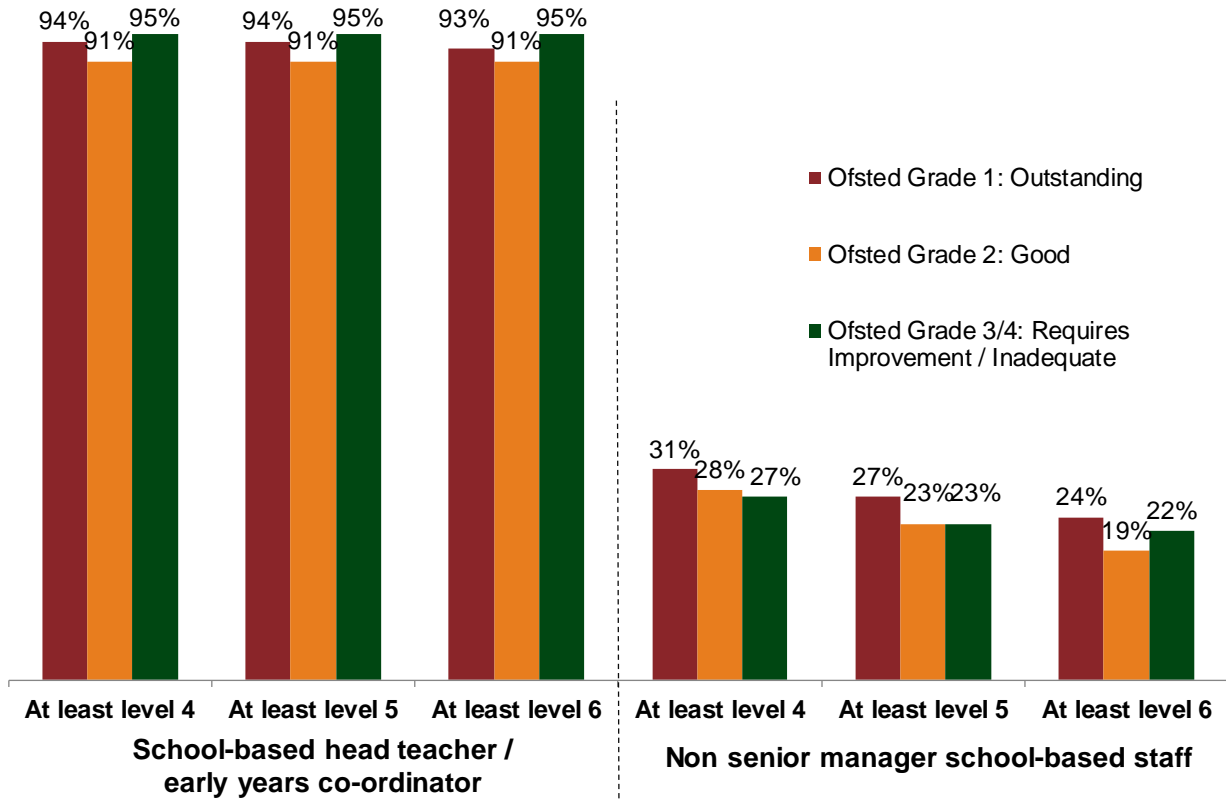
Base: School-based providers who were asked staff loop variant of the survey.
Senior manager in setting: Ofsted Grade 1 (312), Grade 2 (715) Grade 3/4 (124);
Other staff in setting Ofsted Grade 1 (751), Grade 2 (1533) Grade 3/4 (249)

Source: What is the level of the highest early years qualification the headteachers / EYC coordinator holds?
What is your current Ofsted rating?

Note that the differences are not statistically significant.

Figure 4.5 Highest level qualification by Ofsted rating - childminders
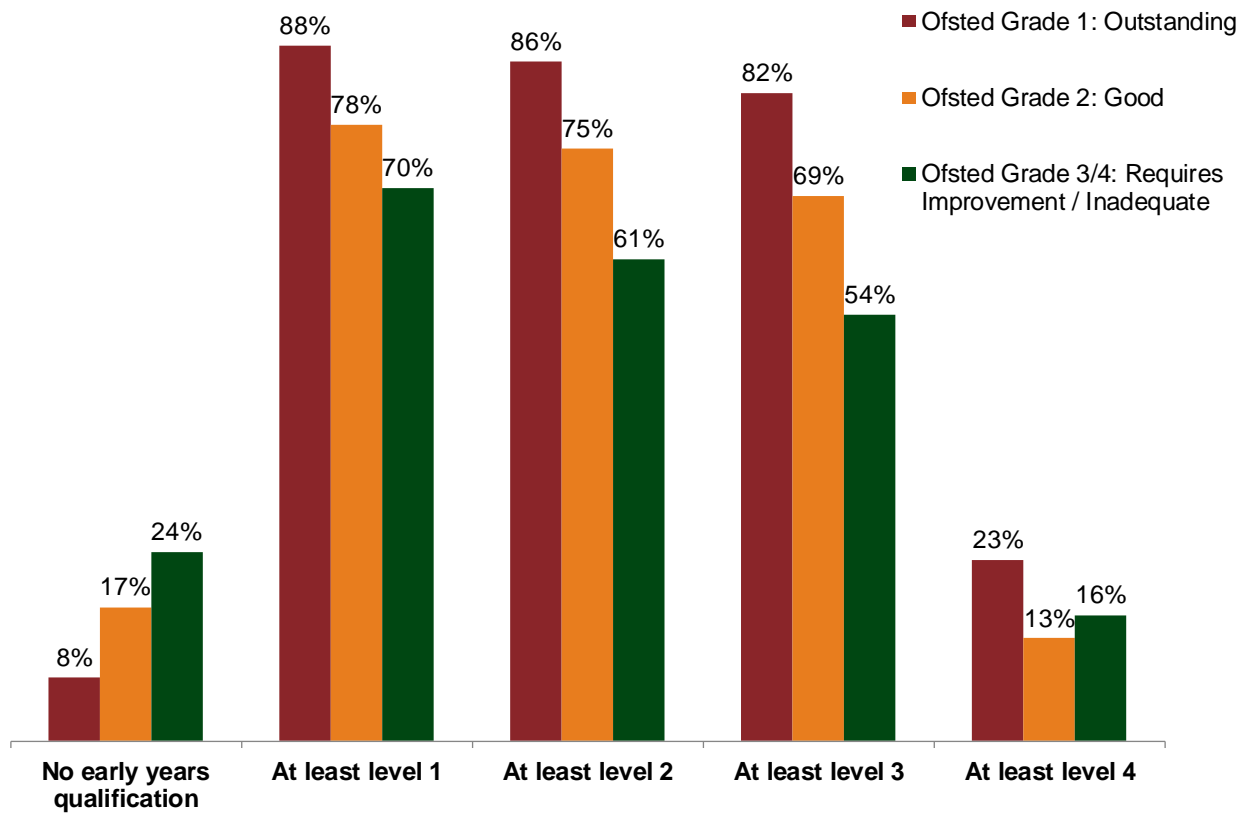
Base: All childminders. Ofsted Grade 1 (238), Grade 2 (920) Grade 3/4 (110)

Source: What is the level of the highest early years qualification you hold? What is your current Ofsted rating?

4.3.3 Early years qualifications

Several questions were introduced into the survey in 2016 to capture additional information and set baseline figures on level 3 and level 6 qualifications. This will help provide more detailed information over time on the flow of staff into level 3 and level 6 qualifications.

Early Years Educator

Providers were asked how many staff with at least a level 3 qualification held a qualification with Early Years Educator[63] in the title. As these qualifications became available in September 2014 they have not been included in previous provider surveys.[64]

Based on representative survey estimates in England in 2016, there were similar proportions of staff whose highest qualification was at level 3 held an Early Years Educator qualification in group and school-based settings:

- of the 162,400 group-based staff whose highest qualification was at level 3, 10% (17,000) had a qualification with Early Years Educator in the title

- of the 24,200 reception staff whose highest qualification was at level 3, 9% (2,200) had a qualification with Early Years Educator in the title

- of the 22,500 nursery staff whose highest qualification was at level 3, 9% (2,000) had a qualification with Early Years Educator in the title

- of the 24,500 childminders whose highest qualification is at level 3, 18% (4,300) had a qualification with Early Years Educator in the title

Qualified Teacher Status (QTS), Early Years Professional Status (EYPS) and Early Years Teacher Status (EYTS)

Providers that had any staff with a qualification at level six or above were asked how many held Qualified Teacher Status (QTS), Early Years Professional Status (EYPS) and Early Years Teacher Status (EYTS).

Figure 4.6 shows the proportion of staff with at least a level 6 qualification reported as holding QTS, EYPS or EYTS. This is shown alongside these proportions as the equivalent of all staff in the sector. This shows the greater likelihood of staff in school-

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[63] Details on early years qualifications are contained here: http://www.education.gov.uk/eypqd/index.shtml
[64] Previous Childcare and Early Years Provider Surveys are available here:
https://www.gov.uk/government/collections/statistics-childcare-and-early-years

based settings to have QTS, while staff in group-based providers were more likely to have EYPS.

Figure 4.6 Level 6 qualifications – all providers
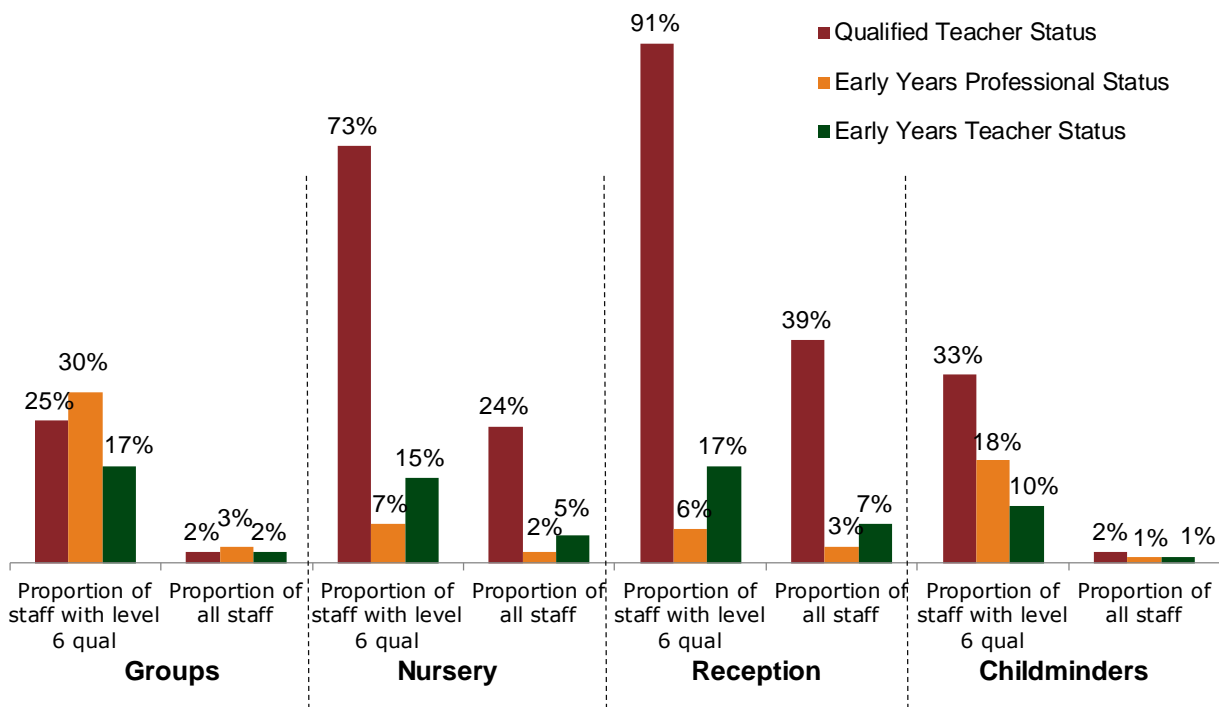
Base: Group based providers with staff at level six or above (1496), Nursery providers with staff at level six or above (1402) Reception providers with staff at level six or above (965), Childminders qualified to level six or above (99)

Source: Of the [number of] staff with level 6 qualifications, what type of level 6 qualification was is that?

4.3.4 GCSE maths and English

Level 3 Early Years Educators can only count in the level 3 staff ratios if they have GCSEs at C or better in English and maths.[65] This only applies to people who registered for an Early Years Educator qualification in England from 1 September 2014 and not historic level 3 qualifications.

In 2016 the survey asked whether staff held a GCSE or O-level grade A-C in maths and English.[66] Echoing their greater likelihood of having higher level early years qualifications, staff in school-based settings were more likely to have GCSE or O Level maths and English. The overall proportions of all staff with these qualifications were:

- 67% group-based staff
- 80% reception staff
- 76% nursery staff
- 62% childminders

Figure 4.7 shows the proportion of staff with GCSEs or O-Level grade A-C in English and maths broken down by staff members' highest level of early years qualification.

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[65] See http://www.education.gov.uk/eypqd/GCSEs.shtml for a list of alternative qualifications.
[66] This was asked separately for English and maths and was included in the staff loop section of the survey, which collected information about specific randomly sampled members of staff to create a representative profile of staff across the provision. The data show staff with both English and maths qualifications.

Figure 4.7 GCSE or O-Level grade A-C in English and maths– all providers

Legend: ■ Level 2 or lower ■ Level 3 ■ Level 4 or higher

Group based staff: 48%, 69%, 81%
Nursery staff: 67%, 76%, 92%
Reception staff: 64%, 73%, 96%
Childminders: 65%, 58%, 73%
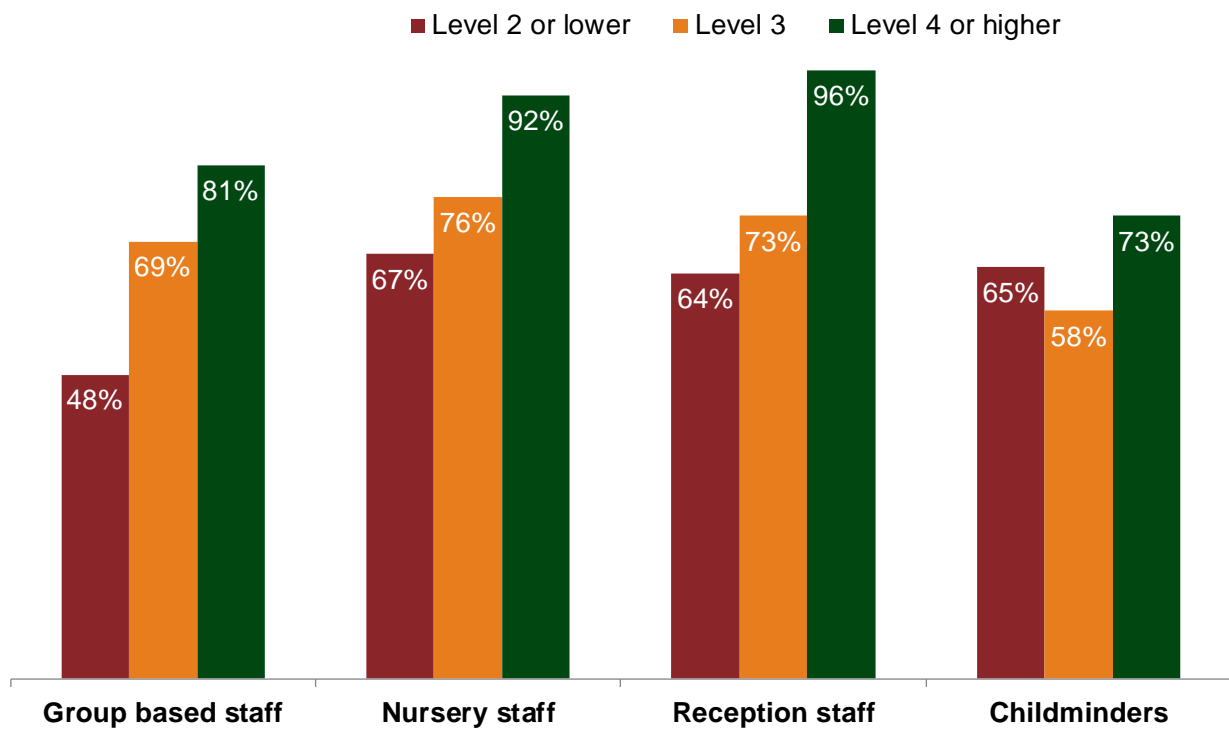
Base: Providers who were asked staff loop variant of the survey. Group-based providers (2,612), reception providers (1,750), school-based nursery providers (2,802) childminders (1,444)

Source: Does [member of staff] hold either a GCSE or O-level grade A-C in English?

4.4 Childcare staff pay in group-based and school-based providers

This section looks at hourly pay for staff in the childcare sector.

As shown in tables 4.1 (group-based) and 4.3 (school-based), the level of pay varied by qualification level. Comparing pay between senior staff and other levels, staff received the following mean hourly pay:

Senior manager / head teacher/Early Years Co-ordinator

- Group-based £11.20

- Reception £24.80

- Nursery £25.80

Non-senior staff

- Group-based £8.00

- Reception £13.00

- Nursery £11.90

4.4.1 Pay in group-based providers

Of the staff earning below the National Living Wage (£7.20) at the time of the survey[67], almost six in ten (57%) were below the age of 25 and would not immediately be subject to the National Living Wage. The remaining four in ten (43%) were aged 25 or over. Ten per cent of group-based staff aged 25 or over earned below the National Living Wage (£7.20). The majority of this was staff currently earning between £6.70 and £7.19 per hour.

From 1 April 2017, the National Living Wage will increase from £7.20 to £7.50. Excluding don't know responses, 34% of group-based staff aged 25 or over earned below £7.50 an hour.

The (mean) average hourly wage for group-based staff was £8.30. This varied by qualification level (as shown in table 4.1).

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[67] The survey was conducted between March and July 2016.

Table 4.1 Staff pay by qualification level - group-based providers

Hourly Pay band	Level 2 or below	Level 3	Level 4	Level 5	Level 6 or above	All childcare staff
Less than £3.87	3%	*	*	1%	1%	1%
£3.87 to £6.69	10%	2%	1%	1%	1%	4%
£6.70 to £7.19	19%	12%	4%	4%	3%	12%
£7.20 to £7.49	35%	23%	10%	9%	7%	23%
£7.50 to £8.49	19%	30%	24%	21%	20%	27%
£8.50 to £9.99	5%	16%	24%	27%	22%	15%
£10 or more	3%	9%	30%	32%	41%	13%
Don't know	5%	7%	6%	5%	4%	6%
Refused	1%	*	*	*	*	*
Mean pay	£7.20	£8.10	£9.30	£9.50	£10.30	£8.30
Median pay	£7.20	£7.70	£8.80	£9.00	£9.20	£7.60
Unweighted base (variant 2 respondents)**	1,384	5,083	762	639	1,277	9,265

Source: Data on pay is derived from a variety of questions. This is outlined in the accompanying technical report.
**To keep the questionnaire to a manageable length it was split into 3 variants, with all providers asked a core set of questions and some questions only asked in variants 1, 2 or 3.

The average hourly wage for senior managers was £11.20, with non-senior manager staff earning £8 per hour on average. There were some regional variations, with staff in London earning the most on average (table 4.2). There were no significant differences by deprivation, Ofsted rating or urban/rural location.

Table 4.2 Staff pay by region - group-based providers

Region	Mean hourly pay	Median hourly pay	Unweighted base size
East Midlands	£7.80	£7.50	1,038
East of England	£8.20	£7.80	1,519
London	£9.40	£8.50	1,360
North East	£7.90	£7.30	365[68]
Yorkshire and Humberside	£7.90	£7.40	1,073
North West	£7.90	£7.50	1,497
South East	£8.60	£7.70	2,010
South West	£8.20	£7.70	1,414
West Midlands	£8.00	£7.50	1,157
England	£8.30	£7.60	11,433

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[68] There was a notably low number of providers in the North East.

4.4.2 Pay in school-based providers

School-based providers were asked about the hourly pay of staff in their nursery (table 4.3) or reception provisions (table 4.4), but not those who worked in their before or after school provisions if they offered these.

Pay levels were significantly higher than at group-based settings, with just 1% of paid staff aged 25 or over earning below the National Living Wage of £7.20, although it should be noted that a high proportion of respondents (31%) gave a 'don't know' response. When excluding them from the analysis, just 2% of nursery staff aged 25 or over and 1% of reception staff aged 25 and over earned below the National Living Wage.

The National Living Wage is set to increase to £7.50 an hour from 1 April 2017. Excluding don't know responses, just 5% of school-based staff aged 25 and over earned less than £7.50 an hour. This compares with 34% of group-based staff (discussed in section 4.4.1).

The average hourly pay was £14.40 for nursery staff and £15.10 for reception staff. Pay levels increased significantly for level 6 staff (see tables 4.3 and 4.4). There was some variation by geographic area for nursery staff, with higher pay in the 30% most deprived areas (£15) than in the 70% least deprived areas (£13.90). Average hourly pay was higher for reception staff in London (£18.70) than in the North East (£13.80). The average hourly pay for head teachers/Early Years Co-ordinators was £25.80 in nurseries and £24.80 in reception provisions compared with £11.90 for other staff in nurseries and £13.00 in reception.

Table 4.3 Staff pay by qualification level – nursery staff

Hourly Pay band	Level 2 or below	Level 3	Level 4	Level 5	Level 6 or above	All nursery staff
Less than £7.19	7%	2%	-	-	2%	3%
£7.20 to £7.49	8%	5%	4%	-	*	4%
£7.50 to £8.49	31%	13%	7%	4%	2%	13%
£8.50 to £9.99	20%	24%	18%	29%	4%	17%
£10 to £12.49	27%	30%	39%	28%	7%	23%
£12.50 to £14.99	4%	15%	22%	20%	6%	11%
£15 or more	3%	12%	10%	19%	78%	30%
Mean pay	£9.70	£11.10	£11.60	*£12.10*	£22.90	£14.40
Median pay	£8.80	£10.20	£11.50	*£10.90*	£22.40	£11.30
Unweighted base size	303	749	117	*78*	997	2,338

Table 4.4 Staff pay by qualification level – reception staff

Hourly Pay band	Level 2 or below	Level 3	Level 4	Level 5	Level 6 or above	All reception staff
Less than £7.19	5%	2%	-	*[-]*	1%	2%
£7.20 to £7.49	9%	1%	7%	*[7%]*	0%	3%
£7.50 to £8.49	27%	11%	11%	*[9%]*	0%	12%
£8.50 to £9.99	27%	26%	10%	*[9%]*	2%	17%
£10 to £12.49	20%	31%	35%	*[28%]*	4%	18%
£12.50 to £14.99	6%	18%	26%	*[45%]*	8%	12%
£15 or more	7%	10%	12%	*[2%]*	85%	36%
Mean pay	£10.00	£11.30	£12.80	*[£11.50]*	£23.30	£15.10
Median pay	£9.20	£10.70	£11.50	*[£11.80]*	£21.80	£12.00
Unweighted base size	208	406	50	*[20]*	738	1,510

4.4.3 Childminders' pay

Income from childminding is covered in chapter 5. Childminder assistants typically received a lower wage than group-based or school-based staff, with three-quarters earning below £7.20, and many of the others working on a non-contractual basis. They earned an average of £5.90 per hour.

Chapter 5 Financials

This chapter covers a broad range of financial information about childcare in England including the cost of childcare, the amount of income received, and profitability. It also identifies average hourly fees for childcare.[69]

Caution should be exercised when reviewing the findings presented in this section. The numbers of providers who were able and/or willing to provide financial information were lower than for other sections of the survey. In addition, the information is self-reported, as is all the survey data, and not externally validated. However, steps were taken to ensure that the data collected and presented is accurate. The technical report provides more information about those steps, and the data sheets that respondents were asked to complete ahead of the interview are published in the accompanying research instruments document.

Key findings

Based on representative survey estimates in England in 2016:

- The cost of providing childcare varied widely across settings; however the size of the setting correlates with the level of spending, with larger settings spending the most and the smaller settings spending the least. London had the highest level of spending, associated with the higher cost of premises and living in London

- Staff costs made up the majority of costs (73% of group-based costs, 80% of nursery costs, 76% of reception costs)

- The primary source of income for group-based providers (56%) and schools with nursery provision (82%) was from the 15 hours of funded entitlement, followed by fees (41% for groups and 28% for schools). The primary source of income for childminders was from fees, which accounted for 83% of their income

- Six in ten (58%) group-based providers made a profit or surplus, on average £22,100. One in ten (12%) broke even and one in four (27%) made a loss, which was on average £10,500

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[69] Respondents were asked about the most recent 12 month period for which they had figures. This could be the last calendar year, their last financial year or any other 12 month period for which they had figures.

5.1 Cost of providing childcare

Respondents were asked if they were able to provide financial information based on a 12 month period and then asked about their total costs over this 12 month period. They were then asked further questions breaking down their costs into more detail. All these questions were on the datasheet (included in the accompanying research instruments report) which was completed by respondents in advance of the survey to maximise accuracy.

It should be noted that for each of the provider types a high proportion said that they could not provide answers for this section, or gave 'don't know' responses to some questions.[70] The proportions who said that they would not be able or willing to provide any financial information were: 49% of group-based providers; 36% of school-based providers; and 38% of childminders. The lower proportions answering the financial questions reduces the precision of the estimates presented here. Given the higher number of group-based providers who were able and willing to provide financial information, the findings in relation to them can be considered broadly indicative; however, the number answering the financial questions from reception providers was low at 182, impacting on the reliability of the conclusions it is possible to draw.[71]

Amongst providers that were able to provide costs, the mean costs per registered place across England per year were:

- £4,700 per registered place in group-based providers

- £2,700 per place in sessional-only group-based providers

- £3,900 per registered place in reception provision

- £4,700 per registered place in school based nurseries

- £1,400 per registered place in childminders

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[70] This is identified in each section.

[71] The unweighted base size is all providers included in variant 3 (group-based) or variant 2 (school-based and childminders) who were able to provide both the number of registered places and total cost of running childcare. Group-based providers, n=1100; sessional only group-based providers, n=390; receptions, n=182; nurseries, n=366; childminders, n= 311. The sample is weighted in line with the survey methodology described in the survey technical report to be representative of the childcare sector. However, it is possible that there are other influences on whether providers were able to provide financial data that are not known and therefore not possible to adjust for. This should be kept in mind when interpreting these data.

5.1.1 Group-based providers' cost of providing childcare

The level of costs for providing childcare varied widely, mainly depending on the number of children provided for. The mean cost of providing group-based childcare was £164,200 while the median cost was £95,200. The mean cost per place was £4,700.

For one in six (17%) group-based providers total annual costs were less than £50,000, but there were many with greater cost levels. Almost three in ten (28%) incurred costs above £150,000 per annum. For 5% the cost of providing childcare was above £500,000. Costs are broken down by region in table 5.1.

Differences by group-based size

The size of a setting is highly correlated with its overall childcare provision costs. Settings with 1-4 paid staff spent on average £52,000; settings with 5-10 paid staff, £96,800; those with 11-19 paid staff, £245,700; and settings with 20 or more paid staff spent on average £533,000.

Differences by group-based provider type

For profit group-based organisations tended to have more children attending than not for profit organisations. As such, amongst providers that were able to provide costs, for profit organisations typically had higher costs than those not for profit (£212,100 compared with £125,500) and providers in the 30% most deprived areas spent an average of £203,400 compared with £151,600 for those in the 70% least deprived areas.

Amongst providers that were able to provide costs, the mean cost per registered place was:[72]

- £6,300 per registered place in group-based providers in the 30% most deprived areas

- £4,200 per registered place in group-based providers in the 70% least deprived areas

- £4,400 per registered place in not for profit group-based providers

- £5,000 per registered place in for profit group-based providers

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[72] Unweighted base size is composed of all variant 3 providers who were able to provide both the number of registered places and total cost of running childcare. 30% most deprived areas, n=259; 70% least deprived areas, n=841; not for profit providers, n=629, for profit providers, n=465.

Differences by group-based region

As shown in tables 5.1 and 5.2, London had the highest costs, predominantly related to the cost of living in London being higher than elsewhere (see section 5.4).

Table 5.1 Cost of providing childcare by region - group-based providers

Cost	East Midlands	East of England	London	North East	Yorkshire and Humberside	North West	South East	South West	West Midlands	England
Less than £25k	5%	6%	6%	[10%]	3%	6%	2%	5%	3%	**5%**
£25k to £49,999	16%	12%	10%	[15%]	12%	11%	9%	15%	13%	**12%**
£50k to £74,999	10%	18%	10%	[12%]	14%	16%	18%	19%	18%	**15%**
£75k to £99,999	13%	19%	12%	[4%]	12%	13%	18%	16%	15%	**15%**
£100k to £149,999	14%	12%	9%	[14%]	11%	10%	16%	15%	12%	**13%**
£150k to £499,999	21%	21%	22%	[23%]	30%	27%	20%	20%	27%	**23%**
£500k or more	6%	3%	13%	[6%]	6%	5%	5%	1%	1%	**5%**
Don't know/Refused	15%	9%	18%	[16%]	12%	12%	12%	9%	11%	**12%**
Mean	**£159,200**	**£142,900**	**£235,400**	**[£176,300]**	**£185,400**	**£168,100**	**£164,500**	**£118,500**	**£136,900**	**£164,200**
Median	**£92,400**	**£87,200**	**£113,700**	**[£101,900]**	**£111,600**	**£95,200**	**£97,400**	**£83,300**	**£89,100**	**£95,200**
Unweighted base (Variant 3 providers who could answer about costs)	115	163	140	[49]	106	145	240	184	129	1,271

Source: What was the total of all your costs for this 12 month period? If necessary: This would include any costs relating to your staffing, your premises, the materials you use in your childcare, your admin costs and so on - i.e. all of your outgoings.

Table 5.2 Cost of providing childcare by region - group-based providers (per place per year)

Cost	East Midlands	East of England	London	North East	Yorkshire and Humberside	North West	South East	South West	West Midlands	England
Mean	*£3,500*	*£3,400*	*£7,700*	*[£3,800]*	*£4,800*	*£5,700*	*£5,100*	*£3,300*	*£3,300*	*£4,700*
Median	*£2,700*	*£2,900*	*£3,100*	*[£2,100]*	*£3,100*	*£2,900*	*£3,100*	*£2,700*	*£3,200*	*£2,900*
Unweighted base (Variant 3 providers who could answer about costs and number of registered places)	*96*	147	111	*[40]*	*93*	125	209	166	113	1,100

5.1.2 School-based providers' cost of providing childcare

Amongst providers that were able to provide costs, the mean cost per registered place was:[73]

- £4,700 per registered place across all nursery provisions, Within this, £8,100 per registered place in maintained nursery schools

- £3,900 per registered place in reception provisions

The full costs are shown in figure 5.1.

Figure 5.1 Cost of providing childcare – school-based providers per year

	Reception	Nursery
Mean cost	*£153,600*	*£172,300*
Median cost	*£120,000*	*£103,900*
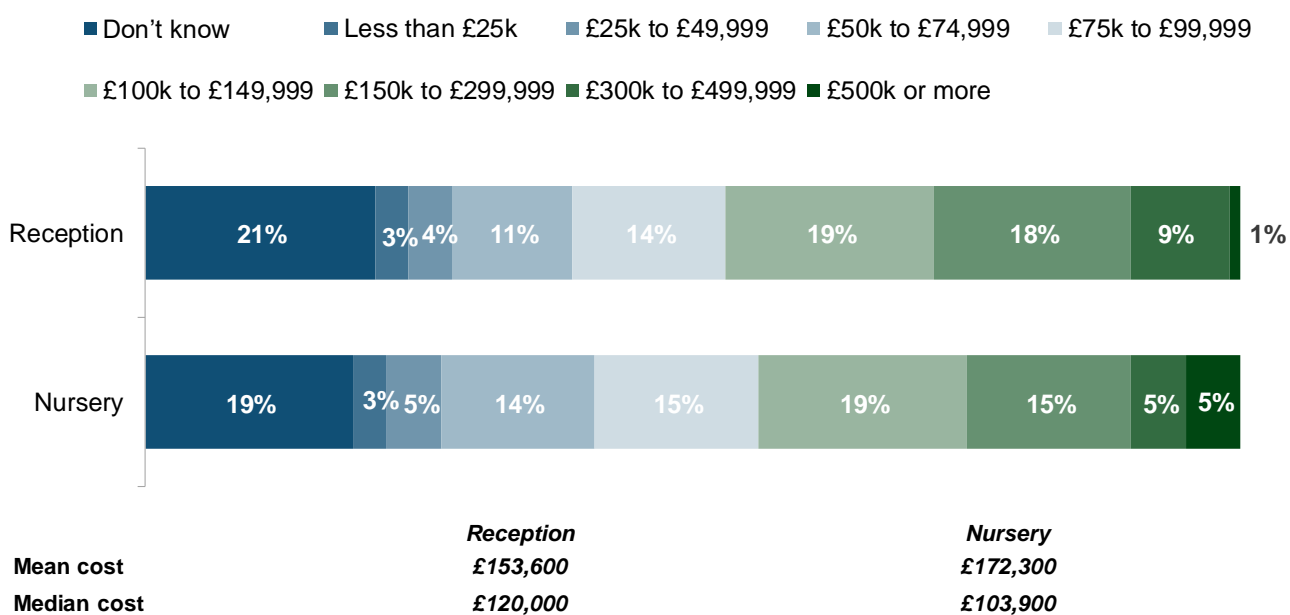
Base: Variant 2 providers who could answer about costs: nursery (443), reception (235)
Source: What was the total of all your costs for the 12 month period?

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[73] Unweighted base size is composed of all variant 2 school-based providers who were able to provide both the number of registered places and total cost of running childcare. Receptions, n=182; Nurseries, n=366; Maintained nurseries, n=94.

Nurseries

Amongst providers that were able to provide costs close to half of nursery provisions (44%) had costs totalling £100,000 or more, with a mean of £172,300 and a median of £103,900.

This was higher for maintained nursery schools (which typically have a higher number of staff and children to support). Maintained nursery schools were more than twice as likely as those with both nursery and reception provision to have costs totalling £100,000 or more (95%[74], compared with 40%).

Nurseries in the 70% least deprived areas were significantly more likely to spend less than £100,000 per annum than those in the 30% most deprived areas.

There was no significant difference in the mean cost per registered place between those in the 30% most deprived areas and those in the 70% least deprived areas.[75] On average costs were £4,800 per registered place in nurseries in the 30% most deprived areas and £4,500 per registered place in nurseries in the 70% least deprived areas.

While the base sizes for regions are generally too low to report on reliably, nursery provisions in London did have the highest average annual costs (£274,500)[76], with 67% spending over £100,000 on their nursery provisions and a mean cost per place of £5,300.

Reception provisions

One in three (31%) reception provisions' total annual costs were below £100,000, while close to half (47%) had costs of £100,000 or more. One in five (21%) did not know what their annual total cost of providing childcare was. There were no significant differences in cost per place by region or deprivation status.

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[74] Low base size, n=98.
[75] Unweighted base is all variant 2 nurseries who could provide both number of registered places and total cost of running childcare, 30% most deprived areas, n=180; 70% least deprived areas, n=186.
[76] Low base size, n=72.

5.1.3 Childminders cost of providing childcare

The average total costs for childminders over 12 months was £8,100, with 65% spending less than £10,000 and 22% spending £10,000 or more. The cost of childminding was linked to size - childminders with 7 or more registered places spent on average £24,900 whereas childminders with 1 to 6 registered places typically spent £7,100. Base sizes are not large enough to provide robust information on cost by categories such as region or area of deprivation. The average cost per child was £1,400.[77]

Figure 5.2 Cost of providing childminding

■ Don't know ■ Less than £5k ■ £5k to £9,999 ■ £10k to £14,999 ■ £15k to £19,999 ■ £20k or more

| 13% | 42% | 23% | 11% | 4% | 7% |

Mean cost	*£8,500*
Median cost	*£5,300*
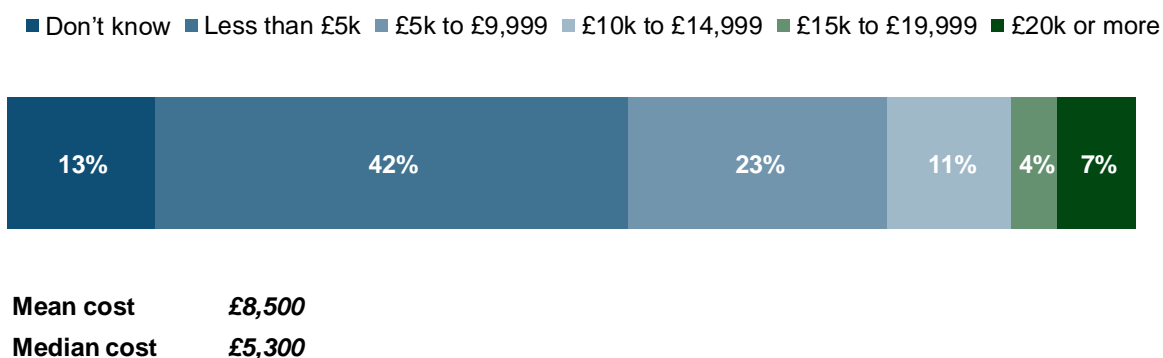
Base: Variant 2 childminders who could answer about costs: 363
Source: What was the total of all your costs for the 12 month period?

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[77] Unweighted base is all variant 2 childminders who could provide both number of registered places and total cost of childminding, n=311.

5.2 Composition of costs

Providers that were able to provide information on their finances over a 12 month period gave a breakdown of their costs. The largest area of group-and school-based providers' costs was staff costs (including wages, National Insurance payments and pension contributions but not training).

On average, staff-related costs accounted for:

- 73% of group-based providers' reported overall cost

- 76% of reception provision costs

- 80% of nursery provision costs

- 4% of childminder costs[78]

Expenditure on staff in group-based providers made up a lower proportion of costs in London (69%) than the rest of England despite average wages being higher – this is mostly attributable to higher expenditure on rent or mortgage payments in London (11%, compared with 8% for England as a whole).

The composition of childminders' costs was different to group-based and school-based providers as the majority did not have to pay other members of staff. For those who did employ assistants the average amount spent on their wages was £9,500 per annum. One of the main expenditures for childminders was for materials used in the course of their childcare provision such as books, toys, art materials and meals; childminders typically spent 40% of their outgoings on such materials. Figure 5.3 shows the full break-down.

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[78] The majority of childminders (86%) had no assistants and incurred no staff costs. The base size of those with assistants asked about total costs of staff was only 48 so the findings should be treated with caution, but staff costs made up 36% of total costs for those with assistants.

Figure 5.3 Costs of childcare – all providers
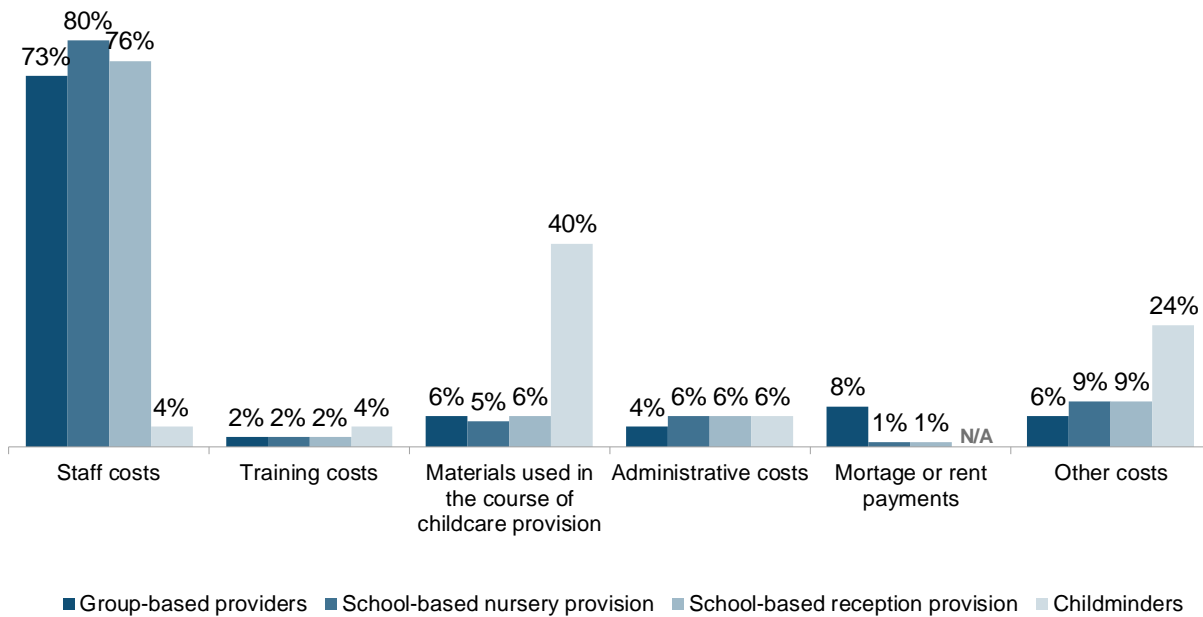
Base: Variant 3 group-based and variant 2 school-based respondents able to answer financial questions about the last 12 months they have figures for: group-based (1271), school-based respondents selected to answer about nursery (443), school based respondents selected to answer about reception (134), childminders (363)
Source: What were your total costs associated with…

5.3 Loans

Group-based providers and childminders were asked whether they had any loans relating to their childcare provision excluding any mortgage. This question was not asked of schools as it was not felt to be relevant to the majority of schools and any analysis would be conducted upon very small base sizes.

5.3.1 Group-based providers' loans

One in ten (10%) group-based providers had a loan, aside from a mortgage, relating to their childcare. This was more common in privately run settings (21%) than voluntary settings (2%).

The amount of the loans varied considerably. The average size of loan was £63,900, while the median was £17,400.

For three in ten (28%) group-based providers it was less than £10,000, and for a similar proportion (30%) between £10,000 and £30,000. However, a quarter (27%) of group-based providers had an outstanding balance of £50,000 more.

5.3.2 Childminders' loans

Just 7% of childminders had a loan, aside from any mortgage, relating to their childminding provision.[79]

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[79] A follow-up question for childminders on the amount of their loan had a base size too small to report (n=25).

5.4 Income[80]

Providers also gave details of their income based over the same 12 month period.

Table 5.3 shows the mean cost and income per registered place amongst providers that were able to provide financial details.

Table 5.3 Cost and income for providing childcare (per place per year)

Average per registered place	Group-based providers	Nursery provision	Childminders
Cost	£4,700	£3,900	£1,400
Income	£5,100	£3,700	£3,100
Unweighted base (variant 2 respondents)	1,271	443	363

Source: What was the total of all your costs for this 12 month period? What was your total income from all sources?

5.4.1 Group-based providers' income

The overall mean income for group-based providers for a 12 month period was £174,100, which is higher than the costs incurred (£164,200).

As shown in table 5.4 overleaf, there was a wide variety of income for providers by region. Income was significantly higher in London, with 15% receiving £500,000 or more per year. This may be linked to the statistically significant finding that group-based providers in London received a higher proportion of income from fees than in other regions (49% in London compared with 41% in England as a whole) with average fees being highest in London (£7.30 per hour for under 2 year olds, compared with £6 per hour in England as a whole; and £6.30 for 3 or 4 year olds, compared with £5.10 per hour in England as a whole).

Average income was also higher in the 30% most deprived areas (where settings typically have more children attending) than in the 70% least deprived areas at £208,600, compared with £162,900 in the 70% least deprived areas.

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[80] Income here is equivalent to revenue. It is described as income in this report as this is how respondents described the money they took in (rather than as income might be understood in a technical sense, as money coming in, minus costs).

Table 5.4 Income per 12 months from providing childcare by region - group-based providers

Cost	East Midlands	East of England	London	North East	Yorkshire and Humberside	North West	South East	South West	West Midlands	England
Less than £25k	6%	6%	8%	*14%*	2%	10%	2%	7%	2%	6%
£25k to £49,999	16%	11%	4%	*11%*	12%	12%	10%	14%	13%	11%
£50k to £74,999	13%	17%	14%	*12%*	10%	12%	16%	15%	19%	15%
£75k to £99,999	8%	17%	7%	*4%*	17%	11%	18%	15%	13%	13%
£100k to £149,999	18%	16%	14%	*16%*	12%	16%	21%	17%	13%	16%
£150k to £499,999	22%	18%	25%	*24%*	32%	26%	20%	22%	29%	24%
£500k or more	3%	5%	15%	*[6%]*	7%	6%	5%	3%	3%	6%
Don't know/Refused	14%	10%	14%	13%	9%	7%	8%	6%	7%	9%
Mean	**£147,800**	**£145,700**	**£257,500**	**£185,400**	**£203,400**	**£195,500**	**£162,500**	**£125,700**	**£152,700**	**£174,100**
Median	**£99,600**	**£90,000**	**£134,900**	**£101,100**	**£121,400**	**£102,800**	**£99,600**	**£90,500**	**£98,100**	**£100,500**
Unweighted base	115	163	140	*[49]*	106	145	240	184	129	1,271

Source: Now, I'd like you to focus on your income over the 12 month period. What was your total income from all sources? If necessary: This would include all income from fees, from local and central government, from fundraising and donations, and from any other sources. If necessary: Again, we're talking about the total income for all of your childcare provision combined.

5.4.2 School-based providers' income

School-based providers were asked to estimate their income for their nursery provision. The mean income for nursery provisions was £149,500. This was significantly higher in maintained nursery schools (£560,100) which typically have a far larger number of children in attendance (92, compared with 38 in nurseries in primary schools). While the base sizes for most sub-groups are too small for robust analysis, income was the highest in London (£230,800), which was significantly higher than many of the other regions reflecting higher costs, despite the low base sizes.[81]

Table 5.5 Income per 12 months from school-based providers

Income	Nursery Provision
Less than £25k	7%
£25k to £49,999	7%
£50k to £74,999	14%
£75k to £99,999	18%
£100k to £149,999	19%
£150k to £499,999	19%
£500k or more	5%
Don't know/Refused	11%
Mean	**£149,500**
Median	**£96,000**
Unweighted base	443

Source: Now, I'd like you to focus on your income relating to your [provision type]. Again thinking about the 12 month period, what was your total income from all sources?

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[81] Unweighted base of 72 in London and 25 to 80 in other regions.

5.4.3 Childminders' income

Childminders' income from childminding was lower than groups or schools, with a mean of £16,800. This is equivalent to a mean income per registered place of £3,100. Half (51%) received less than £15,000 in income over the year. The average was slightly higher in London at £21,000, with 20% receiving £35,000 or more.[82] Base sizes elsewhere are too low to reliably explore other variations in income across the childminder population.

Table 5.6 Income per 12 months from childminding

Income	Percentage
Less than £10k	30%
£10k to £14,999	21%
£15k to £19,999	17%
£20k to £24,999	10%
£25k to £29,999	7%
£30k to £34,999	2%
£35k or more	7%
Don't know/Refused	8%
Mean	**£16,800**
Median	**£14,000**
Unweighted base	363

Source: Now, I'd like you to focus on your income. Again thinking about the 12 month period, what was your total income relating to childminding from all sources?

---

[82] Unweighted base size of 53.

Sources of income

Sources of income vary across providers. The main source of income for group-based and school-based providers with nursery provision came from the 15 hours of funded entitlement, whereas for childminders the main source was fees. Reception provisions are not included in this section as their funding streams are not comparable. For example, reception provisions cannot receive 15 hours funding, or Early Years Pupil Premium. Fundraising and charitable donations contributed to a very small proportion of incomes across the 3 provider types, as did income from Early Years Pupil Premium funding.[83]

Figure 5.4 below summarises the income across the different providers as a percentage of total income. These amounts are then summarised and discussed by provider type.

Figure 5.4: Sources of childcare income, as per cent of total income – group-based providers, school-based providers with nursery and childminders
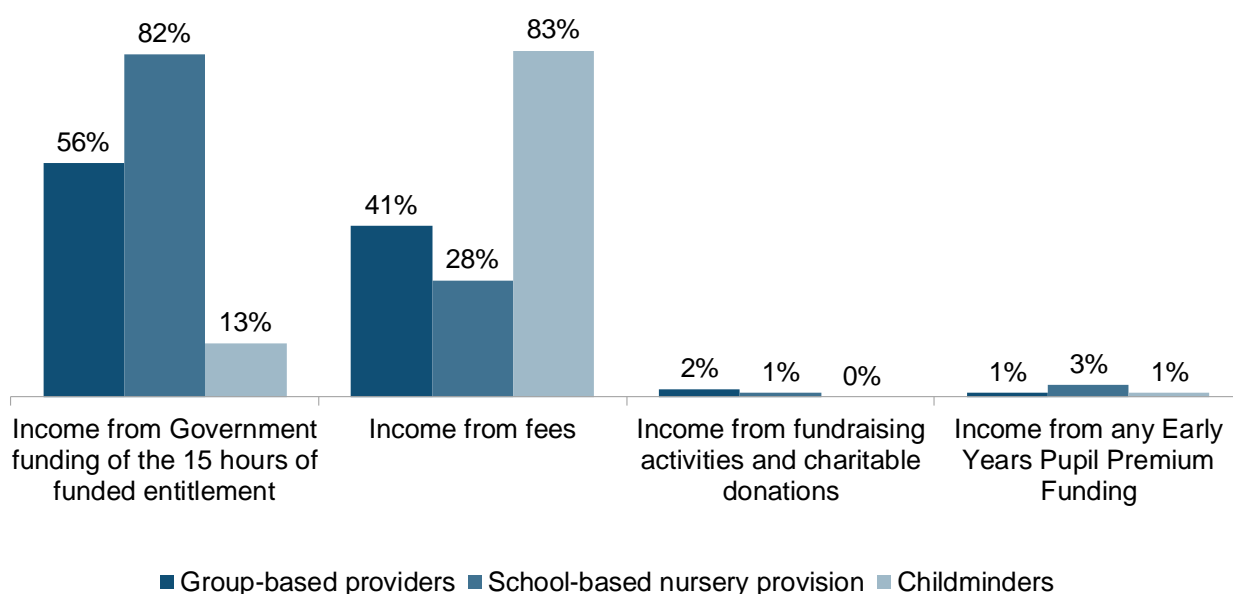
Base: Variant 2 respondents able to answer financial questions about the last 12 months they have figures for: group-based (1271), school-based respondents selected to answer about nursery (443), childminders (363)

Source: Total amount of income received from government funding of the 15 hours of funded entitlement; fees; fundraising activities or charitable donations; and Early Years Pupil Premium funding

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[83] This is additional funding for early years settings to improve the education they provide for disadvantaged 3 and 4 year olds.

Table 5.7 below shows the average amount of income that providers received from different sources over a 12 month period.

Table 5.7 Sources of childcare income – all providers

Income source	Group-based providers	Nursery provision	Childminders
Government funding of the 15 hours of funded entitlement	£70,400	£115,000	£3,000
Fees	£96,600	£66,600	£14,800
Fundraising activities and charitable donations	£2,300	£550	£2
Early Years Pupil Premium Funding	£1,900	£6,300	£250
Unweighted base (variant 2 respondents)	1,271	443	363

Source: What was your total income from [source of income]?

5.5.1 Group-based providers' income

As shown in figure 5.4 at the start of this section, income from funded places made up the majority of income for group-based providers (56%) with an average of £70,400. More than half (52%) received £50,000 or more.

When looking across regions, group-based providers in the South East of England were more likely to receive a higher proportion of their income through the government funding of the 15 hours of funded entitlement. Forty-two per cent of providers said it accounted for 71% or more of their income, compared with 18% in the North West and 19% in London.

Smaller providers were more likely to have a greater proportion of their income accounted for by the 15 hours of government funding. Providers with 1-19 registered places had on average 64% of their income from the 15 hours of government funding.[84] Larger providers with 75-99 registered places received a lower proportion of their income from the 15 hours of government funding, with this making up 34% of their income on average.

Forty-one per cent of group-based provider income came from fees. Regionally, the East, the North East, South East and South West tended to receive a smaller proportion of their income from fees, compared with other regions of England.

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[84] Unweighted base = 60

Early Years Pupil Premium (EYPP) funding and income from fundraising and charitable donations only made up a small proportion of group-based provider income (1% - mean £1900; and 2% - mean £2300 respectively). Close to half (48%) said that EYPP did not account for any of their income, while just over a third (35%) said it accounted for 10% or less of their total income. Smaller settings were more likely to receive no income from EYPP, with three in five (60%) settings with 1-19 registered places receiving no income from EYPP[85], compared with 40% of settings with 100 or more registered places.[86] Groups based in the 30% most deprived areas were more likely to receive some of their income from EYPP compared with the 70% least deprived areas, in line with policy intent. In the 30% most deprived areas, 39% received no income from EYPP compared with 51% receiving no income from EYPP in the 70% least deprived areas.

Half (52%) of group-based providers in the 30% most deprived areas received no income from fundraising or charitable donations, compared with 38% of those in the 70% of least deprived areas. Three in ten (31%) voluntary providers received £2,000 or more from charitable donations or fundraising while only 2% of privately managed providers did so. Private providers were four times more likely to have no income from charitable donations or fundraising than voluntary providers (69%, compared with 16%).

5.5.2 School-based providers' income

Figure 5.2 at the start of the section shows that schools that offer nursery provision received an average of 82% of their income from the 15 hours of government entitlement. Those in the 30% most deprived areas were likely to receive a higher proportion of their income (88%) from government-funded entitlement compared with the 70% least deprived areas (78%).

Nursery provision received 3% of their income, or £6,600 on average from EYPP. There was a noticeable difference when comparing across indices of deprivation. Fifty seven per cent of nursery settings based in the 30% most deprived areas received any income from EYPP, compared with two in five (39%) in the 70% least deprived areas.

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[85] Unweighted base = 69
[86] Unweighted base = 81

On average, nursery settings received £580, or 1% of their total income from fundraising and charitable donations. Overall only one in ten (12%) received any income in this way however this was higher when only considering maintained nursery schools, where 22% were receiving some income from fundraising or charitable donations.

5.5.3 Childminders' income

The majority of childminders' income was made up of fees (83%), with over half (54%) stating that fees made up more than 90% of their income. As shown in figure 5.2 at the start of the section, income from the 15 hours funded entitlement made up a lower proportion of childminders' income (13%) than group- and school-based providers. Six in ten childminders (61%) said that the income received from the 15 hours accounted for 30% or less of their total income. The majority of childminders (85%) received no income from EYPP, however an additional 10% were unable to answer. This was also true of fundraising and charitable donations, with 90% saying it accounted for none of their income, but 9% not providing an answer. Only 1% of childminders had any income, between 1% and 10%, from charitable donations or fundraising activities.

5.9 Hourly fees

Providers were asked their hourly fees. However, nearly one in five (18%) group-based providers, over two in five (43%) school-based providers who offer nursery provision and one in six (16%) childminders answered 'Don't know' at this question.

- Group-based providers charged on average:
    - £6.00 per hour for under 2 year olds
    - £5.30 per hour for 2 year olds
    - £5.10 per hour for 3 or 4 year olds
- 38% of school based nursery provisions charged parents (outside of any funded provision). The average hourly fee for nursery across all age groups was £4.80
- Childminders charged on average:
    - £4.70 per hour for under 2 year olds
    - £4.50 per hour for 2 year olds
    - £4.50 per hour for 3 or 4 year olds

5.9.1 Group-based providers' hourly fees

Average hourly fees for group-based providers were the highest for children under 2 years old at an average of £6.00 compared with 2 year olds (£5.30) and 3 or 4 year olds (£5.10). This is unsurprising given that the ratios for younger children mean that more staff are needed to look after them.

Table 5.8 shows regional differences in the mean fee per hour. Fees were significantly higher across all age groups in London and lowest in the South West, the East of England and the East Midlands. There was little difference across the 70% least and 30% most deprived areas overall but fees in urban areas were consistently higher than rural areas. Table 5.9 shows significant differences across various characteristics in the average fees – including the number of registered places, whether the group is for or not for profit and the type of management of the provision.

Table 5.8 Mean hourly fees across different age groups and regions - group-based providers

Mean fees per hour	East Midlands	East of England	London	North East	Yorkshire and Humberside	North West	South East	South West	West Midlands	30% Most Deprived	70% Least Deprived	Urban	Rural	England total
Under 2 year olds	£5.50	£5.20	£7.30	£6.00	£6.50	£6.00	£6.00	£5.30	£5.60	£6.00	£6.00	£6.20	£5.30	£6.00
Unweighted base	99	113	158	51	115	162	156	122	123	344	755	876	223	1,099
2 year olds	£4.70	£4.60	£6.60	£6.00	£5.20	£5.50	£5.50	£4.60	£4.90	£5.30	£5.30	£5.50	£4.80	£5.30
Unweighted base	187	271	266	79	197	265	402	284	228	580	1599	1609	569	2,179
3 or 4 year olds	£4.80	£4.90	£6.30	£5.00	£5.00	£5.00	£5.00	£4.40	£5.00	£5.10	£5.10	£5.30	£4.50	£5.10
Unweighted base	210	293	288	94	215	321	439	313	251	625	1799	1801	622	2,424

Source: What is the average hourly fee that you charge for children aged [age] in your [provision type]? This is the average fee across all the children of that age.

Table 5.9 Mean hourly fees across different age groups and group types - group-based providers

Mean fees per hour	Smaller settings (less than 20 registered places)	Larger settings (100 registered places or more)	Not for profit organisation/ charity	For profit organisation	Private	Voluntary	Local Authority	School/college	England total
Under 2 year olds	£5.40	£6.90	£4.60	£6.30	£6.40	£4.50	£4.60	£5.60	£6.00
Unweighted base	[32]	129	185	909	854	168	[34]	[32]	1,099
2 year olds	£4.80	£6.70	£4.50	£5.90	£6.00	£4.50	£4.00	£5.00	£5.30
Unweighted base	108	164	893	1,276	1,138	861	76	87	2,179
3 or 4 year olds	£4.80	£6.10	£4.30	£5.60	£5.80	£4.30	£3.70	£4.50	£5.10
Unweighted base	122	179	1,010	1,401	1,241	976	83	103	2,424

Source: What is the average hourly fee that you charge for children aged [age] in your [provision type]? This is the average fee across all the children of that age.

5.9.2 School-based providers' hourly fees

Four in ten (38%) school-based nursery provisions charged parents fees for attendance to this provision - this included any hours outside the core 15 hours of funded entitlement. The average hourly fee for nursery provisions across all age groups was £4.80 although one in four (25%) charged more than £5 per hour. Average fees across the most and least deprived areas were similar – slightly higher in the least deprived areas at £5.00 compared with the most deprived (£4.40) but not significantly so. London had the highest fees (£6.90) and Yorkshire and Humberside had the lowest (£3.80) – these differences were not significant and note the extremely small bases of 48 for London and 26 for Yorkshire and Humberside.

5.9.3 Childminders' hourly fees

Amongst childminders the average fee charged for a child aged younger than 2 years old was £4.70 per hour; for a child aged 2 it was £4.50; and for a child aged 3 or 4 was also £4.50. While base sizes were low[87], the fees charged were higher (significantly so compared to most other areas) in London (£6.20 for children under 2, £6.10 for children aged 2 and £6.20 for children aged 3 or 4).

5.10 Changes to fees in the past 12 months

Providers were also asked if they had changed their fees over the past 12 months.

- 50% of group-based providers had increased their fees; 47% had kept them the same
- 32% of school-based nursery provisions that charged fees had increased their fees; 59% had kept them the same
- 21% of childminders had increased their fees; 76% had kept them the same

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[87] Unweighted base for childminders who look after children of various ages in London:
Under 2 years old = 56; 2 years old = 65; 3 or 4 years old = 76.

5.10.1 Group-based providers

Half (50%) of group-based providers had increased their fees in the past 12 months and just 1% had decreased their fees. A significantly higher proportion of providers with more paid staff had increased their fees – 61% of providers with 11 - 19 paid staff and 73%, with 20 or more paid staff. This aligns with the dominant reason why they increased costs, which was to cover increased staff costs (58%). The next most common reasons for increasing costs were to cover inflation or non-specific increases in costs (30%), rental costs (12%) or utilities costs (8%). Eight per cent of providers increased costs to keep up with competitors and 4% increased costs in line with funding for the 15 hours of funded entitlement.

Slightly less than half (47%) kept their fees the same in the past 12 months. Nearly two thirds (63%) of providers with fewer than 5 paid staff kept their fees the same, supporting the finding that staff costs were largely driving fee increases. The top 2 reasons for group-based providers maintaining their fees were because the provision believed that parents wouldn't be able to afford an increased fee (24%) and because they wanted to keep their prices competitive (23%).

5.10.2 School-based providers

The majority (59%) of school-based nursery providers that charged fees had kept their fees the same in the past 12 months. Those located in the most deprived areas were more likely to have kept their fees unchanged (66%) compared to those in the least deprived areas (55%), although not significantly so. A significantly higher proportion of maintained nursery schools (73%) kept their nursery fees the same compared the fees charged for nursery provision within primary schools with nursery and reception (58%). Independent schools were significantly more likely to have increased their fees for nursery provision (67%) compared with those that were not independent (19%) – although there was a low base of 48 for independent schools.

Overall the main reasons for maintaining the same fees were because providers believed parents could not afford a fee increase (31%), to keep prices competitive (20%) and to ensure affordable and accessible childcare for parents (18%). Of the school-based providers that increased their fees, almost equal proportions said they did so to cover increased staff costs (32%) and to cover inflation or non-specific cost increases (33%). Increasing fees in line with what other providers were charging was the third most popular reason (16%) and a standard annual fee increase was the fourth most common reason (9%).

5.10.3 Childminders

One in five (21%) childminders had increased their fees in the past 12 months, three in four (76%) maintained the same fees within the past year and 2% decreased their fees (the remaining 1% did not know). A higher proportion of childminders with more places increased their fees – 30% who had 7 or more registered places compared with only 12% who had 1 or 2 registered places.[88]

Four in ten (40%) childminders who increased their fees did so to cover inflation or non-specific cost increases, while three in ten (30%) increased their fees in line with what other providers charged. Three tenths (31%) of childminders who maintained their fees did so to keep their prices competitive while only slightly fewer (29%) did not think parents would be able to afford an increased fee.

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[88] Unweighted bases too low to identify as significant: 1-2 registered places = 23; 7 or more registered places = 65.

Figure 5.5 Reasons for increasing fees – all providers

Reason	Group-based providers	School-based providers with nursery provision	Childminders
To cover increased staff costs	58%	31%	9%
To cover inflation / increase in costs (non-specific)	30%	33%	40%
To cover increased rental / mortgage costs*	12%	N/A	4%
To cover increased utilities costs	10%	6%	14%
We just raise our costs every year	9%	9%	5%
Increased in line with what other providers are charging	8%	16%	30%
To cover increased food costs	8%	4%	19%
To cover increased cost of materials used in sessions	8%	3%	11%
Was making a loss / business wasn't sustainable	5%	6%	3%
To improve profit or surplus	2%	6%	6%
Fees have not been increased for some time	2%	0%	10%
Other	3%	10%	9%

Base: Respondents who increased their fees in the last 12 months: variant 3 group-based (127) variant 2 school-based respondents with nursery (77* low base size) variant 2 childminders (127)
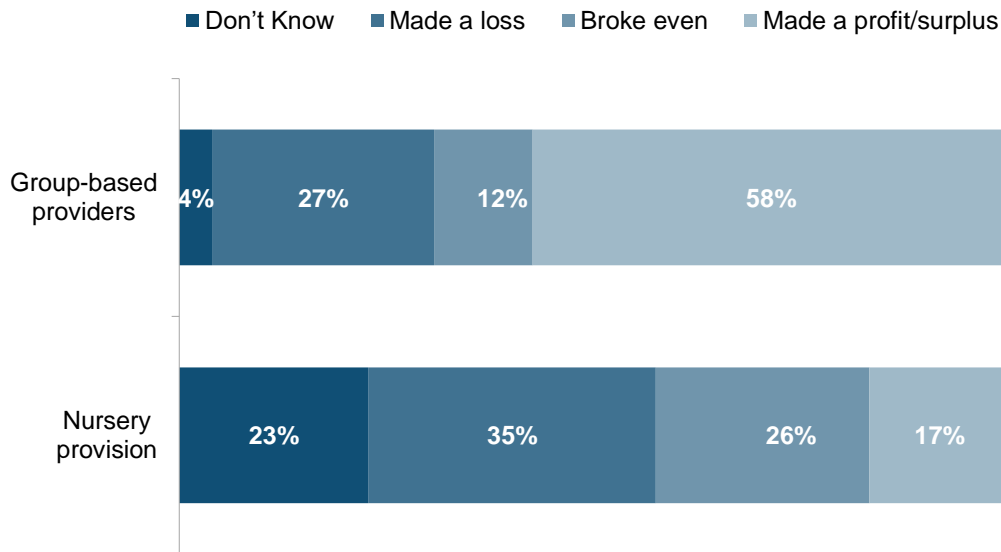Source: What were the main reasons for increasing your fees?

*Not asked of school-based providers with nursery provision

5.11 Profitability

Questions about profitability were included in the group-based and school-based provider surveys and asked of all those who were able to answer about their finances over a 12 month period. However (following cognitive testing), the questions around profitability were identified as not as relevant for reception provisions which are funded differently to other providers or childminders since most are not part of an organisation.

Figure 5.6 Whether childcare providers made a profit or surplus – all providers

Legend: ■ Don't Know ■ Made a loss ■ Broke even ■ Made a profit/surplus

Provider	Don't Know	Made a loss	Broke even	Made a profit/surplus
Group-based providers	4%	27%	12%	58%
Nursery provision	23%	35%	26%	17%

Unweighted base: Variant 2 providers who could answer about finances: Group based providers (1,271); Nursery (650)
Source: Over the 12 months period, after all costs were deducted, did your site…make a profit/surplus, have a zero balance, or make a loss?

100

5.11.1 Group-based providers' profitability

Overall just under half of group-based providers (47%) were able to answer about their finances so were asked this question. A low proportion of these (4%) answered that they did not know when asked about the profit/surplus or loss incurred by their site. More than half (58%) of all group-based provisions who could answer questions about their finances made a profit or surplus in the past year, one in ten (12%) broke even and one in four (27%) made a loss. On average the profit or surplus was £22,100 with a median of £9,000.

The proportion of group-based providers that made a profit or surplus was similar whether the provider was set up to make profit/surplus or not, although for profit groups did make significantly more profit on average. Fifty-eight per cent of not for profit providers who could answer questions about finances made a surplus which was, on average, £11,600; 57% of for profit groups who could answer questions about finances made a profit, which on average amounted to £35,500. Similarly private group-based providers made significantly more profit on average (£37,800) than voluntary providers (£10,600).

The lowest proportion of providers to make a profit or surplus was in the North East of England (42%) although the sample was low[89], while a significantly higher proportion in the East of England (63%) and Yorkshire and Humberside (64%) made a profit or surplus. Although a smaller proportion of group-based providers in London (50%) made a profit or surplus compared to most other regions the profit or surplus made was on average much higher than other areas at £50,800. This is shown in table 5.10. It should be noted that providers in London charged significantly higher fees on average and were less likely to offer funded places.

Provisions with more staff were also more likely to have made a profit or surplus and on average a higher amount of profit or surplus (63% of those with 11-19 paid staff made a profit or surplus and an average of £31,800 while those with 20 or more staff had an average profit or surplus of £55,300). It should be noted that increased staffing costs was the most commonly cited reason for increasing fees (58%).

Of the provisions that made a loss, the largest proportion (21%) made a loss of between £1,000 and £3,000. On average provisions that made a loss lost £10,500. Losses in the 30% most deprived areas were significantly higher than those in the 70% least deprived areas – an average of £16,600[90] in the former compared with £8,600 in the latter. As noted earlier, a higher proportion of groups in the most deprived areas offered funded

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[89] Unweighted base low = 49
[90] Low base for 30% most deprived areas = 81 Is this unweighted?

places and on average had almost triple the number of funded places for 2 year olds and the same number of funded places for 3 or 4 year olds.

Table 5.10 Profitability of group-based provision

Cost	East Midlands	East of England	London	North East	Yorkshire and Humberside	North West	South East	South West	West Midlands	30% Most Deprived	70% Least Deprived	England total
PROFIT OR SURPLUS												
Up to £3,000	18%	19%	9%	[7%]	13%	12%	14%	13%	11%	13%	13%	13%
£3,001 to £10,000	14%	22%	10%	[10%]	24%	13%	18%	21%	17%	12%	18%	17%
£10,001 to £30,000	16%	11%	15%	[14%]	10%	19%	16%	16%	19%	17%	15%	15%
More than £30,000	6%	8%	10%	[7%]	14%	12%	6%	5%	10%	10%	8%	8%
Mean profit/surplus	**£15,600**	**£20,300**	**£50,800**	**[£35,900]**	**£25,100**	**£20,200**	**£14,600**	**£13,800**	**£20,000**	**£24,600**	**£21,400**	**£22,100**
Median profit	**£7,200**	**£5,400**	**£15,000**	**[£15,000]**	**£9,300**	**£13,000**	**£7,000**	**£7,600**	**£10,800**	**£12,000**	**£7,800**	**£9,000**
Zero profit/loss	16%	6%	18%	[12%]	12%	14%	9%	11%	10%	14%	11%	12%
LOSS												
Up to £3,000	8%	9%	8%	[10%]	7%	10%	9%	11%	10%	6%	10%	9%
£3,001 to £10,000	5%	11%	3%	[14%]	4%	7%	10%	8%	8%	6%	8%	8%
£10,001 to £30,000	0%	4%	8%	[8%]	4%	5%	8%	9%	4%	9%	5%	6%
More than £30,000	2%	1%	6%	[2%]	4%	2%	2%	0%	3%	4%	2%	2%
Mean loss	**£8,100**	**£7,400**	**£17,000**	**[£9,700]**	**£13,300**	**£9,000**	**£11,400**	**£7,400**	**£10,000**	**£16,600**	**£8,600**	**£10,500**
Median loss	**£2,400**	**£3,800**	**£11,000**	**[£4,900]**	**£8,100**	**£5,000**	**£6,200**	**£6,600**	**£4,000**	**£11,200**	**£4,200**	**£4,900**
Don't know/ Refused	14%	9%	14%	[16%]	6%	7%	8%	4%	9%	10%	9%	9%
Unweighted base	115	163	140	[49]	106	145	240	184	129	303	968	1,271

Source: And in this 12 month period, after all costs were deducted, including any wages or dividends drawn by the owner or owners, did your site make a profit/surplus, have a zero balance, or make a loss.

How much pre-tax profit or surplus did your site make over that period? Would you be willing and able to say which of the following bands best describes the amount of profit or surplus over that period? How much loss did your setting make over that period?

Would you be willing and able to say which of the following bands best describes the size of the loss over that period?

5.11.2 School-based providers' profitability

The questions about surplus and deficit for school-based providers were posed to those that could answer about their finances over the past 12 months and had nursery provision, meaning comparatively few respondents answered. A fairly high proportion who were eligible to answer said that they did not know about the surpluses or losses made by the school-based nursery over the past 12 months – 22%.

About one in three schools with nursery provision (35%) generated a deficit in the past year from their nursery provision specifically, 17% generated a surplus and 26% had a zero balance.[91] A particularly high proportion (52%) of nursery schools in the North East of England generated a deficit, a significantly higher proportion than the East Midlands (27%)[92] and London (31%).[93] A significantly higher proportion (22%) of larger nursery schools with 40-69 children generated a surplus compared with smaller ones of 20-39 children (13%).

[91] Unweighted base = 650
[92] Small unweighted base = 62
[93] Small unweighted base = 107

Chapter 6 Funded hours

At the time of this 2016 survey all 3 and 4 year olds in England were entitled to 570 hours of funded early education or childcare a year, which is often taken as 15 hours each week for 38 weeks of the year. The most disadvantaged 2 year olds[94] were also entitled to these funded hours. The government plans to extend the 3 and 4 year old entitlement from September 2017 to 30 hours a week of funded childcare for 38 weeks of the year for working parents who meet the eligibility criteria.

As outlined in the research context section of this report, the fieldwork for this survey was conducted around 18 months ahead of the planned roll-out of 30 hours for working families, and the policy was in the early stages of development. As a result there was some uncertainty in the sector about critical aspects of the policy, such as how much funding would be available.

This chapter explores the current level of funded provision and plans for offering the extended entitlement.

Key findings

Based on representative survey estimates in England in 2016:

- The proportions of providers that planned to offer the 30 hours of funded childcare were lower than those that currently offered 15 hours funded childcare for 3 and 4 year olds

    - 63% (14,600) of group-based providers planned to offer 30 hours funded childcare compared with 96% (22,700) currently offering the 15 funded hours for 3 and 4 year olds

    - 42% (3,900) of primary schools with nurseries; and 78% (350) of maintained nursery schools planned to offer 30 hours funded childcare compared with 91% (8,200); and 98% (400) respectively currently offering the 15 funded hours for 3 and 4 year olds

    - 55% (25,400) of childminders planned to offer 30 hours funded childcare, compared with 51% (23,600) currently offering the 15 funded hours for 3 and 4 year olds

- Providers that planned to offer the extended 30 hours funded childcare, were most commonly planning to use existing places that would otherwise remain unfulfilled (59% group-based, 53% primary schools with a nursery and 71% childminders)

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94 https://www.gov.uk/help-with-childcare-costs/free-childcare-and-education-for-2-to-4-year-olds

- For group-based providers and childminders the most common reasons for not offering 30 hours funded childcare were that the funding is lower than hourly fees / they will lose money (31% group-based; 34% childminders) or they are not open long enough / work insufficient hours (28% group-based; 18% childminders). Schools with a nursery most frequently said this was due to lack of space (41%) or lack of staff capacity (26%)

6.1 Provision and take-up of government-funded places
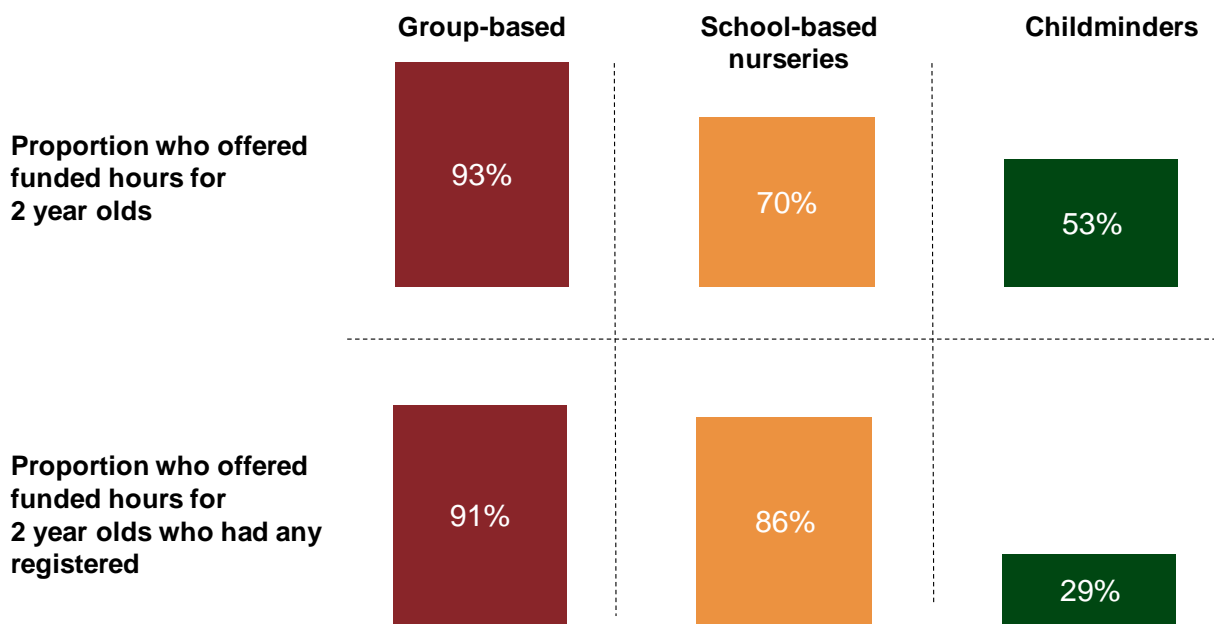
6.1.1 Funded provision for 2 year olds

Providers that offer provision for 2 year olds were asked whether they offer the government funded early education for 2 year olds, and if so, whether they have any children currently registered at their setting that receive this funding. As shown in figure 6.1, it was common to offer this entitlement in group-based and school-based settings, but less so amongst childminders.

Providers that offered government funded hours for 2 year olds had the following number of registered children receiving the entitlement on average:

- group-based mean = 8 children per setting

- school based nursery provision mean[95] = 11 children per setting

- childminders mean = <1 child per setting (as a large proportion of childminders that offered the entitlement did not have any registered children receiving it)

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[95] This includes primary schools with nurseries and maintained nursery schools.

Figure 6.1 Providers that offered funded hours for 2 year olds and whether they currently had any children registered for the provision – all providers

|	Group-based	School-based nurseries	Childminders
Proportion who offered funded hours for 2 year olds	93%	70%	53%
Proportion who offered funded hours for 2 year olds who had any registered	91%	86%	29%

Base: Group-based providers with provision for 2 year olds (5453)
Nurseries with provision for 2 year olds (403)
Childminders with provision for 2 year olds (1174)

Source: Whether setting offers funded hours for 2 year olds; number of 2 year olds at setting that receive funded hours

6.1.2 2 year old funding by area of deprivation

As would be expected given the eligibility criteria[96], it was more common for providers in the 30% most deprived areas to have 1 or more children taking up the government-funded hours for 2 year olds. Figure 6.2 shows the proportion of providers offering provision for 2 year olds with any children taking up the entitlement by deprivation.

Figure 6.2 Proportion of providers with any registered children taking up funded hours for 2 year olds – all providers
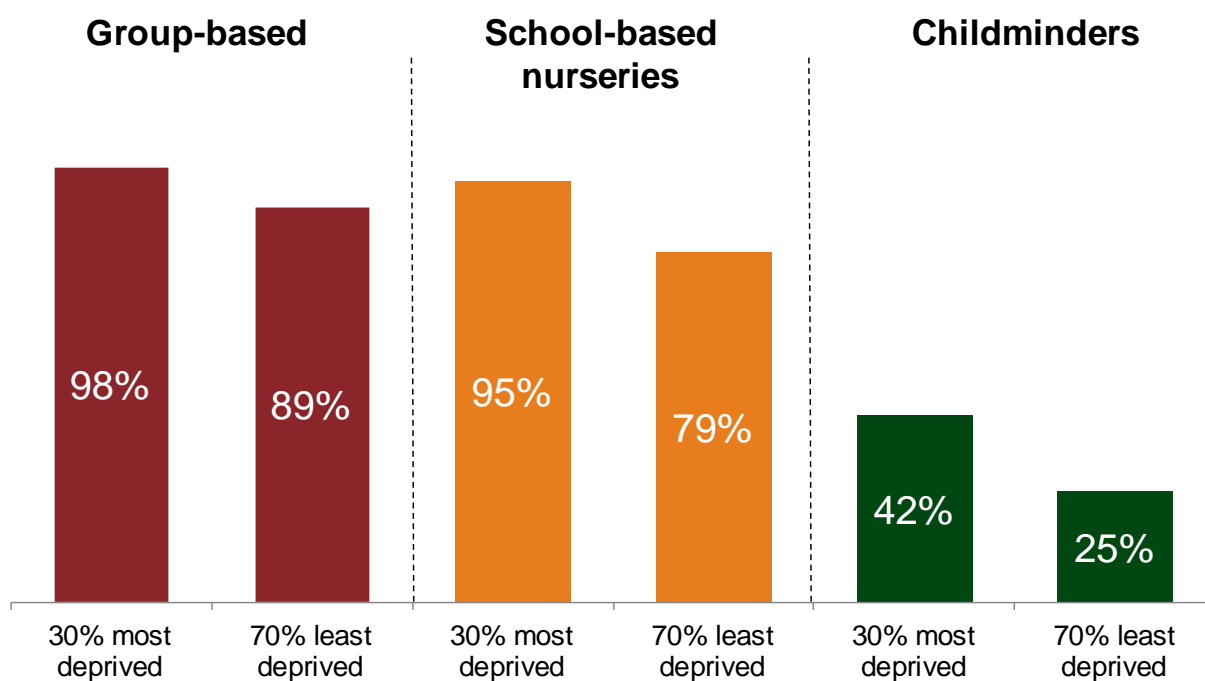
Base: Group-based providers that offer funded hours for 2 year olds (5090)
Nurseries that offer funded hours for 2 year olds (305)
Childminders that offer funded hours for 2 year olds (625)
Source: Number of 2 year olds at setting that receive funded hours

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[96] For more information on the eligibility criteria see here: https://www.gov.uk/help-with-childcare-costs/funded-childcare-and-education-for-2-to-4-year-olds

6.1.3 Funded provision for 3 and 4 year olds

Providers that offered provision for 3 or 4 year olds were asked whether they offer the government funded early education for 3 and 4 year olds. These providers were then asked whether they had any children currently registered at their setting that received this funding.
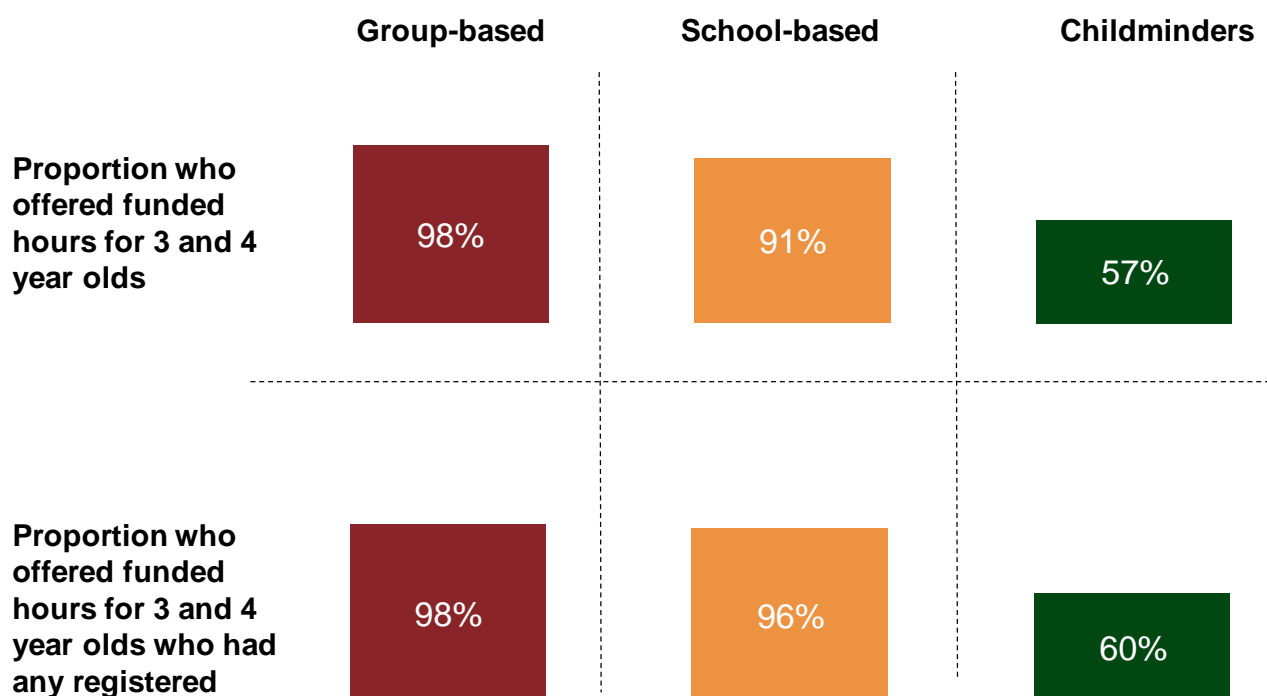
Figure 6.3 shows that, as for funded provision for 2 year olds, it was more common for group-based and school-based providers to offer the funded hours than childminders. Amongst nurseries that offered provision for the relevant age of child, they were more likely to offer the funded provision for 3 and 4 year olds (91%) than 2 year olds (70%); and more likely to currently have registered children taking the entitlement (96% for 3 and 4 year olds compared with 86% for 2 year olds). In contrast to funded hours for 2 year olds, there were no significant differences by deprivation.

Providers that offered government funded hours for 3 and 4 year olds had the following number of registered children receiving the entitlement on average:

- group-based mean = 30 children per setting
- school-based nursery mean[97] = 44 children per setting
- childminder mean = 1 child per setting

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[97] This includes primary schools with nurseries and maintained nursery schools.

Figure 6.3 Providers that offered funded hours for 3 and 4 year olds and whether they had any registered – all providers

	Group-based	**School-based**	**Childminders**
Proportion who offered funded hours for 3 and 4 year olds	98%	91%	57%
Proportion who offered funded hours for 3 and 4 year olds who had any registered	98%	96%	60%

Base: Group-based providers with provision for 3 or 4 year olds (5755)
Nurseries with provision for 3 or 4 year olds (1847)
Childminders with provision for 3 or 4 year olds (1289)
Source: Whether setting offers funded hours for 3 and 4 year olds; number of 3 and 4 year olds at setting that receive funded hours

6.1.4 Funded provision by capacity

Chapter 3 of this report discusses spare capacity amongst childcare providers. Some patterns in capacity can be observed in relation to whether the provider offers funded hours or not. In particular group-based providers and childminders that offered funded places for 2 year olds were less likely to have spare capacity for any aged children.

- Group-based providers that offered funded places for 2 year olds were less likely to have any spare capacity in full day provision, with 22% saying they had no extra places across their full day provision, compared with 29% that did not offer funded provision

- Childminders offering funded places to 2 year olds were less likely to have any spare capacity, with half (50%) who offered funded places to 2 year olds having no spare capacity across their provision, compared with 43% of those that did not offer funded places

There was no significant difference between group-based providers offering funded places for 3 and 4 year olds in full day provision. However, half (50%) of childminders that offered funded places for 3 and 4 years olds had no spare capacity, compared with 41% of those that did not offer funded places.

In school-based nurseries, there was no significant difference in capacity between those offering funded places for 2 year olds or for 3 and 4 year olds and those that did not offer it.

## 6.2 Intention of offering 30 hours funded childcare

Providers were asked if they planned to offer the extended 30 hours of funded childcare. This is shown in figure 6.4, which compares responses across the different providers. For comparison, figure 6.4 also shows the proportion of all providers that currently offered the 15 hours of government funded education for 3 and 4 year olds.[98] This is discussed by provider in the remainder of the section.

It is important to note that while the existing 15 hours entitlement is universal, the additional 15 hours of funded childcare will only be available for families where both parents are working (or the sole parent is working in a single parent family), and each parent earns the equivalent of 16 hours a week at the national minimum or living wage, and less than £100,000 a year. This means that there will be fewer children eligible for the additional 15 hours childcare.

Compared to the other provider types, group-based providers were most likely to be planning on offering the extended hours, although this was substantially less than the proportion currently offering 15 funded hours for 3 and 4 year olds. The survey was conducted between 14 and 18 months before the new policy is planned for introduction in September 2017, when, for example, the fairer funding formula had not been announced, as highlighted in the research context section (section 1.2). As figure 6.4 shows, at this time there was a high level of uncertainty, with a quarter (27%) of schools with a nursery, two fifths (19%) of group-based providers, and 12% of childminders saying they didn't know if they would offer the new entitlement.

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[98] Note that where the 15-hours entitlement is discussed in section 6.1 of this chapter data are based on providers that currently offer provision for 3 and 4 year olds. In this section data are based on all providers to give a representative view across the sector of plans to offer the extended hours. As such, in this section the 15 hour entitlement is based on all providers for comparability.

Figure 6.4 Comparison of providers currently offering 15 hours childcare for 3 and 4 year olds with plans to offer 30 hours funded childcare – all providers
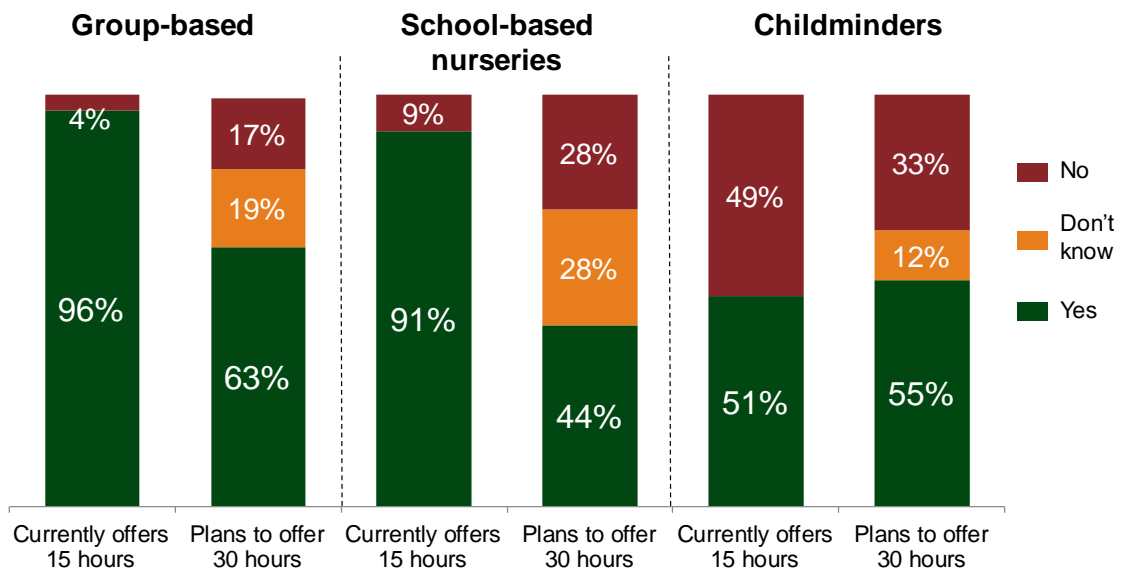
Base: Group-based providers that offer full day care or sessional care (5820), School-based nurseries (1849), Childminders (1444)
Source: And do you currently offer the government funded early education for 3-4 year olds?

Base: Respondents included in variant 1 of questionnaire: Group-based providers that offer full day care or sessional care (1038), School-based nurseries (854) Childminders (860)
Source: Do you intend to offer places to children using the 30 hours of funded entitlement?

6.2.1 Group-based providers' intention to offer 30 hours

At the time of the survey over three fifths (63%; 15,000) of group-based providers that offered full day provision or sessional provision planned to offer the extended 30 hours of funded childcare.

Chapter 3 of this report discusses providers' spare capacity. Group-based providers that had no extra capacity were slightly less likely to intend to offer the 30 hours funded entitlement than those with spare capacity. Seven in ten (69%) group-based providers with some extra capacity in their full day provision intended to offer the 30 hours. This was lower at six in ten (62%) group-based providers with no extra capacity in their full day provision. A similar pattern was seen amongst providers that offered sessional but not full day provision. Overall, half (51%) of sessional-only group-based providers intended to offer the 30 hours; this rose to 58% of those with spare capacity, compared with 44% of those with no spare capacity.

A higher proportion (70%) of providers in the 30% most deprived areas planned to offer the extended hours compared with providers in the 70% least deprived areas (61%). Providers with 5 or more paid staff (65%) were also significantly more likely to say they would offer the extended hours compared with those that had less than 5 paid staff members (51%).

6.2.2 School-based providers' intention to offer 30 hours

Forty-four per cent (4,300) of schools with nursery provision planned to offer the 30 hours of government funded entitlement, with 28% saying they did not know.

A higher proportion (49%) of schools with nursery provision in the most deprived areas planned to offer the extended funded entitlement compared with the 70% least deprived areas (41%). Schools with more registered places were also more likely to be planning to implement the extended hours – 55% of schools offering nursery provision with 40 - 69 children registered in nursery provision planned to do so compared with 36% of those with fewer than 20 children.

A higher proportion (78%; 17% didn't know) of maintained nursery schools planned to offer this extension compared with primary schools with a nursery (44%; 27% didn't know).

6.2.3 Childminders' intention to offer 30 hours

Over half (55%; 25, 400) of childminders said they planned to offer the 30 hours of funded childcare, while 12% didn't know. As for group-based and school-based providers, a higher proportion of childminders in the 30% most deprived areas (64%) planned to offer it compared with those in the 70% least deprived areas (52%).
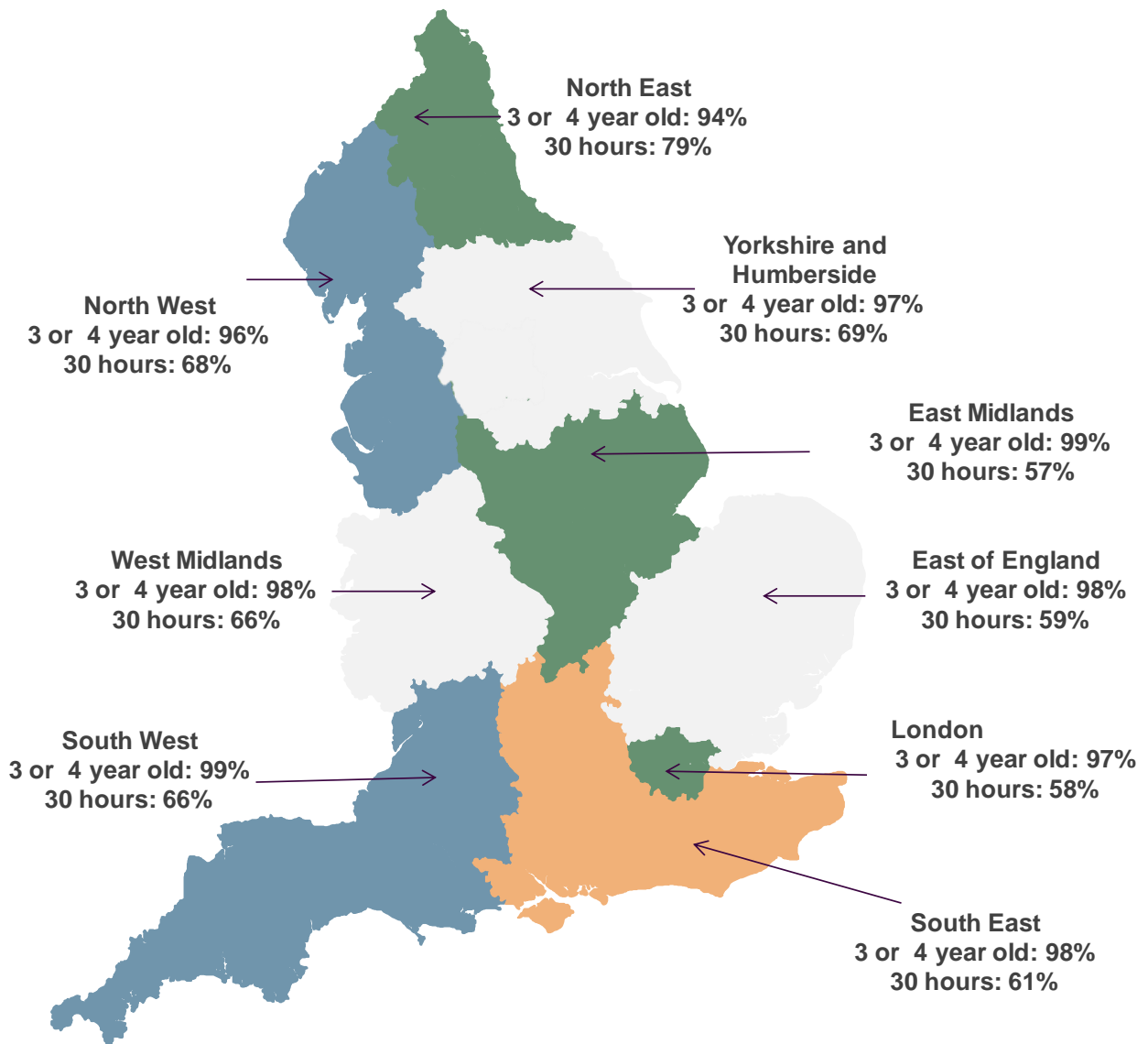
6.3 Funded provision by region

The next section summarises whether providers currently offered funded places for 3 or 4 year olds and whether they intended to offer 30 hours free childcare.

6.3.1 Group-based providers

As shown in figure 6.5 there was little variation in funded places offered by region although providers in the North East and North West were most likely to plan to offer 30 hours funded childcare.

Figure 6.5 Whether currently offered funded places for 3 or 4 year olds and whether intended to offer 30 hours funded childcare by region – group-based providers
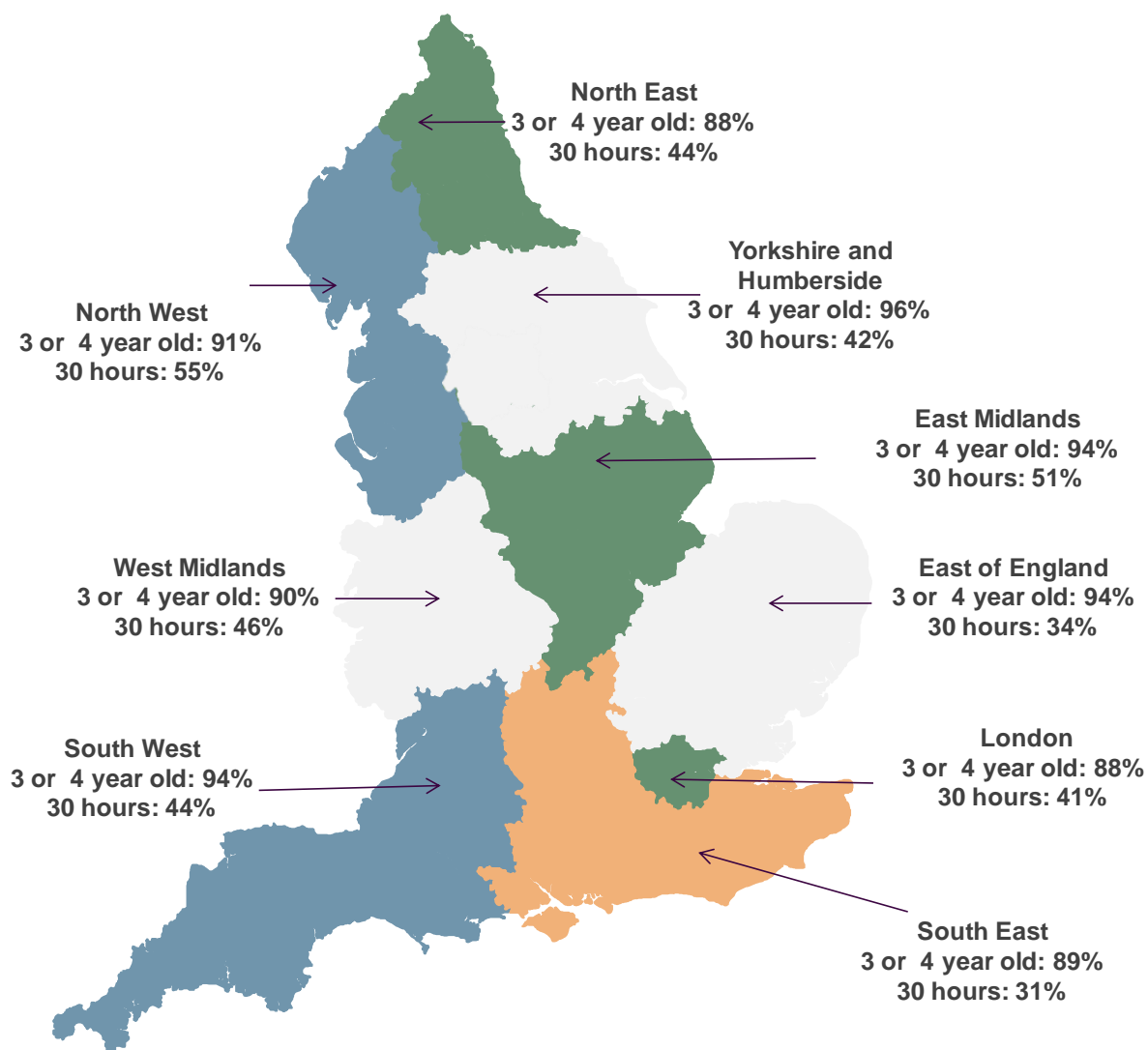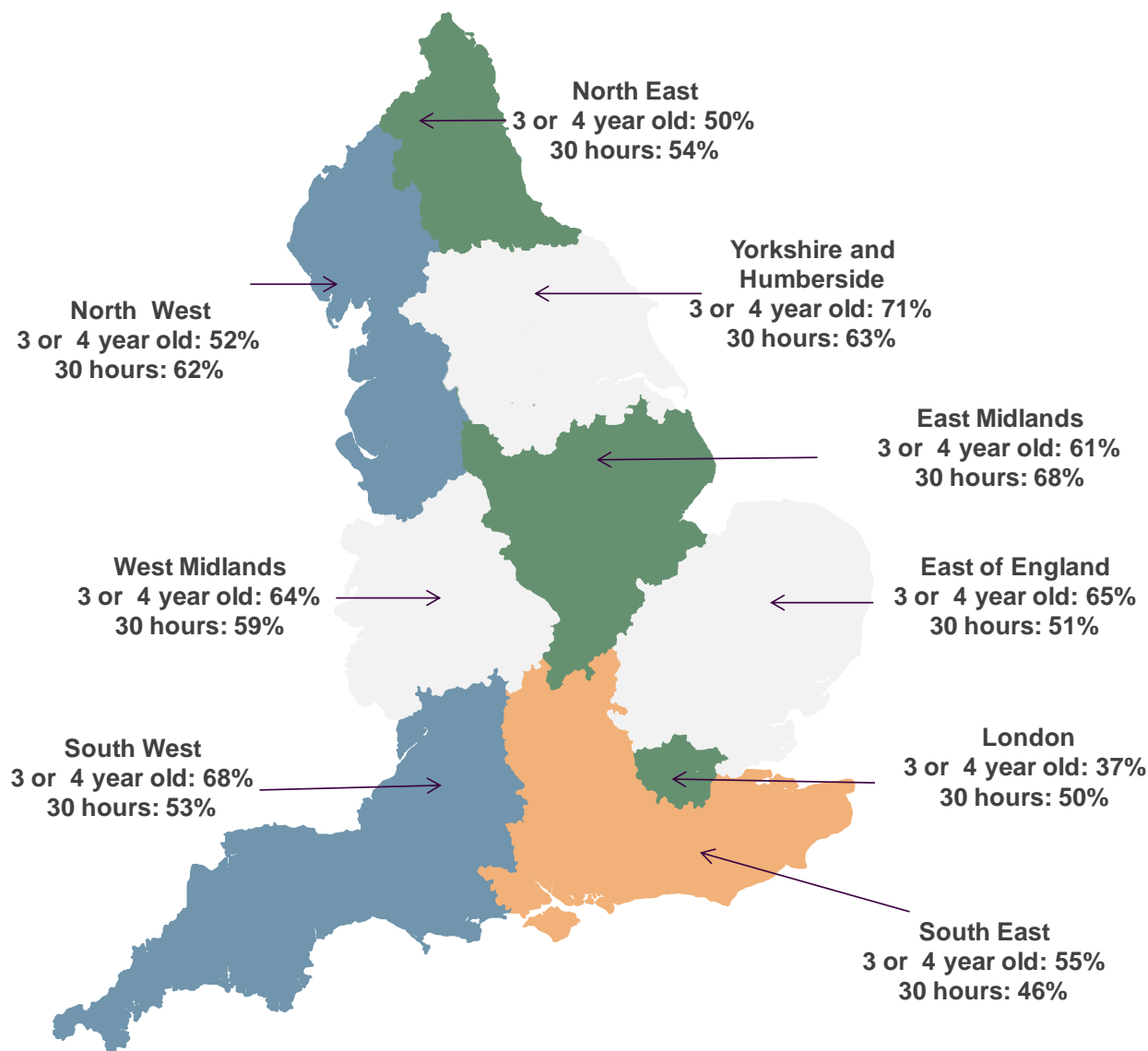

North East
3 or 4 year old: 94%
30 hours: 79%

Yorkshire and Humberside
3 or 4 year old: 97%
30 hours: 69%

North West
3 or 4 year old: 96%
30 hours: 68%

East Midlands
3 or 4 year old: 99%
30 hours: 57%

West Midlands
3 or 4 year old: 98%
30 hours: 66%

East of England
3 or 4 year old: 98%
30 hours: 59%

South West
3 or 4 year old: 99%
30 hours: 66%

London
3 or 4 year old: 97%
30 hours: 58%

South East
3 or 4 year old: 98%
30 hours: 61%

Base: respondents that look after 3 and 4 year olds (either in their full day care or sessional care) (5755); variant 1 respondents that offer full day care or sessional care (1038)

Source: And do you currently offer the government funded early education for 3-4 year olds? Do you intend to offer places to children using the 30 hours of funded entitlement?

6.3.2 School-based providers

As shown in figure 6.6, there is some variation by region for school-based nurseries offering funded places to 3 or 4 year olds and the likelihood of offering 30 hours funded childcare (although caution should be taken with the base sizes for whether they were planning to offer 30 hours funded childcare).

Figure 6.6 Whether currently offered funded places for 3 or 4 year olds and whether intended to offer 30 hours funded childcare by region – school-based nurseries

North East
3 or 4 year old: 88%
30 hours: 44%

Yorkshire and Humberside
3 or 4 year old: 96%
30 hours: 42%

North West
3 or 4 year old: 91%
30 hours: 55%

East Midlands
3 or 4 year old: 94%
30 hours: 51%

West Midlands
3 or 4 year old: 90%
30 hours: 46%

East of England
3 or 4 year old: 94%
30 hours: 34%

South West
3 or 4 year old: 94%
30 hours: 44%

London
3 or 4 year old: 88%
30 hours: 41%

South East
3 or 4 year old: 89%
30 hours: 31%

Base: school-based providers with nurseries that look after 3 and 4 year olds in their provision (1847); variant 1 school-based providers with nursery provision (1218)

Source: Does [school name] currently offer the government funded early education for 3 and 4 year olds? Do you intend to offer places to children using the 30 hours of funded entitlement?

6.3.3 Childminders

Childminders in London were least likely to offer funded places for 3 and 4 year olds.

Figure 6.7 Whether currently offered funded places for 3 or 4 year olds and whether intended to offer 30 hours funded childcare by region – childminders

North East
3 or 4 year old: 50%
30 hours: 54%

Yorkshire and Humberside
3 or 4 year old: 71%
30 hours: 63%

North West
3 or 4 year old: 52%
30 hours: 62%

East Midlands
3 or 4 year old: 61%
30 hours: 68%

West Midlands
3 or 4 year old: 64%
30 hours: 59%

East of England
3 or 4 year old: 65%
30 hours: 51%

South West
3 or 4 year old: 68%
30 hours: 53%

London
3 or 4 year old: 37%
30 hours: 50%

South East
3 or 4 year old: 55%
30 hours: 46%

Base: childminders that accept 3 and 4 year olds in their childminding provision (1289); variant 1 childminders (860)
Source: Do you currently offer the government funded early education for 3 and 4 year olds?
Do you intend to offer places to children using the 30 hours of funded entitlement?

6.4 How providers will implement 30 hours funded childcare

Providers that said they planned to offer the extended 30 hours of funded childcare were asked how they planned to accommodate this, allowing them to select as many answers as applied from a list of 4 response options. This is shown in figure 6.8. The most common response amongst all providers was to say they would use existing places that would otherwise remain unfilled, although a large proportion of schools with nursery provision (43%) said they would expand the scale of their provision.

While three in ten (29%) of school based nursery providers would accommodate the extension by taking fewer children, this was more common within maintained nursery schools than nursery provision within primary schools or (44% compared with 27%). There is no other significant difference in response when primary schools are compared with maintained nursery schools.

Figure 6.8 How providers planned to implement 30 hours funded childcare – all providers
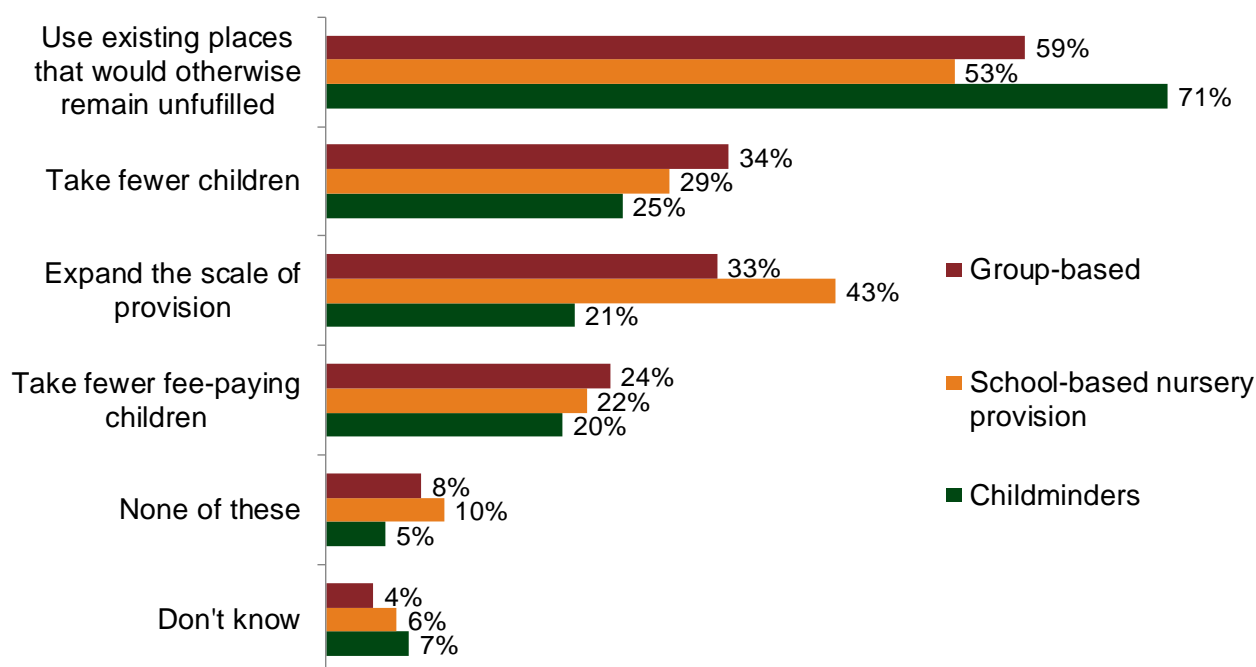
Base: Group-based providers that plan to offer 30 hours free childcare (662)
School-based nursery providers that plan to offer 30 hours free childcare (377)
Childminders that that plan to offer 30 hours free childcare (468)
Source: How setting plans to offer 30 hours free childcare

6.5 Concerns about 30 hours funded childcare

Providers that did not plan to offer the extended hours were asked to give all the reasons why not, without using a prompted list. It should be noted that the survey was conducted between 14 and 18 months before the new policy is planned for introduction in September 2017, when, for example, the fairer funding formula had not been announced, as highlighted in the research context section (section 1.2). The reasons differ by provider type, so they are discussed separately in this section, although the top two reasons are consistent between group-based providers and childminders. In the summary, the main reasons were:

- group-based providers - the funding is lower than hourly fees / will lose money / not financially viable (34%), or they're not open for sufficient hours (28%)

- schools with a nursery – lack of physical space (41%), or lack of staff capacity / staff ratios (26%)

- childminders – the funding is lower than hourly fees / will lose money (34%), or they don't work sufficient hours (18%)

6.5.1 Group-based providers' concerns about 30 hours

Figure 6.9 shows the most frequently given reasons by group-based providers for not planning to offer 30 hours funded childcare.

**Figure 6.9 Reasons for not offering 30 hours funded childcare - group-based**
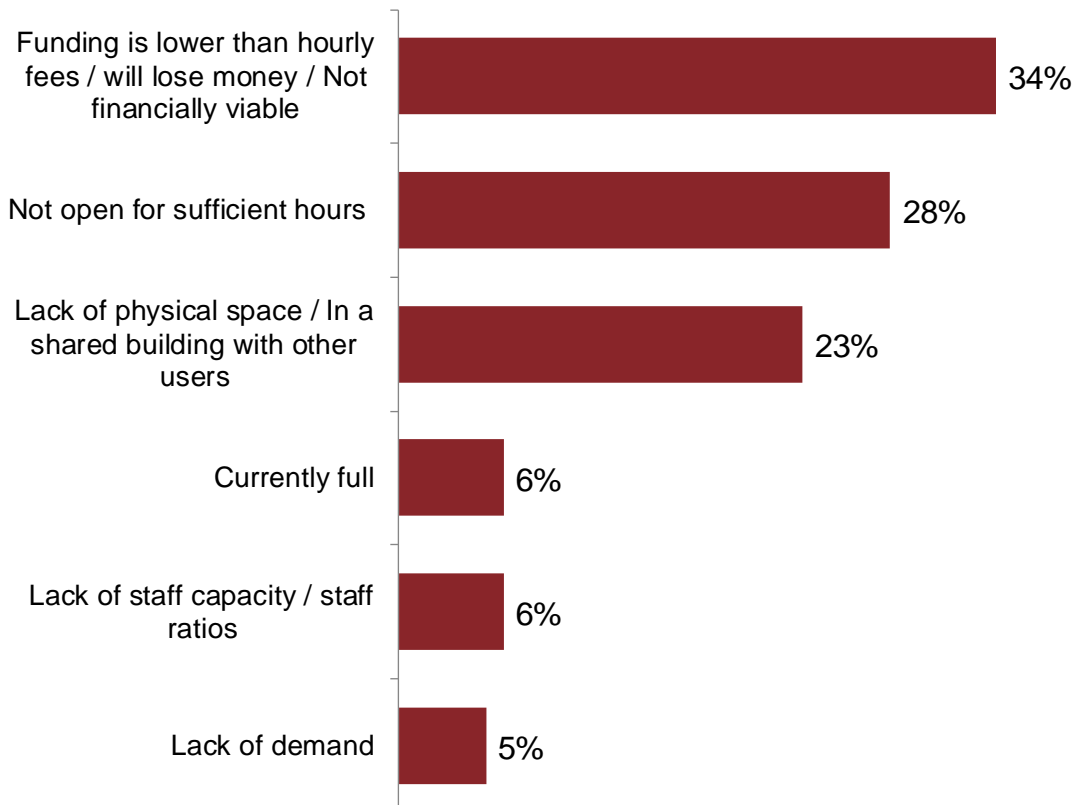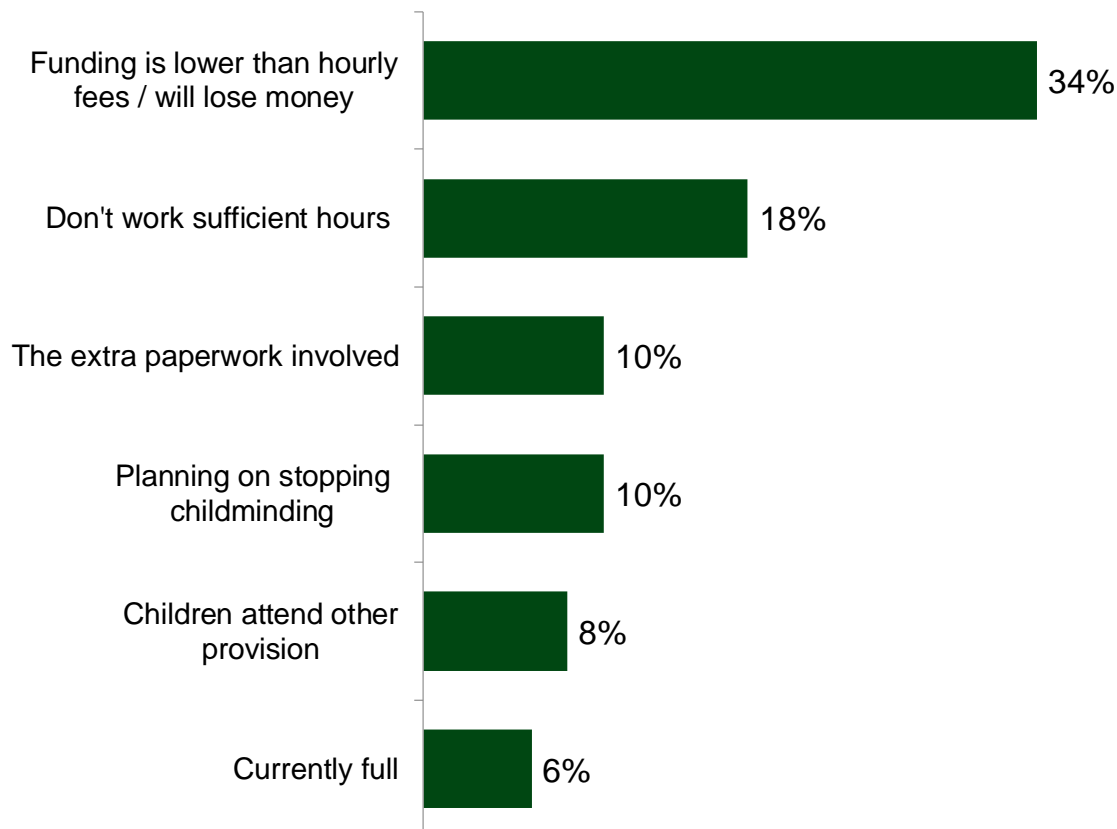

Base: Group-based providers offering full day care or sessional care asked variant 1 of survey that that don't plan to offer 30 hours free childcare (179)
Source: Reasons won't offer 30 hours free childcare

Significantly more (42%) for profit providers were deterred by funding being lower than hourly fees compared with non-profit providers (16%). A higher proportion (32%) of non-profit providers were not open long enough to offer 30 hours of provision compared with those for profit (26%).

6.5.2 School-based providers' concerns about 30 hours

Figure 6.10 shows the most frequently given reasons by primary schools with a nursery for not planning to offer 30 hours funded childcare.

Figure 6.10 Reasons for not offering 30 hours funded childcare – nursery provision
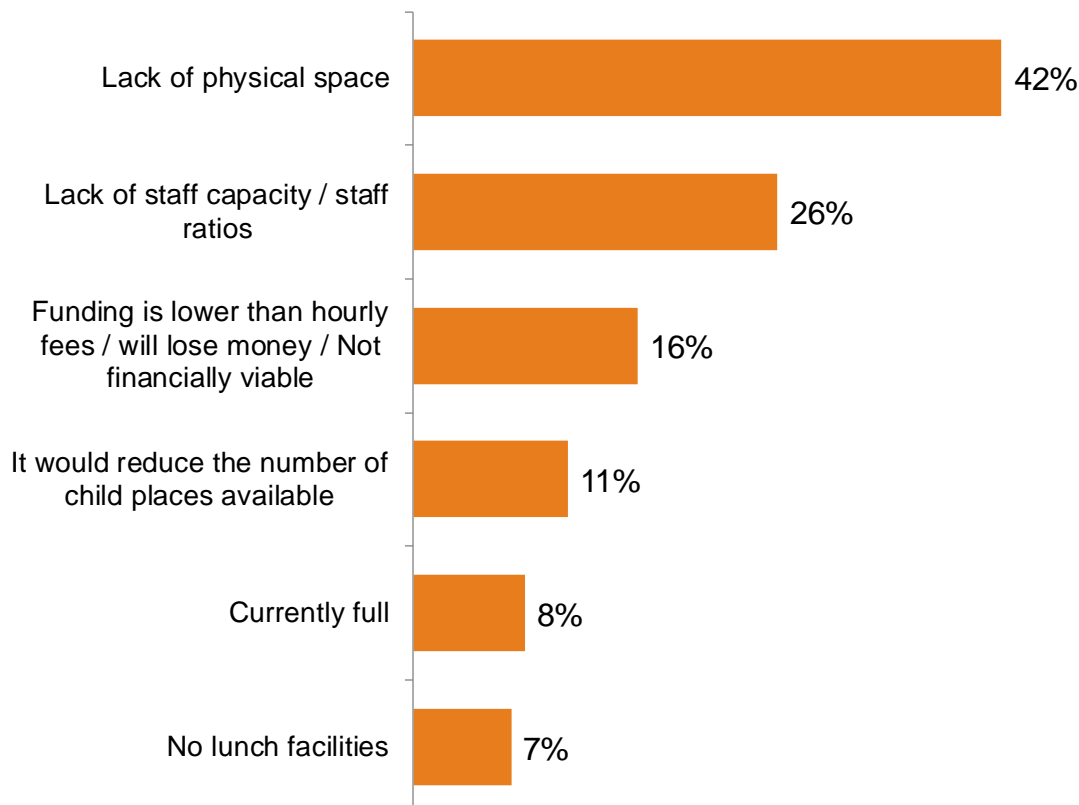
Base: Schools with a nursery asked variant 1 of survey that that don't plan to offer 30 hours free childcare (258)
Source: Reasons won't offer 30 hours free childcare

Lack of physical space was significantly more likely to prevent schools with nursery provision in the most deprived areas (51%) from offering the extended hours compared with those in the least deprived areas (37%). Independent schools were significantly more likely to have expressed financial concerns about offering the extended hours – a much higher proportion attributed their intention to funding being lower than hourly fees (35%) compared with not independent schools (5%) although the base for independent schools was low (40).

6.5.3 Childminders' concerns about 30 hours

Figure 6.11 shows the childminders' most common reason for not planning to offer 30 hours funded childcare.

Figure 6.11 Reasons for not offering 30 hours funded childcare - childminders

Base: Childminders asked variant 1 of survey that that don't plan to offer 30 hours free childcare (295) [17]
Source: Reasons won't offer 30 hours free childcare

Over half (54%)[99] of childminders in the South East attributed their decision not to offer the extension to potentially losing money – more than across other regions.

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[99] Small unweighted base=74

Chapter summary

Findings below are based on representative survey estimates, in England in 2016.

Amongst group-based providers[100] with provision for 2 year olds:

- o 93% (20,500) offered 15 hours funded early education or childcare for 2 year olds
- o of these, 91% (18,700) had any registered children currently taking up these funded hours

Amongst group-based providers with provision for 3 or 4 year olds:

- o 98% (22,700) offered 15 hours funded early education or childcare for 3 and 4 year olds
- o of these, 98% (22,400) had any registered children currently taking up these funded hours

Sixty-three per cent (14,600) of all group-based providers planned to offer 30 hours funded childcare

Amongst nurseries with provision for 2 year olds:

- o 70% (1,400) offered 15 hours funded early education or childcare for 2 year olds
- o of these, 86% (1,200) had any registered children currently taking up these funded hours

Amongst nurseries with provision for 3 or 4 year olds:

- o 91% (8,600) offered 15 hours funded early education or childcare for 3 and 4 year olds
- o of these, 96% (8,300) had any registered children currently taking up these funded hours

Forty-four per cent (4,300) of schools with nursery provision planned to offer 30 hours funded childcare.

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[100] Those that offered full day care and / or sessional care.

Amongst childminders with provision for 2 year olds

- o 53% (20,000) offered 15 hours funded early education or childcare for 2 year olds

- o of these, 29% (5,700) had any registered children currently taking up these funded hours

Amongst childminders with provision for 3 or 4 year olds:

- o 57% (23,600) offered 15 hours funded early education or childcare for 3 and 4 year olds

- o 60% of these (14,200) had any registered children currently taking up these funded hours

Fifty-five per cent (25,400) of all childminders planned to offer 30 hours funded childcare.

Appendix 1

Table A.1 Number of registered places by provider type

Registered places	England	East Midlands	East of England	London	North East	Yorkshire and Humberside	North West	South East	South West	West Midlands
Group-based	1,198,700	107,800	133,200	178,100	42,300	108,000	178,400	213,700	121,600	115,700
Unweighted base	6221	549	786	751	222	573	812	1105	781	642
School-based nursery	352,600	26,600	33,900	72,700	26,400	41,800	50,400	38,800	20,400	41,600
Unweighted base	1903	174	187	289	187	236	325	185	102	218
School-based reception	734,000	63,400	80,300	124,700	36,900	72,300	94,600	121,800	67,600	72,400
Unweighted base	2043	199	203	262	171	255	335	234	159	225
School-based before School	327,000	24,000	35,900	48,900	24,400	31,500	50,700	45,500	32,500*	33,600
Unweighted base	1304	118	122	202	122	157	200	146	99*	138
School-based after School	212,200	15,300*	21,800*	43,200	9,700*	14,800*	33,100	30,600	22,100*	21,500*
Unweighted base	843	66*	85*	143	62*	82*	131	107	77*	90*
Childminders	267,600	23,100	32,400	43,200	11,500*	26,700	30,500	51,800	27,600	20,800
Unweighted base	1444	127	163	220	60*	142	170	306	149	107

Source: Group-based: Thinking about your whole setting and all of the childcare you offer, how many Ofsted registered places do you have in total?   School-based: how many children can you look after in your NURSERY CLASSES at one time? Thinking about your RECEPTION CLASSES, how many places do you have in total?   Childminders: How many places for children under the age of 8 have you personally got registered with Ofsted?

*Low base size

Table A.2 Proportion of registered places by provider type

Registered places %	England	East Midlands	East of England	London	North East	Yorkshire and Humberside	North West	South East	South West	West Midlands
Group-based	39%	41%	39%	35%	28%	37%	41%	43%	42%	38%
Unweighted base	6221	549	786	751	222	573	812	1105	781	642
School-based nursery	11%	10%	10%	14%	17%	14%	12%	8%	7%	14%
Unweighted base	1903	174	187	289	187	236	325	185	102	218
School-based reception	24%	24%	24%	24%	24%	24%	22%	24%	23%	24%
Unweighted base	2043	199	203	262	171	255	335	234	159	225
School-based before School	11%	9%	11%	10%	16%	11%	12%	9%	11%	11%
Unweighted base	1304	118	122	202	122	157	200	146	99	138
School-based after School	7%	6%*	6%*	8%	6%*	5%*	8%	6%	8%*	7%*
Unweighted base	843	66*	85*	143	62*	82*	131	107	77*	90*
Childminders	9%	9%	10%	8%	8%*	9%	7%	10%	9%	7%
Unweighted base	1444	127	163	220	60*	142	170	306	149	107

Source: Group-based: Thinking about your whole setting and all of the childcare you offer, how many Ofsted registered places do you have in total? School-based: how many children can you look after in your nursery classes at one time? Thinking about your reception classes, how many places do you have in total? Childminders: How many places for children under the age of 8 have you personally got registered with Ofsted?

*Low base size

Table A.3 Spare capacity - group-based full day provision

	Total	Monday	Tuesday	Wednesday	Thursday	Friday
% providers with spare capacity	75%	76%	73%	73%	76%	79%
Average % spare capacity	20%	21%	19%	18%	19%	23%
Average no. of spare places	9	10	8	8	8	10
Total no. of spare places	139,200	29,200	25,400	26,000	26,800	31,900
Unweighted base	3,968	801	791	795	799	782

Source: How many under school-aged children were booked to attend your full day care provision on that [reference day]? How many extra children would you have been willing and able to take in your full day provision on that day?

Table A.4 Spare capacity - group-based sessional provision (throughout the day)

	Total	Monday	Tuesday	Wednesday	Thursday	Friday
% providers with spare capacity	45%	43%	48%	43%	46%	47%
Average % spare capacity	13%	13%	14%	11%	13%	14%
Average no. of spare places	5	4	5	4	5	6
Total no. of spare places	36,900	6,700	7,900	6,400	8,500	7,300
Unweighted base	1,858	391	369	384	390	324

Source: How many different under school aged children were booked to attend your sessional provision at any time throughout that [reference day]. How many, if any, children that needed provision throughout the whole day would you have been willing and able to take on that day?

Table A.5 Spare capacity - group-based before school provision

	Total	Monday	Tuesday	Wednesday	Thursday	Friday
% providers with spare capacity	82%	84%	81%	81%	79%	87%
Average % spare capacity	43%	45%	41%	40%	41%	50%
Average no. of spare places	8	8	8	8	8	9
Total no. of spare places	51,400	10,000	9,400	11,500	9,900	10,600
Unweighted base	1,564	317	297	350	303	297

Source: How many children were booked to attend your before school provision on that [reference day]? How many extra children would you have been willing and able to take in your before school provision on that day?

Table A.6 Spare capacity - group-based after school provision

	Total	Monday	Tuesday	Wednesday	Thursday	Friday
% providers with spare capacity	79%	79%	77%	77%	78%	84%
Average % spare capacity	36%	38%	33%	33%	34%	42%
Average no. of spare places	8	7	6	7	8	8
Total no. of spare places	54,700	11,000	8,900	11,100	12,100	11,700
Unweighted base	1,784	363	362	370	353	336

Source: How many children were booked to attend your after school provision on that [reference day]? How many extra children would you have been willing and able to take in your after school provision on that day?

Table A.7 Total number of places booked, total number of spare places, total % providers with spare capacity and average % spare capacity by region - group-based full day provision

	England	East Midlands	East of England	London	North East	Yorkshire and Humberside	North West	South East	South West	West Midlands
Total no. of places booked	555,600	45,600	55,400	89,300	19,200	52,500	85,400	95,600	53,100	59,400
Total no. of spare places	139,200	12,600	12,000	22,000	6,200	14,900	23,500	20,500	13,000	14,500
Total % providers with spare capacity	75%	76%	74%	69%	83%	77%	81%	71%	73%	78%
Average % spare capacity	20%	21%	19%	19%	28%	22%	21%	18%	19%	20%
Unweighted base	3968	347	425	522	150	407	561	637	473	446

Source: How many under school-aged children were booked to attend your full day care provision on that [reference day]? How many extra children would you have been willing and able to take in your full day provision on that day?

Table A.8 Total number of places booked, total number of spare places, total % providers with spare capacity and average % spare capacity by region - group-based sessional provision

	England	East Midlands	East of England	London	North East	Yorkshire and Humberside	North West	South East	South West	West Midlands
Total no. of places booked	220,800	16,100	35,800	33,800	6,500*	13,700	18,800	53,100	25,900	16,900
Total no. of spare places	36,900	3,600	3,900	4,300	1,000*	2,800	4,900	8,500	5,100	2,600
Total % providers with spare capacity	44%	48%	45%	35%	33%*	51%	46%	47%	56%	42%
Average % spare capacity	13%	15%	10%	10%	13%*	15%	16%	12%	15%	11%
Unweighted base	1858	156	323	184	57*	125	170	423	269	151

Source: How many different under school aged children were booked to attend your sessional provision at any time throughout that [reference day].
How many, if any, children that needed provision throughout the whole day would you have been willing and able to take on that day?
*Low base size

Table A.9 Total number of places booked, total number of spare places, total % providers with spare capacity and average % spare capacity by region - group-based before school

	England	East Midlands	East of England	London	North East	Yorkshire and Humberside	North West	South East	South West	West Midlands
Total no. of places booked	82,900	8,200	8,000	7,600	3,600*	9,600	17,500	9,800	7,000	11,600
Total no. of spare places	51,400	5,700	4,600	4,600	2,700*	6,000	9,100	7,500	5,700	5,500
Total % providers with spare capacity	83%	81%	82%	77%	87%*	82%	81%	79%	85%	82%
Average % spare capacity	43%	44%	41%	49%	50%*	41%	38%	48%	50%	39%
Unweighted base	1564	179	174	105	88*	198	246	182	191	201

Source: How many children were booked to attend your before school provision on that [reference day]?
How many extra children would you have been willing and able to take in your before school provision on that day?
*Low base size

Table A.10 Total number of places booked, total number of spare places, total % providers with spare capacity and average % spare capacity by region - group-based after school

	England	East Midlands	East of England	London	North East	Yorkshire and Humberside	North West	South East	South West	West Midlands
Total no. of places booked	122,400	12,400	12,100	14,500	5,200*	14,100	24,000	15,300	9,900	15,100
Total no. of spare places	54,700	6,100	5,200	7,800	2,600*	5,600	9,800	6,700	5,400	5,600
Total % providers with spare capacity	79%	79%	72%	80%	82%*	79%	80%	74%	78%	81%
Average % spare capacity	36%	37%	31%	41%	41%*	33%	34%	38%	38%	34%
Unweighted base	1784	203	204	143	95*	218	283	209	203	226

Source: How many children were booked to attend your after school provision on that [reference day]?
How many extra children would you have been willing and able to take in your after school provision on that day?
*Low base size

Table A.11 Total number of places booked, total number of spare places, total % providers with spare capacity and average % spare capacity by region - school-based nursery morning

	England	East Midlands	East of England	London	North East	Yorkshire and Humberside	North West	South East	South West	West Midlands
Total no. of places booked	213,100	17,200	20,600	39,900	17,300	27,100	27,500	25,900	12,500*	25,000
Total no. of spare places	30,700	3,300	2,900	4,200	2,600	4,600	4,300	3,800	1,700*	3,300
Total % providers with spare capacity	42%	46%	33%	33%	41%	45%	50%	46%	58%*	44%
Average % spare capacity	13%	15%	12%	9%	13%	14%	15%	15%	15%*	14%
Unweighted base	1521	148	147	222	155	205	235	160	81*	168

Source: How many children were booked to attend your nursery provision that ran in the morning on that [reference day]?

How many extra children would you have been willing and able to take in your nursery provision that ran in the morning on that day?

*Low base size

Table A.12 Total number of places booked, total number of spare places, total % providers with spare capacity and average % spare capacity by region - school-based nursery afternoon

	England	East Midlands	East of England	London	North East	Yorkshire and Humberside	North West	South East	South West	West Midlands
Total no. of places booked	171,900	14,000	15,000	33,900	13,900	23,000	20,800	20,000	10,500*	20,800
Total no. of spare places	48,300	4,600	4,400	7,700	3,700	6,800	7,400	5,800	3,200*	4,900
Total % providers with spare capacity	64%	58%	63%	57%	56%	68%	65%	67%	76%*	62%
Average % spare capacity	24%	24%	24%	18%	23%	24%	29%	24%	29%*	23%
Unweighted base	1521	148	147	222	155	205	235	160	81*	168

Source: How many children were booked to attend your nursery provision that ran in the afternoon on that [reference day]?

How many extra children would you have been willing and able to take in your nursery provision that ran in the afternoon on that day?

*Low base size

Table A.13 Total number of places booked, total number of spare places, total % providers with spare capacity and average % spare capacity by region - school-based reception

	England	East Midlands	East of England	London	North East	Yorkshire and Humberside	North West	South East	South West	West Midlands
Total no. of places booked	672,000	61,000	76,900	113,700	33,300	64,400	87,100	111,300	59,400	64,800
Total no. of spare places	59,800	5,200	6,900	7,100	3,400	7,100	8,800	7,900	7,100	6,400
Total % providers with spare capacity	48%	48%	56%	42%	45%	56%	42%	43%	48%	49%
Average % spare capacity	11%	10%	10%	6%	10%	14%	11%	10%	13%	12%
Unweighted base	2037	199	203	260	171	254	334	234	158	224

Source: How many children were booked to attend your reception classes on that [reference day]?

How many extra children would you have been willing and able to take in your reception provision on that day?

Table A.14 Total number of places booked, total number of spare places, total % providers with spare capacity and average % spare capacity by region - school-based (before school)

	England	East Midlands	East of England	London	North East	Yorkshire and Humberside	North West	South East	South West	West Midlands
Total no. of places booked	211,600	14,800	21,500	30,400	16,400	22,200	33,800	27,600	20,800*	24,000
Total no. of spare places	95,500	7,600	11,200	11,300	5,900	8,600	17,900	12,200	11,800*	9,000
Total % providers with spare capacity	71%	78%	63%	68%	60%	73%	72%	71%	78%*	78%
Average % spare capacity	32%	33%	27%	27%	27%	34%	34%	31%	37%*	32%
Unweighted base	1300	118	122	202	121	157	200	145	98*	137

Source: How many children were booked to attend your before school provision on that [reference day]? How many extra children would you have been willing and able to take in your before school provision on that day?

*Low base size

Table A.15 Total number of places booked, total number of spare places, total % providers with spare capacity and average % spare capacity by region - school-based (after school)

	England	East Midlands	East of England	London	North East	Yorkshire and Humberside	North West	South East	South West	West Midlands
Total no. of places booked	142,600	9,300*	14,600*	29,000	6,000*	9,600*	22,400	22,300	14,700*	14,700*
Total no. of spare places	58,200	5,600*	5,700*	9,400	2,800*	4,700*	10,300	5,900	8,200*	5,600*
Total % providers with spare capacity	72%	76%*	60%*	65%	66%*	77%*	75%	81%	80%*	67%*
Average % spare capacity	31%	37%*	26%*	27%	35%*	37%*	33%	24%	38%*	28%*
Unweighted base	831	65*	84*	142	60*	82*	131	105	74*	88*

Source: How many children were booked to attend your after school provision on that [reference day]?

How many extra children would you have been willing and able to take in your after school provision on that day?

*Low base size

Table A.16 Total number of places booked, total number of spare places, total % providers with spare capacity and average % spare capacity by region - childminders

	England	East Midlands	East of England	London	North East	Yorkshire and Humberside	North West	South East	South West	West Midlands
Total no. of places booked	121,400	9,100*	15,100	21,100	4,200*	12,100*	11,700	25,400	13,200	9,600*
Total no. of spare places	27,900	2,200*	3,800	5,300	1,000*	3,100*	4,700	3,300	2,100	2,600*
Total % providers with spare capacity	53%	62%*	55%	56%	56%*	44%*	58%	47%	56%	60%*
Average % spare capacity	24%	27%*	25%	27%	26%*	20%*	26%	21%	23%	23%*
Unweighted base	907	75*	102	141	36*	87*	111	189	103	63*

Source: How many different under school-aged children were booked to attend your childminding provision on that [reference day]? Please include any of your own children if they occupied your childminding places.

How many, if any, extra under school-aged children that needed provision throughout the day would you have been willing and able to take on that day?

*Low base size

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