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Childcare and Early Years Providers Survey 2011

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Government policy and may make reference to the Department for Children, Schools and Families (DCSF) which has now been replaced by the Department for Education (DfE).

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1. Summary

1.1 Introduction

The Department for Education commissioned TNS BMRB to collect information about childcare and early years provision across England in 2011. In this report the survey findings are drawn together to provide an overview of the whole childcare and early years sector, as well as highlighting similarities and differences between specific types of provider.

Where appropriate, the findings from the 2011 survey have been compared with those from similar surveys conducted in 2010, 2009, 2008, 2007, 2006, 2005, 2003 and 2001. As discussed in detail in chapter 2, it was necessary to introduce changes to the sampling methodology in 2009 and 2010 - as such, year on year changes comparing data from 2010 onwards with data from earlier years should be viewed bearing this in mind. In general it is clear that long term trends in the estimated number of providers do follow consistent trends, but it is still possible that the estimate of the precise number of estimated providers in a specific year may have been influenced by these changes to sampling approach.

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

1.2 Characteristics of provision

There has been a dramatic transformation of the childcare market in England over the past decade. The number and profile of providers has changed substantially since 2001, and the number of places available to children has increased substantially over this time.

In 2011, the survey recorded 107,900 settings providing different types of childcare and early years care, of which 15,700 were early years providers in maintained schools and 92,200 were childcare settings. This marks a slight increase from the figures in 2010, when the survey recorded a total of 105,100 childcare and early years settings. This change was driven by an increase in the total number of childcare settings, from 89,500 in 2010 to 92,200 in 2011.

1.2.1 Childcare provision overview

Childminders

In 2011, the downwards trend in the number of working childminders that began in 2008 came to an end. In 2011, the survey recorded a total of 48,800 active childminders, an increase of three per cent on the 47,400 who were active in 2010. Childminders were also the most optimistic of all the childcare providers when it came to future growth, with 16 per cent saying that they planned to expand their provision in the next year. It should, however, be noted that the current total of 48,800 active childminders is well below the levels seen from 2005 to 2007 (when the survey recorded between 57,700 and 59,800 active childminders).

As in previous years, there were more childminders than there were any other type of specific childcare setting (though the smaller scale of childminders' provision means that they actually care for less children overall than each of the different types of group based childcare provider). Childminders supply the broadest provision of all the childcare providers, catering for both pre-school and school aged children and typically providing care throughout full days and with availability throughout the year.

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

Continuing the pattern that has been seen consistently in previous waves of the survey, childminders were less strongly represented in the less affluent areas of the country, with only 19 per cent of all childminders to be found in the 30 per cent most deprived areas.

Full day care providers

Full day care settings were the most widespread of all the different types of group based childcare provision, with the survey estimating a total of 17,600 such settings in 2011. This constitutes a five per cent increase since 2010 (when there were 16,700 full day care settings) and continues the long-term trend whereby the estimated number of full day care providers has increased every year since 2001. Over the past five years (since 2006) the survey estimates that the number of full day care settings has increased by 39 per cent – a change that is at least partly driven by the large number of sessional settings that have switched to full day provision, presumably in response to increased parental demand for full day provision.

Like childminders, full day care providers cover a full and long day and are typically open all year round. They usually cater for pre-school children and tend to be the type of provision used by working parents. Although most full day care settings are privately run (61 per cent), the voluntary sector also plays a significant role, accounting for 31 per cent of all full day care settings in 2011.

Maintained providers have a very specific role in the full day care sector – while they account for a small proportion of providers overall, the maintained sector is responsible for most of the full day care provision offered on-site in children's centres. The number of children's centres offering full day care on site continued to fall this year, with the total of 550 in 2011 representing a sharp decline in numbers from the peak of 1,000 that the survey recorded in 2008 and 2009.

Full day care settings were distributed fairly evenly across areas with differing levels of deprivation, with 25 per cent of all such settings to be found in the 30 per cent most deprived areas. Over time, as the number of full day care settings has increased, the proportion to be found in the most deprived areas has decreased (from 30 per cent in 2007 to 25 per cent in 2011), suggesting that the new settings which have opened over this period have tended to be clustered in the wealthier areas. However, full day care providers based specifically within children's centres remain heavily concentrated in the less affluent areas of the country, with 71 per cent of all such settings to be found in the 30 per cent most deprived areas in 2011. This is a result of government guidance requiring children's centres in the 30 per cent most deprived areas to offer full day care provision, while children's centres operating outside the most deprived areas were given more flexibility about the type of childcare provision they offered.

Sessional providers

The number of sessional settings fell by five per cent between 2010 and 2011 (from 8,300 to 7,900). This continues a longer term downward trend and since 2006 there has been a decrease of 19 per cent in the number of sessional settings. However, this decrease at least partly reflects a tendency for sessional settings to switch their provision to full day care, rather than being a sign that such providers are leaving the sector altogether.

Sessional settings are more likely to be voluntary run than any of the other types of group based provider. Six in ten sessional settings were voluntary run in 2011 (60 per cent), though this is a decrease from 64 per cent in 2010 and 67 per cent in 2009. Sessional settings were also more likely to be found in the more affluent areas of the country, with 80 per cent being located in the 70 per cent least deprived areas.

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Out of school providers

In 2011, the total number of out of school settings rose from 17,200 to 17,900, which again continues the annual increases that have been seen in previous years. Of these 17,900 settings, 10,000 offered after school care (an increase of five per cent compared to 2010) and 7,900 offered holiday care (an increase of three per cent compared to 2010).

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

Ownership of after school clubs is split between privately run settings (43 per cent), voluntary run settings (24 per cent) and maintained settings (32 per cent) and there have not been any marked changes in this profile over time. Half of holiday clubs were privately run in 2011 (50 per cent), while a quarter (25 per cent) were voluntary run and around a quarter (24 per cent) were maintained. Since 2007 there has been a degree of change in the profile of holiday club ownership, with private providers accounting for a larger proportion of the holiday club sector as it has grown in size (44 per cent were privately owned in 2007, compared to 50 per cent in 2011).

1.2.2 Early years provision overview

The number of early years providers in 2011 remained the same as that which was recorded in 2010 and 2009, with a total of 15,700 in each of those three years. Of those, 400 were nursery schools, 6,700 were primary schools with nursery and reception classes, and 8,600 were primary schools with nursery but no reception classes.

Nursery schools remain particularly important in the 30 per cent most deprived areas of the country, where 59 per cent of all nursery schools were to be found in 2011. This was also true, to a lesser extent, of primary schools with nursery and reception classes, 44 per cent of which were to be found in the 30 per cent most deprived areas. Conversely, primary schools with reception classes but no nursery classes tended to be found in wealthier areas, with 87 per cent of all such settings to be found in the 70 per cent least deprived areas.

1.3 Places and children

The estimated number of registered places offered across all types of childcare and early years settings decreased slightly in 2011, falling by two per cent from 2,755,800 to 2,708,100. When looking at this total figure, which adds the separate totals for each specific type of care together, it should be borne in mind that any given child may occupy more than one of those places (for example attending both full day care and holiday clubs).

The number of registered full day care places remained essentially stable between 2010 and 2011 (721,500 in 2011 compared to 716,700 in 2010). This represents a 33 per cent increase compared to the number of full day care places in 2007 (544,200). There were more than twice as many places offered by full day care settings than by any of the other specific types of childcare provider, with after school clubs offering the next highest number of childcare places (357,400 in 2011).

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

In spite of the increase in the total number of out of school providers in 2011, the number of registered places offered by such settings actually decreased slightly, falling by three per cent for both after school clubs and holiday clubs. In 2011 there were a total of 339,300 registered holiday club places and 357,400 after school places.

Each childminder cares for a relatively small number of children, meaning that in total they accounted for 236,900 registered places. In spite of the increase in the number of active childminders in 2011, the number of places registered with them fell by 3 per cent (from 245,100 in 2010), pointing to a decrease in the number of children registered with each childminder. This figure marks a continuation of the longer term decline in the number of registered childminder places recorded by the survey, falling from 262,900 in 2009 and from 291,500 in 2007.

Early years providers in maintained schools had an estimated total of 802,000 registered places in 2011, which was three per cent lower than the total of 825,500 in 2010. Relatively few of these were accounted for by nursery schools (25,900), while primary schools with nursery and reception classes accounted for the majority of early years places, with 489,100 registered to them. Primary schools with reception but no nursery classes accounted for the other 286,900 registered places, which was seven per cent lower than the number in 2010 (308,400), though broadly in line with the number seen in 2006.

Overall, across all types of provision in 2011, the total number of places to be found in the 30 per cent most deprived areas remained very similar to the total in 2010 (778,300 in 2011 compared to 770,800 in 2010). The number of holiday club places in the most deprived areas did, however, rise between 2010 and 2011 (from 111,200 to 120,400).

1.3.1 Child vacancies

When considering data relating to the number of vacancies, it should be borne in mind that 100 per cent occupancy rates are not realistic in most settings, as there will be peaks and troughs in demand on different days of the week (and our data relates to the number of vacancies on an average day). Also, new providers may also find that it takes time to build up the number of children on their books, which will again tend to lead to increases in spare capacity in any expanding parts of the sector.

In 2011, there were an estimated 462,500 vacancies across all types of provider. The amount of spare capacity in full day care settings increased from 122,700 places in 2010 to 134,600 places in 2011. On average there were eight vacancies per full day care setting, the same number as in 2010 (indicating that the increase in spare capacity is linked to the increase in the total number of full day care settings in 2011 rather than to a fall in demand). The number of vacancies in full day care settings based specifically in children's centres fell from 4,000 to 2,900 (six per setting), reflecting the reduction in the number of such settings in 2011.

In 2011, holiday clubs continued to have the largest amount of spare capacity per setting, with an average of 11 vacancies per setting (compared to an average of eight vacancies per setting in after school clubs). In total there were 77,700 after school vacancies and 77,600 holiday club vacancies in 2011.

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

The average number of vacancies in sessional providers continued to rise in 2011, and now stands at six vacancies per setting (compared to five per setting in 2010 and only two per setting in 2008). It is striking that the amount of spare capacity in sessional settings continues to rise even as the number of such settings decreases, and would seem to suggest that a further decline in the number of sessional settings may be seen in the future. Overall there were 47,200 sessional vacancies in 2011.

There was little change in the number of vacancies amongst childminders, with a total of 62,000 in 2011 (compared to 61,500 in 2010). This equates to an average of one vacancy per active childminder, a figure that has remained constant since 2006.

The average number of vacancies in nursery schools increased to 4,000 in 2011 (compared to 3,000 in 2010 and 1,400 in 2007). There was an associated increase in the number of vacancies per nursery schools, from eight per setting in 2010 to 10 per setting in 2011 (and the difference compared to 2007, when there were only three vacancies per nursery school, is quite pronounced). There was a decrease in the average number of vacancies per setting in primary schools with nursery and reception classes (six per setting in 2011, compared to eight in 2010). The number of vacancies in primary schools with reception but no nursery classes continued to fall in 2011 and now stands at two per setting (compared to three per setting in 2010 and five per setting in 2007). Overall there were 40,100 vacancies in primary schools with reception and nursery classes, and 19,300 in primary schools with reception but no nursery classes.

Overall, around 27% of the vacancies to be found nationally in 2011 were located in the 30 per cent most deprived areas, a proportion that is broadly in line with the proportion seen in previous years. Though 35 per cent of holiday club places were to be found in the most deprived areas, only 29 per cent of holiday club vacancies were in those areas, suggesting that the demand for holiday clubs was stronger in those areas.

1.4 Staff

The total number of staff working across all childcare and early years settings decreased by two per cent, falling from 434,100 in 2010 to 426,500 in 2011 (this total includes both paid and unpaid staff). Nevertheless, this remains a far higher number than was seen in 2006 (347,300). It should be noted that when looking at any totals combining the number of staff in different types of setting, it is likely that some double counting takes place (as a given staff member may work in more than one type of setting, for example working in both sessional and holiday care).

In contrast to the decreasing total staff figure, the number of people working in full day care settings rose by three per cent, from 213,300 in 2010 to 219,300 in 2011. This increase was driven by an increase in the number of *paid* staff, which rose from 187,800 in 2010 to 196,700 in 2011. The number of *unpaid* staff actually decreased from 26,800 in 2010 to 22,700 in 2011 and this was a trend which was consistent for all the different types of group based childcare provider. In total the number of unpaid staff in all group based settings fell by 19 per cent (declining from 56,900 in 2010 to 46,300 in 2011).

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

It is possible that an increase in the number of people joining apprenticeship schemes has contributed to this decline in the unpaid workforce (with 7,300 more people starting an apprenticeship in the 'children's care, learning and development' category in the 2010/2011 academic year compared to the preceding year).¹

Overall there were an estimated 63,500 staff working in sessional providers, 68,500 in after school clubs and 75,200 in holiday clubs. The number of staff working in full day care settings in children's centres declined sharply, falling from 12,900 in 2010 to 8,600 in 2011 (reflecting the reduced number of children's centres now offering full day care on site). The number of staff working in early years settings also decreased, falling from 127,600 in 2010 to 122,900 in 2011.

1.4.1 Pay

The long term trend for wages in the childcare sector to increase more rapidly than those in the broader national economy came to an end in 2011. This is likely to be connected to the challenging economic climate rather than being a sign of any change in the fundamentals that had previously been pushing staff costs up (i.e. low wages in the childcare sector compared to the national average wage and increasing levels of qualification amongst the workforce).

Between 2010 and 2011 there was no significant change in the pay of staff working in full day care, sessional and after school settings. However, average pay in holiday clubs fell by nine per cent while average pay in those children's centres which still offered full day care rose by four per cent (though this may be attributable to differences in the profile of the children's centres that continued to offer full day care provision compared to those that ceased their provision in 2011).

Staff working in full day care settings based in children's centres earned more per hour than staff at other childcare providers, earning an average of £11.30 per hour in 2011. This was followed by staff in holiday clubs and after school clubs, who earned £8.20 on average. Staff in sessional providers earned £7.90 per hour and full day care staff earned £7.80 per hour in 2011.

By way of context, the national average hourly wage for UK employees rose by one per cent between 2010 and 2011, from £14.65 to £14.76.²

In the early years sector, average pay remained essentially flat between 2010 and 2011 (the data showed a one per cent increase for nursery schools and for primary schools with reception but no nursery classes, but this change was not statistically significant).

1.5 Qualifications

Raising the level of qualification of the childcare workforce has been a key focus in recent years and one that remains of prime importance, as highlighted by the recent findings of the Nutbrown Review.³ This is an area in which very significant progress has been made in recent years and the upward trend in qualification levels was again maintained in 2011.

¹ BIS Data Service, Statistical First Release, 28th June 2012, Apprenticeship Supplementary Tables, Breakdown by Framework, Level and Gender.

http://www.thedataservice.org.uk/statistics/statisticalfirstrelease/sfr_supplementary_tables/Apprenticeship_sfr_supplementary_tables/

² ONS Annual Survey of Hours and Earnings, 2011 Provisional Results (SOC 2000) - Hourly pay excluding overtime tables <http://www.ons.gov.uk/ons/publications/re-reference-tables.html?edition=tcn%3A77-235202>

³ Nutbrown, C (June 2012), Nutbrown Review, Foundations for Quality Final Report <http://www.education.gov.uk/nutbrownreview>

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

The proportion of paid staff in full day care settings with at least a relevant level 3 qualification had increased to 84 per cent in 2011 (compared to 81 per cent in 2010 and 72 per cent in 2007). The proportion with a level 6 qualification had also risen (from four per cent in 2007, to eight per cent in 2010 and 11 per cent in 2011).

Childminders had also seen further increases in qualification levels this year, with 59 per cent now qualified at level 3 (compared to 54 per cent in 2010 and 41 per cent in 2007), though they remain some way behind staff in group based settings in this regard.

Qualification levels in early years settings were typically higher than those in childcare settings. Between 77 per cent of staff (in primary schools with reception but no nursery classes) and 88 per cent (in nursery schools) had at least a level 3 qualification. There was also a relatively high proportion of staff qualified to at least level 6 in the early years settings - 34 per cent in nursery schools, 41 per cent in primary schools with nursery and reception classes and 45 per cent in primary schools with reception but no nursery classes.

1.6 Financial information

1.6.1 Profitability

In 2011, the proportion of settings reporting that they had made a *profit* was on a par with the proportions seen in 2010. However, the proportion of full day care, sessional and holiday care settings that reported making a *loss* decreased in 2011 (while there was no change in the proportion of after school clubs and children's centres reporting a loss for their provision).

Amongst full day care settings, the proportion making a loss fell from 19 per cent in 2010 to 12 per cent in 2011. In sessional settings the equivalent decrease in the proportion of loss making settings was from 20 per cent to 14 per cent, while holiday clubs fell from 23 per cent in 2010 to 18 per cent in 2011. Around a fifth of after school clubs reported making a loss (22 per cent), while the full day care offered in children's centres was the most likely of all the types of care to be loss-making (31 per cent).

Providers based in the 30 per cent most deprived areas continued to be more likely to report making a loss than those in the 70 per cent least deprived areas. Nonetheless, the proportion of sessional settings in the most deprived areas that reported a loss fell from 27 per cent in 2010 to 18 per cent in 2011.

It is encouraging that the proportion of settings making a loss had not increased in 2011, bearing in mind the continuing economic turbulence in the wider economy.

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

2. Introduction

2.1 Policy background

The Government believes that families need to be sure that the early education and childcare they use is both of a high quality and affordable so that it gives children the best start in life; ensures they are ready for school; and enables parents to meet their own work commitments. For children growing up in disadvantaged families, their early experiences can either embed disadvantage, or give them the opportunity to break free of this cycle, and improving outcomes for these families is one of the focal points of the Government's policy for the foundation years.

In July 2011, it published its *Families in the Foundation Years* policy statement, setting out its vision for '...a family-friendly environment for all children to grow up in, where families are welcomed and supported, children are safe, and childhood is celebrated and enjoyed'.⁴

This statement, and the Government's established commitment to encouraging the provision of high quality health and early education services, have been driven by evidence showing the critical importance of the early years in determining short and longer term outcomes for children, and the kind of interventions that are likely to be most effective in supporting families with different needs.⁵ Alongside a range of health programmes, support for early education is seen as playing a key role in realising the Government's vision for the foundation years. The main initiatives underpinning this vision are highlighted briefly below.

- Free early education for all three and four year olds was extended to 15 hours a week in September 2010. In 2012, the Government also announced that this entitlement will become more flexible, so it can be taken between 7am and 7pm, and spread across two days instead of the current minimum of three days.⁶
- From September 2013, disadvantaged two year olds will have a legal entitlement to free early education (a total of 570 hours or 15 hours a week if distributed over 38 weeks). In 2013, they will be eligible to a free place if their families meet the criteria used to assess eligibility for free school meals or if they are looked after by the local authority. It is estimated that 20 per cent of two year olds (around 150,000) will be entitled to a place in this first phase. In 2014 eligibility will be extended to around 40 per cent of two year olds (approximately 260,000) and the Government is currently consulting on the eligibility criteria for this second phase.⁷

⁴ Families in the Foundation Years , web article, Department for Education, April 2012

<http://www.education.gov.uk/childrenandyoungpeople/earlylearningandchildcare/early/b0077836/introduction>

⁵ Families in the Foundation Years – Evidence Pack, Department for Education and Department of Health, July 2011

<http://media.education.gov.uk/assets/files/families%20in%20the%20foundation%20years%20full%20evidence%20pack%20final%2018%20july.pdf>

⁶ As above.

⁷ Extending Free Early Education to More Two Year Olds, Department for Education, July 2012

<http://www.education.gov.uk/aboutdfe/departamentalinformation/consultations/a00211261/extending-free-early-education-two-year-olds>

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

- The Early Years Foundation Stage (EYFS) statutory framework has been streamlined and took effect from September 2012. The reformed EYFS takes forward the Government's changes recommended by the 2011 Tickell Review. The reforms will aim to: reduce paperwork and bureaucracy; strengthen partnerships between parents and professionals; focus on the three prime areas of learning most essential for children's learning and development; simplify the age five assessment; and provide early intervention where needed, through the introduction of a progress check at age two.⁸

A recent report from the National Audit Office on the provision of free early education for three and four year olds found that DfE has made progress against many of its objectives in delivering the free entitlement, but if it is to achieve value for money it must look to address variations in take-up, quality of provision and the impact on attainment in later years.⁹

The Government is considering further ways of helping to strengthen early education and childcare with a view to ensuring that it is of high quality and affordable. These next steps include:

- Reviewing the existing early years workforce qualifications in order to ensure further progress towards the development of a highly qualified workforce of child and family centred practitioners. The report of the independent Nutbrown Review, published in June 2012, made a series of recommendations about how qualifications in the sector may be improved, building on the Tickell review of the EYFS, which highlighted the importance of having qualifications that are of a high standard and meet the needs of all learners.¹⁰ At the time of the publication of this survey the Government was considering Professor Nutbrown's findings in detail, but had announced that it would discuss the recommendations with the sector before responding later in the year.
- Looking at how the costs of childcare for working families and the burdens on childcare providers can be reduced, without compromising the safety or quality of provision. A commission led by the Children's Minister and the Minister for Disabled People has been established to look into this area and will report in autumn 2012.¹¹

To support the Government in its drive to develop the sector, the Childcare and Early Years Providers Survey series provides a valuable source of evidence. It will help to monitor progress towards meeting commitments made by the Government, as well as measuring the impact of broader demographic considerations, including:

⁸ Statutory Framework for the Early Years Foundation Stage 2012: setting the standards for learning, development and care for children from birth to five. Department for Education, 2012.

<http://media.education.gov.uk/assets/files/pdf/e/eyfs%20statutory%20framework%20march%202012.pdf>

⁹ National Audit Office (2012) Delivering the free entitlement to education for three- and four-year-olds

http://www.nao.org.uk/publications/1012/education_for_3-4-year-olds.aspx

¹⁰ Nutbrown, C. (June 2012), Nutbrown Review, Foundations for Quality Final Report

<http://www.education.gov.uk/nutbrownreview>

¹¹ Childcare Commission: Call for Evidence, web article, 19 July 2012

<https://www.education.gov.uk/aboutdfe/departmentalinformation/consultations/a00211976/childcare-commission-call-for-evidence>

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

Free early education for disadvantaged two year olds

- The planned extension of the free offer for disadvantaged two year olds to around 260,000 children in 2014 will require a substantial increase in capacity among those who cater for this age group, primarily daycare providers and childminders.
- Trend data on available places and planned changes will be essential to understand if the sector is building sufficient sustainable capacity to meet the continued demand for provision, including new places, and what can be done to overcome possible barriers to expansion.

The impact of a high quality workforce

- There is strong evidence showing that early education has a positive effect on children's social and cognitive development only if it meets certain quality standards, but some providers still operate below these standards.¹² The quality of staff, and in particular their qualification levels, is strongly associated with good quality provision, hence the Government's commitment to improve the quality of the early years workforce.
- The independent Nutbrown review has further underlined the importance of increasing the qualification levels of the workforce in this sector, as well as the importance of increasing the status of childcare and early years employment - a factor that is often linked, to some degree, with pay rates.¹³
- The survey series, which produces data on staff qualifications, training, pay, recruitment and retention, will provide essential data to assess progress towards improving the quality of the childcare workforce.

Changing demographic pressures

- In recent years the historical decline in the birth rate has gone into reverse, with the result that over the next decade there will be significant additional demands placed on the early education and childcare sector as a result of population growth.¹⁴
- The Childcare and Early Years Providers Survey will continue to allow a better understanding of the amount of spare capacity that currently exists in the system and how much additional capacity may be needed. It will also help to identify any related patterns which may emerge, for example whereby provider fees may change according to reductions or increases in spare capacity.

¹² Burchinal, M. R., Roberts, J. E., Riggins, R., Jr., Zeisel, S. A., Neebe, E., & Bryant, D. (2000). Relating quality of center-based child care to early cognitive and language development longitudinally. *Child Development*, 71(2), 339-357; Smith R., Purdon S., Schneider V., La Valle I., Woolny I., Owen R., Bryson C., Mathers S., Sylva K., Lloyd E. (2009) *Early Education Pilot for Two Year Old Children Evaluation*, Research Report DCSF-RR134, DCSF: London; Sylva K. et al. (1999) *Characteristics of the pre-school environment*, EPPE Technical Paper 6A, London, Institute of Education.

¹³ Nutbrown, C. (June 2012), Nutbrown Review, Foundations for Quality Final Report <http://www.education.gov.uk/nutbrownreview>

¹⁴ ONS National Population Projections (2010-based projections) indicate that the number of children aged 0-9 living in the UK is expected to increase from 7,451,000 in 2011 to 8,362,000 in 2021. This represents an increase of 912,000 children (or 12 per cent). The projected change in the number of children aged 0-4 is less pronounced, but sizeable nonetheless, rising from 3,936,000 in 2011 to 4,156,000 in 2021 (an increase of six per cent).

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

2.2 Objectives of the research

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

Previously, the Department for Children, Schools and Families (DCSF) and the Department for Education and Skills (DfES) commissioned surveys amongst childcare and early years providers in 1998, 2001, 2003, 2005, 2006, 2007, 2008, 2009 and 2010. The 2011 phase of research consisted of surveys amongst the nine following childcare and early years settings:

Childcare

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

Other Early Years providers

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

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

2.3 The survey

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

- Provider characteristics (ownership, charitable status, free early education sessions);
- Number of places and children attending (number of places, ages, vacancies);
- Staff characteristics (number of staff, pay, hours, time spent with children);
- Qualifications (qualifications held and worked towards by paid staff);
- Profitability

To minimise burden, the Childcare and Early Years Providers Survey alternates between a full questionnaire and a reduced questionnaire (that focuses only on the key measures) on a two yearly cycle. The 2011 survey employed the reduced questionnaire, which means that not all of the variables covered in the 2010 report appear in this year's version.

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

2.4 Survey design

This report is based on interviews conducted with senior managers¹⁵ of childcare providers (or in a small number of cases, an alternative senior member of staff), childminders, and head teachers/early years or foundation stage co-coordinators amongst the early years settings.

2.4.1 Questionnaire

Three different questionnaires were used; one for the childcare group (full day care, sessional, after school, holiday care and children's centres)¹⁶, one for the early years group (nursery schools, primary schools with reception but no nursery classes and primary schools with nursery and reception classes) and a third for childminders.

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

Interviews were conducted by telephone using CATI (Computer Assisted Telephone Interviewing) by Kantar Operations' fully trained telephone interviewers in Ealing and Hull.¹⁷ The short interviews for the sample building phase were conducted from 1st September to 23rd September 2011. The main survey interviews were carried out between 19th September and 12th December 2011.

2.4.2 Changes to the sampling approach

The 2011 survey replicated the approach that was taken in 2010 (and full details can be found in the technical appendix) and trends between those two years are directly comparable.

However, changes to the way in which Ofsted classifies providers meant that the 2010 surveys had to employ a different sampling method to that which had been used previously. The changes that were made in 2010 may potentially have impacted on trends between 2010 and earlier waves of the survey, as discussed in more detail below and in chapter 2.6.3.

There were three key factors which affected the surveys' samples in 2010; changes to Ofsted's classification of registered childcare providers; a change in the available sample source for school-run out of school providers; and a new sampling approach for the early years group.

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

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

¹⁵ No specific definition was provided for 'Senior Manager'. Settings decided themselves who best fitted this description.

¹⁶ Some questions were asked only of children's centres.

¹⁷ Kantar Operations provide the operational resources and capabilities for all Kantar's UK companies (including TNS BMRB).

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

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

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

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

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

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

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

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

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

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

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

2.4.3 Weighting and grossing

Data are weighted by region to ensure the figures are representative of providers throughout England. The population profiles used for the weighting of the 2011 survey data were taken from the School Census database of January 2010 for early years providers and for out of school provision by primary schools; the DfE database of children's centres in May 2011; and a snapshot of the Ofsted database from June 2011 for childcare providers and childminders.

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

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

When selecting the members of staff, respondents were instructed to list them in alphabetical order by surname and pick the first three or two in order to provide a random selection. The data were weighted at a provider level to the true number of staff that each provider employs.¹⁸

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

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

2.5 Structure of the report

The report is structured as follows:

- Chapter 1 Summary
- Chapter 2 Introduction
- Chapter 3 Characteristics of provision
- Chapter 4 Places and attendance
- Chapter 5 Workforce composition
- Chapter 6 Qualifications
- Chapter 7 Profitability

¹⁸ In some cases staff weights have been capped in order to prevent reducing the sample efficiency by too large a margin. Full details are given in section 4.3.1 of the Technical Report.

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

2.6 Notes on reading the report

2.6.1 Notes on numbers

In the tables, either grossed up figures or percentages are provided. Where the main report shows a table of percentages, the equivalent table showing grossed up figures may appear in Appendix 1 (or vice versa). The grossed up figures are based on the total number of providers registered with Ofsted in June 2011, recorded on the DfE database of children's centres in May 2011, or recorded on the School Census database in January 2010, excluding the proportion found by the survey to be no longer eligible for the survey (e.g. closed down, no longer in business).¹⁹ These grossed up figures are not exact and, like the percentages reported, are subject to margins of error.

Throughout the report, where the text comments on differences between subgroups of the sample, these differences have been tested for statistical significance and were found to be statistically significant at the 95 per cent confidence level or above, giving these findings a confidence interval of +/- five per cent. Tests were run on the effective sample sizes, factoring in design effects for each sample group (see the Technical Report). Occasionally comments may be made on shifts that were not statistically significant but which may nonetheless serve as an early indicator of future significant shifts. In such cases these changes are described as 'directional'.

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

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

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

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

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

¹⁹ In the 2009 dataset, the grossed up number of childcare providers and childminders was calculated based on the August 2008 Ofsted database, which was the most recent usable source at that time. As such, 18 months worth of updates to the Ofsted database occurred between the 2009 and 2010 surveys, which may have served to increase the magnitude of year on year changes in the data for childcare providers and childminders.

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

2.6.2 Notes on tables

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

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

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

Symbols used in tables:

* signifies a percentage that is greater than 0 but less than 0.5.

signifies a value that is less than 50.

† signifies a cell where data has not been included due to a base of less than 50.

‡ signifies a cell where data should be treated with caution due to a low base size.

+/-0 signifies no change from previous years.

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

Unless otherwise stated the figures referred to throughout the report are weighted.

2.6.3 Notes on trends

Where appropriate, comparisons are made with previous waves of the survey, chiefly the 2010, 2009, 2008 and 2007 waves.

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

As described in chapter 2.4.2, there were a number of sampling changes in 2010, which mean that care should be taken when comparing 2011 and 2010 results with those from previous years. The discussion below focuses on how the sampling changes impact on the survey's estimates of the number of providers, but it should be remembered that there may also be knock-on effects on the estimates of the number of staff and children attending (as well as any other variables influenced by the total number of providers). If the estimated number of providers increases, the estimates of the number of staff and attendees will also tend to increase. The results from 2010 and 2011 are, however, directly comparable.

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

It seems that the data for after school clubs and holiday clubs, in particular, may have been impacted by the change in sampling method, with a marked increase in the number of providers (and certain shifts in their profile) since 2009. One of the key changes in the out of school profile is that a higher proportion of such settings in 2010 also offered full day care than was the case in previous years. This shift may partly be a reflection of genuine trends in the sector, but the scale of the change would seem to indicate that the 2010 and 2011 samples of out of school providers may have included settings that were not within the scope of the sample in previous years. The fact that a relatively small proportion of out of school providers in the sample claimed to have opened in the past year also suggests that the sampling approach has played a part in the increase in the estimated number of such providers.

However, as discussed below, it should also be borne in mind that the 2009 data is likely to have underestimated the number of out of school providers at that time. Indeed, had the rate of increase in the number of out of school providers between 2007 and 2008 continued over the following two years, then the 2010 figures for the total number of providers would be very much in line with the earlier trend. In general it appears that long term trends recorded in the report are indeed genuine, but it should be borne in mind that the precise scale of changes over time and between years, particularly between 2009 and 2010, may have been affected by the need to adapt the sampling approach.

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

Sessional providers will also have been affected in a similar manner, and the increase in the total number (again detailed in chapter 3.1) between 2009 and 2010 may not reflect the true trend within the sector. It is likely that the 2009 data exaggerated the decline in numbers from 2008, while the 2010 data may have estimated a higher total than that which would have been found using the previous sampling approach.

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

For early years providers, the change in sample source from Edubase to the School Census in 2010 appears to have had a relatively limited impact on trends. Estimates for the total number of providers in each of the sub-groups (nursery schools, primary schools with nursery and reception classes, and primary schools with reception but no nursery classes) are relatively consistent with those seen in previous years.

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

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

The re-contact survey in 2009 still gave us an estimate of how many of the providers in the re-contact sample were no longer in business or providing that service, i.e. ineligible. However, to apply these ineligibility rates to recent snapshots of the total number of providers from the Ofsted/DCSF/Edubase databases of providers does not provide an accurate estimate of the total number of providers in 2009, as the ineligibility rates did not take account of any new providers. Furthermore, given the changes in the classification system used on the Ofsted database in September 2008, it was necessary to use an August 2008 snapshot of the database to calculate population estimates for childcare providers, rather than a more recent 2009 snapshot. All of the above factors mean that it is likely that the 2009 data underestimated the total number of providers, places and staff for all groups.

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

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

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

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

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

3. Characteristics of provision

This chapter discusses the number of providers in operation. It compares the distribution of settings across the most and least deprived areas, their geographical spread, and ownership profile. Where possible, changes over time are also examined.

3.1 Number of providers

Table 3.1 shows the number of providers of each type since 2006, while table 3.2 shows the percentage change in the number of providers between 2011 and previous years.

As shown by Table 3.1, the total number of settings in 2011 had increased slightly from the level seen in 2010, rising from 105,100 to an estimated 107,900. This builds on the small increase recorded between 2009 and 2010, though the 2011 figure represents a decrease of two per cent from 2006, when the total stood at 110,600.

	2011	2010	2009	2008	2007	2006
	No.	No.	No.	No.	No.	No.
Full day care	17,600	16,700	14,100	13,800	13,600	12,700
<i>Full day care in children's centres</i>	550	800	1,000	1,000	950	800
Sessional	7,900	8,300	7,800	8,500	8,700	9,700
After school clubs	10,000	9,500	7,900	8,800	8,500	7,700
Holiday clubs	7,900	7,700	6,400	6,500	5,800	6,400
Childminders - working	48,800	47,400	51,000	56,100	59,800	57,900
<i>Childminders - registered</i>	57,500	57,900	63,600	65,800	69,200	71,500
Childcare total²⁰	92,200	89,500	87,200	93,800	96,400	94,400
Nursery schools	400	400	450	450	450	450
Primary schools with nursery and reception classes	6,700	6,700	6,700	6,700	6,800	6,500
Primary schools with reception but no nursery classes	8,600	8,600	8,600	8,700	8,900	9,200
Early years total¹	15,700	15,700	15,700	15,900	16,200	16,200
Total provision¹	107,900	105,100	103,000	109,700	112,600	110,600
<i>Base: All childcare providers 2011, 2010, 2009, 2008, 2007, 2006. All early years provision in maintained schools 2011, 2010, 2009, 2008, 2007, 2006.</i>						

²⁰ The childcare total includes full day care, sessional providers, after school providers, holiday clubs and working childminders. The early years total includes nursery schools, primary schools with nursery and reception classes, and primary schools with reception but no nursery classes. It should be noted that a single setting may potentially offer more than one type of care. As such, the 'childcare total' reflects the total amount of provision being offered, where a single setting offering both full day care and holiday care would be counted twice. The same principal applies to the 'total provision' figures, which add the 'childcare total' and the 'early years total'. The total number of different settings may therefore be significantly lower than the figures shown in these totals.

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

	% change from 2010 to 2011	% change from 2009 to 2011	% change from 2008 to 2011	% change from 2007 to 2011	% change from 2006 to 2011
Full day care	5%	25%	28%	29%	39%
<i>Full day care in children's centres</i>	-31%	-45%	-45%	-42%	-31%
Sessional	-5%	1%	-7%	-9%	-19%
After school clubs	5%	27%	14%	18%	30%
Holiday clubs	3%	23%	22%	36%	23%
Childminders - working	3%	-4%	-13%	-18%	-16%
<i>Childminders - registered</i>	-1%	-10%	-13%	-17%	-20%
Childcare total	3%	6%	-2%	-4%	-2%
Nursery schools	0%	-11%	-11%	-11%	-11%
Primary schools with nursery and reception classes	0%	0%	0%	-1%	3%
Primary schools with reception but no nursery classes	0%	0%	-1%	-3%	-7%
Early years total	0%	0%	-1%	-3%	-3%
Total provision	3%	5%	-2%	-4%	-2%

*Base: All childcare providers 2011, 2010, 2009, 2008, 2007, 2006.
All early years provision in maintained schools 2011, 2010, 2009, 2008, 2007, 2006.*

The total for childcare provision increased from 89,500 in 2010 to 92,200 in 2011²¹, an annual increase of three per cent. This total of 92,200 was made up of; 17,600 full day care providers, 550 of whom provided full day care on site in children's centres; 7,900 sessional providers; 10,000 after school clubs; 7,900 holidays clubs; and 48,800 working childminders.

The number of early years providers has remained highly stable over the years. As was the case in both 2009 and 2010, there were 15,700 early years providers in 2011. This total of 15,700 was made up of; 400 nursery schools; 6,700 primary schools with nursery and reception classes; and 8,600 primary schools with reception but no nursery classes.

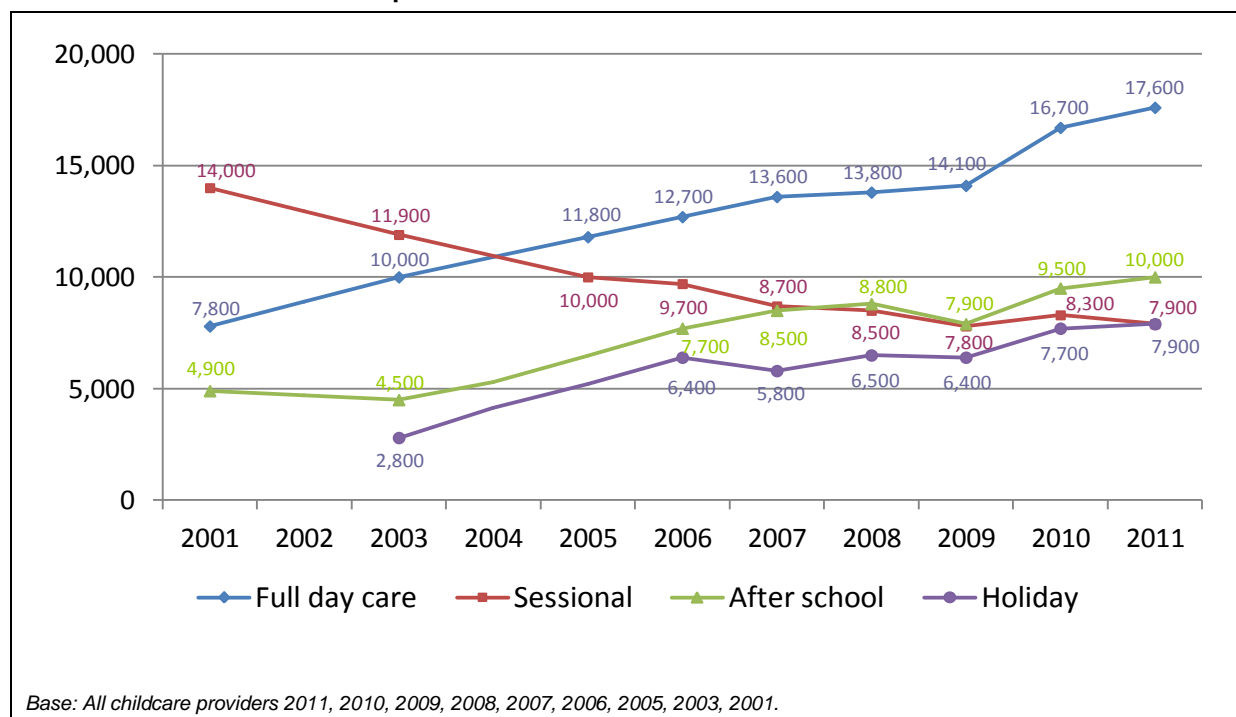
²¹ As noted in the preceding footnote, the total number of different settings may be significantly lower as any given setting may provide more than one type of care.

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

Childcare

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

Chart 3.1 Number of childcare providers



Looking across the past decade, chart 3.1 shows that there has been a sustained upwards trend in the number of full day care, after school and holiday care providers. Only sessional care has seen a decline in numbers over this time, falling markedly from 14,000 providers in 2001 to 7,900 in 2011 (a 44 per cent decrease).²²

The number of full day care providers has increased every year since 2001. With a total of 17,600 full day care providers in 2011, there has been a 126 per cent increase since 2001 and a five per cent increase since 2010. This latest increase in the number of full day care providers is a positive development bearing in mind the growing pressures and capacity challenges that will be faced by the childcare sector in the years to come, due to demographic changes²³ and the substantial expansion of the free entitlement to disadvantaged two year olds.²⁴

²² As discussed in chapter 2, it is possible that estimates of the number of providers in 2009 were slightly low, due to the re-contact nature of the sample in that year. It is also possible that the change of sampling approach in 2010 may have impacted on the data. Nonetheless, the long term trends in the number of different types of provider are clear and relatively consistent.

²³ ONS National Population Projections (2010-based projections) indicate that the number of children aged 0-9 living in the UK is expected to increase from 7,451,000 in 2011 to 8,362,000 in 2021. This represents an increase of 912,000 children (or 12 per cent). The projected change in the number of children aged 0-4 is less pronounced, rising from 3,936,000 in 2011 to 4,156,000 in 2021 (an increase of six per cent).

²⁴ By September 2013, 150,000 two year olds will be entitled to receive free early education and by September 2014 this figure is expected to increase to 260,000.

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

It should, however, be noted that the number of full day care settings based specifically in children's centres decreased by 31 per cent in 2011 and the number of such settings now stands at 550 (a 45 per cent decline from the peak of 1,000 that was seen in 2009). The factors underlying this trend are discussed in chapter 3.8.

As mentioned earlier, the number of sessional providers has continued to decrease in 2011. However, the rate of decrease during the second half of the decade has been lower than during the first half of the decade and the figures do appear to have stabilised to some extent in recent years. The decrease in the number of sessional providers has been more than offset by the increase in the number of full day care providers over time, and may well reflect increasing parental demand for childcare that covers longer hours.

Between 2010 and 2011 there was a five per cent increase in the number of after school clubs, with the total number now standing at 10,000. This marked a continuation of the long term growth trend which has been seen since the measurement of this specific provision started in 2003. There was also an increase in the number of holiday clubs, which rose by three per cent in 2011, to a total of 7,900. The Childcare and Early Years Survey of Parents 2010 shows that 43 per cent of parents who were non-users of holiday care said that they would be likely to use it if suitable holiday care was available. This increase in the number of providers should therefore help to ease the problems that these parents have had with the supply of care.²⁵

Childminders

Ofsted records show that there were around 57,500 registered childminders in England in June 2011.²⁶ However, as in previous years, a minority of these registered childminders were not actively caring for children and were therefore ineligible to participate in the survey. The proportion of registered childminders that were actively working increased from 82 per cent in 2010 to 85 per cent in 2011.

The total number of active childminders in 2011 was 48,800; this represents a three per cent increase since 2010 and marks a reversal of the longer term downward trend (in spite of the fact that the number of registered childminders actually decreased by one per cent over the same period). This is a small but encouraging increase in the number of childminders, which will help to sustain parental choice. It is also a positive development as childminders will be expected to play a key role in providing some of the new free early education places which are to be provided to disadvantaged two year olds.

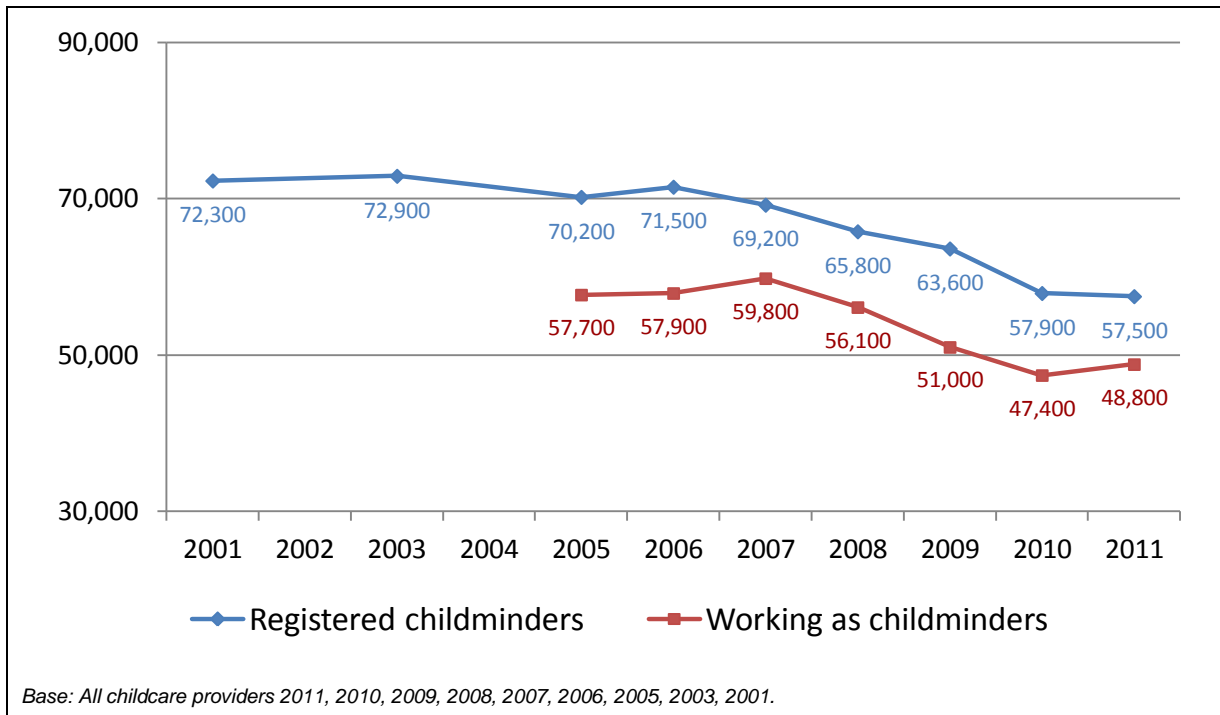
Chart 3.2 shows the number of childminders (both registered and active) since 2001.

²⁵ Smith, P, Gilby, N., Dobie, S., Hobden, S., Sullivan, L., Williams, M., Littlewood, M., D'Souza, J., Flore, G. (2012), Childcare and early years survey of parents 2010, OSR12/2012

²⁶ Based on a snapshot of the Ofsted Regulatory Support Application (RSA)

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

Chart 3.2 Number of childminders



Early years provision in maintained schools

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

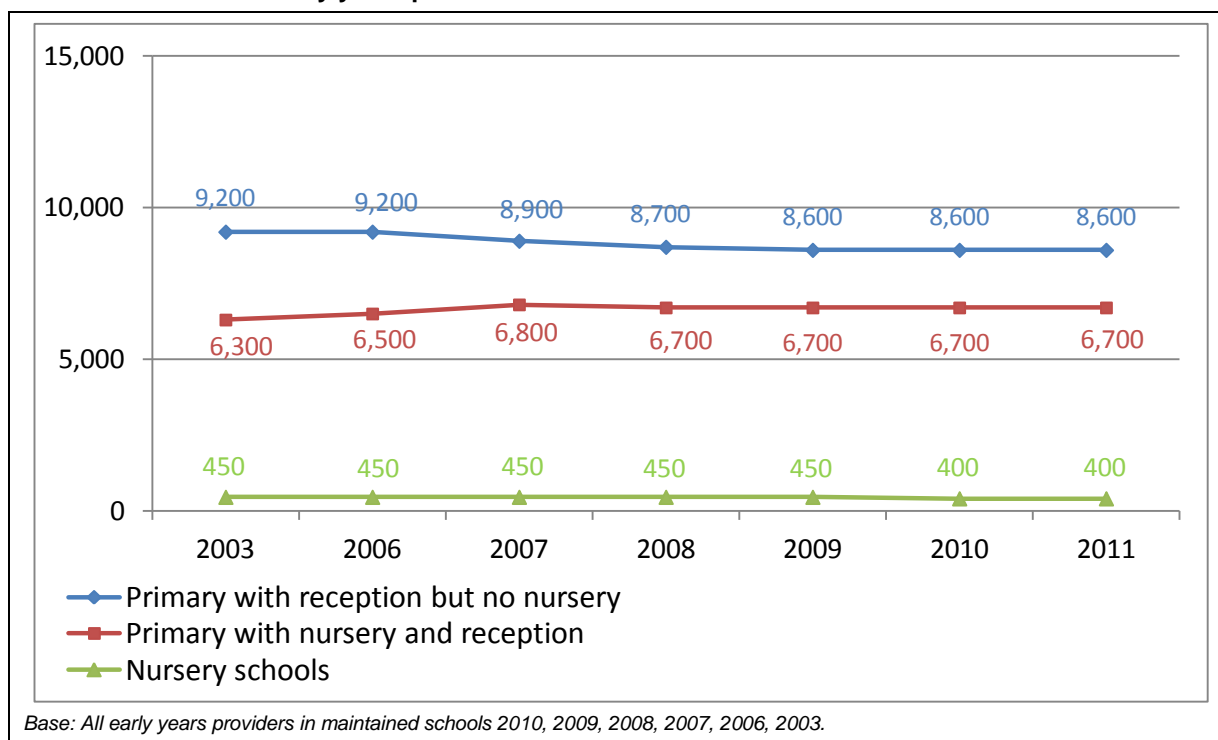
Overall the number of early years providers has been highly stable between 2003 and 2011 (around 16,000 in 2003 compared with 15,700 in 2011). Within this total, the number of primary schools with reception but no nursery classes has fallen by seven per cent from 2003 to 2011, though this decrease has been largely offset by an increase of six per cent in the number of primary schools with nursery and reception classes. There has been no change in number of providers for either of these groups since 2009.

The number of nursery schools has declined slightly since 2003 (although in the chart below this decline is slightly exaggerated due to the rounding of the number of providers to the nearest 50 for figures below 1000).²⁷ A proportion of this slight decrease in nursery numbers would be attributable to mergers between nurseries.

²⁷ The change in Nursery schools between 2009 and 2011 is less pronounced than chart 3.3 indicates as the data in the chart are rounded. The actual numbers fell from 434 in 2009, to 414 in 2011. See chapter 2.6.1 for further details of rounding.

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

Chart 3.3 Number of early years providers in maintained schools



3.2 Providers in deprived areas

Table 3.3 shows the proportion of providers that operate in the 30 per cent most deprived areas in England. Table 3.2a in Appendix 1 shows the equivalent figures for the *number* of providers that operate in areas of high and low deprivation.

Childcare

As shown in Table 3.3, the distribution of childcare providers between areas of high and low deprivation has remained essentially stable over time. Overall, 22 per cent of the total childcare settings were to be found in the 30 per cent most deprived areas in 2011, the same proportion as in 2010. However, because the overall number of settings has increased since 2010, this does mean that the absolute number of settings operating in the 30 per cent most deprived areas has actually increased, from 19,900 in 2010 to 20,900 in 2011 (see Table 3.2a in Appendix 1).

While the total number of children’s centres offering on-site full day care had decreased significantly this year, those that continued to operate remained heavily concentrated in the 30 per cent most deprived areas. Seven in ten children’s centres offering on-site full day care were located in the 30 per cent most deprived areas (71 per cent), a proportion that has remained stable since 2008. The skew towards deprived areas stems from the historic requirement for centres in these areas to provide full day care, while children’s centres outside the most deprived areas were under no such obligation.

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

In 2011, one in five (20 per cent) sessional care settings were located in the 30 per cent most deprived areas. This figure is similar to the proportion in 2010 (19 per cent) and maintains the longer term upwards trend (rising from 17 per cent in 2007). However, it should be borne in mind that although the *proportion* of sessional providers operating in the most deprived areas has increased over time, the *number* of such providers has remained fairly stable since 2007 (1,600 in 2011 compared to 1,500 in 2007). The increase in the proportion of sessional settings in deprived areas is actually driven by the declining number of sessional providers in the 70 per cent least deprived areas (which has fallen from 7,300 to 6,300).

Many providers who cease their sessional provision switch to offering full day care instead - as such, it would appear that this phenomenon has been more widespread in the 70 per cent least deprived areas. This idea is supported by the gradual decline in the proportion of full day care settings to be found in the most deprived areas (falling from 30 per cent in 2007 to 25 per cent in 2011).

The proportion of after school clubs and holiday clubs located in the 30 per cent most deprived areas in 2011 remained in line with the figures from 2010 (26 per cent of after school clubs and 31 per cent of holiday clubs).

Childminders

Childminders were the least likely of all the different types of childcare provider to operate in the 30 per cent most deprived areas in England, though the proportion has remained very stable over time. In 2011, 19 per cent of childminders were to be found in the 30 per cent most deprived areas.

Early years provision in maintained schools

Just over one in four (27 per cent) early years providers were located in the 30 per cent most deprived areas in England. Of the different types of early years provider, nursery schools were most likely to be based in the 30 per cent most deprived areas (59 per cent), compared to 44 per cent of primary schools with nursery and reception and 13 per cent of primary schools with reception but no nursery class.

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

	2011		2010		2009		2008		2007	
	30% most deprived areas	70% least deprived areas	30% most deprived areas	70% least deprived areas	30% most deprived areas	70% least deprived areas	30% most deprived areas	70% least deprived areas	30% most deprived areas	70% least deprived areas
Childcare settings	22%	78%	22%	78%	21%	79%	22%	78%	22%	78%
Full day care	25%	75%	26%	74%	26%	74%	29%	71%	30%	70%
<i>Full day care in children's centres</i>	71%	29%	73%	27%	72%	28%	71%	29%	77%	22%
Sessional	20%	80%	19%	81%	15%	85%	17%	83%	17%	83%
After school clubs	26%	74%	26%	74%	31%	69%	30%	70%	29%	71%
Holiday clubs	31%	69%	31%	69%	28%	72%	28%	72%	31%	69%
Childminders	19%	81%	19%	81%	18%	82%	20%	80%	18%	82%
Early years settings	27%	73%	25%	75%	24%	76%	28%	72%	25%	75%
Nursery schools	59%	41%	58%	42%	68%	32%	62%	38%	65%	35%
Primary schools with nursery and reception classes	44%	56%	41%	59%	43%	57%	50%	50%	44%	56%
Primary schools with reception but no nursery classes	13%	87%	10%	90%	8%	92%	10%	90%	14%	86%
<i>Base: All childcare providers 2011, 2010, 2009, 2008, 2007. Early years provision in maintained schools 2011, 2010, 2009, 2008, 2007</i>										

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

3.3 Providers by region

Table 3.4 shows the distribution of providers by Region. Table 3.3a in Appendix 1 shows the *number* of providers by Region.²⁸

Childcare

As with previous years there was considerable variation in the distribution of providers by Region, though the proportions in each region had generally remained very consistent when comparing 2011 to 2010. The only significant change was a decrease in the proportion of all children's centres offering on-site full day care which were to be found in the North West, which fell from 19 per cent in 2010 to 12 per cent in 2011.²⁹

The North East, Yorkshire and Humberside's share of children's centres providing full day care was 25 per cent whilst London's share was 23 per cent. No other region had more than a 12 per cent share.

A larger proportion of sessional and full day care providers operated in the South East (18 per cent for both types of provision) than in any other regions, as was the case in previous years.

After school clubs and holiday clubs were most frequently found in the North West (18 per cent of after school clubs and 16 per cent holiday clubs) or the North East, Yorkshire and Humberside (16 per cent for both). Southern regions (South West, South East and London) took a smaller share of the total number of holiday and after school providers than full day care providers.

The distribution of childminders has remained almost entirely static compared to both 2010 and 2009 (and remains highly similar to the distribution in 2008). The South East (20 per cent) and London (17 per cent) continued to encompass the largest proportion of childminders.

²⁸ In previous reports Regions were referred to as GOR (Government Office Region). After the Comprehensive Spending Review, it was confirmed that the GORs would close at the 31st March 2011.

²⁹ Base sizes for full day care in children's centres are relatively low (circa 300), so the scale of changes may be exaggerated due to the larger statistical margins of error associated with smaller samples. Nonetheless, there was a significant decrease in the proportion of all such children's centres that were to be found in the North West between 2010 (19 per cent) and 2011 (12 per cent). This suggests that there was more discontinuation of provision in the North West than was the case in other parts of the country.

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

	Full day care	<i>Full day care in children's centres</i>	Sessional	After school clubs	Holiday clubs	Childminders	Nursery schools	Primary schools with nursery and reception classes	Primary schools with reception but no nursery classes
Total number of providers	17,600	550	7,900	10,000	7,900	48,800	400	6,700	8,600
East Midlands	8%	2%	9%	9%	10%	9%	8%	7%	12%
East	11%	8%	14%	9%	10%	12%	10%	10%	13%
London	14%	23%	15%	13%	13%	17%	19%	19%	4%
North East	12%	25%	11%	16%	16%	14%	8%	9%	3%
Yorkshire & Humberside							8%	14%	8%
North West	13%	12%	12%	18%	16%	11%	17%	17%	14%
South East	18%	10%	18%	12%	13%	20%	11%	7%	20%
South West	12%	9%	11%	9%	10%	9%	4%	4%	17%
West Midlands	11%	11%	10%	14%	12%	8%	15%	13%	9%
<i>Base: All childcare providers 2011. All early years providers in maintained schools 2011</i>									

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

Early years provision in maintained schools

The levels of early years provision in maintained schools continued to vary considerably across the regions, but shifts in this distribution from year to year continue to be minimal in 2011.

Nursery schools continued to be heavily concentrated in London (19 per cent) and the North West (17 per cent). The smallest proportion was in the South West, where only four per cent of nursery schools were located.

Primary schools with nursery and reception classes were heavily concentrated in London (19 per cent) and the North West (17 per cent). However, in London, primary schools with reception but no nursery classes were very much the exception rather the rule (with London accounting for only four per cent of such settings).

Primary schools with reception but no nursery classes were concentrated in the South East (20 per cent) and the South West (17 per cent). Both these regions accounted for a much smaller proportion of primary schools with both nursery and reception classes (7 per cent in the South East and 4 per cent in the South West).

3.4 Ownership of provision

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

Tables 3.5a and 3.5b show the breakdown of providers by ownership.³⁰ Tables 3.5c and 3.5d in Appendix 1 show the *number* of providers by ownership.

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

In 2011 six in ten (61 per cent) full day care providers were privately run whilst three in ten (31 per cent), were run by voluntary organisations. These proportions had not changed significantly from the levels seen in 2010, though the longer term trend points towards an increase in the proportion of voluntary providers over time. The ownership pattern is reversed when looking at sessional care providers, with 34 per cent being privately owned and 60 per cent owned by voluntary organisations in 2011. Also in contrast to the development of the full day care sector, the longer term trend for sessional care providers is for a move from voluntary to private provision. A significant factor behind these divergent trends in ownership is that many former voluntary sessional providers have now extended their provision and switched to full day care.³¹

³⁰ It should be noted that respondents were able to give more than one response when answering, to allow for multiple ownership. As such, adding the individual types of ownership together will, in some cases, result in a total which is larger than the overall number of settings.

³¹ In the 2010 Childcare and Early Years Providers survey, 47 per cent of voluntary providers offering full day care said that in the past they had only offered sessional care. The equivalent figure for privately run providers was much lower (16 per cent).

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

On-site full day care provision in children's centres was less likely than other types of provision to be either privately or voluntarily owned (32 per cent). Two in three children's centres offering full day care were maintained (69 per cent), and most of these were run by local authorities (53 per cent).

Many children's centres grew from earlier Governmental funded settings such as Sure Start Local Programmes, Neighbourhood Nurseries and Early Excellence Centres. These would generally, but not always, have been owned and run by local authorities, explaining the relatively high level of local authority ownership in this area of childcare. It was intended that more centres should be developed from other sources such as privately run settings and settings run by voluntary organisations³². As the survey only covers full day care provision on site at children's centres, it is possible that a higher proportion of private and voluntary organisations are running full day care provision off site. However, we are unable to establish this with the current data set.

After school and holiday clubs were more likely to be privately run than under any other type of ownership. Around four in ten after school clubs (43 per cent) and five in ten holiday clubs (50 per cent) were privately run in 2011. The proportion of after school clubs in private ownership had risen between 2010 and 2011 (from 38 per cent to 43 per cent). Between 2009 and 2011, the proportion of after school and holiday clubs under voluntary ownership started to decline. The proportion of after school clubs under voluntary ownership fell from 32 per cent to 24 per cent, while the proportion of holiday clubs fell from 36 per cent to 25 per cent. Over the same period, there were increases of a similar scale in the proportion of such settings under private ownership. Bearing in mind the increase in the total estimated number of these out of school providers between 2009 and 2011, this would seem to suggest that the majority of providers that had recently joined the sector were under private ownership.

³² Sure Start Children's Centres: Phase 3 Planning and Delivery, DCSF
<http://publications.everychildmatters.gov.uk/eOrderingDownload/DCSF-00665-2007.pdf>

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

Characteristics of provision

	Full day care					Full day care in children's centres					Sessional				
	2011	2010	2009	2008	2007	2011	2010	2009	2008	2007	2011	2010	2009	2008	2007
Total number of providers	17,600	16,700	14,100	13,800	13,600	550	800	1,000	1,000	950	7,900	8,300	7,800	8,500	8,700
Private or Voluntary	91%	89%	88%	87%	87%	32%	34%	40%	30%	39%	94%	95%	95%	93%	93%
Private	61%	59%	66%	65%	66%	16%	16%	21%	12%	20%	34%	31%	28%	29%	29%
Voluntary	31%	30%	22%	22%	21%	16%	18%	19%	18%	19%	60%	64%	67%	64%	65%
Maintained	8%	12%	10%	11%	12%	69%	68%	57%	68%	58%	6%	7%	4%	6%	7%
Local authority	5%	6%	4%	5%	6%	53%	57%	50%	58%	49%	4%	4%	2%	4%	4%
School/college	3%	5%	6%	6%	7%	16%	11%	7%	10%	9%	2%	3%	2%	2%	3%
Other	1%	2%	2%	3%	2%	1%	3%	2%	3%	*	*	1%	*	1%	1%

Base: All childcare providers 2011, 2010, 2009, 2008, 2007

	After school clubs					Holiday clubs				
	2011	2010	2009	2008	2007	2011	2010	2009	2008	2007
Total number of providers	10,000	9,500	7,900	8,800	8,500	7,900	7,700	6,400	6,500	5,800
Private or Voluntary	67%	66%	69%	67%	68%	75%	75%	74%	72%	76%
Private	43%	38%	37%	37%	43%	50%	48%	38%	38%	44%
Voluntary	24%	28%	32%	30%	26%	25%	27%	36%	34%	32%
Maintained	32%	35%	30%	31%	33%	24%	26%	24%	24%	25%
Local authority	5%	7%	6%	9%	8%	5%	10%	14%	14%	13%
School/college	27%	28%	24%	22%	25%	19%	16%	10%	10%	12%
Other	1%	*	2%	3%	2%	1%	1%	4%	4%	3%

Base: All childcare providers 2011, 2010, 2009, 2008, 2007

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

3.5 Charitable status

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

As in previous years, sessional care providers were most likely to be not-for-profit organisations and there hadn't been any significant change in this regard since 2010 (73 per cent were not-for-profit in 2011 versus 74 per cent in 2010). The decrease compared to 2009, when 80 per cent of sessional providers were not-for-profit, was however maintained in 2011.

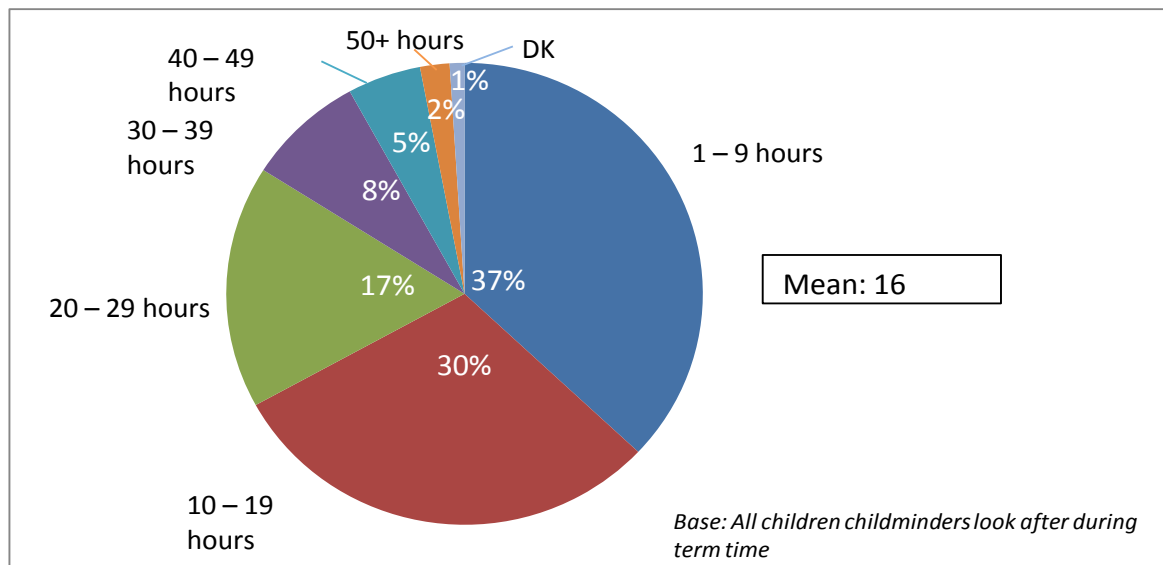
For all other types of providers, just over four in ten settings in 2011 operated on a not-for-profit basis (45 per cent of full day care providers, 46 per cent of children's centres offering full day care, 44 per cent of after school clubs and 41 per cent of holiday clubs). For full day care providers this marked an increase compared to 2010, when 40 per cent operated on a not-for-profit basis.

3.6 Childminder hours of care

Nine in ten childminders (90 per cent) accepted children both during term time and during the school holidays, a situation which has not changed significantly since 2008 (when 88% operated both in and out of term time).

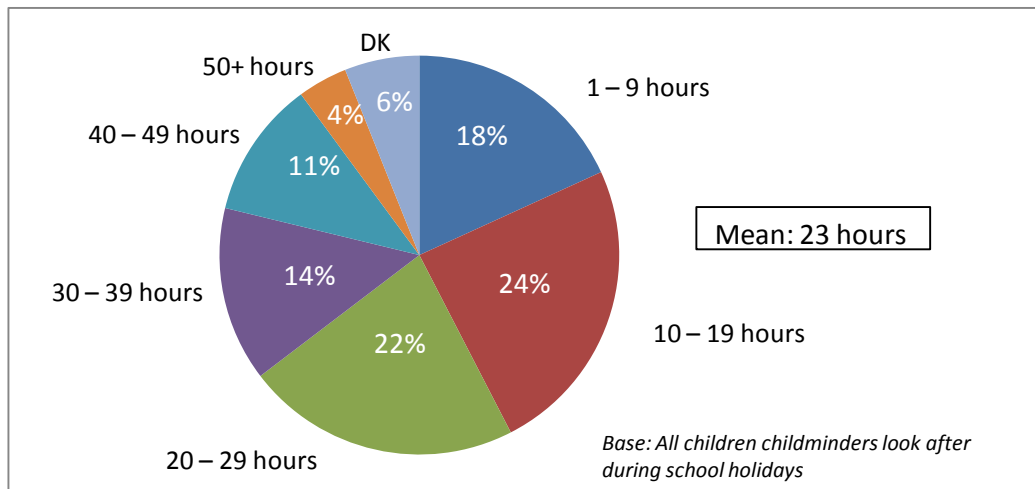
Childminders were also asked how long they looked after the children they were caring for (charts 3.3a and 3.3b). In a typical week, the average time spent looking after children was 16 hours in term-time and 23 hours during the school holidays. This is broadly in line with previous years.

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



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

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



3.7 Business expansion

	Proportion who have expanded in the last year			Proportion who plan to expand in the next year		
	2011	2010	2009	2011	2010	2009
Full day care	15%	15%	15%	11%	13%	13%
Full day care in children's centres	8%	8%	13%	9%	17%	12%
Sessional	11%	10%	10%	7%	10%	13%
After school clubs	21%	24%	12%	11%	16%	12%
Holiday clubs	16%	14%	13%	11%	13%	11%
Childminders	14%	16%	14%	16%	14%	13%

Base (1st column): All childcare providers 2011, 2010, 2009. All childminders 2011, 2010, 2009.

Base (2nd column): All childcare providers 2011, 2010, 2009 who have not expanded in the last 12 months. All childminders 2011, 2010, 2009 who have not expanded in the last 12 months

Following the same pattern as was seen in 2010, after school providers were the most likely to have expanded their provision in the 12 months leading up to the survey in 2011 (21 per cent). Nevertheless, 16 per cent of holiday clubs, 15 per cent of full day care providers and 14 per cent of childminders did claim to have expanded during this period. Sessional care settings (11 per cent) and children's centres who offer full day care (eight per cent) were the least likely to have expanded their provision in the past year.

There was little change in expansion rates for any of the different provider types between the 2010 and 2011 survey years.

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

It should be noted, as discussed in detail in chapter 4.1, that the total number of places in after school clubs, holiday clubs and registered with childminders actually decreased slightly between 2010 and 2011. As such, it would appear that while some providers did increase the scale of their provision in 2011, other providers scaled back their provision (though the survey does not collect data on this specific subject).

Among those who had not expanded in the last year, there was a lower expectation that expansion would be on the cards for all types of group-based childcare provider in 2011. This was particularly the case for children’s centres offering full day care, where the proportion expecting to expand fell from 17 per cent to 9 per cent. However, childminders were more optimistic, with 16 per cent planning to expand (compared with 14 per cent in 2010).

3.8 Types of service provided in children’s centres

Following a rapid expansion in the number of children’s centres between 2006 and 2008 (from 800 to 2,900) the number of children’s centres operating in England has increased at a slower rate over the last few years and stood at 3,500 in 2011 (table not included).

When considering figures relating to on site full day care provision in children’s centres, it should be borne in mind that all phase one children’s centres (established in 2004-6) were required to provide full day care, as were phase two children’s centres (established 2006-8) in the 30 per cent most deprived areas. Phase three children’s centres (established in 2008-10) were under no obligation to provide any full day care. In contrast to phase one children’s centres, which were advised to deliver their full day care on site, phase two children’s centres were advised that they could provide their full day care in a separate location up to half a mile away where necessary.

Table 3.9 shows the proportion of all children’s centres that offered different types of care on site in 2010 and 2011.

	2011	2010
Full day care	16%	25%
Sessional	19%	25%
Before school care	7%	10%
After school clubs	7%	10%
Holiday clubs	10%	16%
<i>Base (1st column): All children’s centres 2011, 2010.</i>		

As in previous years, all children’s centres were asked what types of childcare they provided on-site. The proportion offering full day care for children under five declined rapidly, falling from 25 per cent in 2010 to 16 per cent in 2011. In absolute terms this represented a decline in numbers from 800 in 2010 to 550 in 2011.

There was a slightly less marked decline in the number of children’s centres offering sessional care, falling from 25 per cent in 2010 to 19 per cent in 2011. This represented a decrease from 800 settings in 2010 to 650 in 2011.

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

Relatively low proportions of children's centres offered before school care (seven per cent), holiday care (10 per cent) and after school care (seven per cent) on site in 2011. The number of children's centres offering before school care on site fell from 300 in 2010 to 250 in 2011, while holiday care fell from 500 to 350 settings and after school fell from 350 to 250 settings. Weekend care was offered by only one per cent of children's centres in 2011 (as was the case in 2010).

Children's centres in the 30 per cent most deprived areas continued to be more likely than those elsewhere to offer on site full day care (23 per cent compared with 10 per cent elsewhere) and sessional care (23 per cent compared with 14 per cent).

The decline in the provision of childcare in children's centres could reflect market factors. Children's centres in the most deprived areas were originally asked to provide childcare because, at the time, the level of childcare provision in these areas was below the national average. However, it was recognised that the challenge would be whether there was going to be a demand for this provision, and, in particular, if levels of demand could be sustained if commercially viable (rather than subsidised) fees had to be charged. The steady decline of this type of provision could reflect a lack of demand, particularly as childcare provision in children's centres may now be less likely to be subsidised than when provision was first introduced - it was always envisaged that provision in children's centres would eventually need to become financially viable, and reductions in children's centres budget may also have affected their ability to subsidise childcare.³³ Increases in the broader supply of full day care provision may also have impacted on demand for provision specifically based in children's centres. In response to concerns from some children's centres about the sustainability and viability of providing childcare, in 2011 the Government removed the requirement for centres in the most disadvantaged areas to provide childcare if there was not an identifiable need.

³³ Sure Start Children's Centres Census (2012), London, 4Children.

4. Places and attendance

This chapter details the number of registered places and the number of children actually attending settings. It also looks at the age of the children who attend, the number of vacancies in settings, and also provides information on the free early years entitlement for three and four year olds.

4.1 Number of places

It should be noted that the number of registered places, which is examined in this chapter, is not necessarily reflective of the number of children that actually *attend* a given setting in a typical week. The number of children attending may, in some cases, be greater than the number of registered places, as two or more part time children can share a single registered place. However, in cases where the setting is operating at less than full capacity, the number of children attending may also be lower than the number of registered places. The number of children attending settings is discussed in more detail in chapter 4.5.

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

In 2011, the survey estimated that there were 2,708,100 childcare and early years places overall. This marks a slight decrease of two per cent compared the total seen in 2010 (2,755,800). Of these, 1,906,100 places were provided by full day care settings,³⁴ sessional providers, after school clubs, holiday clubs, and childminders,³⁵ and 802,000 places were registered in early years education in maintained schools.

Childcare

Between 2006 and 2010 the number of places in full day care settings increased significantly every year. In 2011, while the total number of places increased by one per cent compared to 2010 (now standing at a total of 721,500), the scale of the change was not significant, potentially pointing towards a levelling off in the scale of full day care provision. The demographic factors and the expansion of free early education for disadvantaged two year olds discussed in chapter 3.1 would suggest that demand for childcare will continue to increase in the future, so it will be important to continue to monitor this slowing of growth in future years.

As was the case in 2010, the rate of increase in the number of full day care providers exceeded the increase in the number places in 2011, resulting in a fall in the average number of registered places per setting to 41.

There were 251,000 registered sessional care places in 2011. This represents an identical number of places to that seen in 2010, and means that there has been little change in number since 2007, when the total stood at 248,100.³⁶

³⁴ Including registered places in full day care provided by children's centres.

³⁵ Childminder figures only include places registered with active childminders.

³⁶ As discussed in chapter 3.1, the lower figure seen in 2009 may be linked to the fact that the survey was conducted using a 'recontact' methodology.

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

The number of after school and holiday club places stood at 357,400 and 339,300 respectively in 2011. This represents a three per cent decrease for both types of setting since 2010. As was discussed in the 2010 report, it should be highlighted that the large increase in the recorded number of after school and holiday providers that was seen between 2009 and 2010 may have been primarily influenced by changes to the sampling method rather than any genuine surge in the number of registered places offered by such providers. As such, the long term trend for such providers should be read as being relatively stable, but is currently tending downwards.

Reflecting the decline in the number of children's centres offering full day care in 2011, the number of registered full day care places in children's centres also declined sharply (falling from 40,300 in 2010 to 28,800 in 2011).

	Number of registered places					
	2011	2010	2009	2008	2007	2006
Full day care	721,500	716,700	647,800	620,700	596,500	544,200
<i>Full day care in children's centres</i>	28,800	40,300	50,600	50,000	51,100	37,700
Sessional	251,000	251,000	227,900	243,500	248,100	278,300
After school clubs	357,400	368,100	272,500	282,700	259,900	260,100
Holiday clubs	339,300	349,400	260,400	262,600	230,300	263,900
Childminders	236,900	245,100	262,900	275,300	291,500	272,600
Total childcare	1,906,100	1,930,300	1,671,500	1,684,800	1,626,400	1,619,100
Nursery schools	25,900	25,300	29,600	30,600	28,400	28,100
Primary schools with nursery and reception classes	489,100	491,800	468,300	511,200	533,000	477,300
Primary schools with reception but no nursery classes	286,900	308,400	272,700	275,500	306,300	286,100
Total early years	802,000	825,500	770,600	817,400	867,600	791,500
Total overall	2,708,100	2,755,800	2,442,100	2,502,200	2,494,000	2,410,600
<i>Base: Childcare providers 2011, 2010, 2009, 2008, 2007, 2006. Early years provision in maintained schools 2011, 2010, 2009, 2008, 2007, 2006</i>						

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

Table 4.1b Number of registered places					
	% change in numbers				
	From 2010 to 2011	From 2009 to 2011	From 2008 to 2011	From 2007 to 2011	From 2006 to 2011
Full day care	+1%	+11%	+16%	+21%	+33%
<i>Full day care in children's centres</i>	-29%	-43%	-42%	-44%	-24%
Sessional	+0%	+10%	+3%	+1%	-10%
After school clubs	-3%	+31%	+26%	+38%	+37%
Holiday clubs	-3%	+30%	+29%	+47%	+29%
Childminders	-3%	-10%	-14%	-19%	-13%
Total childcare	-1%	+14%	+13%	+17%	+18%
Nursery schools	+2%	-13%	-15%	-9%	-8%
Primary schools with nursery and reception classes	-1%	+4%	-4%	-8%	+2%
Primary schools with reception but no nursery classes	-7%	+5%	+4%	-6%	+0%
Total early years	-3%	+4%	-2%	-8%	+1%
Total overall	-2%	+11%	+8%	+9%	+12%
<i>Base: Childcare providers 2011, 2010, 2009, 2008, 2007, 2006. Early years provision in maintained schools 2011, 2010, 2009, 2008, 2007, 2006</i>					

Looking at the number of registered places per setting, outlined in Table 4.2, full day care providers in children's centres tended to have a greater capacity than any of the other childcare providers (with an average of 51 registered places). Of the other types of provider, full day care settings and holiday clubs were the most likely to offer large scale provision, with 30 per cent of full day care settings and 31 per cent of holiday clubs offering 50 or more places. This is reflected in the relatively high mean number of places in these settings (41 in full day care settings and 44 in holiday clubs).

Sessional providers had the smallest average number of places in 2011 (32 per setting), though the scale of sessional provision has increased over time, rising from an average of 27 places in 2005.

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

Table 4.2 Capacity of settings - childcare						
	Full day care	Full day care in children's centres	Sessional	After school clubs	Holiday clubs	Total
Ofsted registered places per setting in 2011						
1-9	1%	1%	1%	1%	2%	1%
10-19	6%	3%	12%	14%	11%	10%
20-29	34%	13%	53%	29%	24%	34%
30-39	17%	16%	16%	19%	17%	17%
40-49	13%	15%	7%	16%	14%	13%
50 or more	30%	51%	11%	18%	31%	24%
Don't know	0%	*	*	3%	2%	1%
Mean number of places per setting over time						
2011	41	51	32	37	44	39
2010	43	52	31	40	47	41
2009	46	50	29	35	42	40
2008	45	51	29	33	41	38
2007	44	54	28	31	40	36
2006	43	55	29	35	43	37
2005	44	N/A	27	N/A	N/A	N/A
<i>Base: Childcare providers 2011, 2010, 2009, 2008, 2007, 2006, 2005</i>						

Childminders

In total there were 236,900 Ofsted registered places with childminders in 2011, representing a decline of three per cent compared with 2010. This was despite a three per cent rise in the number of active childminders over the same period, pointing to a slight decrease in the number of registered places per childminder in 2011.

Childminders can register to look after a maximum of six children under the age of eight. In 2011 each childminder was registered to provide an average of 5.1 places

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

Table 4.3 Capacity of settings - childminders	
Ofsted registered places per childminder in 2011	
1-2	4%
3-4	25%
5-6	62%
7 or more	4% ³⁷
Don't know	5%
Mean number of places per childminder over time	
2011	5.1
2010	5.2
2009	5.2
2008	4.9
2007	4.9
2006	5.0
2005	4.8
<i>Base: Childminders 2011, 2010, 2009, 2008, 2007, 2006, 2005</i>	

Early years provision in maintained schools

Among early years providers in maintained schools, there were a total of 802,000 registered places in 2011, a three per cent decrease from 2010 when there were 825,500 places.

There were 25,900 nursery school places, 489,100 places in primary schools with nursery and reception classes and 286,900 places in primary schools with reception but no nursery classes.

The number of places in nursery schools did not change significantly between 2010 and 2011, and nor did the number of nursery schools in operation. The average number of places per setting also remained static at 63.

There was also no significant change in the number of registered places in primary schools with nursery and reception classes, or in the total number of this type of provider. On average these settings had 73 places; the same as in 2010.

However, the number of places offered by primary schools with reception but no nursery classes fell by 7 per cent between 2010 and 2011, reducing to the same number as was recorded in 2006. This decrease was driven by a reduction in the average number of places per setting, which fell from 36 in 2010 to 33 in 2011 – as discussed in chapter 3.1, the total number of such settings actually remained stable between 2010 and 2011.

³⁷ It appears that a small proportion of childminders included the places they have for children aged 8 and over in their response. It may also be the case that some childminders had registered assistants, effectively boosting their capacity.

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

Table 4.4 Ofsted registered places per setting – early years provision in maintained schools				
	Nursery schools	Primary schools with nursery and reception classes	Primary schools with reception but no nursery classes	Total
Places per setting in 2011				
1-24	1%	5%	36%	22%
25-49	32%	20%	44%	33%
50-74	37%	31%	15%	22%
75-99	17%	25%	4%	13%
100-149	11%	16%	1%	8%
150-199	2%	2%	*	1%
200 or more	*	*	*	0%
Don't know	*	*	*	0%
Mean number of places per setting over time				
2011	63	73	33	51
2010	63	73	36	53
2009	69	70	32	49
2008	71	76	32	52
2007	65	79	35	50
2006	66	75	32	49
<i>Base: Early years provision in maintained schools 2011, 2010, 2009, 2008, 2007, 2006</i>				

4.2 Number of places in deprived areas

Table 4.5 shows the change in the number of registered places in the 30 per cent most deprived areas between 2007 and 2011. The total number of places in the 30 per cent most deprived areas increased by six per cent from 2007 to 2011. Over the same period the number of places in the 70 per cent least deprived areas rose more quickly, increasing from 1,758,500 in 2007 to 1,929,800 in 2011 (an increase of 10 per cent).

However, more recently, from 2010 to 2011, the number of places in the 30 per cent most deprived areas remained essentially stable (increasing by one per cent), while the number in the 70 per cent least deprived areas declined by three per cent.

Overall, around three in ten of the total number of registered places in 2011 (29 per cent) were located in the 30 per cent most deprived areas, though there were marked differences in the proportion of different types of provider to be found in these areas. A large proportion of places in primary schools with nursery and reception classes were to be found in the 30 per cent most deprived areas (45 per cent). The same applies to full day care in children's centres (70 per cent of all such places were to be found in the deprived areas) and nursery schools (62 per cent). However, only 18 per cent of childminders and 16 per cent of primary schools with reception but no nursery classes were to be found in the 30 per cent most deprived areas.

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

Childcare

The number of full day care places in the 30 per cent most deprived areas did not change between 2010 and 2011, but the number in 2011 was four per cent higher than in 2007.

The number of sessional places in the 30 per cent most deprived areas also remained steady between 2010 and 2011, with a total of 49,100 places in 2011. However, only 20 per cent of all sessional places in England were to be found in the 30 per cent most deprived areas, indicating that sessional provision remains underrepresented in these areas.

The number of after school places in deprived areas fell by four per cent between 2010 and 2011, which mirrors the three per cent decrease that was seen across England as a whole. Over the same period, the number of places offered by holiday clubs in the 30 per cent most deprived areas rose by eight per cent, bucking the wider trend of a three per cent decline across England as a whole.

	30% most deprived areas (2011)		30% most deprived areas (2010)		30% most deprived areas (2009)		30% most deprived areas (2008)		30% most deprived areas (2007)	
	No	% of all places	No.	% of all places	No.	% of all places	No.	% of all places	No.	% of all places
Full day care	190,300	26%	191,000	27%	180,700	28%	186,000	30%	183,100	31%
<i>Full day care in children's centres</i>	20,100	70%	29,100	72%	34,700	69%	34,900	70%	38,200	75%
Sessional	49,100	20%	49,200	20%	34,000	15%	41,000	17%	44,000	18%
After school clubs	90,800	25%	94,400	26%	84,700	31%	84,800	30%	78,900	30%
Holiday clubs	120,400	35%	111,200	32%	70,000	27%	75,400	29%	62,800	27%
Childminders	42,400	18%	46,100	19%	44,100	17%	51,500	19%	49,500	17%
Nursery schools	16,000	62%	15,100	60%	20,100	68%	19,500	64%	19,200	68%
Primary schools with nursery and reception classes	222,000	45%	224,200	46%	222,000	47%	266,100	52%	253,100	47%
Primary schools with reception but no nursery classes	47,300	16%	39,600	13%	24,600	9%	34,800	13%	44,900	15%
Total	778,300	29%	770,800	28%	680,200	28%	759,200	30%	735,500	29%

*Base: Childcare providers, 30% most deprived areas 2011, 2010, 2009, 2008, 2007.
Early years provision in maintained schools, 30% most deprived areas 2011, 2010, 2009, 2008, 2007*

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

Table 4.5b Number of places in the 30% most deprived areas				
	% change in number of places			
	From 2010 to 2011	From 2009 to 2011	From 2008 to 2011	From 2007 to 2011
Full day care	+/-0%	+5%	+2%	+4%
<i>Full day care in children's centres</i>	-31%	-42%	-42%	-47%
Sessional	+/-0%	+44%	+20%	+12%
After school clubs	-4%	+7%	+7%	+15%
Holiday clubs	+8%	+72%	+60%	+92%
Childminders	-8%	-4%	-18%	-14%
Nursery schools	+6%	-20%	-18%	-17%
Primary schools with nursery and reception classes	-1%	+/-0%	-17%	-12%
Primary schools with reception but no nursery classes	+19%	+92%	+36%	+5%
TOTAL	+1%	+14%	+3%	+6%
<i>Base: Childcare providers in 30 per cent most deprived areas 2011, 2010, 2009, 2008, 2007. Early years provision in maintained schools in 30 per cent most deprived areas 2011, 2010, 2009, 2008, 2007</i>				

Childminders

The number of places registered with childminders in deprived areas was 14 per cent lower in 2011 than in 2007, at 42,400 places. Over the same period, the number of places registered with childminders across England fell by 19 per cent, showing that deprived areas actually saw less of a decline in the number of childminders than was the case in the less deprived areas. However, focusing on more recent changes, between 2010 and 2011 there was an eight per cent decrease in the number of places registered with childminders in deprived areas (compared to a decrease of only three per cent across England as a whole).

Early years provision in maintained schools

The number of places offered by nursery schools in deprived areas rose by six per cent between 2010 and 2011, but this still represents a 17 per cent decline since 2007. Overall, the proportion of all nursery school places that were to be found in deprived areas remained high at 62 per cent; a reflection of the fact that 59 per cent of nursery providers were based in the 30 per cent most deprived areas.

The number of places offered by primary schools with nursery and reception classes in deprived areas showed minimal change from 2010 and stood at 222,000 in 2011. This equates to 45 per cent of all such places to be found across England.

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

The number of places offered in primary schools with reception but no nursery classes in deprived areas was five per cent higher in 2011 than in 2007, with 47,300 places available in 2011. This equates to only 16 per cent of all such places in England, but does represent a 19 per cent increase since 2010, when there were 39,600 places.³⁸

4.3 Number of places by region

Tables 4.6a-c show the distribution of places by Region. A table showing the *number* of places by Region in 2011 is included in Appendix 1 (table 4.6e). Table 4.6d shows the total population of each region, along with the total number of children in each region, to provide context to the figures in tables 4.6a-c (taken from ONS mid-year population estimates for 2010).

	Full Day Care					Full day care in children's centres					Sessional				
	2011	2010	2009	2008	2007	2011	2010	2009	2008	2007	2011	2010	2009	2008	2007
East Midlands	8%	8%	8%	8%	9%	1%	4%	5%	6%	6%	9%	10%	12%	10%	10%
East	10%	10%	10%	10%	9%	8%	12%	9%	8%	6%	16%	14%	15%	16%	17%
London	14%	14%	16%	14%	14%	24%	20%	20%	21%	18%	15%	14%	11%	11%	11%
North East, Yorkshire & Humberside	13%	14%	13%	13%	13%	23%	21%	23%	23%	22%	10%	11%	10%	10%	10%
North West	16%	15%	14%	14%	15%	14%	20%	13%	13%	18%	11%	12%	11%	10%	9%
South East	17%	18%	18%	18%	18%	10%	8%	10%	10%	10%	19%	19%	22%	21%	23%
South West	11%	10%	9%	12%	10%	8%	6%	10%	7%	8%	10%	10%	12%	13%	12%
West Midlands	11%	11%	12%	12%	12%	13%	10%	10%	13%	12%	10%	10%	7%	8%	8%

Base: Childcare providers 2011, 2010, 2009, 2008, 2007

	After school clubs					Holiday clubs					Childminders				
	2011	2010	2009	2008	2007	2011	2010	2009	2008	2007	2011	2010	2009	2008	2007
East Midlands	9%	9%	7%	7%	7%	10%	9%	7%	7%	6%	9%	9%	9%	10%	9%
East	8%	8%	8%	8%	7%	12%	10%	10%	11%	10%	13%	12%	12%	13%	12%
London	15%	16%	17%	16%	14%	15%	17%	15%	15%	15%	16%	16%	14%	16%	14%
North East, Yorkshire & Humberside	15%	16%	12%	13%	17%	16%	14%	12%	14%	10%	14%	15%	15%	15%	16%
North West	19%	16%	24%	21%	23%	15%	14%	12%	13%	15%	11%	12%	12%	11%	12%
South East	12%	15%	16%	14%	13%	13%	14%	20%	17%	23%	20%	18%	20%	18%	18%
South West	8%	8%	6%	8%	7%	9%	10%	12%	12%	10%	9%	9%	10%	9%	9%
West Midlands	13%	13%	11%	12%	12%	10%	12%	12%	12%	11%	8%	9%	9%	8%	9%

Base: Childcare providers 2011, 2010, 2009, 2008, 2007

³⁸ When looking at table 4.5b the changes between 2009 and 2011 should be viewed with caution. As discussed earlier, it is possible that the 2009 survey offered low estimates in terms of the number of providers and registered places, due to the fact that it was conducted as a recontact survey.

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

	Nursery Schools					Primary schools with nursery and reception classes					Primary schools with reception but no nursery classes				
	2011	2010	2009	2008	2007	2011	2010	2009	2008	2007	2011	2010	2009	2008	2007
East Midlands	7%	8%	6%	8%	8%	7%	6%	6%	7%	8%	11%	12%	10%	11%	10%
East	11%	10%	12%	9%	11%	8%	8%	9%	9%	9%	12%	12%	12%	13%	13%
London	22%	20%	16%	18%	22%	25%	26%	23%	19%	23%	5%	5%	6%	4%	5%
North East, Yorkshire & Humberside	14%	16%	16%	16%	13%	21%	22%	20%	23%	N/A	10%	10%	10%	11%	10%
North West	16%	16%	16%	18%	17%	15%	16%	17%	17%	N/A ³⁹	14%	11%	12%	14%	12%
South East	11%	13%	10%	11%	11%	8%	7%	7%	7%	8%	23%	24%	23%	20%	25%
South West	6%	5%	9%	4%	4%	3%	2%	3%	4%	3%	16%	16%	18%	17%	17%
West Midlands	13%	13%	14%	15%	14%	14%	14%	14%	13%	13%	10%	9%	8%	9%	9%

Base: Early years provision in maintained schools 2011, 2010, 2009, 2008, 2007

	Population of regions				Proportion of total English population in each region			
	Total population	Children aged 0-4	Children aged 5-11	Children aged 0-11	Total population	Children aged 0-4	Children aged 5-11	Children aged 0-11
Total (all regions)	52,234,000	3,267,100	4,062,964	7,330,100	100%	100%	100%	100%
East Midlands	4,481,400	266,300	341,200	607,500	9%	8%	8%	8%
East	5,831,800	356,600	463,400	820,000	11%	11%	11%	11%
London	7,825,200	586,300	619,500	1,205,900	15%	18%	15%	16%
North East, Yorkshire & Humberside	7,907,900	470,700	594,100	1,064,800	15%	14%	15%	15%
North West	6,935,700	428,400	539,200	967,600	13%	13%	13%	13%
South East	8,523,100	520,500	676,200	1,196,600	16%	16%	17%	16%
South West	5,273,700	290,400	388,200	678,600	10%	9%	10%	9%
West Midlands	5,455,200	348,000	441,100	789,100	10%	11%	11%	11%

Base: English population

The regional distribution of places reported in 2011 was similar to previous years, with registered places broadly mirroring the distribution of settings and with higher levels of provision in regions with a higher population.

³⁹ Data are not available for primary schools with nursery and reception classes in the North East and North West regions as an insufficient number of interviews were achieved in these areas. Data are also not available for primary schools with nursery and reception classes in Yorkshire & Humberside as this region was grouped with the North East and North West to ensure that national figures were representative. For further details please see the Technical Report.

⁴⁰ Sourced from ONS Mid-Year Population Estimates for 2010.

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

Childcare

As in 2010, the South East had the greatest share of full day care (17 per cent), sessional (19 per cent) and childminding places (20 per cent) in England, though the North West had nearly as many full day care places (16 per cent). In general, the regional distribution of full day care places closely mirrored the population of children aged 0-4 in each region. However, London had a relatively limited supply of full day care places relative to population (14 per cent of places were in London, compared to 18 per cent of the population of 0-4 year olds).

In terms of sessional care, there was a relatively high level of provision in the East region relative to the population of 0-4 year old children living there (16 per cent of sessional places versus 11 per cent of the 0-4 year old population).

In 2011, London had 15 per cent of all holiday club places in England; similar to the proportion of places offered in the North East, Yorkshire and Humberside (16 per cent) and the North West (15 per cent). The regional distribution of holiday club places was essentially in line with the population of children in each region, though the South East only accounted for 13 per cent of places (compared to 17 per cent of the population of 5-11 year olds).

The greatest proportion of after school club places were to be found in the North West (19 per cent) and this was high relative to the proportion of 5-11 year old children living in the North West (13 per cent).

The proportion of all children's centres full day care places to be found in the East Midlands has decreased over time, from six per cent in 2007 to only one per cent in 2011. This is relatively low compared to the proportion of children aged 0-4 that live in the East Midlands (eight per cent). The proportion of children's centres' full day care places in London (24 per cent) and in the North East, Yorkshire and Humberside (23 per cent) was high relative to the population of children aged 0-4 in those regions (18 and 14 per cent respectively).

The distribution of childminder places was largely in line with the regional population distribution, though there was a relatively high level of supply in the South East (20 per cent of childminder places compared to 16 per cent of the 0-4 population).

Early years provision in maintained schools

London continues to hold the greatest share of places in nursery schools (22 per cent) and primary schools with nursery and reception classes (25 per cent), though the region accounts for just five per cent of places in primary schools with reception but no nursery classes. Compared to the population of children in London, it is clear that the level of supply of primary schools with both reception and nursery schools was relatively high and the supply of primary schools with reception but no nursery classes was relatively low (London accounts for 16 per cent of the population of children aged 0-11). The same applied to the North East, Yorkshire and Humberside region, which accounted for 21 per cent of places in primary schools with nursery and reception classes (but only 15 per cent of the population).

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

The South East continues to hold the greatest share of places in primary schools with reception but no nursery classes (23 per cent) and this is a high proportion relative to the population of children (16 per cent of all children aged 0-11 live in the South East). There was also a relatively high supply of places in this type of setting in the South West (16 per cent of places versus nine per cent of the population).

The proportion of nursery school places in the South East was low relative to that region's population (11 per cent of places compared to 16 per cent of all children aged 0-11).

The regional breakdown of places for all types of early years provision has remained very stable since 2007.

4.4 Childcare places by ownership

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

The distribution of registered places across the different types of ownership continued to broadly reflect the pattern of ownership of settings discussed in chapter 3.4. The distribution of places by ownership in 2011 remained similar to that seen in 2010.

The large majority of sessional (95 per cent) and full day care (91 per cent) places were in private or voluntary settings. However, full day care places were more likely to be found in private providers (69 per cent), whereas sessional care places were more likely to be found in voluntary settings (57 per cent). The proportion of sessional care places to be found in private providers increased from 28 per cent in 2007 to 37 per cent in 2011, though it is possible that some of this change is attributable to changes in sampling method between 2009 and 2010.

The proportion of full day care places to be found in private settings has not changed since 2007 (69 per cent in 2011, compared to 70 per cent in 2007). However, there has been an increase in the proportion of voluntary run full day care settings, from 16 per cent in 2007 to 22 per cent in 2011.⁴¹

The majority of after school club and holiday club places were also found in private providers in 2011, but maintained settings played a greater role in the provision of these care types, with schools and colleges accounting for 29 per cent of after school and 19 per cent of holiday places. For holiday clubs the proportion of places being offered in schools rose from 11 per cent in 2007 to 19 per cent in 2011. Overall, 42 per cent of after school places and 50 per cent of holiday club places were accounted for by private providers.

The majority of registered full day care places in children's centres were in maintained settings (69 per cent) – a higher proportion than for any of the other care types. The decline in the total number of such settings since 2010 (as discussed in chapter 3.1) has not impacted significantly on the ownership profile of the children's centre provision that remains.

⁴¹ It should be noted that the change in sampling approach in 2010 may have had some impact on this change.

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

	Full day care					<i>Full day care in children's centres</i>					Sessional				
	2011	2010	2009	2008	2007	2011	2010	2009	2008	2007	2011	2010	2009	2008	2007
Total number of places	721,500	716,700	647,800	620,700	596,500	28,800	40,300	50,600	50,000	51,100	251,000	251,000	227,900	243,500	248,100
Private or Voluntary	91%	87%	88%	86%	86%	32%	32%	37%	28%	35%	95%	95%	95%	93%	93%
Private	69%	65%	72%	70%	70%	15%	15%	19%	11%	16%	37%	36%	30%	29%	28%
Voluntary	22%	23%	16%	16%	16%	17%	17%	18%	18%	18%	57%	59%	65%	64%	65%
Maintained	8%	12%	10%	10%	11%	69%	69%	60%	69%	61%	6%	7%	5%	6%	6%
Local Authority	5%	6%	4%	5%	6%	55%	58%	52%	59%	53%	4%	4%	2%	3%	3%
School/college	4%	5%	5%	5%	6%	14%	11%	8%	10%	8%	2%	3%	2%	3%	3%
Other	1%	2%	2%	4%	3%	1%	3%	2%	3%	5%	*	1%	1%	2%	1%

Base: Childcare providers 2011, 2010, 2009, 2008, 2007

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

	After school clubs					Holiday Clubs				
	2011	2010	2009	2008	2007	2011	2010	2009	2008	2007
Total number of places	357,400	368,100	272,500	282,700	259,900	339,300	349,400	260,400	262,600	230,300
Private or Voluntary	66%	65%	69%	68%	68%	75%	73%	71%	70%	71%
Private	42%	37%	39%	40%	44%	50%	48%	37%	40%	42%
Voluntary	24%	28%	29%	29%	24%	25%	24%	33%	30%	29%
Maintained	34%	36%	30%	30%	33%	25%	28%	25%	26%	29%
Local Authority	4%	7%	7%	10%	8%	6%	13%	17%	16%	17%
School/college	29%	29%	23%	20%	25%	19%	15%	8%	10%	11%
Other	1%	*	3%	2%	2%	1%	2%	5%	5%	3%

Base: Childcare providers 2011, 2010, 2009, 2008, 2007

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

As in previous years, full day care settings in children's centres continued to offer the highest mean number of places per setting, with an average of 52 places available in each private or voluntary setting and an average of 51 places available in maintained settings.

The average number of places registered with full day care providers in general was lower than the number of registered places in children's centres, with 41 places for private or voluntary full day care providers and 42 places for maintained providers.

Amongst sessional providers, private settings offered the most places - 35 on average, compared with 30 places per voluntary setting and 32 in maintained settings.

Amongst after school clubs, schools and colleges offered the most places on average (40), while private providers offered an average of 36 places and voluntary providers offered 35. Maintained holiday care settings also tended to have more registered places than their private or voluntary equivalents (46 and 43 respectively).

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

	Full day care					<i>Full day care in children's centres</i>					Sessional				
	2011	2010	2009	2008	2007	2011	2010	2009	2008	2007	2011	2010	2009	2008	2007
Private or Voluntary	41	42	46	45	44	52	50	46	48	50	32	30	29	29	28
Private	47	47	50	49	48	†	49	45	†	49	35	36	31	29	28
Voluntary	30	32	33	33	33	†	50	†	50	51	30	28	29	29	29
Maintained	42	47	46	43	39	51	52	53	52	56	32	31	30	28	26
Local Authority	†	46	†	43	40	53	52	53	52	58	†	30	†	26	27
School/college	†	48	†	43	38	†	†	†	†	†	†	†	†	31	26

Base: Childcare providers 2011, 2010, 2009, 2008, 2007

	After school clubs					Holiday Clubs				
	2011	2010	2009	2008	2007	2011	2010	2009	2008	2007
Private or Voluntary	36	39	35	33	31	43	45	40	40	38
Private	36	38	37	34	32	44	47	41	43	40
Voluntary	35	40	33	32	29	43	42	39	36	36
Maintained	39	42	36	32	30	46	51	45	44	46
Local Authority	†	38	†	37	30	†	62	51	46	53
School/college	40	43	35	30	31	46	45	37	42	40

Base: Childcare providers 2011, 2010, 2009, 2008, 2007

4.5 Number of children attending

The previous section discussed the number of registered places in different types of setting. As mentioned earlier, the number of registered places is not necessarily reflective of the number of children that actually *attend* a given setting in a typical week, which is what this section focuses on.

⁴² Settings under 'Other' ownership have been excluded from this table due to consistently low base sizes.

⁴³ Settings under 'Other' ownership have been excluded from this table due to consistently low base sizes.

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

The number of children attending may in some cases be greater than the number of places, as part time children can share places. However, the number of children attending may also be lower than the number of registered places if a provider is not operating at full capacity. Although care is taken to avoid double counting within individual settings, some degree of double counting when collating figures across different types of setting is unavoidable because children can attend more than one setting (e.g. a given child may attend both full day care and holiday care). We would therefore advise caution when using the total row in table 4.9, as we are unable to estimate the extent to which this has occurred.

Table 4.9 shows the number of children attending childcare and attending early years provision in maintained schools, while table 4.9b shows how the number of children attending in 2011 has changed compared to previous years.

Table 4.9 Number of children attending childcare and early years provision					
	Number of children				
	2011	2010	2009	2008	2007
	No.	No.	No.	No.	No.
Full day care	948,200	957,700	873,900	872,800	820,100
<i>Full day care in children's centres</i>	38,400	53,500	72,100	66,600	68,400
Sessional	282,900	311,800	326,200	361,500	356,800
After school clubs	508,400	509,000	412,600	426,400	414,300
Holiday clubs	389,400	398,400	328,200	347,600	297,700
Childminders	266,100	259,000	276,600	294,200	278,500
Nursery schools	33,900	33,800	39,800	40,500	38,300
Primary schools with nursery and reception classes	528,200	519,100	494,200	526,500	517,800
Primary schools with reception but no nursery classes	265,200	273,900	241,400	245,300	263,200
Total	3,222,300	3,262,700	2,992,900	3,114,800	2,986,700
<i>Base: Childcare providers 2011, 2010, 2009, 2008, 2007. Early years provision in maintained schools 2011, 2010, 2009, 2008, 2007</i>					

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

	From 2010 to 2011	From 2009 to 2011	From 2008 to 2011	From 2007 to 2011
% change	%	%	%	%
Full day care	-1%	+9%	+9%	+16%
<i>Full day care in children's centres</i>	-28%	-47%	-42%	-44%
Sessional	-9%	-13%	-22%	-21%
After school clubs	+/-0%	+23%	+19%	+23%
Holiday clubs	-2%	+19%	+12%	+31%
Childminders	+3%	-4%	-10%	-4%
Nursery schools	+/-0%	-15%	-16%	-11%
Primary schools with nursery and reception classes	+2%	+7%	+/-0%	+2%
Primary schools with reception but no nursery classes	-3%	+10%	+8%	+1%
Total	-1%	+8%	+3%	+8%

*Base: Childcare providers 2011, 2010, 2009, 2008, 2007.
Early years provision in maintained schools 2011, 2010, 2009, 2008, 2007*

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

	2011	2010	2009	2008	2007
Full day care	54	58	62	64	61
<i>Full day care in children's centres</i>	68	69	73	69	73
Sessional	36	38	42	43	41
Holiday clubs	51	54	53	56	53
After school clubs	51	54	52	49	50
Childminders	6	6	5	5	5
Nursery schools	82	83	92	92	86
Primary schools with nursery and reception classes	79	78	74	79	77
Primary schools with reception but no nursery classes	31	32	28	28	30

Base: Childcare providers 2011, 2010, 2009, 2008, 2007. Early years provision in maintained schools 2011, 2010, 2009, 2008, 2007

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

Childcare

The number of children attending across all types of childcare and early years provision did not change significantly between 2010 (3,262,700) and 2011 (3,222,300). However, there was an eight per cent increase between 2007 and 2011⁴⁴.

Amongst the childcare groups, the largest change took place in full day care in children's centres, where the numbers attending fell by 28 per cent between 2010 and 2011; from 53,500 to 38,400. This decline is associated with the decline in the number of children's centres offering full day care, as discussed in chapter 3. There was also a significant fall in the number of children attending sessional care, which fell by nine per cent between 2010 and 2011 (from 311,800 to 282,900) and is the third successive year in which attendance has decreased. As discussed in chapter 3, this decrease is at least partly driven by the decrease in the number of settings offering sessional care in 2011, with many now switching their provision to full day rather than sessional care.

Attendance numbers in after school and holiday clubs remained broadly static between 2010 and 2011, as did the number of children attending full day care provision.

Childminders

In 2011 there were 266,100 children attending childminders, which was a three per cent increase since 2010 when the total number of attendees stood at 259,000. This increase in the number of children cared for by childminders reflects the change in the total number of active childminders over the same period, which also rose by three per cent.

However, even with the increase between 2010 and 2011, the total number of children attending childminders in 2011 remained ten per cent lower than in 2008 when there were 294,200 children in attendance.

Early years provision in maintained schools

Between 2010 and 2011 there was little change in the number of children attending early years provision in maintained schools. The number attending primary schools with nursery and reception classes was 528,200 (a two per cent increase) whilst the number attending primary schools with reception only was 265,200 (a three per cent decrease). Attendance levels in nursery schools did not vary significantly and stood at 33,900 in 2011.

The mean number of children attending early years settings remained stable between 2010 and 2011. The mean number of children attending primary schools with reception and nursery classes was, unsurprisingly, much higher than the number of children attending primary schools which only offered reception classes (79 and 31 respectively).

⁴⁴ Though this change may have been influenced to some extent by the change in sampling approach described in chapter 2.

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

4.5.1 Ratio of children to places

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

	Number of attendees per place				
	2011	2010	2009	2008	2007
Full day care	1.3	1.3	1.3	1.4	1.4
<i>Full day care in children's centres</i>	1.3	1.3	1.4	1.3	1.3
Sessional	1.1	1.2	1.4	1.5	1.4
After school clubs	1.4	1.4	1.5	1.5	1.6
Holiday clubs	1.1	1.1	1.3	1.3	1.3
Childminders	1.1	1.1	1.1	1.1	1.0
Nursery schools	1.3	1.3	1.3	1.3	1.3
Primary schools with nursery and reception classes	1.1	1.1	1.1	1.1	1.1
Primary schools with reception but no nursery classes	0.9	0.9	0.9	0.9	0.9
<i>Base: Childcare providers 2011, 2010, 2009, 2008, 2007. Early years provision in maintained schools 2011, 2010, 2009, 2008, 2007</i>					

Childcare

All types of childcare provider had more children attending than there were places. This is because two (or more) children may attend on a part time basis, therefore effectively 'sharing' a single registered place.

Between 2010 and 2011, the ratio of children attending to places remained highly consistent across all childcare groups. Looking further back in time, the ratio of attendees to places for sessional providers has decreased, from 1.4 in 2007 to 1.1 in 2011. The ratio has also be tending downwards in holiday and after school clubs (both of which saw a 0.2 decline in the ratio between 2007 and 2011).

Early years provision in maintained schools

The ratio of children attending to places remained static for all types of early years provision between 2010 and 2011 (maintaining the pattern seen going back to 2007). In nursery schools and primary schools with nursery and reception classes there were more children attending than there were places (1.3 and 1.1 respectively).

In primary schools with reception but no nursery classes there were fewer children attending than there were places, resulting in the lowest ratio across all provider types (0.9). In 2011 there were 265,200 children attending the 286,900 available places in primary schools with reception but no nursery classes.

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

4.6 Child vacancies

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

	Number of vacancies					Percentage change			
	2011	2010	2009	2008	2007	From 2010 to 2011	From 2009 to 2011	From 2008 to 2011	From 2007 to 2011
	No.	No.	No.	No.	No.	%	%	%	%
Full day care	134,600	122,700	100,500	82,300	107,300	+10%	+34%	+64%	+25%
<i>Full day care in children's centres</i>	2,900	4,000	5,700	5,100	8,800	-28%	-49%	-43%	-67%
Sessional	47,200	41,700	25,500	19,900	32,400	+13%	+85%	+137%	+46%
After school clubs	77,700	63,800	58,300	59,200	64,300	+22%	+33%	+31%	+21%
Holiday clubs	77,600	75,500	70,400	62,800	70,000	+3%	+10%	+24%	+11%
Childminders	62,000	61,500	59,400	65,900	85,900	+1%	+4%	-6%	-28%
Nursery schools	4,000	3,000	2,500	1,400	1,400	+33%	+60%	+186%	+186%
Primary schools with nursery and reception classes	40,100	48,500	39,000	44,000	56,400	-17%	+3%	-9%	-29%
Primary schools with reception but no nursery classes	19,300	24,100	26,600	30,900	42,900	-20%	-27%	-38%	-55%
Total	462,500	440,800	382,300	371,500	460,600	+5%	+21%	+24%	+0%
<i>Base: Childcare providers 2011, 2010, 2009, 2008, 2007. Early years provision in maintained schools 2011, 2010, 2009, 2008, 2007</i>									

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

Table 4.13 Mean number of vacancies for children in childcare and early years providers										
	Mean number of vacancies					Proportion of places vacant nationally				
	2011	2010	2009	2008	2007	2011	2010	2009	2008	2007
	No.	No.	No.	No.	No.	No.	%	%	%	%
Full day care	8	8	7	6	9	19%	17%	16%	13%	18%
<i>Full day care in children's centres</i>	6	6	6	6	11	10%	10%	11%	10%	17%
Sessional	6	5	3	2	4	19%	17%	11%	8%	13%
After school clubs	8	7	8	7	8	22%	17%	21%	21%	25%
Holiday clubs	11	11	12	11	13	23%	22%	27%	24%	30%
Childminders	1	1	1	1	1	26%	25%	23%	24%	29%
Nursery schools	10	8	6	3	3	15%	12%	8%	5%	5%
Primary schools with nursery and reception classes	6	8	6	7	9	8%	10%	8%	9%	11%
Primary schools with reception but no nursery classes	2	3	3	4	5	7%	8%	10%	11%	14%
Total	5	4	4	3	4	17%	16%	16%	15%	18%

*Base: Childcare providers 2011, 2010, 2009, 2008, 2007.
Early years provision in maintained schools 2011, 2010, 2009, 2008, 2007*

Childcare

Between 2010 and 2011 the estimated number of vacancies in most types of childcare provider increased, with the only exception being full day care offered in children's centres.

For most groups the increase in the total number of vacancies may be at least partly explained by a rise in the number of providers. The nature of childcare provision means that it is difficult to run a setting at 100 per cent capacity (as not all parents want childcare on every single day of the week, so there tend to be peaks and troughs in demand which may also be exacerbated by seasonal factors). New providers may also find that it takes time to build up the number of children on their books. Therefore, as the number of providers increases, it is almost inevitable that the number of vacancies will also increase. However, it is striking that the number of vacancies has increased at the same time as the number of registered places has actually decreased for most providers, suggesting that there may also have been a decrease in demand for childcare between 2010 and 2011, possibly linked to the economically challenging situation that continued to affect England in 2011.

In 2011, sessional care and full day care in children's centres were the only types of provision to see a decrease in the number of settings in operation.

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

For full day care in children's centres a 31 per cent fall in the number of settings was matched by a 28 per cent fall in the number of vacancies, suggesting that demand remained relatively stable in the centres that remained open. However, amongst sessional providers the number of settings in operation fell by five per cent, while the number of vacancies actually increased by 13 per cent between 2010 and 2011. This points to a decrease in demand amongst existing sessional providers, borne out by a decline of nine per cent in the number of children attending between 2010 and 2011. This decrease in demand is likely to place existing sessional providers under additional financial strain and may point towards future decreases in the number of settings offering sessional care.⁴⁵

In order to better understand changes in vacancy numbers it is also useful to focus on the average number of vacancies per setting and on the proportion of the total available places that are vacant for each different type of provider.

Amongst full day care providers the number of vacancies rose by ten per cent between 2010 and 2011; from 122,700 to 134,600. In 2011, 19 per cent of all full day care places were vacant. This continues a gradual upward trend that started in 2008 when 13 per cent of places were vacant and brings the proportion of vacancies back in to line with the figure in 2007 (18 per cent). The average number of vacancies per setting (eight) did not change between 2011 and 2010.

Looking specifically at full day care providers in children's centres, the proportion of all places that were vacant nationally was lower than for any other care type (10 per cent) whilst the mean number of vacancies in each setting (six) was slightly lower than was the case amongst full day care providers generally (eight).

For sessional providers the mean number of vacancies per setting was six. This was a small increase from 2010 (five) and a notable rise from 2008 when each setting had an average of two vacancies. Overall, 19 per cent of all sessional places were vacant in 2011.

A similar proportion of after school and holiday club places were vacant across England (22 per cent and 23 per cent respectively) but holiday clubs had a higher number of vacancies per setting; 11, compared to eight in after school clubs. This reflects the larger average scale of holiday club provision.

A quarter (26 per cent) of registered places offered by childminders were vacant in 2011, though on average each provider had only one vacancy (reflecting the small scale of provision offered by childminders). Overall, the number of childminder vacancies in 2011 remained in line with the number seen in 2010 (62,000 and 61,500 respectively). Childminders have consistently had the highest proportion of vacancies of all providers - while for some this may create problems in terms of making their business financially viable, a recent study has shown that many childminders decide not to fill all their vacancies as they feel this would compromise the quality of the care they provide.⁴⁶

⁴⁵ However, this may not result in a proportional decrease in the total number of childcare providers. In the past many providers that cease to offer sessional care have switched to offering full day provision as opposed to leaving the sector altogether.

⁴⁶ Fauth, R., Jelacic, H., Lea, J., Willmott, N. and Owen, S. (2011), Childminding practice in England, NCB Report http://ncb.org.uk/media/496733/childminding_report_final.pdf

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

Early years provision in maintained schools

In 2011 there were approximately 4,000 vacancies in nursery schools. This represents 15 per cent of all nursery school places, and continues the upward trend which saw 12 per cent of places vacant in 2010 and only five per cent vacant in 2007. On average there were ten vacant places per nursery setting (an increase from eight in 2010 and only three in 2007).

In primary schools with nursery and reception classes the total number of vacancies was 40,100, which is 17 per cent lower than in 2010, when there were 48,500 vacancies. This fall in the total number of vacancies is reflected in a decrease in the average number of vacancies per setting, which fell from eight in 2010 to six in 2011. The proportion of places in primary schools with nursery and reception classes that were vacant nationally fell from ten per cent to eight per cent.

In primary schools with reception but no nursery classes, the overall number of vacancies fell by 20 per cent between 2011 and 2010, from 24,100 to 19,300. There were only two vacancies per setting in 2011 (compared to three in 2010) and only seven per cent of places were vacant nationally (compared to 14 per cent in 2007).

4.6.1 Number of places vacant by deprivation

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

	30% most deprived areas (2011)		30% most deprived areas (2010)		30% most deprived areas (2009)		30% most deprived areas (2008)		30% most deprived areas (2007)	
	No.	% of all vacancies	No.	% of all vacancies	No.	% of all vacancies	No.	% of all vacancies	No.	% of all vacancies
Full day care	38,300	28%	33,800	28%	25,900	26%	25,500	31%	35,700	33%
<i>Full day care in children's centres</i>	2,100	72%	3,000	74%	4,400	77%	3,900	76%	6,900	78%
Sessional	10,400	22%	7,800	19%	3,900	15%	4,000	20%	6,100	19%
After school clubs	19,900	26%	18,900	30%	21,500	37%	19,700	33%	21,300	33%
Holiday clubs	22,400	29%	22,800	30%	17,100	24%	18,800	30%	19,400	28%
Childminders	12,600	20%	14,200	23%	11,600	20%	13,200	20%	15,700	18%
Nursery schools	2,600	65%	1,900	64%	2,000	80%	900	64%	900	64%
Primary schools with nursery and reception classes	18,100	45%	21,300	44%	17,000	44%	23,200	53%	27,600	49%
Primary schools with reception but no nursery classes	2,400	12%	3,000	13%	2,600	10%	4,500	15%	7,800	18%
Total	126,700	27%	123,700	28%	101,500	26%	109,800	30%	134,700	29%

*Base: Childcare providers, 30% most deprived areas 2011, 2010, 2009, 2008, 2007.
Early years provision in maintained schools, 30% most deprived areas 2011, 2010, 2009, 2008, 2007*

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

Table 4.14b Change in the number of vacant places in the 30% most deprived areas				
	% change in number of vacant places			
	From 2010 to 2011	From 2009 to 2011	From 2008 to 2011	From 2007 to 2011
Full day care	+13%	+48%	+50%	+7%
<i>Full day care in children's centres</i>	-31%	-53%	-47%	-70%
Sessional	+34%	+167%	+160%	+71%
After school clubs	+5%	-7%	+1%	-7%
Holiday clubs	-2%	+31%	+19%	+15%
Childminders	-11%	+8%	-5%	-20%
Nursery schools	+35%	+29%	+186%	+186%
Primary schools with nursery and reception classes	-15%	+7%	-22%	-34%
Primary schools with reception but no nursery classes	-21%	-8%	-47%	-69%
TOTAL	+2%	+25%	+15%	-6%
<i>Base: Childcare providers 30% most deprived areas 2011, 2010, 2009, 2008, 2007. Early years provision in maintained schools 2011, 2010, 2009, 2008, 2007</i>				

Overall, almost three in ten of the vacant places to be found nationally (27 per cent) were located in the 30 per cent most deprived areas (126,700). This is similar to the proportion of nationwide vacancies that were located in deprived areas in previous years and is also broadly in line with the proportion of registered places that are located in these areas (29 per cent).

Childcare

For most childcare groups the proportion of vacant places that were located in deprived areas closely mirrored the distribution of overall registered places. The one exception was holiday clubs where 35 per cent of all registered places but only 29 per cent of all vacancies were to be found in deprived areas, suggesting that demand for holiday care is relatively high in these areas.

Amongst full day care providers, 26 per cent of all registered places and 28 per cent of all vacancies were in the 30 per cent most deprived areas.

As expected, a high proportion of the vacancies in full day care settings in children's centres were to be found in deprived regions (72 per cent), which was in keeping with 70 per cent of registered places being located in these areas.

Within the sessional care group there were 10,400 vacant places in the 30 per cent most deprived areas, which was 22 per cent of all vacant sessional places nationwide in 2011. Since 2009 the number of vacant sessional places in deprived areas has more than doubled, rising from 3,900 to 10,400 (an increase of 167%). Over the same period the number of registered places in these areas increased by 44 per cent. The much sharper rise in the number of vacancies would suggest some degree of over-supply of sessional care in these areas.

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

The distribution of after school vacancies and places were very similar, with 26 per cent after school vacancies and 25 per cent of all after school places to be found in the disadvantaged areas.

There were 12,600 vacant childminder places in the 30 per cent most deprived regions in 2011; 20 per cent of the total vacant places amongst childminders in England.

Early years provision in maintained schools

In 2011, the majority (65 per cent) of vacant nursery school places in England were located in the 30 per cent most deprived areas. Though the overall number of nursery school vacancies in deprived areas remains low (2,600), the number has almost tripled since 2007 when there were only 900 vacancies.

The proportion of vacancies in primary schools with nursery and reception classes and in primary schools with reception but no nursery classes that was to be found in deprived areas was in line with the proportion of all places in deprived areas for these provider types (45 per cent and 12 per cent respectively).

4.6.2 Number of places vacant by region

Table 4.15 shows the distribution of vacant places by Region.

	Full Day Care	Full day care in children's centres	Sessional	After school clubs	Holiday clubs	Childminders	Nursery Schools	Primary schools with nursery and reception classes	Primary schools with reception but no nursery classes
East Midlands	10%	2%	10%	8%	11%	11%	7%	8%	14%
East	9%	3%	14%	7%	13%	11%	16%	9%	18%
London	13%	19%	12%	16%	12%	17%	8%	11%	3%
North East, Yorkshire & Humberside	12%	27%	10%	16%	15%	13%	18%	32%	12%
North West	16%	17%	14%	19%	16%	11%	28%	17%	13%
South East	19%	8%	18%	13%	12%	22%	8%	8%	13%
South West	9%	10%	11%	8%	12%	7%	3%	4%	17%
West Midlands	12%	15%	11%	13%	8%	7%	13%	12%	10%

Base: Childcare providers 2011. Early years provision in maintained schools 2011

Childcare

The distribution of vacant places by region broadly followed the distribution of available places. The highest proportion of full day care vacancies were found in the South East (19 per cent), which is home to 17 per cent of all registered full day care places. The South East also had the highest proportion of vacant sessional places (18 per cent) whereas the North West had the highest proportion of vacant after school (19 per cent) and holiday club (16 per cent) places.

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

Early years provision in maintained schools

The North East, Yorkshire and Humberside had the largest share of national vacancies in primary schools with nursery and reception classes, with 32 per cent of all vacancies located in this region. The East was home to the most vacancies in primary schools with reception but no nursery classes (18 per cent). The North West had the highest proportion of nursery school vacancies (28 per cent).

4.6.3 Number of places vacant

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

	Full day care	Full day care in children's centres	Sessional	After school clubs	Holiday clubs	Nursery schools	Primary schools with nursery and reception classes	Primary schools with reception but no nursery classes	Total (excl. Childminders)
Number of vacancies	134,600	2,900	47,200	77,700	77,600	4,000	40,100	19,300	400,400
None	17%	28%	28%	17%	17%	36%	36%	57%	27%
1-5	32%	27%	30%	32%	21%	11%	22%	27%	28%
6-10	24%	20%	23%	22%	24%	13%	16%	10%	20%
11-20	14%	11%	11%	15%	17%	14%	14%	4%	13%
21-30	4%	1%	3%	4%	7%	11%	4%	1%	4%
31 or more	3%	2%	2%	3%	4%	7%	3%	*	2%
Don't Know	6%	12%	3%	6%	9%	8%	5%	1%	5%

Base: Childcare providers 2011. Early years provision in maintained schools 2011

Childcare

Full day care providers in children's centres and sessional providers were most likely to report having no vacancies in 2011 (28 per cent of each). This is a significant decrease for sessional providers, 36 per cent of whom had no vacancies in 2010 (which in turn was a significant decline from the figure of 57 per cent in 2008). The proportion of full day care providers with no vacancies did not change between 2011 and 2010, remaining stable at 17 per cent.

After school and holiday clubs had the same proportion of settings with no vacancies (17 per cent), but after school clubs were more likely to have between one and five vacancies (32 per cent, compared to 21 per cent of holiday clubs). The proportion of after school clubs with no vacancies fell from 23 per cent in 2010.

Early years provision in maintained schools

Primary schools with reception but no nursery classes were the most likely to be operating at full capacity with 57 per cent saying they had no vacancies. A further 27 per cent reported that they only had between one and five vacancies on an average day.

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

The remaining early years settings were operating with more spare capacity, with 36 per cent of nursery schools and 36 per cent of primary schools with nursery and reception classes reporting no vacancies. This marked a decline in the number of nursery schools operating at full capacity, which stood at 44 per cent in 2010. One in ten nursery schools (11 per cent) had between one and five vacancies, compared to 22 per cent of primary schools with nursery and reception classes.

4.7 Proportion of places occupied

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

	Full Day Care	Full day care in children's centres	Sessional	After school clubs	Holiday clubs	Childminders	Nursery Schools	Primary schools with nursery and reception classes	Primary schools with reception but no nursery classes
None	1%	1%	3%	2%	2%	0%	0%	0%	0%
1 to 25% occupied	2%	1%	2%	1%	3%	6%	3%	*	1%
26 to 50% occupied	5%	1%	8%	11%	11%	17%	7%	2%	5%
51 to 75% occupied	23%	11%	21%	23%	26%	15%	22%	12%	10%
76 to 99% occupied	46%	47%	35%	37%	30%	13%	24%	43%	27%
100% occupied	17%	27%	28%	16%	17%	35%	36%	37%	57%
Don't Know	6%	13%	4%	9%	12%	11%	8%	5%	1%
Mean occupancy rate%	79%	87%	79%	76%	74%	75%	82%	90%	90%

Base: Childcare providers 2011. Early years provision in maintained schools 2011

Childcare

Occupancy rates (occupied places as a proportion of registered places) were high across all childcare provider types. The lowest average occupancy rate was found in holiday clubs (74 per cent) whilst the highest rate was in full day care in children's centres (87 per cent).

Sessional providers (28 per cent) and full day care providers in children's centres (27 per cent) were the most likely to say they operated at full occupancy. Full day care providers generally (17 per cent), holiday clubs (17 per cent) and after school clubs (16 per cent) were less likely to say this was the case.

Childminders had an average occupancy rate of 75 per cent, with a third (35 per cent) saying they were fully occupied.

Early years provision in maintained schools

Early years providers in maintained schools generally reported higher levels of occupancy than childcare providers. Average occupancy was highest in primary schools with nursery and reception classes, and in primary schools with reception but no nursery classes (90 per cent in both). It was slightly lower, but still high, in nursery schools (82 per cent).

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

Primary schools with reception but no nursery classes were the most likely to say they were fully occupied (57 per cent), followed by primary schools with nursery and reception classes (37 per cent) and nursery schools (36 per cent).

4.8 Free early education entitlement for 3 and 4 year olds

The number of hours of free care that children are entitled to receive was increased in September 2010, from 12.5 hours per week to 15 hours per week, with the care to be made available for 38 weeks per year.

The 2011 Childcare and Early Years Providers Survey was conducted prior to expansion of the free provision to two year olds, which is being piloted from September 2012 (hence the lack of coverage of this area in this report). It also took place before the initiative to allow parents to spread the 15 hour free entitlement for three and four year olds over two days rather than three days and the extension of the hours of free entitlement from 8 a.m.- 6 p.m. to 7 a.m.- 7 p.m. (again introduced in September 2012).

Table 4.18 shows the number of weeks per year that three and four year olds were able to access their 15 hours of free care.

	Full Day Care	Full day care in children's centres	Sessional	After school clubs	Holiday clubs	Childminders	Nursery Schools	Primary schools with nursery and reception classes	Primary schools with reception but no nursery classes
None	2%	4%	3%	51%	N/A	8%	0%	*	20%
Less than 16 weeks	1%	*	1%	1%	N/A	6%	*	*	1%
16 to 38 weeks	67%	52%	78%	24%	N/A	24%	62%	59%	46%
39 to 52 weeks	28%	43%	17%	19%	N/A	51%	36%	39%	26%
Don't Know	2%	1%	1%	5%	N/A	11%	1%	1%	7%
Mean	39	39	37	18	N/A	37	38	38	30

Base: Childcare providers with 3 and 4 year olds 2011. Childminders who offer the sessions 2011. Early years provision in maintained schools with 3 and 4 year olds 2011

Childcare

Half of childminders (51 per cent) offered the free care sessions across more than the statutory 38 weeks per year – this marked a notable increase from 2010, when 36 per cent offered this extra flexibility. This result reflects the findings of a recent study on childminders which showed that they can provide very flexible childcare.⁴⁷ Full day care providers in children's centres were also inclined to offer the free entitlement across a wider span than the basic requirement (43 per cent).

⁴⁷ Fauth, R., Jelcic, H., Lea, J., Willmott, N. and Owen, S. (2011), Childminding practice in England, NCB Report http://ncb.org.uk/media/496733/childminding_report_final.pdf

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

Not surprisingly, after school clubs were the least likely to offer free care sessions, with half saying that they didn't offer them at all (51 per cent). It is also likely that some after school clubs that also offered full day care provision were thinking about their broad provision rather than specifically about after school provision when answering this question.

Early years provision in maintained schools

Primary schools with reception but no nursery classes were less likely than the other types of early years providers to offer the free entitlement over more than 38 weeks (26 per cent). Indeed, one in five primary schools with reception but no nursery classes offered no free entitlement (20 per cent). This was a lower level than was seen in 2010 (33 per cent), though it remains higher than is seen amongst the other early years providers, which have a virtually universal offering.

4.9 Age of children

Childcare

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

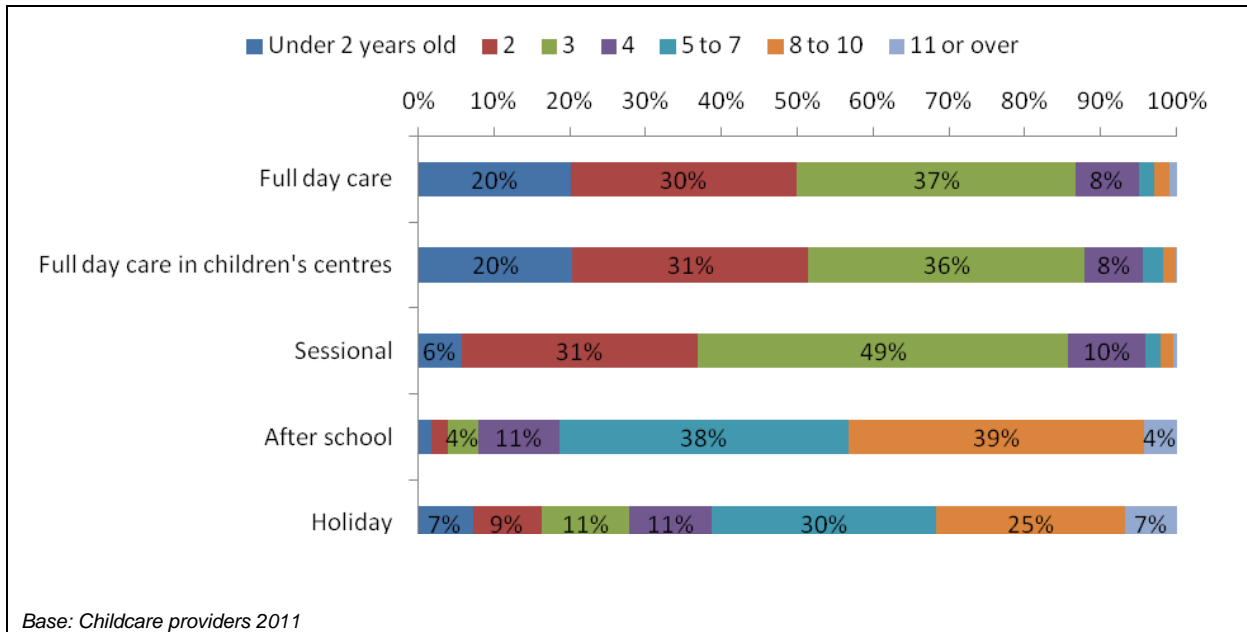
In 2011, the large majority of children attending full day care (95 per cent), full day care in children's centres (95 per cent) and sessional care (96 per cent) were aged less than 5 years old, reflecting the pre-school focus of these providers. There was a decrease in the proportion of 4 years olds on the books of full day care and sessional providers compared to 2010 – in full day care the proportion fell from 12 per cent to 8 per cent and in sessional care from 14 per cent to 10 per cent.

The age profile of full day care providers in general was almost identical to that of full day care providers in children's centres. Sessional providers were less likely to look after the very youngest children (six per cent of their attendees were aged under two, compared to 20 per cent in full day care provision), but they were more likely than full day care providers to look after three year olds (49 per cent, compared to 37 per cent).

As one might expect, after school and holiday clubs had an older profile, which reflected the nature of care they provide. Four out of five children (81 per cent) children attending after school clubs were aged five or above, as were 62 per cent of children attending holiday clubs.

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

Chart 4.1: Age of children attending provision



4.10 Children with disabilities

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

	Full Day Care	Full day care in children's centres	Sessional	After school clubs	Holiday clubs	Childminders
Minor disabilities	32%	61%	30%	36%	41%	5%
Moderate disabilities	27%	54%	23%	24%	35%	4%
Severe disabilities	13%	34%	9%	8%	13%	1%
Does not currently care for children with disabilities	53%	21%	58%	49%	43%	90%

Base: Childcare providers 2011

Full day care providers in children's centres were most likely to be looking after children with some kind of disability, with only 21 per cent saying they did not. However, this was an increase compared to 2010, when only 13 per cent said that they did not care for children with disabilities. This may be a sign that the centres that stopped their day care provision between 2010 and 2011 were more likely to have cared for children with disabilities than the ones that remained open. A third of full day care providers in children's centres (34 per cent) said they were currently looking after children with severe disabilities.

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

Amongst full day care providers in general, the proportion looking after children with disabilities was lower than was the case for those operating specifically in children's centres (47 per cent compared to 79 per cent). The proportion of sessional providers caring for children with disabilities was similar to that of full day care providers (42 per cent). Holiday clubs (57 per cent) and after school clubs (51 per cent) were slightly more likely than full day care and sessional providers to care for children with disabilities.

Childminders were the least likely group to look after children with disabilities, with nine out of ten (90 per cent) saying they did not currently do so. This may be at least partly attributable to the fact that they look after fewer children than the other providers do. This may also be connected to the fact that childminders primarily work alone and are therefore less likely to have the additional resources that are available in group settings and which allow, for example, one-to-one support. The proportion is broadly in line with that in 2010 (87 per cent).

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

5. Workforce composition

This chapter looks at the number and type of paid and unpaid staff working within the childcare and early years sector. It also explores their average rates of pay, the hours they work and how much of their time is spent interacting with children.

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

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

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

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

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

5.1 Number of staff

Estimates of staffing numbers are typically correlated to the estimated number of settings detailed in chapter 3, with increases in the total number of settings being mirrored by an increase in the number of staff working in the sector. In many cases in 2011 this remains the case, though there are exceptions to be found in the out of school (after school and holiday clubs) provision, as discussed later.

Childcare

The number of paid and unpaid staff working within group based childcare settings is shown in table 5.1a and the percentage change in the number of staff working in these settings across the years is shown in table 5.1b.

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

In the 2010 Childcare and Early Years Providers Survey, we asked an additional question to determine whether staff working in a given setting also held other jobs in the childcare and education sector. It was found that seven per cent of providers reported that at least one member of staff held other jobs in the childcare and education sector and it is reasonable to assume that a similar situation would apply in 2011.

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

Table 5.1a Number of staff working in childcare providers						
	Number of paid and unpaid staff					
	2011	2010	2009	2008	2007	2006
	No.	No.	No.	No.	No.	No.
Full day care	219,300	213,300	187,600	178,500	161,800	152,400
<i>Full day care in children's centres</i>	8,600	12,900	15,800	13,900	13,700	10,000
Sessional	63,500	65,400	60,800	66,500	63,100	72,200
After school clubs	68,500	72,100	51,400	53,100	50,400	54,500
Holiday clubs	75,200	83,300	60,500	62,800	51,200	68,200
Total*	426,500	434,100	360,300	360,900	326,500	347,300
	Number of paid staff					
	2011	2010	2009	2008	2007	2006
	No.	No.	No.	No.	No.	No.
Full day care	196,700	187,800	173,200	165,500	151,200	140,000
<i>Full day care in children's centres</i>	7,800	11,400	14,600	13,500	12,900	9,200
Sessional	55,500	54,600	50,100	54,800	52,700	57,000
After school clubs	62,500	66,300	46,800	48,600	46,100	48,500
Holiday clubs	67,900	73,000	52,600	50,800	45,400	55,500
Total*	382,600	381,700	322,700	319,700	295,400	301,000
	Number of unpaid staff					
	2011	2010	2009	2008	2007	2006
	No.	No.	No.	No.	No.	No.
Full day care	22,700	26,800	16,100	15,800	15,000	15,400
<i>Full day care in children's centres</i>	950	1,800	1,500	1,400	1,400	1,100
Sessional	9,300	11,100	11,100	13,400	12,200	16,800
After school clubs	6,300	7,100	4,800	4,900	4,700	6,000
Holiday clubs	8,000	11,900	8,700	12,700	6,700	12,700
Total*	46,300	56,900	40,700	46,800	38,600	50,900

Base: Childcare providers 2011, 2010, 2009, 2008, 2007, 2006

* As discussed above, there may be some degree of double counting in the total figures, due to some staff working for more than one provider, or staff working in settings that offer more than a single type of care.

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

Table 5.1b Number of staff working in childcare providers					
	% change in number of paid and unpaid staff				
	From 2010 to 2011	From 2009 to 2011	From 2008 to 2011	From 2007 to 2011	From 2006 to 2011
	%	%	%	%	%
Full day care	3%	17%	23%	36%	44%
<i>Full day care in children's centres</i>	-33%	-46%	-38%	-37%	-14%
Sessional	-3%	4%	-5%	1%	-12%
After school clubs	-5%	33%	29%	36%	26%
Holiday clubs	-10%	24%	20%	47%	10%
Total	-2%	18%	18%	31%	23%
	% change in number of paid staff				
	From 2010 to 2011	From 2009 to 2011	From 2008 to 2011	From 2007 to 2011	From 2006 to 2011
	%	%	%	%	%
Full day care	5%	14%	19%	30%	41%
<i>Full day care in children's centres</i>	-32%	-47%	-42%	-40%	-15%
Sessional	2%	11%	1%	5%	-3%
After school clubs	-6%	34%	29%	36%	29%
Holiday clubs	-7%	29%	34%	50%	22%
Total	+/- 0%	19%	20%	30%	27%
	% change in number of unpaid staff				
	From 2010 to 2011	From 2009 to 2011	From 2008 to 2011	From 2007 to 2011	From 2006 to 2011
	%	%	%	%	%
Full day care	-15%	41%	44%	51%	47%
<i>Full day care in children's centres</i>	-47%	-37%	-32%	-32%	-14%
Sessional	-16%	-16%	-31%	-24%	-45%
After school clubs	-11%	31%	29%	34%	5%
Holiday clubs	-33%	-8%	-37%	19%	-37%
Total	-19%	14%	-1%	20%	-9%

Base: Childcare providers 2011, 2010, 2009, 2008, 2007, 2006.

Between 2006 and 2011, the total number of staff working in childcare providers increased substantially, rising by 23 per cent from 347,300 to 426,500. This growth was driven by an increase of 44 per cent in the number of staff working in full day care providers and, to a lesser extent, by increases of 10 per cent in the number of staff in holiday clubs and 26 per cent in the number of staff in after school clubs. However, over the same period, the number of staff employed in full day care settings in children's centres and in sessional care settings actually decreased (by 14 per cent and 12 per cent respectively). These decreases are to be expected bearing in mind the decrease in the number of settings offering these types of care between 2006 and 2011, as discussed in chapter 3.1.

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

Focusing on more recent changes, between 2010 and 2011 the total number of staff (including both paid and unpaid staff) working in childcare providers remained relatively stable (426,500 in 2011 compared to 434,100 in 2010). The number of staff in full day care providers increased by three per cent over this period (from 213,300 to 219,300). However, the total number of staff operating in all other types of childcare provider declined between 2010 and 2011. The number fell most quickly for full day care in children's centres, where there was a 33 per cent decrease in staff between 2010 and 2011. This decrease runs in parallel with the decrease of 31 per cent in the total number of such providers.

Between 2010 and 2011 there was also a decrease of three per cent in the number of staff working in sessional settings (compared to a decrease of five per cent in the total number of such settings).

The number of staff in after school clubs fell by five per cent (in spite of an increase of five per cent in the number of such settings) and holiday club staffing fell by 10 per cent (while the number of settings increased by three per cent). As such, it appears that while the change in childcare staffing levels are generally reflective of wider changes in the number of providers, out of school provision has seen a decrease in staffing levels that goes beyond these broader sector trends.

Overall, the number of *paid* childcare staff remained stable between 2010 and 2011, with a total of 382,600 in 2011 (compared to 381,700 in 2010). Full day care providers saw a five per cent increase in the number of paid staff, while sessional providers saw a two per cent increase. There were decreases in the number of paid staff in after school settings (six per cent), holiday clubs (seven per cent) and full day care in children's centres (32 per cent).

There was a marked decrease in the number of *unpaid* staff, which fell by 19 per cent between 2010 and 2011. This applied to all types of childcare provider, with decreases ranging from 11 per cent in after school clubs to 47 per cent in full day care settings in children's centres. While unpaid staff only accounted for 11 per cent of all staff, it remains striking that there have been decreases in their numbers for all types of provider in the childcare sector. One possible contributing factor in this shift, is the increasing number of young people joining apprenticeship schemes. In the 2010/11 academic year there were 27,410 apprenticeship starts in the "children's care, learning and development" category, an increase of 36 per cent on the number the previous year (20,110).⁴⁸ This equates to an additional 7,300 apprenticeships, which is more than double the previous largest single year increase for which records are available (going back to 2002). As such, it is possible that providers in 2011 were making more use of apprentices (who would be considered as paid staff) and taking on fewer placement students (who are included in the unpaid staff definition). This idea is supported by the fact that, as discussed later, there were decreases in the proportion of all staff that were students across most types of provider (see chapter 5.3).

⁴⁸ BIS Data Service, Statistical First Release, 28th June 2012, Apprenticeship Supplementary Tables, Breakdown by Framework, Level and Gender.
http://www.thedataservice.org.uk/statistics/statisticalfirstrelease/sfr_supplementary_tables/Apprenticeship_sfr_supplementary_tables/

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

Early years provision in maintained schools

Table 5.2 shows the number of paid and unpaid staff working in early years settings in maintained schools. It also shows the percentage change in the number of staff working in these settings over time.

The total number of staff working in early years provision decreased slightly between 2010 and 2011, falling by four per cent, from 127,600 to 122,900, though the number of *paid* staff remained essentially stable (98,200 in 2011 compared to 98,800 in 2010).

In 2011, there were 66,100 members of staff in primary schools with nursery and reception classes, a decrease from 68,400 in 2010. There were 50,600 staff in primary schools with reception but no nursery classes, a decrease from 53,200 in 2010. However, the number of staff in nursery schools increased slightly (by three per cent) between 2010 and 2011, from 6,000 to 6,200.

The number of *paid* staff in primary schools with nursery and reception classes, and in primary schools with reception but no nursery classes, remained essentially stable between 2010 and 2011. However, the number of paid staff in nursery schools rose by six per cent.

In common with the pattern seen amongst childcare providers, the number of *unpaid* staff (which includes both students and any volunteers involved in running early years sessions) in all types of early years provider fell between 2010 and 2011. The decreases ranged from eight per cent in nursery schools to 13 per cent in primary schools with nursery and reception classes.

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

Workforce composition

Table 5.2 Number of staff working in early years providers in maintained schools									
	Number of paid and unpaid staff					% change in number of staff			
	2011	2010	2009	2008	2007	From 2010 to 2011	From 2009 to 2011	From 2008 to 2011	From 2007 to 2011
	No.	No.	No.	No.	No.	%	%	%	%
Nursery schools	6,200	6,000	6,100	6,000	5,900	3%	2%	3%	5%
Primary schools with nursery and reception classes	66,100	68,400	61,800	63,600	64,900	-3%	7%	4%	2%
Primary schools with reception but no nursery classes	50,600	53,200	49,400	48,100	53,500	-5%	2%	5%	-5%
TOTAL	122,900	127,600	117,300	117,700	124,200	-4%	5%	4%	-1%
	Number of paid staff					% change in number of staff			
	2011	2010	2009	2008	2007	From 2010 to 2011	From 2009 to 2011	From 2008 to 2011	From 2007 to 2011
	No.	No.	No.	No.	No.	%	%	%	%
Nursery schools	5,200	4,900	5,300	5,300	5,000	6%	-2%	-2%	4%
Primary schools with nursery and reception classes	54,400	54,500	51,400	52,400	52,300	+/- 0%	6%	4%	4%
Primary schools with reception but no nursery classes	38,700	39,400	37,600	37,700	38,600	-2%	3%	3%	+/- 0%
TOTAL	98,200	98,800	94,300	95,400	95,800	-1%	4%	3%	3%
	Number of unpaid staff					% change in number of staff			
	2011	2010	2009	2008	2007	From 2010 to 2011	From 2009 to 2011	From 2008 to 2011	From 2007 to 2011
	No.	No.	No.	No.	No.	%	%	%	%
Nursery schools	1,100	1,200	700	1,000	1,000	-8%	57%	10%	10%
Primary schools with nursery and reception classes	13,200	15,200	11,800	14,600	14,700	-13%	12%	-10%	-10%
Primary schools with reception but no nursery classes	13,000	14,800	12,300	12,900	15,600	-12%	6%	1%	-17%
TOTAL	27,300	31,200	24,800	28,500	31,400	-13%	10%	-4%	-13%

Base: Early years provision in maintained schools 2011, 2010, 2009, 2008, 2007.

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

5.2 Number of places per paid staff member

Childcare

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

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

	2011	2010	2009	2008	2007	2006
Full day care	3.7	3.8	3.7	3.8	4.0	3.9
<i>Full day care in children's Centres</i>	3.7	3.5	3.5	3.7	4.0	4.1
Sessional	4.5	4.6	4.5	4.4	4.7	4.9
After school clubs	5.7	5.6	5.8	5.8	5.6	5.4
Holiday clubs	5.0	4.8	5.0	5.2	5.1	4.8

Base: Childcare providers 2011, 2010, 2009, 2008, 2007, 2006.

The ratio of registered places to staff in 2011 was very similar to 2010. In both full day care and full day care in children's centres there were less than four places per member of staff (3.7 places per paid member of staff in both). This is a reflection of the younger age profile of children cared for in these establishments and the according staffing requirements set out by Ofsted.

The ratio for sessional care was 4.5 places per staff member and reflects the wider age range of the children this type of provider tends to care for.

Holiday clubs and after school clubs tend to care for older children and therefore had a higher ratio of registered places to members of staff; 5.7 registered places per member of staff for holiday clubs, and 5.0 registered places per member of staff for after school clubs.

	Full day care	<i>Full day care in children's centres</i>	Sessional	After school clubs	Holiday clubs
Private or Voluntary	3.7	3.7‡	4.6	5.3	4.9
<i>Private</i>	3.6	†	4.3	5.2	4.6
<i>Voluntary</i>	3.9	†	4.8	5.5	5.4
Maintained	3.8	3.7	4.0 ‡	7.0	5.6
<i>Local authority</i>	†	3.7...	†	†	†
<i>School/college</i>	†	†	†	7.2	6.8
<i>Other</i>	†	†	†	†	†

Base: Childcare providers 2011.

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

Table 5.4 shows the ratio of registered places to staff, by ownership of the setting. For full day care providers, there was little variation in the number of registered places by ownership of the establishment (ranging from 3.6 in private settings to 3.9 in voluntary settings). Private and voluntary after school clubs had fewer places per staff member than maintained after school clubs (5.3 compared to 7.0). The same pattern was also noticeable, but to a lesser extent, among holiday clubs (4.9 places per staff member in private or voluntary sector compared to 5.6 in maintained settings).

Early years provision in maintained schools

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

Table 5.5 displays the ratio of registered places to staff members amongst early years providers. The downward trend in nursery schools has continued, decreasing from 5.7 in 2007 and 2008 to 5.0 in 2011. Primary schools with nursery and reception classes saw no change between 2010 and 2011 (stable at 9.0). There was a slight decrease in primary schools with reception but no nursery classes, from 7.8 in 2010 to 7.4 in 2011.

Nursery schools reported the lowest ratio in the maintained sector, which is unsurprising given the younger age profile of children in these settings.

	2011	2010	2009	2008	2007
Nursery schools	5.0	5.2	5.6	5.7	5.7
Primary schools with nursery and reception classes	9.0	9.0	9.1	9.8	8.2
Primary schools with reception but no nursery classes	7.4	7.8	7.3	7.3	7.9

Base: Early years provision in maintained schools 2011, 2010, 2009, 2008, 2007.

5.3 Staff type

Childcare

Tables 5.6a, 5.6b and 5.6c show the breakdown of the childcare workforce by staff type. The number and proportion of staff by staff type, broken down by type of provider and type of ownership, are included in Appendix 1 (tables 5.6d - 5.6i).

Supervisors were the largest staff group across all types of providers. In full day care settings and settings offering full day care within children's centres, over half of all staff were supervisors (56 and 60 per cent respectively). In both sessional providers and holiday clubs, supervisors accounted for exactly half of staff (50 per cent in both), while they accounted for just under half of all staff in after school clubs (47 per cent).

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

In 2011 the proportion of supervisors increased in full day care settings (from 52 per cent in 2010 to 56 per cent in 2011). The same applied to full day care settings operating specifically within children's centres (increasing from 54% to 60%), as well as in sessional providers and holiday clubs (both increased from 46 per cent in 2010 to 50 per cent in 2011). After school clubs were the only settings where the proportion of supervisors had not show an upward trend, remaining essentially flat (48 per cent in 2010 and 47 per cent in 2011).

More than ten per cent of staff were senior managers in sessional settings (12 per cent), after school clubs (15 per cent) and holiday clubs (11 per cent). In full day care settings, only eight per cent of staff were senior managers and the proportion was lowest in children's centres (seven per cent), reflecting the relatively large total number of staff employed in these full day care settings.

Other paid staff (who were not qualified to supervise a group of children on their own) accounted for around a quarter of all childcare staff (26 per cent in full day care, 23 per cent in children's centres providing full day care, 24 per cent in sessional care and 29 per cent in both after school and holiday clubs). There were no significant changes in the proportion of other paid staff between 2010 and 2011.

Less than ten per cent of staff across childcare settings were students on placement. There has been a slight decrease between 2010 and 2011 of the proportion of students in each provider type and it would seem to be this, rather than a decrease in the number of unpaid volunteers, which is behind the decline in the number of unpaid staff in the childcare sector.

Volunteers remained the smallest specific staff group for all types of childcare provider. Sessional providers benefitted from the highest proportion of voluntary staff (seven per cent in 2011), while five per cent of holiday club staff were volunteers and only three per cent of staff in the other types of provider volunteered. There were no notable differences between 2010 and 2011.

	Full day care					Full day care in children's centres				
	2011	2010	2009	2008	2007	2011	2010	2009	2008	2007
Senior manager	8%	8%	7%	8%	8%	7%	6%	6%	7%	7%
Supervisory	56%	52%	56%	52%	54%	60%	54%	64%	64%	61%
Other paid childcare staff	26%	28%	29%	34%	31%	23%	27%	22%	27%	25%
Students on placement	8%	9%	5%	6%	6%	8%	11%	6%	7%	3%
Volunteers	3%	3%	3%	2%	3%	3%	3%	3%	3%	3%

Base: Childcare providers 2011, 2010, 2009, 2008, 2007.

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

	Sessional				
	2011	2010	2009	2008	2007
Senior manager	12%	12%	12%	12%	12%
Supervisory	50%	46%	44%	40%	41%
Other paid childcare staff	24%	25%	27%	31%	30%
Students on placement	7%	9%	7%	8%	7%
Volunteers	7%	8%	11%	12%	12%

Base: Childcare providers 2011, 2010, 2009, 2008, 2007.

	After school clubs					Holiday Clubs				
	2011	2010	2009	2008	2007	2011	2010	2009	2008	2007
Senior manager	15%	13%	15%	16%	16%	11%	9%	10%	10%	11%
Supervisory	47%	48%	46%	43%	43%	50%	46%	43%	38%	42%
Other paid childcare staff	29%	29%	30%	33%	33%	29%	31%	34%	33%	36%
Students on placement	6%	5%	4%	4%	5%	6%	7%	5%	9%	6%
Volunteers	3%	4%	5%	5%	5%	5%	7%	9%	11%	7%

Base: Childcare providers 2011, 2010, 2009, 2008, 2007.

Early years provision in maintained schools

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

The proportion of each type of staff in maintained schools in 2011 was very similar to the proportions seen in 2010. However, there has been a small increase in the proportion of nursery nurses in all provider types across this time period - the proportion of nursery nurses in nursery schools increased from 38 to 42 per cent, in primary schools with nursery and reception classes from 25 to 28 per cent, and in primary schools with reception but no nursery classes from 15 to 17 per cent. This equates to an increase in the number of nursery nurses from 2,300 to 2,600 in nursery schools, from 16,400 to 18,000 in primary schools with nursery and reception classes, and from 7,300 to 7,900 in primary schools with reception but no nursery classes.

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

As would be expected, nursery schools had the highest proportion of nursery nurses (42 per cent).⁴⁹ In nursery schools around one in six staff was an early years teacher and there was a similar proportion of early years support staff (17 per cent for both). There was usually only one early years co-ordinator per setting so they represented the smallest proportion of paid staff (seven per cent). Almost a fifth (18 per cent) of the nursery schools workforce was unpaid, with 12 per cent of the workforce made up of students and six per cent of volunteers.

In primary schools with nursery and reception classes more than a quarter of staff were nursery nurses (28 per cent), followed by 22 per cent early years teachers and 19 per cent other paid support staff. Head teachers or early years co-ordinators made up 10 per cent of the workforce, the same proportion as students on placement and volunteers (both 10 per cent). Unpaid staff made up 20 per cent of the workforce in these settings (10 per cent students and 10 per cent volunteers).

The breakdown of staff in primary schools with reception but no nursery classes was quite different to that in the other early years providers. The largest staff group was early years support staff (22 per cent of all staff). Nine per cent of staff were students on placement and 19 per cent were volunteers, showing that in these settings unpaid staff accounted for a larger proportion of staff than in the other types of early years provider. Head teachers or early years co-ordinators accounted for 18 per cent of the staff, a higher proportion than in the other early years providers. As could be expected, primary schools with reception but no nursery classes had the smallest proportions of nursery nurses (17 per cent).

⁴⁹ Nursery nurses are defined as being those qualified to supervise a group of children on their own, but who are not qualified early years teachers.

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

	Nursery schools					Primary schools with nursery and reception classes					Primary schools with reception but no nursery classes				
	2011	2010	2009	2008	2007	2011	2010	2009	2008	2007	2011	2010	2009	2008	2007
Head teacher/Early years or foundation stage co-ordinator	7%	7%	7%	7%	8%	10%	10%	10%	10%	11%	18%	17%	17%	17%	16%
Early years teachers	17%	18%	21%	20%	19%	22%	22%	22%	21%	20%	15%	17%	14%	17%	14%
Nursery nurses	42%	38%	40%	42%	40%	28%	25%	25%	25%	24%	17%	15%	12%	12%	11%
Early years support staff	17%	18%	19%	18%	18%	19%	20%	20%	21%	22%	22%	22%	23%	23%	20%
Students on placements	12%	13%	8%	10%	12%	10%	12%	9%	12%	12%	9%	10%	7%	8%	8%
Volunteers	6%	7%	4%	6%	6%	10%	11%	10%	11%	12%	19%	20%	18%	19%	21%

Base: Early years providers 2011, 2010, 2009, 2008, 2007.

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

5.4 Working hours

The average number of hours worked per week by different levels of paid staff in different types of provider is shown in tables 5.14 and 5.15. Part time staff are included in the calculation of these averages. In Appendix 1, tables 5.14a-g and 5.15a give a more detailed breakdown of staff working hours by type of ownership, profit making status (for childcare providers) and area of deprivation (for both childcare and early years providers).

Childcare

Staff working in full day care providers tended to work the longest hours (an average 32 hours per week, rising to 34 hours for full day care provision in children's centres). This was followed by staff working in holiday clubs who were contracted for an average of 29 hours per week, though this time would be concentrated in holiday periods. These providers offer longer hours of care than both sessional and after school providers, where staff worked an average of 22 hours and 21 hours per week respectively. In all types of providers, senior managers worked the longest hours, followed by supervisory staff and then other paid staff.

Between 2010 and 2011 there were no marked differences in the average hours worked per week. In the longer term, there has been an increase in the average hours worked in sessional settings, rising from 18 hours per week in 2007 to 22 hours in 2011. The same applies to after school clubs, where average hours have risen from 18 to 21 hours since 2007.

	Full day care	Full day care in children's centres	Sessional	After school clubs	Holiday clubs
All staff	32	34	22	21	29
Senior managers	35	36	26	26	33
Supervisory staff	34	35	24	22	30
Other paid childcare staff	29	32	18	17	24

Base: All paid childcare staff 2011.

Early years provision in maintained schools

In 2011, the number of hours worked by different types of staff was very similar to the hours worked in 2010 across all types of early years providers.

As was the case in previous years, the average working hours of all staff in nursery schools was slightly higher (31 hours per week) than in primary schools with reception but no nursery classes (26 hours per week) and similar to primary schools with nursery and reception classes (29 hours per week).

Across all three types of providers, early years coordinators tended to work the longest hours and other early years support staff had the shortest average working hours.

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

	Nursery schools					Primary schools with nursery and reception classes					Primary schools with reception but no nursery classes				
	2011	2010	2009	2008	2007	2011	2010	2009	2008	2007	2011	2010	2009	2008	2007
All staff	31	31	30	30	31	29	29	29	29	29	26	26	26	26	27
Early years coordinators	34	35	37	35	41	31	31	32	32	34	31	31	32	32	33
Early years teachers	30	30	30	30	33	30	29	30	30	31	27	28	29	28	30
Nursery nurses	33	33	32	32	32	30	30	30	30	30	26	27	26	26	26
Other early years support staff	24	25	22	24	23	25	25	24	25	24	22	22	22	22	21

Base: All paid early years staff 2011, 2010, 2009, 2008, 2007

5.4.1 Time spent interacting with children

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

Childcare

Level 6 qualified staff in full day care settings spent the most time interacting directly with children (an average of 6.3 hours a day), followed by staff in holiday clubs (5.7 hours a day) and those working in full day care settings at children's centres (5.6 hours a day). This is at least partly due to their longer hours of operation relative to sessional and after school provision.

Supervisory staff qualified to at least level 6 in all types of providers spent more time interacting directly with children than senior managers. As was found in 2009 and 2010, senior managers in children's centres offering full day care spent the least time interacting directly with children (2 hours per day).

The amount of time all level 6 qualified staff in full day care settings spent interacting with children increased from 5.7 hours in 2010 to 6.3 hours in 2011. This was due to increases for both senior managers (from 3.9 hours in 2010 to 4.4 hours in 2011) and supervisory staff (6.3 hours increasing to 6.8 hours).

Contact hours in sessional settings also increased, from 4.3 hours per day in 2010 to 5.1 hours per day in 2011. This was driven by an increase in contact time for supervisory staff (from 4.8 hours to 6 hours per day).

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

	Full day care	Full day care in children's centres	Sessional	After school clubs	Holiday clubs
All staff qualified to at least level 6	6.3	5.6	5.1	4.6	5.7
Senior managers qualified to at least level 6	4.4	2.0	3.5	3.1	3.9
Supervisory staff qualified to at least level 6	6.8	6.2	6.0	5.7	6.6
Other paid childcare staff qualified to at least level 6	†	†	†	†	†
<i>Base: All childcare staff qualified to at least level 6 2011.</i>					

Early years provision in maintained schools

The average daily hours that staff qualified to at least level 6 spent interacting directly with children in 2011 was similar to that 2010 and 2009 for all three types of early years provider.

As was found in previous years, level 6 qualified staff in nursery schools tended to spend less time interacting directly with children (5 hours per day) than equivalent staff at both primary schools with nursery and reception classes (5.8 hours per day) and primary schools with reception but no nursery classes (5.6 hours per day). This difference was particularly pronounced at the early years coordinators level. In nursery schools, early years coordinators qualified to at least level 6 spent 1.9 hours a day interacting directly with children, compared to an average of 5.4 hours per day in both primary school settings.

	Nursery schools	Primary schools with nursery and reception classes	Primary schools with reception but no nursery classes
All staff qualified to at least level 6	5.0	5.8	5.6
Early years coordinators qualified to at least level 6	1.9	5.4	5.4
Early years teachers qualified to at least level 6	5.9	6.0	5.8
Nursery nurses qualified to at least level 6	†	5.9†	†
Other early years support staff qualified to at least level 6	†	†	†
<i>Base: All paid early years staff qualified to at least level 6 2011.</i>			

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

5.5 Pay levels

Childcare

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

Overall, it is evident that the long term trend for wages in the childcare sector to increase faster than wages in the broader UK economy came to an end in 2011. However, it is likely that this is strongly connected to the challenging economic climate rather than any change in the fundamentals which have been driving increases in wages in recent years (i.e. low wages in the childcare sector compared to the broader economy coupled with an increasingly qualified workforce). As discussed in chapter 6, qualification levels of the childcare workforce continued to increase in 2011 and the inherent upwards pressure on wages is likely to remain, albeit restricted for the time being by the exceptionally challenging financial situation that providers were faced with from 2010 to 2011.

Staff working in full day care offered at children's centres earned more per hour than staff at other childcare providers, earning an average of £11.30 per hour in 2011. This was followed by staff in holiday clubs and after school clubs, both of which earned an average of £8.20 per hour. Staff in sessional care providers earned £7.90 an hour on average and full day care staff earned £7.80.

Between 2010 and 2011, pay levels in full day care, sessional and after school providers did not change significantly. However, average pay in holiday clubs fell by nine per cent and in children's centres offering full day care average pay increased by four per cent.

Senior managers in full day care offered at children's centres had the highest overall pay level with an average of £16.30 per hour, followed by those working in after school clubs (£11.30) and in holiday clubs (£11.10 per hour). In full day care, senior managers earned an average of £10.60 per hour and in sessional care £9.80 an hour.

Supervisory staff hourly pay was similar across the childcare providers at around £8.00 an hour, the one exception being for those working at children's centres offering full day care who were paid an average of £11.90 an hour. Generally, supervisory staff hourly pay had tended to decrease since 2010 and holiday club supervisors saw the greatest fall (a 10 per cent decrease between 2010 and 2011). Bucking this trend, the hourly pay of supervisory staff in children's centres increased by three per cent.

Considering other paid staff, the highest hourly pay was again to be found in children's centres offering full day care (£8.40 an hour). Other paid staff working in full day care earned an average of £6.60 per hour, those working at sessional providers £6.80 per hour and those working in after school and holiday clubs respectively earned £6.90 and £7.00 an hour. In 2011, other paid staff in holiday clubs earned on average hourly rate that was £0.80 less than in 2010, a ten per cent decrease.

To put these findings into context, the national average hourly wage for UK employees rose by one per cent between 2010 and 2011 (from £14.65 to £14.76).⁵⁰

⁵⁰ ONS Annual Survey of Hours and Earnings, 2011 Provisional Results (SOC 2000) - Hourly pay excluding overtime tables

<http://www.ons.gov.uk/ons/publications/re-reference-tables.html?edition=tcn%3A77-235202>

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

	Full day care			<i>Full day care in children's centres</i>			Sessional		
	2011	% change from 2010 to 2011	% change from 2009 to 2010	2011	% change from 2010 to 2011	% change from 2009 to 2010	2011	% change from 2010 to 2011	% change from 2009 to 2010
All staff	£7.80	-2%	+5%	£11.30	+4%	+5%	£7.90	+1%	+5%
Senior managers	£10.60	-2%	+2%	£16.30	+/- 0%	+4%	£9.80	+2%	+7%
Supervisory	£8.10	-2%	+5%	£11.90	+3%	+6%	£7.90	-1%	+7%
Other paid staff	£6.60	+/- 0%	+3%	£8.40	+/- 0%	+6%	£6.80	+1%	+3%

Base: All childcare providers 2011, 2010, 2009

	After school clubs			Holiday clubs		
	2011	% change from 2010 to 2011	% change from 2009 to 2010	2011	% change from 2010 to 2011	% change from 2009 to 2010
All staff	£8.20	-1%	+5%	£8.20	-9%	+6%
Senior managers	£11.30	+1%	+6%	£11.10	-7%	+3%
Supervisory	£8.20	-5%	+8%	£8.40	-10%	+6%
Other paid staff	£6.90	+3%	+/- 0%	£7.00	-10%	+4%

Base: All childcare providers 2011, 2010, 2009

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

Early years provision in maintained schools

Table 5.18 and 5.19 show the average annual pay and hourly pay by staff type in each early years provider.

Table 5.18 Average annual pay						
	Nursery schools		Primary schools with nursery and reception classes		Primary schools with reception but no nursery classes	
	2011	% change from 2010 to 2011	2011	% change from 2010 to 2011	2011	% change from 2010 to 2011
All staff	£23,700	1%	£22,200	+/- 0%	£21,600	1%
Head teachers/ Early years or foundation stage co-ordinators	£52,100	3%	£38,800	2%	£35,900	2%
Qualified early years teachers	£34,200	3%	£30,600	5%	£29,400	3%
Nursery nurses	£19,900	3%	£16,700	-3%	£13,800	-3%
Other paid early years support staff	£11,200	-7%	£11,600	-3%	£10,400	1%

Base: All paid early years staff 2011, 2010.

Table 5.19 Average hourly pay						
	Nursery schools		Primary schools with nursery and reception classes		Primary schools with reception but no nursery classes	
	2011	% change from 2010 to 2011	2011	% change from 2010 to 2011	2011	% change from 2010 to 2011
All staff	£14.40	1%	£14.70	3%	£14.90	1%
Head teachers/ Early years or foundation stage co-ordinators	£29.50	5%	£24.40	3%	£22.80	4%
Qualified early years teachers	£22.60	3%	£20.50	3%	£20.60	4%
Nursery nurses	£11.50	2%	£10.70	-2%	£10.10	+/- 0%
Other paid early years support staff	£8.80	-6%	£8.80	-2%	£9.00	-2%

Base: All paid early years staff 2011, 2010.

As seen in previous years, the average annual pay and hourly pay were generally higher in nursery schools than in the two primary school settings and this applied to all levels of seniority apart from support staff. The average annual pay among all staff in nursery schools in 2011 was £23,700 compared to £22,200 in primary schools with nursery and reception classes, and £21,600 in primary schools with reception but no nursery classes. The salary gap between nursery schools and the two primary school settings was higher amongst senior members of staff.

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

The annual salary of head teachers in nursery schools was considerably higher than that of early years co-ordinators in primary school settings (£52,100 per annum compared with £38,800 in primary schools with nursery and reception classes and £35,900 in primary schools with reception but no nursery classes). This was due to both longer working hours and a higher hourly rate. Between 2010 and 2011 the average hourly pay increased by five per cent for head teachers in nursery schools and by four per cent for early years co-ordinators in primary schools with reception but no nursery classes.

The same pattern exists among early years teachers, albeit with smaller differences between the different types of provider. In nursery schools, early years teachers earned an average of £34,200 per year compared to £30,600 in primary schools with nursery and reception classes and £29,400 in primary schools with reception but no nursery classes. Early years teachers in primary schools with nursery and reception classes saw an increase of five per cent in their annual pay between 2010 and 2011.

Nursery nurses earned an average £19,900 per annum in nursery schools compared to £16,700 in primary schools with nursery classes and £13,900 in primary schools with reception but no nursery classes. These show no real change from 2010.

Other paid early years support staff earned an average of £11,200 in nursery schools in 2011 which is a seven per cent decrease compared to the average from 2010 (£12,100). While this decrease is statistically significant, it may overstate the true scale of the decline as there is a relatively sizeable margin of error around these figures. Other paid support staff earned an average of £11,600 in primary schools with nursery classes and a lower average of £10,400 in primary schools with reception but no nursery classes.

5.5.1 Variations in pay

Staff working in all types of childcare provider earned more per hour in local authority and school/college run establishments than in privately owned or voluntary providers.

Staff working for all types of childcare provider in the 30 per cent most deprived areas earned slightly more per hour than those working in the 70 per cent least deprived areas, with differences ranging from 40 pence per hour for sessional settings to 80 pence per hour for after school clubs.

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

	Not graduate led	Graduate led
Full day care	£7.70	£8.10
<i>Full day care in children's centres</i>	<i>£9.90</i>	<i>£12.50</i>
Sessional	£7.80	£8.00
After school club	£7.90	£9.10
Holiday club	£8.00	£8.50
<i>Base: All childcare providers 2011.</i>		

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

Average pay was typically higher in not-for-profit settings than in for-profit settings, and graduate led settings paid higher average wages than non-graduate led settings across all types of childcare provider. The gap between average pay in graduate led and non-graduate led settings varied for the different childcare provider types. Full day care in children's centres showed the largest difference in hourly pay for staff across graduate and non-graduate led settings (£2.60) and sessional providers demonstrated the smallest difference (£0.20).

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

Pay and qualification

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

Pay and region

Table 5.21 shows the average hourly pay for staff working in different types of setting based in different English regions.

	East Midlands	East of England	London	North East	Yorkshire and Humber	North West	South East	South West	West Midlands
Full day care	£7.40	£7.60	£9.50	£8.20	£7.40	£7.50	£8.00	£7.40	£7.40
<i>Full day care in children's centres</i>	†	£9.00	£15.10	£8.50	£10.80	£10.60	£10.10	£10.10	£12.10
Sessional	£7.50	£7.50	£8.50	£8.30	£7.80	£7.50	£7.90	£8.20	£7.80
After school clubs	£7.30	£8.00	£9.70	£7.90	£7.60	£8.10	£8.50	£7.70	£8.70
Holiday clubs	£7.10	£8.10	£9.60	£8.30	£8.10	£7.60	£9.00	£8.30	£7.40
Nursery schools	£15.00‡	£13.10	£15.70	£13.90	£14.40	£14.90	£13.10	†	£14.00
Primary school with nursery and reception classes	£14.80	£14.50	£16.00	£14.90	£13.90	£14.50	£13.30	£13.00	£14.40
Primary schools with reception but no nursery classes	£16.30	£13.80	£16.70	£16.80‡	£14.60	£14.80	£14.50	£14.80	£15.20

Base: All childcare providers 2011. All early years provision in maintained schools 2011

Staff working for childcare and early years providers in London generally earned more per hour than their counterparts working in other regions. This would be expected given that the cost of living is higher in London than in other parts of England and salaries tend to include London weighting to account for this.

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

Amongst childcare providers, the greatest variation between London and the next highest paid region was found in full day care within children's centres, where staff in London earned £3 per hour more than staff in the next highest paid region (West Midlands).

Pay rates for after school clubs, holiday clubs and full day care settings were the lowest in the East Midlands. Amongst early years providers, staff working in the East of England and South East regions tended to have the lowest pay levels.

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

6. Qualifications

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

The survey focuses only on qualifications that are relevant to working with young people and children⁵¹ – other qualifications that do not relate directly to working with young people and children are not taken into account in this chapter.

Throughout this chapter qualifications are broken down by a number of different factors, such as ownership of provision, type of staff, deprivation and region. Base sizes become quite small in certain instances, particularly when comparing different regions. Figures broken down into many groups should be treated with caution. Small base sizes are highlighted by a number of different symbols (see chapter 2.6.2 for further explanation of what each symbol means).

6.1 Definition of qualifications

The qualifications are grouped together in the levels that they have been accredited with by the Qualifications and Curriculum Authority⁵². Examples of the types of qualification that fall into each level are detailed below.

- Level 1 (foundation level) – GCSE grade D-G, Foundation level GNVQ, Level 1 NVQ
- Level 2 (intermediate level) – GCSE A*-C, Intermediate GNVQ, Level 2 NVQ
- Level 3 (Advanced level) – A level, Vocational A level (Advanced GNVQ), Level 3 NVQ
- Level 4 – Higher level qualifications, BTEC Higher Nationals, Level 4 NVQ (e.g. Level 4 Certificate in Early Years Practice)
- Level 5 – Higher level qualifications, BTEC Higher Nationals, Level 5 NVQ (e.g. Diploma in Higher Education and Playwork, Early Years Foundation Degree)
- Level 6 – Honours degree (e.g. BA Early Childhood Studies, Bachelor of Education (BEd), Early Years Professional Status)

⁵¹ Overseas qualifications have been excluded from the analysis, but they have been included in the tables for information. The proportion of staff with overseas qualifications across the sector as a whole is very low (less than one per cent). Respondents were provided with a detailed list of qualifications which might count as 'relevant' for the purposes of the survey.

⁵² For further information on how the different qualification levels are defined please see: <https://www.education.gov.uk/eypqd/qualification-search>

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

- Level 7 – Masters degree, PGCE, National Professional Qualification for Integrated Centre Leadership (NPQICL)
- Level 8 – Doctorate

6.2 Qualifications held by all staff

6.2.1 Qualification level by broad sector

Table 6.1 shows the proportion of staff qualified at each level in each of three broad sectors (group based childcare⁵³, early years care and childminders) and how those proportions have changed since 2007. It should be noted that there is a likelihood of double counting of staff within the total group based paid childcare staff figures. For example, a children's centre may offer both full day care and holiday clubs. It is highly likely that a member of staff at this centre would work in both the full day care provision and the holiday club provision and therefore be counted twice in the total. For this reason total 'group based childcare' figures should be treated primarily as an indication of differences between this and the other sectors rather than as an absolute measure.

Across all paid staff within all types of provider, more than three in four members of the workforce (78 per cent) in 2011 were qualified to at least level 3⁵⁴ and around one in seven (15 per cent) were qualified to at least level 6.

In 2011 there continued to be a degree of variation between different sectors. Many staff in early years providers in maintained schools are required to hold higher qualifications upon appointment, such as an NNEB⁵⁵ diploma for nursery nurses or a PGCE⁵⁶ for qualified early years teachers. Therefore it is not surprising that staff in early years providers in maintained schools continued to hold higher qualifications than group based childcare staff and childminders in 2011.

Amongst the group based childcare providers and early years settings, the difference was relatively small when it came to the proportion of staff holding at least a level 3 qualification (79 per cent amongst paid childcare staff and 82 per cent amongst paid early years staff). However, the difference was more pronounced when it came to the proportion of staff holding at least a level 6 qualification in 2011 (10 per cent amongst paid group based childcare staff, compared to 42 per cent amongst paid early years staff). Childminders typically had lower levels of qualification than staff in the group based providers, with 59 per cent of childminders holding at least a level 3 qualification and four per cent holding a relevant level 6 qualification in 2011.

⁵³ Group based childcare includes full day care, sessional care, holiday clubs and after school clubs.

⁵⁴ Those qualified to 'at least level 3' are those with a highest qualification between levels 3 and 8.

⁵⁵ National Nursery Examination Board.

⁵⁶ Post-Graduate Certificate of Education.

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

Amongst group based childcare settings and childminders, staff were more likely to have their highest qualification specifically at level 3 than at any other level, with the majority of staff in childcare providers (56 per cent) and half of childminders (50 per cent) having their highest qualification at level 3 in 2011. These findings reflect historical government policy aimed at encouraging staff working in under eights day care to achieve level 3 qualifications as set out in the 2008 Early Years Foundation Stage Statutory Framework issued by the previous administration.⁵⁷ At the time of this survey, the 2008 version of the EYFS Framework was still in effect – however, an updated version of the framework was published in March 2012 and came into force in September 2012.⁵⁸

Amongst childminders there was a continuation of the rapid increase in qualification levels seen since 2007. The proportion of childminders holding a qualification at level 3 *or higher* rose from 54 per cent in 2010 to 59 per cent in 2011. Across the same period, the proportion of childminders with no relevant qualifications at all decreased from 22 per cent to 16 per cent. This marks a continuation of the improvement in childminder qualification levels – the proportion of childminders with no qualifications has halved since 2007, falling from 33 per cent in 2007 to 16 per cent in 2011. This decrease may partly be driven by the decrease in the total number of childminders between 2007 and 2010, as discussed in chapter 3.1, with some of the least qualified childminders leaving the sector altogether. Although the gap is closing, the proportion of childminders with no relevant qualifications remains higher than that seen in group based childcare providers where only eight per cent of staff have no relevant qualifications, and in early years settings where only six per cent have no relevant qualifications.

As well as the increase in the proportion of childminders holding at least a level 3 qualification, there have also been increases across the sector as a whole. The proportion of *all* staff working in the sector holding at least a level 3 qualification has continually increased year on year, from 64 per cent in 2007, to 75 per cent in 2010 and 78 per cent in 2011.

Amongst paid staff in group based childcare settings, there were similar increases in the proportion holding at least a level 3 qualification, rising from 65 per cent in 2007 to 76 per cent in 2010 and 79 per cent in 2011.

However, perhaps reflecting the high initial starting point, the figures for staff holding at least a level 3 qualification in early years providers in maintained schools has remained essentially stable over time, rising only slightly from 79 per cent in 2007 to 82 per cent in 2011 (with much of that change occurring between 2010 and 2011, when the level rose from 80 per cent to 82 per cent).

⁵⁷ The statutory framework for the Early Years Foundation Stage, which superseded the National Standards for Under 8s Day Care and Childminding in September 2008, stipulates that in registered settings other than childminding settings, all supervisors and managers must hold a full and relevant level 3 qualification and half of all other staff must hold a full and relevant level 2 qualification.

⁵⁸ The updated framework which came into force in September 2012 removes the requirement for supervisors to hold a full and relevant level 3 qualification. The requirement now reads '*In group settings, the manager must hold at least a full and relevant level 3 qualification and at least half of all other staff must hold at least a full and relevant level 2 qualification*'.

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

Focusing specifically on high level qualifications, the proportion of *all* staff qualified to at least level 6 has increased at a slower rate in absolute terms, rising from 11 per cent in 2007 to 15 per cent in 2011. Between 2010 and 2011 there was an increase in the proportion of group based childcare staff holding at least a level 6 qualification, from 8 per cent to 10 per cent (though this remains a significantly lower proportion than the 42 per cent seen in early years settings).

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

	Total group based paid childcare staff					Childminders					Total paid early years staff					Total				
	2011	2010	2009	2008	2007	2011	2010	2009	2008	2007	2011	2010	2009	2008	2007	2011	2010	2009	2008	2007
Level 1	1%	1%	1%	1%	2%	11%	6%	8%	9%	12%	1%	1%	1%	2%	2%	2%	1%	2%	2%	3%
Level 2	11%	13%	14%	17%	18%	8%	8%	6%	7%	8%	8%	8%	8%	9%	8%	10%	11%	12%	14%	15%
Level 3	56%	55%	56%	54%	54%	50%	47%	41%	38%	36%	31%	31%	31%	31%	31%	51%	50%	49%	48%	47%
Level 4	9%	9%	8%	5%	4%	4%	3%	4%	3%	1%	2%	2%	2%	2%	2%	7%	7%	6%	5%	4%
Level 5	5%	4%	3%	2%	2%	2%	1%	1%	1%	0%	6%	4%	5%	4%	3%	5%	4%	3%	2%	2%
Level 6	8%	7%	6%	5%	4%	2%	2%	2%	2%	2%	29%	31%	31%	30%	32%	11%	11%	10%	9%	9%
Level 7	1%	1%	1%	1%	1%	2%	1%	1%	1%	1%	13%	11%	9%	9%	8%	3%	3%	2%	2%	2%
Level 8	*	*	*	*	*	0%	0%	*	0%	0%	*	*	*	*	*	*	*	*	*	*
Overseas	*	*	*	*	*	*	0%	0%	N/A	*	*	*	*	*	*	*	*	*	*	*
No qualification	8%	8%	10%	11%	13%	16%	22%	31%	34%	33%	6%	5%	6%	7%	9%	8%	8%	11%	13%	15%
Any qualification	91%	90%	89%	86%	85%	80%	69%	66%	63%	64%	91%	89%	90%	89%	88%	90%	88%	87%	84%	82%
Other	*	*	*	1%	1%	3%	3%	3%	N/A	3%	*	1%	1%	1%	*	1%	1%	1%	1%	1%
Don't Know	1%	2%	1%	2%	2%	4%	5%	3%	3%	3%	2%	6%	4%	4%	3%	2%	3%	2%	3%	3%
At least level 3	79%	76%	73%	68%	65%	59%	54%	49%	44%	41%	82%	80%	79%	77%	79%	78%	75%	72%	66%	64%
At least level 6	10%	8%	7%	6%	5%	4%	3%	3%	3%	3%	42%	42%	40%	39%	42%	15%	14%	13%	11%	11%

Base: All paid childcare staff, All childminders, All early years staff, 2011, 2010, 2009, 2008, 2007

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

6.2.2 Qualification level by type of provider

While the previous chapter focused on the broad childcare sectors (group based childcare providers, early years providers and childminders), this chapter now moves on to look at qualification levels within each of the more specific provider types (full day care, sessional care etc.). Tables 6.3a, 6.3b and 6.4 show the levels of highest qualification held by each specific type of setting, while the proportion of staff holding at least level 3 and level 6 qualifications is discussed in detail in sections 6.2.3 and 6.2.4.

Across all of the various types of childcare provider, the proportion whose highest qualification was specifically at level 3 ranged from around five in ten to around six in ten in 2011. The highest proportion was to be found in sessional settings, where 59 per cent of staff had a highest qualification at level 3. The equivalent proportion was 57 per cent in full day care settings, 53 per cent in holiday clubs, 50 per cent in after school clubs and amongst childminders, and 47 per cent within children's centres.

Staff working in full day care in children's centres were the most likely to have a highest qualification specifically at level 6 (17 per cent), while the proportion holding a level 6 qualification in other group based childcare providers was around half that level (10 per cent of full day care staff, seven per cent of sessional, after school and holiday club staff). Only two per cent of childminders had their highest qualification specifically at level 6.

The rise in the proportion of staff with a highest qualification specifically at level 3 has continued in after school and holiday clubs, and amongst childminders in 2011. Childminders have seen an increase from 36 per cent in 2007 to 47 per cent in 2010 and 50 per cent in 2011. The proportion with a highest qualification at level 3 rose from 47 per cent in 2010 to 50 per cent in 2011 in after school clubs (and from 51 to 53 per cent in holiday clubs).

In 2011, staff working in full day care settings were more likely to hold level 6 qualifications than before (10 per cent in 2011, compared to 7 per cent in 2010 and only 3 per cent in 2007). This is also true of full day care staff working specifically in children's centres (17 per cent in 2011 compared to seven per cent in 2007). As staff have become more highly qualified, there have been decreases in the proportion whose highest qualification was at level 2 or 3, while there have been increases in the proportion whose highest qualification was at levels 4, 5 and 6.

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

Table 6.3a Highest relevant qualifications held by all paid staff - childcare providers															
	Full day care					Full day care in children's centres					Sessional				
	2011	2010	2009	2008	2007	2011	2010	2009	2008	2007	2011	2010	2009	2008	2007
Level 1	*	*	1%	1%	1%	*	*	*	*	*	1%	1%	1%	2%	2%
Level 2	8%	10%	11%	14%	16%	5%	7%	8%	9%	10%	11%	14%	18%	21%	19%
Level 3	57%	58%	61%	62%	61%	47%	52%	57%	57%	61%	59%	57%	55%	51%	51%
Level 4	10%	11%	10%	6%	5%	12%	11%	12%	8%	7%	8%	7%	6%	4%	3%
Level 5	6%	5%	4%	2%	2%	10%	6%	6%	4%	4%	3%	3%	2%	1%	1%
Level 6	10%	7%	6%	4%	3%	17%	15%	11%	11%	7%	7%	6%	4%	4%	3%
Level 7	1%	1%	1%	1%	1%	5%	4%	3%	3%	2%	1%	1%	1%	1%	1%
Level 8	*	*	*	*	*	*	*	*	*	*	*	*	*	0%	*
Overseas	*	*	*	*	*	*	*	0%	*	0%	*	*	*	*	*
Other	*	*	*	*	1%	*	*	*	1%	*	*	*	*	1%	1%
Don't know	1%	2%	1%	2%	2%	2%	3%	*	3%	3%	1%	1%	1%	1%	2%
No qualification	6%	6%	6%	8%	9%	2%	3%	4%	4%	4%	9%	9%	12%	14%	16%

Base: All paid childcare staff 2011, 2010, 2009, 2008, 2007. All childminders 2011, 2010, 2009, 2008, 2007.

Table 6.3b Highest relevant qualifications held by all paid staff - childcare providers															
	After school clubs					Holiday clubs					Childminders				
	2011	2010	2009	2008	2007	2011	2010	2009	2008	2007	2011	2010	2009	2008	2007
Level 1	1%	1%	2%	2%	3%	1%	1%	2%	3%	3%	11%	6%	8%	9%	12%
Level 2	15%	18%	20%	20%	21%	13%	14%	19%	19%	21%	8%	8%	6%	7%	8%
Level 3	50%	47%	47%	45%	43%	53%	51%	46%	41%	40%	50%	47%	41%	38%	36%
Level 4	7%	7%	5%	4%	3%	9%	9%	5%	4%	4%	4%	3%	4%	3%	1%
Level 5	4%	4%	2%	2%	2%	4%	4%	3%	3%	2%	2%	1%	1%	1%	*
Level 6	7%	7%	5%	5%	4%	7%	7%	7%	7%	7%	2%	2%	2%	2%	2%
Level 7	1%	1%	1%	1%	1%	2%	1%	1%	1%	2%	2%	1%	1%	1%	1%
Level 8	0%	*	*	*	*	*	*	0%	*	0%	0%	0%	*	0%	0%
Overseas	*	*	*	*	*	*	*	*	*	*	*	*	0%	N/A	*
Other	*	*	*	1%	1%	*	*	1%	2%	2%	3%	3%	3%	N/A	3%
Don't know	3%	3%	1%	3%	3%	2%	4%	3%	4%	3%	4%	5%	3%	3%	3%
No qualification	11%	11%	16%	17%	19%	9%	8%	13%	16%	16%	16%	22%	31%	34%	33%

Base: All paid childcare staff 2011, 2010, 2009, 2008, 2007. All childminders 2011, 2010, 2009, 2008, 2007

As table 6.4 shows, within the early years maintained sector, primary schools with reception but no nursery classes, and primary schools with nursery and reception classes had the largest proportion of staff with a highest qualification at level 6 (30 per cent and 29 per cent respectively). This represents a decrease for staff in primary schools with reception but no nursery classes (from 34 per cent in 2010), though this is offset by an equivalent increase in the proportion of staff holding a higher, level 7, qualification, which rose from 11 per cent in 2010 to 15 per cent in 2011.

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

Staff in nursery schools were the least likely in the early years sector to have a highest qualification at level 6 (20 per cent) and were more typically qualified to level 3 (44 per cent). Again, there has been a slight decrease in the proportion of nursery staff holding level 6 qualifications (falling from 24 per cent in 2007 to 20 per cent in 2011), though this is counter-balanced by an equivalent increase in the proportion with a highest qualification at level 7 (which rose from 8 per cent to 13 per cent over the same period).

Table 6.4 Highest relevant qualifications held by all paid staff - early years providers

	Nursery schools					Primary schools with nursery and reception classes					Primary schools with reception but no nursery classes				
	2011	2010	2009	2008	2007	2011	2010	2009	2008	2007	2011	2010	2009	2008	2007
Level 1	1%	1%	1%	2%	1%	1%	1%	1%	2%	2%	1%	1%	2%	2%	2%
Level 2	8%	8%	7%	7%	7%	8%	7%	8%	8%	8%	9%	9%	10%	10%	8%
Level 3	44%	43%	45%	42%	44%	36%	35%	35%	36%	35%	22%	24%	24%	21%	22%
Level 4	4%	3%	3%	5%	3%	2%	2%	2%	2%	2%	2%	2%	2%	3%	2%
Level 5	5%	5%	7%	5%	4%	5%	4%	5%	4%	3%	8%	5%	5%	4%	4%
Level 6	20%	21%	22%	22%	24%	29%	30%	32%	30%	30%	30%	34%	32%	33%	36%
Level 7	13%	12%	10%	9%	8%	12%	10%	8%	8%	7%	15%	11%	10%	9%	9%
Level 8	*	*	*	*	*	*	*	1%	*	*	0%	*	*	*	*
Overseas	*	*	*	N/A	*	*	*	*	*	*	*	*	*	*	*
Other	*	2%	*	1%	*	*	1%	1%	1%	*	*	1%	1%	1%	*
Don't know	1%	2%	*	1%	1%	1%	5%	3%	3%	3%	3%	7%	8%	5%	4%
No qualification	3%	4%	4%	6%	7%	5%	4%	5%	5%	8%	9%	6%	6%	10%	10%

Base: All paid early years staff 2011, 2010, 2009, 2008, 2007

6.2.3 Level 3 or above

Tables 6.5a, 6.5b and 6.6 show the proportion of staff qualified to *at least* level 1, 2, 3, 5 and 6 in different types of setting.

In the childcare sector, paid staff in full day care provided by children's centres were most likely to hold *at least* a level 3 qualification (90 per cent); the equivalent proportion was 84 per cent amongst all paid full day care staff, 79 per cent amongst sessional staff, 75 per cent in holiday clubs, 69 per cent in after school clubs, and 59 per cent amongst childminders.

The proportion of staff holding at least a level 3 qualification increased for all types of childcare provider between 2010 and 2011. The largest increase was seen amongst childminders, where the proportion rose from 54 per cent to 59 per cent. The smallest increase over this period was amongst after school club staff, where the proportion holding at least a level 3 qualification rose from 67 per cent to 69 per cent.

The proportion of staff qualified to at least level 3 was similar in nursery schools (88 per cent) and primary schools with nursery and reception classes (85 per cent). This was slightly higher than the proportion qualified to at least level 3 in primary schools with reception but no nursery classes (77 per cent).

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

6.2.4 Level 6 or above

Within childcare settings, the highest proportion of staff holding at least a level 6 (graduate level) qualification was to be found in children's centres with full day care, with just over two in ten (21 per cent) qualified to this level in 2011. In full day care settings in general, the equivalent proportion was 11 per cent. In all other childcare settings fewer than 10 per cent of staff held a qualification of at least level 6. This ranged from nine per cent in after school clubs to four per cent of childminders.

There was an increase in the proportion of full day care staff holding at least a level 6 qualification, rising from 8 per cent in 2010 to 11 per cent in 2011.

The proportion of staff with at least a level 6 qualification was higher in early years settings than in childcare settings. In primary schools with reception but no nursery classes 45 per cent of staff had at least a level 6 qualification in 2011, compared to 41 per cent in primary schools with nursery and reception classes and 34 per cent in nursery schools. These relatively high levels are unsurprising given that a substantial proportion of staff working in these settings are qualified teachers and therefore hold degrees.

	Full day care					Full day care in children's centres					Sessional				
	2011	2010	2009	2008	2007	2011	2010	2009	2008	2007	2011	2010	2009	2008	2007
At least level 1	93%	92%	93%	90%	88%	95%	94%	96%	93%	92%	91%	89%	87%	84%	81%
At least level 2	92%	92%	92%	89%	88%	95%	94%	96%	92%	92%	90%	88%	86%	82%	79%
At least level 3	84%	81%	82%	75%	72%	90%	87%	88%	83%	82%	79%	74%	68%	61%	60%
At least level 5	17%	13%	11%	7%	5%	31%	25%	20%	18%	14%	12%	10%	7%	6%	6%
At least level 6	11%	8%	7%	5%	4%	21%	19%	14%	14%	9%	8%	7%	5%	4%	4%

Base: All paid childcare staff 2011, 2010, 2009, 2008, 2007. All childminders 2011, 2010, 2009, 2008, 2007

	After school clubs					Holiday clubs					Childminders				
	2011	2010	2009	2008	2007	2011	2010	2009	2008	2007	2011	2010	2009	2008	2007
At least level 1	86%	86%	82%	78%	77%	89%	87%	83%	78%	78%	77%	68%	63%	60%	61%
At least level 2	84%	85%	80%	76%	75%	88%	86%	82%	75%	75%	67%	63%	55%	51%	49%
At least level 3	69%	67%	60%	56%	53%	75%	72%	63%	56%	54%	59%	54%	49%	44%	41%
At least level 5	12%	12%	9%	8%	7%	13%	12%	12%	11%	10%	6%	4%	3%	4%	3%
At least level 6	9%	9%	6%	6%	5%	8%	8%	8%	8%	9%	4%	3%	3%	3%	3%

Base: All paid childcare staff 2011, 2010, 2009, 2008, 2007. All childminders 2011, 2010, 2009, 2008, 2007

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

	Nursery schools					Primary schools with nursery and reception classes					Primary schools with reception but no nursery classes				
	2011	2010	2009	2008	2007	2011	2010	2009	2008	2007	2011	2010	2009	2008	2007
<i>At least level 1</i>	97%	92%	95%	91%	91%	93%	90%	91%	90%	87%	87%	86%	85%	82%	83%
<i>At least level 2</i>	95%	91%	94%	89%	91%	92%	89%	89%	88%	85%	86%	85%	83%	80%	81%
<i>At least level 3</i>	88%	84%	88%	82%	83%	85%	82%	81%	80%	77%	77%	76%	74%	70%	73%
<i>At least level 5</i>	39%	38%	40%	36%	36%	46%	44%	45%	42%	40%	53%	50%	48%	47%	49%
<i>At least level 6</i>	34%	33%	32%	31%	32%	41%	40%	40%	38%	37%	45%	45%	42%	42%	45%

Base: All paid early years staff 2011, 2010, 2009, 2008, 2007.

6.3 Qualification levels by deprivation

Tables 6.7a-c show the proportion of paid staff in different types of provider holding different levels of qualification, according to the level of deprivation of the area their settings are based in (the 30 per cent most deprived areas compared with the 70 per cent least deprived areas). Table 6.7a focuses on the proportion of staff holding *any* relevant qualification (from level 1 to level 8). Table 6.7b focuses on staff holding at least a level 3 qualification, while table 6.7c focuses on staff with at least a level 6 qualification.

Focusing specifically on the proportion of staff with at least a level 3 qualification, in 2011 there was a significantly higher proportion qualified to this level in the 30 per cent most deprived areas for full day care, sessional and holiday club settings.

More broadly, in 2011 after school and holiday club staff were more likely to have a relevant qualification (at any level) in the more deprived areas than in the less deprived areas. In after school clubs 89 per cent of staff in the 30 per cent most deprived areas held a relevant qualification, compared to 84 per cent in the least deprived areas. In holiday clubs the equivalent proportions were 93 per cent and 87 per cent respectively. However, there was no statistically significant difference for childminders, or staff in full day care settings, children's centres, sessional settings or at early years providers in maintained schools in areas with differing levels of deprivation.

Childminders working in the 70 per cent least deprived areas were more likely to have at least a level 6 qualification (five per cent) than those working in the 30 per cent most deprived areas (one per cent).

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

Table 6.7a Proportion of paid staff that hold a relevant qualification (levels 1 to 8) by deprivation				
	2011		2010	
	30% most deprived areas	70% least deprived areas	30% most deprived areas	70% least deprived areas
Childcare				
Full day care	94%	92%	94%	92%
<i>Full day care in children's centres</i>	96%	93%	95%	93%
Sessional	93%	90%	90%	89%
After school clubs	89%	84%	92%	84%
Holiday clubs	93%	87%	90%	85%
Childminders	80%	77%	72%	67%
Early years providers				
Nursery schools	98%	96%	92%	93%
Primary schools with nursery and reception classes	95%	92%	91%	90%
Primary schools with reception but no nursery classes	90%	86%	86%	86%
Table 6.7b Proportion of paid staff that hold at least a relevant level 3 qualification by deprivation				
	2011		2010	
	30% most deprived areas	70% least deprived areas	30% most deprived areas	70% least deprived areas
Childcare				
Full day care	85%	84%	84%	81%
<i>Full day care in children's centres</i>	91%	86%	88%	85%
Sessional	84%	77%	76%	74%
After school clubs	74%	67%	73%	64%
Holiday clubs	78%	73%	76%	71%
Childminders	62%	58%	50%	55%
Early years providers				
Nursery schools	89%	86%	84%	84%
Primary schools with nursery and reception classes	86%	84%	82%	82%
Primary schools with reception but no nursery classes	77%	77%	74%	76%
Table 6.7c Proportion of paid staff that hold at least a relevant level 6 qualification by deprivation				
	2011		2010	
	30% most deprived areas	70% least deprived areas	30% most deprived areas	70% least deprived areas
Childcare				
Full day care	10%	12%	9%	8%
<i>Full day care in children's centres</i>	22%	19%	19%	20%
Sessional	11%	8%	9%	6%
After school clubs	10%	8%	11%	8%
Holiday clubs	8%	9%	9%	8%
Childminders	1%	5%	3%	3%
Early years providers				
Nursery schools	35%	32%	32%	35%
Primary schools with nursery and reception classes	41%	41%	40%	41%
Primary schools with reception but no nursery classes	45%	45%	41%	45%
<i>Base: All paid childcare staff, All childminders, All early years staff 2011, 2010</i>				

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

6.4 Qualification levels by region

Tables 6.8a-c display the levels of qualification held by staff in different types of provider, whose settings are based in different regions. Base sizes become relatively small when looking at individual regions. As such, care should be taken when comparing between regions as confidence intervals are likely to be large.

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

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

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

Qualifications

Table 6.8a Proportion of paid staff that hold a relevant qualification (levels 1 to 8) by region

	East Midlands	East of England	London	North East	Yorkshire & Humberside	North West	South East	South West	West Midlands
Childcare									
Full day care	88%	92%	92%	93%	93%	96%	91%	92%	96%
Full day care in children's centres	†	93%	96%	95%	96%	96%	94%	90%	97%
Sessional	93%	89%	92%	92%	89%	90%	87%	91%	96%
After school clubs	86%	80%	82%	92%	87%	91%	81%	83%	88%
Holiday clubs	90%	81%	86%	94%	92%	91%	84%	91%	93%
Childminders	78%‡	79%	79%		81%	76%‡	73%	77%‡	77%‡
Early years providers									
Nursery schools	97%‡	98%	98%	98%	97%	96%	91%	†	98%
Primary schools with nursery and reception classes	95%	91%	92%	98%	93%	97%	85%	92%	97%
Primary schools with reception but no nursery classes	89%	83%	85%	94%‡	89%	94%	82%	87%	91%

Table 6.8b Proportion of paid staff that hold at least a relevant level 3 qualification by region

	East Midlands	East of England	London	North East	Yorkshire & Humberside	North West	South East	South West	West Midlands
Childcare									
Full day care	83%	83%	80%	90%	86%	91%	79%	82%	87%
Full day care in children's centres	†	87%	92%	93%	92%	91%	84%	82%	92%
Sessional	79%	73%	82%	87%	75%	81%	72%	80%	91%
After school clubs	76%	60%	65%	83%	69%	74%	61%	65%	73%
Holiday clubs	80%	71%	65%	88%	83%	79%	62%	79%	78%
Childminders	61%‡	55%	60%		61%	62%‡	54%	56%‡	69%‡
Early years providers									
Nursery schools	96%‡	89%	84%	92%	93%	90%	83%	†	91%
Primary schools with nursery and reception classes	88%	80%	81%	88%	83%	89%	77%	83%	92%
Primary schools with reception but no nursery classes	83%	69%	64%	89%‡	80%	87%	72%	77%	79%

Table 6.8c Proportion of paid staff that hold at least a relevant level 6 qualification by region

	East Midlands	East of England	London	North East	Yorkshire & Humberside	North West	South East	South West	West Midlands
Childcare									
Full day care	10%	8%	12%	13%	15%	12%	10%	13%	8%
Full day care in children's centres	†	9%	27%	20%	21%	17%	23%	28%	21%
Sessional	6%	5%	11%	7%	8%	13%	5%	12%	8%
After school clubs	12%	6	8%	8%	8%	9%	8%	8%	10%
Holiday clubs	7%	7%	10%	14%	11%	8%	7%	12%	7%
Childminders	5%‡	5%	2%		3%	1%‡	5%	7%‡	3%‡
Early years providers									
Nursery schools	31%‡	35%	29%	34%	45%	38%	32%	†	31%
Primary schools with nursery and reception classes	39%	42%	42%	45%	40%	43%	39%	41%	40%
Primary schools with reception but no nursery classes	47%	42%	46%	43%‡	47%	46%	43%	47%	47%

Base: All paid childcare staff, All childminders, All early years staff, 2011

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

6.5 Qualification levels by ownership of setting

Tables 6.9a-c show the proportion of all paid childcare staff that held any childcare related qualification (levels 1 to 8), a qualification of at least level 3, and a qualification of at least level 6, broken down by ownership type. Analysis is not provided for early years provision in maintained schools because the schools are all run by Local Authorities.

Overall providers owned by local authorities or by a school or college tended to have slightly higher proportions of staff qualified to level 6 than other types of providers. Amongst after school clubs, privately owned settings had the highest proportion of staff qualified to at least level 3 (74 per cent).

In general, the proportion of paid staff with any qualification did not differ greatly by type of ownership. However, staff in school/college and local authority run holiday clubs were less likely to hold any qualification than staff in private and voluntary owned settings. The proportion of qualified staff in privately run after school settings (88 per cent) also tended to be higher than in local authority and school/college run settings.

In terms of staff qualified to at least level 3, privately run after school clubs and holiday clubs tended to employ the highest proportion of such staff (74 per cent and 81 per cent respectively). Providers owned by schools and local authorities were more likely than settings under other types of ownership to have staff qualified to at least level 3 in sessional settings. Voluntary full day care providers had a lower proportion of staff qualified to at least level 3 (80 per cent) than other types of provider.

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

Table 6.9a Proportion of paid staff that hold a relevant qualification (levels 1 to 8) by ownership of provision					
	Full day care	Full day care in children's centres	Sessional	After school clubs	Holiday clubs
All settings	93%	95%	91%	86%	89%
Private	93%	94%	90%	88%	92%
Voluntary	92%	98%	90%	85%	88%
Local authority	92%	95%	98%	81%	82%
School/college	94%	94%	96%‡	84%	82%
Other	†	†	†	†	99%‡
Table 6.9b Proportion of paid staff that hold at least a relevant level 3 qualification by ownership of provision					
	Full day care	Full day care in children's centres	Sessional	After school clubs	Holiday clubs
All settings	84%	90%	79%	69%	75%
Private	85%	89%	80%	74%	81%
Voluntary	80%	88%	77%	67%	70%
Local authority	84%	91%	93%	60%	70%
School/college	88%	87%	90%‡	64%	61%
Other	†	†	†	†	91%‡
Table 6.9c Proportion of paid staff that hold at least a relevant level 6 qualification by ownership of provision					
	Full day care	Full day care in children's centres	Sessional	After school clubs	Holiday clubs
All settings	11%	21%	8%	9%	8%
Private	11%	13%	9%	7%	8%
Voluntary	8%	22%	7%	8%	9%
Local authority	18%	23%	14%	8%	9%
School/college	14%	21%	12%‡	12%	10%
Other	†	†	†	†	2%‡
<i>Base: All paid childcare staff 2011</i>					

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

6.6 Qualification levels according to seniority of staff

Table 6.10 shows the level of highest qualification by staff type across all group based childcare settings (i.e. excluding childminders).

	2011			2010		
	Senior managers	Supervisors	Other paid childcare staff	Senior managers	Supervisors	Other paid childcare staff
Level 1	*	*	2%	*	*	2%
Level 2	0%	5%	27%	1%	5%	30%
Level 3	42%	66%	41%	44%	67%	37%
Level 4	18%	11%	2%	20%	11%	2%
Level 5	11%	6%	1%	10%	5%	1%
Level 6	20%	9%	2%	17%	8%	2%
Level 7	5%	1%	*	5%	1%	*
Level 8	*	0%	0%	*	*	*
Overseas	*	*	*	*	*	*
No qualification	2%	1%	23%	2%	1%	22%
Any qualification	98%	98%	75%	97%	97%	75%
Other	*	*	*	*	*	*
Don't Know	1%	1%	2%	1%	2%	4%
At least level 3	97%	93%	46%	96%	92%	42%
At least level 6	25%	11%	2%	22%	9%	2%

Base: All paid childcare staff 2011, 2010

Across all group based childcare settings in 2011, nearly all senior managers and supervisors held a relevant qualification at some level (98 per cent of senior managers and 98 per cent of supervisors). A similar proportion held at least a level 3 qualification (97 per cent of senior managers and 93 per cent of supervisors). One in four senior managers were qualified to at least level 6 (25 per cent), compared with one in ten (11 per cent) supervisors.

Other paid childcare staff tended to be less qualified, with three in four (75 per cent) holding any relevant qualification, just under half (46 per cent) being qualified to at least level 3, and just two per cent being qualified to at least level 6. The proportion of other paid childcare staff with at least a level 3 qualification increased from 42 per cent in 2010 to 46 per cent in 2011.

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

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

	Private	Voluntary	Local Authority	School/college	Other
Full day care	97%	94%	95%	96%‡	†
Full day care in children's centres	97%	98%	97%	94%	†
Sessional	95%	91%	98%‡	94%‡	†
After school	89%	79%‡	72%‡	74%	†
Holiday clubs	93%	84%	88%	79%	†

Base: All supervisors in childcare providers 2011.

Nearly all supervisors in full day care provision were qualified to at least level 3; this was consistent across all types of ownership. Supervisors at sessional settings which were run on a voluntary basis were less likely to be qualified to level 3 than those at privately run sessional care settings (91 per cent and 95 per cent respectively).

In after school clubs, supervisors in privately and voluntary owned settings were more likely to be qualified to at least level 3 (89 per cent and 79 per cent respectively), than supervisors in settings run by schools or local authorities (72 per cent and 74 per cent respectively).

Table 6.12 shows the proportion of other paid childcare staff that held at least a level 2 qualification, broken down by the type of ownership for each specific provider type.

	Private	Voluntary	Local Authority	School/college	Other
Full day care	77%	76%	81%‡	79%‡	†
Full day care in children's centres	84%‡	94%‡	83%	88%‡	†
Sessional	67%	70%	†	†	†
After school	67%	64%	†	57%	†
Holiday clubs	77%	71%	67%‡	49%	†

Base: All other paid childcare staff 2011.

In 2011 there were generally no statistically significant differences in the proportion of other paid staff holding at least a level 2 qualification according to ownership of the settings. The one exception related to other paid staff in school run holiday clubs, who were less likely to be qualified to at least level 2 than was the case for staff in holiday clubs under different types of ownership.

6.6.1 Senior managers

Tables 6.13a and 6.13b show the highest level of qualification of the senior managers in different types of group based childcare providers.

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

Across all types of provider except full day care in children's centres, the most commonly held highest qualification was at level 3, although the proportions varied by type of provider, from 37 per cent of those working in full day care to 51 per cent of those working in sessional provision in 2011. Senior managers responsible for full day care that was specifically run in children's centres were much less likely than those in the other types of childcare provider to hold a level 3 qualification (14 per cent), tending instead to hold level 6 or 7 qualifications.

Nearly all senior managers in all types of childcare setting held at least a level 3 qualification, ranging from 99 per cent in full day care settings to 94 per cent in after school clubs. There had been little change in these proportions between 2010 and 2011.

Senior managers in full day care settings in children's centres were more likely than senior managers working for other types of provider to be qualified to at least level 5 (66 per cent) or to be qualified to at least level 6 (52 per cent). In 2011, the proportion qualified to at least level 6 was lowest in sessional care settings (20 per cent, though this does represent an increase from 11 per cent in 2007).

Although the most commonly held specific level of qualification among senior managers was still at level 3 in 2011, the proportion whose highest qualification was at level 3 has been falling consistently over the last few years, for all types of provider. This has largely been due to a widespread increase in the proportion of senior managers qualified to higher levels.

All provider types have seen a continuation in 2011 of the gradual increase in the number of senior managers qualified to at least level 6 that was seen in previous years. Between 2007 and 2011, the proportion of senior managers qualified to at least level 6 increased substantially for all groups. It rose from 16 per cent to 28 per cent in full day care settings, from 11 per cent to 20 per cent in sessional settings, from 16 per cent to 24 per cent in after school clubs, and from 18 per cent to 25 per cent in holiday clubs.

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

Table 6.13a Highest relevant qualification of senior manager															
	Full day care					Full day care in children's centres					Sessional				
	2011	2010	2009	2008	2007	2011	2010	2009	2008	2007	2011	2010	2009	2008	2007
Level 1	0%	*	0%	0%	*	0%	0%	0%	0%	*	0%	*	0%	*	*
Level 2	0%	*	*	*	*	0%	0%	*	0%	*	*	1%	1%	1%	1%
Level 3	37%	38%	42%	52%	58%	14%	17%	21%	27%	34%	51%	56%	62%	64%	69%
Level 4	21%	24%	24%	20%	17%	18%	15%	20%	19%	20%	19%	17%	16%	15%	11%
Level 5	13%	11%	11%	8%	5%	13%	10%	10%	9%	9%	7%	7%	7%	4%	4%
Level 6	24%	20%	18%	14%	12%	26%	27%	25%	21%	16%	16%	13%	9%	10%	8%
Level 7	4%	4%	3%	3%	4%	26%	26%	19%	19%	14%	4%	3%	3%	2%	3%
Level 8	*	*	*	*	*	0%	0%	2%	1%	1%	*	*	0%	0%	*
Overseas	*	*	*	*	*	0%	0%	0%	0%	0%	0%	*	*	*	*
Other	*	*	*	*	1%	0%	0%	1%	2%	2%	*	*	*	1%	1%
Don't know	*	*	*	1%	1%	1%	2%	*	1%	2%	1%	1%	1%	1%	1%
No qualification	1%	1%	1%	1%	2%	1%	1%	*	1%	1%	1%	1%	2%	14%	3%
At least level 1	99%	98%	98%	97%	96%	98%	96%	98%	96%	95%	98%	98%	97%	96%	95%
At least level 2	99%	98%	98%	97%	96%	98%	96%	98%	96%	95%	98%	98%	97%	96%	95%
At least level 3	99%	98%	98%	97%	96%	98%	96%	98%	96%	95%	98%	97%	96%	95%	94%
At least level 5	41%	36%	32%	25%	21%	66%	64%	56%	50%	40%	27%	24%	19%	16%	15%
At least level 6	28%	25%	21%	17%	16%	52%	54%	46%	41%	31%	20%	17%	12%	12%	11%

Base: All senior managers in childcare providers 2011, 2010, 2009, 2008, 2007

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

	After school clubs					Holiday clubs				
	2011	2010	2009	2008	2007	2011	2010	2009	2008	2007
Level 1	0%	*	*	0%	*	*	*	*	*	1%
Level 2	*	1%	1%	1%	2%	*	1%	1%	2%	2%
Level 3	48%	48%	55%	59%	62%	39%	41%	49%	52%	51%
Level 4	12%	15%	14%	12%	8%	19%	20%	15%	13%	13%
Level 5	9%	9%	6%	5%	5%	12%	10%	7%	7%	5%
Level 6	17%	16%	12%	13%	12%	19%	17%	15%	14%	15%
Level 7	7%	7%	6%	4%	4%	7%	5%	3%	3%	4%
Level 8	0%	*	*	*	*	*	1%	0%	0%	0%
Overseas	*	0%	0%	0%	0%	0%	*	*	*	0%
Other	*	1%	1%	1%	1%	1%	1%	1%	1%	2%
Don't know	2%	1%	15	3%	2%	1%	2%	1%	1%	1%
No qualification	3%	2%	3%	2%	3%	3%	3%	5%	6%	7%
At least level 1	94%	96%	95%	94%	94%	95%	94%	92%	91%	90%
At least level 2	94%	96%	95%	94%	94%	95%	94%	92%	90%	89%
At least level 3	94%	95%	94%	93%	92%	95%	93%	90%	89%	87%
At least level 5	33%	33%	25%	22%	21%	38%	32%	26%	24%	23%
At least level 6	24%	23%	19%	16%	16%	25%	23%	19%	17%	18%

Base: All senior managers in childcare providers 2011, 2010, 2009, 2008, 2007

6.6.2 Supervisors

Tables 6.14a and 6.14b show the highest level of qualification held by supervisors in different types of childcare providers.

As was the case for senior managers, the most commonly held specific level of qualification for supervisors was a level 3 qualification. This applied to all types of provider in 2011, ranging from 46 per cent (for full day care in children's centres) to 71 per cent (in sessional settings).

In full day care settings, 96 per cent of supervisors held *at least* a level 3 qualification. The proportion of supervisors in full day care settings who were qualified to at least level 6 has increased continuously in recent years (from three per cent in 2007 to 12 per cent in 2011).

Supervisors in full day care settings in children's centres were significantly more likely than supervisors in other types of setting to be qualified to at least level 5 (37 per cent) or qualified to at least level 6 (24 per cent). These both represent large increases from the levels seen in 2007, when 13 per cent held at least a level 5 qualification and eight per cent held at least a level 6 qualification.

In sessional settings and holiday clubs, the proportion of supervisors holding at least a level 3 qualification was very similar (93 per cent and 89 per cent respectively), while in after school clubs the proportion was lower (82 per cent). The proportion of supervisory staff with a level 3 qualification had been steadily increasing year on year, but that trend has levelled off for full day care, after school and holiday providers in 2011. Sessional providers were the only type to see an increase between 2010 and 2011, when the proportion of supervisors with at least a level 3 qualification rose from 90 per cent to 93 per cent.

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

	Full day care					Full day care in children's centres					Sessional				
	2011	2010	2009	2008	2007	2011	2010	2009	2008	2007	2011	2010	2009	2008	2007
Level 1	*	*	*	*	*	*	0%	0%	0%	*	*	*	*	1%	1%
Level 2	2%	2%	2%	4%	6%	1%	1%	1%	1%	3%	5%	8%	10%	14%	15%
Level 3	65%	70%	73%	78%	80%	46%	55%	63%	64%	74%	71%	71%	73%	71%	70%
Level 4	12%	13%	12%	8%	6%	14%	13%	14%	10%	8%	9%	8%	7%	4%	3%
Level 5	7%	5%	4%	2%	2%	13%	8%	6%	4%	5%	4%	3%	2%	2%	1%
Level 6	11%	8%	7%	5%	3%	20%	19%	13%	13%	6%	8%	6%	4%	3%	4%
Level 7	2%	1%	1%	1%	*	4%	3%	2%	2%	2%	1%	1%	1%	1%	1%
Level 8	0%	*	*	*	*	0%	*	0%	0%	0%	0%	0%	*	0%	0%
Overseas	*	*	*	*	*	0%	0%	0%	0%	0%	0%	*	0%	*	*
Other	*	*	*	*	*	*	0%	0%	1%	*	*	*	0%	*	1%
Don't know	1%	1%	*	1%	2%	1%	1%	*	3%	2%	1%	1%	1%	1%	2%
No qualification	*	*	*	*	1%	*	*	2%	*	1%	1%	*	2%	2%	4%
At least level 1	99%	99%	99%	98%	97%	98%	99%	100%	96%	98%	98%	98%	97%	96%	94%
At least level 2	99%	99%	99%	98%	97%	98%	99%	100%	96%	98%	98%	97%	97%	95%	93%
At least level 3	96%	97%	97%	94%	91%	97%	98%	98%	94%	94%	93%	90%	87%	81%	78%
At least level 5	19%	14%	12%	8%	5%	37%	30%	22%	19%	13%	13%	10%	7%	6%	6%
At least level 6	12%	9%	8%	6%	3%	24%	23%	15%	16%	8%	9%	7%	5%	4%	4%

Base: All supervisors in childcare providers 2011, 2010, 2009, 2008, 2007

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

	After school clubs					Holiday clubs				
	2011	2010	2009	2008	2007	2011	2010	2009	2008	2007
Level 1	1%	*	1%	2%	1%	*	*	*	1%	1%
Level 2	12%	13%	18%	19%	22%	7%	6%	14%	14%	15%
Level 3	62%	61%	62%	60%	58%	65%	63%	60%	57%	58%
Level 4	9%	8%	6%	3%	3%	11%	11%	6%	4%	5%
Level 5	4%	4%	2%	1%	2%	5%	5%	5%	4%	2%
Level 6	8%	8%	5%	5%	3%	8%	9%	9%	9%	9%
Level 7	*	1%	1%	*	1%	1%	1%	1%	1%	2%
Level 8	0%	0%	0%	0%	*	0%	*	0%	*	0%
Overseas	*	*	*	*	*	*	0%	*	*	*
Other	*	*	*	1%	1%	1%	1%	1%	2%	2%
Don't know	3%	3%	1%	3%	2%	2%	3%	1%	5%	2%
No qualification	2%	2%	4%	6%	6%	1%	1%	2%	4%	3%
At least level 1	95%	95%	95%	91%	91%	96%	95%	96%	90%	92%
At least level 2	94%	94%	94%	89%	90%	96%	95%	96%	89%	91%
At least level 3	82%	82%	76%	70%	68%	89%	89%	81%	75%	76%
At least level 5	12%	13%	8%	7%	7%	14%	15%	15%	14%	13%
At least level 6	8%	8%	6%	5%	4%	9%	10%	10%	10%	11%

Base: All supervisors in childcare providers 2011, 2010, 2009, 2008, 2007

6.6.3 Other paid childcare staff

Tables 6.15a and 6.15b show the highest level of qualification of other paid staff working in different types of childcare providers.

Amongst other paid staff, the most common level of qualification held was at level 3, for all types of provider.

Around half of other childcare staff in full day care settings were qualified to *at least* level 3 (53 per cent), and the figure was higher in full day care children's centres (67 per cent). The equivalent proportions were lower in sessional care (40 per cent), holiday clubs (42 per cent) and after school clubs (35 per cent).

There have been large shifts in the proportion of other paid staff holding at least a level 3 qualification since 2007. The proportion in full day care settings increased from 32 per cent to 53 per cent over this period, while sessional settings saw an increase from 21 per cent to 40 per cent, after school clubs from 16 per cent to 35 per cent, and holiday clubs from 20 per cent to 42 per cent.

The proportion of other paid staff qualified to level 6 or higher remained very low in 2011 (ranging between two per cent and four per cent amongst the various types of provider). This is perhaps to be expected, bearing in mind the non-supervisory role that they have.

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

	Full day care					Full day care in children's centres					Sessional				
	2011	2010	2009	2008	2007	2011	2010	2009	2008	2007	2011	2010	2009	2008	2007
Level 1	1%	1%	2%	1%	2%	1%	2%	1%	1%	1%	2%	3%	4%	4%	5%
Level 2	24%	29%	29%	33%	37%	19%	20%	28%	30%	31%	30%	31%	38%	37%	31%
Level 3	47%	42%	44%	39%	30%	58%	53%	49%	48%	42%	37%	33%	21%	19%	18%
Level 4	2%	3%	2%	1%	1%	3%	4%	1%	1%	2%	1%	1%	1%	1%	1%
Level 5	*	2%	1%	*	*	2%	1%	2%	2%	1%	1%	*	*	*	1%
Level 6	3%	2%	2%	1%	1%	4%	5%	2%	2%	2%	1%	2%	1%	2%	1%
Level 7	*	*	0%	*	*	1%	*	0%	0%	0%	1%	*	*	*	*
Level 8	0%	0%	0%	*	*	0%	0%	0%	0%	0%	0%	*	0%	0%	0%
Overseas	*	*	*	*	*	0%	*	0%	*	0%	*	*	0%	0%	*
Other	0%	*	*	*	*	*	*	0%	0%	*	*	1%	1%	1%	1%
Don't know	1%	3%	1%	3%	2%	5%	7%	1%	3%	6%	2%	2%	2%	2%	5%
No qualification	20%	18%	20%	21%	26%	8%	8%	15%	13%	15%	26%	27%	32%	34%	38%
At least level 1	78%	78%	79%	75%	71%	87%	85%	84%	84%	79%	71%	70%	66%	63%	57%
At least level 2	77%	77%	77%	74%	69%	86%	83%	83%	83%	78%	70%	67%	62%	59%	52%
At least level 3	53%	48%	48%	41%	32%	67%	63%	54%	53%	47%	40%	36%	24%	22%	21%
At least level 5	3%	4%	3%	1%	2%	6%	6%	4%	4%	3%	2%	2%	1%	2%	2%
At least level 6	3%	2%	2%	1%	1%	4%	5%	2%	2%	2%	2%	2%	1%	2%	1%

Base: All other paid childcare staff in childcare providers 2011, 2010, 2009, 2008, 2007

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

Table 6.15b Highest relevant qualification of other paid childcare staff										
	After school clubs					Holiday clubs				
	2011	2010	2009	2008	2007	2011	2010	2009	2008	2007
Level 1	2%	3%	4%	4%	6%	3%	2%	4%	5%	7%
Level 2	28%	35%	31%	30%	29%	28%	29%	30%	30%	32%
Level 3	32%	25%	19%	19%	14%	39%	37%	26%	19%	16%
Level 4	1%	1%	*	*	*	1%	2%	1%	1%	1%
Level 5	1%	*	*	*	*	1%	*	1%	1%	*
Level 6	2%	3%	1%	2%	1%	1%	1%	3%	4%	3%
Level 7	*	*	*	*	*	*	*	*	*	*
Level 8	0%	0%	*	0%	0%	0%	0%	0%	*	0%
Overseas	*	*	*	*	0%	0%	0%	0%	0%	*
Other	1%	1%	*	1%	1%	*	*	1%	2%	1%
Don't know	3%	2%	2%	4%	3%	2%	7%	5%	4%	5%
No qualification	30%	29%	42%	39%	44%	24%	21%	30%	32%	34%
At least level 1	66%	67%	56%	56%	51%	74%	72%	65%	61%	59%
At least level 2	64%	65%	52%	52%	45%	71%	70%	61%	56%	52%
At least level 3	35%	30%	21%	22%	16%	42%	41%	31%	26%	20%
At least level 5	3%	4%	2%	2%	2%	2%	2%	4%	5%	3%
At least level 6	2%	3%	2%	2%	1%	2%	2%	3%	4%	3%

Base: All other paid childcare staff in childcare providers 2011, 2010, 2009, 2008, 2007

6.7 Qualifications for early years staff

Table 6.16 shows the level of qualification held by each type of staff working in early years providers in maintained schools.

All or almost all of the early years co-ordinators (100 per cent), early years teachers (100 per cent) and nursery nurses (99 per cent) held a relevant qualification of some description. Around four in five (78 per cent) other paid early years support staff held a relevant qualification of some sort.

The vast majority of early years co-ordinators (100 per cent), early years teachers (99 per cent) and nursery nurses (96 per cent) were qualified to at least level 3, while almost half of other paid early years support staff (46 per cent) were qualified to this level.

Very high proportions of years co-ordinators and teachers were qualified to least level 6 (98 per cent of both). In contrast, only five per cent of nursery nurses and five per cent other paid early years support staff were qualified to at least level 6.

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

Table 6.16 Relevant qualifications of paid staff by staff type in early years provision				
	Early years co-ordinators	Early years teachers	Nursery nurses	Other paid early years support staff
Level 1	0%	0%	1%	3%
Level 2	0%	0%	3%	27%
Level 3	0%	0%	71%	34%
Level 4	0%	0%	4%	2%
Level 5	1%	1%	14%	5%
Level 6	60%	66%	5%	4%
Level 7	32%	30%	0%	1%
Level 8	0%	0%	0%	0%
Overseas	0%	0%	0%	0%
No qualification	0%	0%	1%	22%
Other	0%	0%	0%	0%
Don't know	7%	1%	2%	3%
Base: All paid staff in early years providers 2011				
Any qualification	100%	100%	99%	78%
At least level 3	100%	99%	96%	46%
At least level 6	98%	98%	5%	5%
Base: All paid staff in early years providers answering question (i.e. excluding 'don't know' responses) 2011				

6.7.1 Early years or foundation stage co-ordinators

Table 6.17 shows the highest level of qualification of early years co-ordinators/head teachers within each of the specific types of early years provider over time.

Nearly all early years or foundation stage co-ordinators/head teachers were qualified to at least level 6 (99 per cent in nursery classes, 98 per cent in primary schools with nursery and reception classes and in primary schools with reception classes but no nursery classes). With almost universal qualification to level 6, there is minimal scope for further increases, and the figures in 2011 showed little change from 2010.

Furthermore, seven in ten early years co-ordinators/head teachers in nursery schools held a level 7 qualification in 2011, an increase on the 2010 proportion of 63 per cent and the 2009 proportion of 55 per cent. Early years co-ordinators/head teachers were less likely to hold a level 7 qualification in primary schools with nursery and reception classes and in primary schools with reception but no nursery classes (31 per cent in both). Nevertheless, the proportion in both of these primary school settings has increased from 19 per cent in 2007.

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

Table 6.17 Highest relevant qualification of early years co-ordinators/head teachers															
	Nursery schools					Primary schools with nursery and reception classes					Primary schools with reception but no nursery classes				
	2011	2010	2009	2008	2007	2011	2010	2009	2008	2007	2011	2010	2009	2008	2007
Level 1	0%	0%	0%	0%	0%	0%	*	0%	0%	0%	0%	0%	0%	0%	0%
Level 2	0%	0%	0%	0%	0%	*	*	0%	0%	0%	0%	0%	*	*	*
Level 3	0%	1%	0%	1%	1%	*	*	*	1%	1%	*	1%	1%	*	*
Level 4	0%	0%	3%	1%	1%	*	*	*	1%	*	*	*	1%	1%	1%
Level 5	1%	1%	2%	*	2%	1%	1%	1%	1%	1%	1%	1%	*	*	1%
Level 6	25%	31%	35%	37%	61%	63%	62%	68%	69%	67%	59%	64%	60%	54%	66%
Level 7	70%	63%	55%	53%	34%	31%	26%	21%	20%	19%	31%	21%	22%	18%	19%
Level 8	1%	2%	4%	1%	1%	*	*	1%	1%	*	0%	*	*	*	*
Overseas	0%	0%	0%	0%	0%	0%	0%	*	*	*	0%	0%	0%	*	*
Other	0%	1%	0%	4%	0%	0%	1%	2%	2%	0%	0%	1%	2%	3%	0%
Don't know/ not stated	3%	3%	1%	4%	0%	5%	9%	7%	10%	12%	8%	13%	14%	23%	13%
No qualification	0%	0%	0%	0%	0%	0%	0%	*	0%	0%	0%	0%	0%	*	0%
<i>Base: All early years co-ordinators/head teachers in early years providers in maintained schools 2011, 2010, 2009, 2008, 2007</i>															
At least level 1	99%	99%	100%	96%	100%	100%	99%	97%	97%	98%	100%	99%	98%	95%	99%
At least level 2	99%	99%	100%	96%	100%	100%	98%	97%	97%	98%	100%	99%	98%	95%	98%
At least level 3	99%	99%	100%	96%	100%	100%	98%	97%	97%	98%	100%	99%	98%	95%	98%
At least level 5	99%	99%	97%	95%	98%	99%	98%	96%	96%	97%	99%	98%	96%	94%	97%
At least level 6	99%	98%	95%	94%	96%	98%	97%	96%	96%	95%	98%	97%	96%	93%	96%
<i>Base: All early years co-ordinators/head teachers in early years providers in maintained schools answering question 2011, 2010, 2009, 2008, 2007</i>															

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

6.7.2 Qualified early years teachers

Table 6.18 shows the highest level of qualification of early years teachers within each of the specific types of early years provider over time.

As was the case with early years co-ordinators and head teachers, the large majority of early years teachers in 2011 were also qualified to high levels. In nursery schools, all early years teachers held at least a level 3 qualification (100 per cent), while the equivalent proportion in the two types of primary school setting was 99 per cent.

Virtually all early years teachers in nurseries also held at least a level 6 qualification in 2011 (99 per cent), while 98 per cent of those in primary schools with nursery and reception classes and 97 per cent of those in primary schools with reception but no nursery schools were equally qualified.

Over time, the proportion of early years teachers whose highest qualification is specifically at level 6 has declined, while the proportion whose highest qualification is at level 7 has increased. In nursery schools the proportion with a level 7 qualification rose from 21 per cent in 2007 to 34 per cent in 2011. In primary schools with nursery and reception classes, the equivalent shift was from 18 per cent in 2007 to 29 per cent in 2011, while in primary schools with reception but no nursery classes there was an increase from 17 per cent to 32 per cent over the same period.

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

	Nursery schools					Primary schools with nursery and reception classes					Primary schools with reception but no nursery classes				
	2011	2010	2009	2008	2007	2011	2010	2009	2008	2007	2011	2010	2009	2008	2007
Level 1	0%	0%	0%	0%	0%	0%	*	0%	0%	0%	*	0%	0%	*	0%
Level 2	0%	0%	0%	*	0%	*	*	*	*	0%	*	*	*	1%	0%
Level 3	0%	1%	1%	1%	*	*	*	2%	1%	1%	*	1%	1%	1%	1%
Level 4	0%	*	1%	1%	1%	*	*	*	*	1%	0%	*	1%	1%	1%
Level 5	1%	2%	1%	2%	5%	1%	1%	1%	1%	1%	2%	3%	1%	2%	1%
Level 6	64%	59%	75%	70%	72%	67%	69%	73%	70%	75%	64%	67%	69%	67%	73%
Level 7	34%	31%	22%	22%	21%	29%	24%	17%	21%	18%	32%	23%	19%	17%	17%
Level 8	0%	*	0%	0%	0%	0%	0%	2%	*	*	0%	*	1%	0%	0%
Overseas	0%	*	0%	0%	*	*	*	1%	0%	1%	*	0%	*	*	*
Other	0%	2%	*	2%	0%	0%	1%	2%	1%	*	*	1%	2%	3%	1%
Don't know	1%	4%	1%	1%	1%	1%	4%	2%	5%	3%	1%	5%	6%	7%	5%
No qualification	0%	0%	0%	*	0%	*	0%	*	*	*	0%	*	0%	*	*
At least level 1	100%	93%	99%	97%	99%	100%	95%	96%	94%	96%	100%	94%	92%	90%	94%
At least level 2	100%	93%	99%	97%	99%	100%	95%	96%	94%	96%	99%	94%	92%	90%	94%
At least level 3	100%	93%	99%	97%	99%	99%	95%	95%	94%	96%	99%	94%	92%	89%	94%
At least level 5	100%	92%	97%	94%	98%	99%	94%	93%	92%	94%	99%	93%	90%	86%	91%
At least level 6	99%	90%	97%	92%	93%	98%	93%	92%	91%	93%	97%	90%	89%	84%	90%

Base: All qualified early years teachers in early years providers in maintained schools 2011, 2010, 2009, 2008, 2007

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

6.7.3 Early years nursery nurses

Table 6.19 shows the highest level of qualification of nursery nurses within each of the specific types of early years provider over time.

The majority of nursery nurses held their highest qualification specifically at level 3 (72 per cent in nursery schools, 77 per cent in primary schools with nursery and reception classes and 55 per cent in primary schools with reception but no nursery classes). In fact 99 per cent of nurses in nursery schools held *at least* a level 3 qualification and 98 per cent of nursery nurses in primary schools with nursery and reception classes were equally qualified. However, the equivalent proportion was slightly lower in primary schools with reception but no nursery classes (89 per cent). There has been little change in these proportions since 2007.

The proportion of nursery nurses holding at least a level 5 qualification has increased since 2007. In nursery schools the proportion rose from 11 per cent in 2007 to 19 per cent in 2011, while in primary schools with nursery and reception classes the equivalent shift was from 7 per cent in 2007 to 16 per cent in 2011, and in primary schools with reception but no nursery classes the proportion rose from 16 per cent to 27 per cent over the same period.

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

	Nursery schools					Primary schools with nursery and reception classes					Primary schools with reception but no nursery classes				
	2011	2010	2009	2008	2007	2011	2010	2009	2008	2007	2011	2010	2009	2008	2007
Level 1	0%	0%	0%	0%	0%	*	*	*	*	0%	2%	*	1%	*	*
Level 2	1%	*	0%	*	*	1%	1%	3%	2%	1%	7%	7%	5%	6%	7%
Level 3	72%	72%	79%	79%	81%	77%	74%	76%	79%	85%	55%	63%	66%	62%	68%
Level 4	8%	5%	4%	8%	6%	4%	6%	5%	4%	5%	5%	4%	5%	6%	5%
Level 5	9%	9%	14%	7%	6%	12%	10%	11%	8%	5%	21%	14%	15%	11%	11%
Level 6	9%	10%	3%	4%	5%	4%	4%	4%	3%	2%	5%	5%	3%	6%	4%
Level 7	1%	*	0%	0%	0%	*	*	0%	*	*	0%	*	0%	1%	*
Level 8	0%	0%	0%	0%	0%	0%	0%	*	0%	0%	0%	0%	0%	0%	0%
Overseas	0%	0%	0%	0%	1%	0%	*	0%	*	*	0%	0%	0%	0%	0%
Other	0%	2%	0%	*	*	0%	*	*	*	0%	0%	*	0%	1%	0%
Don't know	0%	*	0%	1%	0%	1%	3%	1%	2%	1%	3%	5%	4%	3%	2%
No qualification	0%	*	0%	*	0%	*	*	*	0%	*	2%	1%	1%	4%	2%
At least level 1	100%	97%	100%	98%	99%	100%	96%	99%	98%	98%	98%	94%	95%	93%	97%
At least level 2	100%	97%	100%	98%	99%	100%	96%	99%	98%	98%	96%	93%	94%	92%	96%
At least level 3	99%	97%	100%	98%	99%	98%	95%	96%	95%	97%	89%	87%	89%	86%	89%
At least level 5	19%	20%	17%	11%	11%	16%	14%	15%	11%	7%	27%	19%	18%	18%	16%
At least level 6	10%	11%	3%	4%	5%	4%	5%	4%	3%	2%	5%	5%	3%	7%	5%

Base: All nursery nurses in early years providers in maintained schools 2011, 2010, 2009, 2008, 2007

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

6.7.4 Other paid early years support staff

Table 6.20 shows the highest level of qualification of paid early years support staff within each of the specific types of early years provider over time.

Other paid staff were most likely to hold a level 2 or level 3 qualification, with more than half holding this level of qualification in each of the different types of early years setting.

Early years support staff at primary schools with reception but no nursery classes were the most likely to be unqualified, with one in four (27 per cent) not having any qualifications relevant to childcare in 2011. The proportion of unqualified staff in primary schools with nursery and reception classes was 18 per cent and in nursery schools was 13 per cent in 2011.

More than two in three early years support staff were qualified to at least level 2 (ranging from 70 per cent to 81 per cent in the different types of early years setting). Just under half were qualified to at least level 3 (46 per cent in all three types of setting). In general very few other paid early years staff held qualifications above level 3, although 12 per cent of other paid staff in primary schools with reception but no nursery classes held at least a level 5 qualification.

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

	Nursery schools					Primary schools with nursery and reception classes					Primary schools with reception but no nursery classes				
	2011	2010	2009	2008	2007	2011	2010	2009	2008	2007	2011	2010	2009	2008	2007
Level 1	6%	4%	5%	8%	4%	4%	5%	5%	6%	7%	2%	3%	4%	5%	5%
Level 2	35%	35%	30%	34%	33%	30%	25%	27%	27%	28%	23%	23%	25%	23%	20%
Level 3	39%	38%	38%	19%	22%	37%	42%	36%	34%	26%	29%	33%	33%	27%	28%
Level 4	2%	1%	3%	1%	1%	1%	2%	1%	1%	1%	3%	4%	2%	3%	2%
Level 5	2%	1%	3%	2%	0%	2%	2%	2%	3%	2%	7%	5%	6%	5%	4%
Level 6	2%	2%	2%	3%	2%	4%	3%	3%	4%	2%	4%	5%	3%	3%	3%
Level 7	0%	0%	0%	0%	0%	*	0%	0%	0%	*	1%	*	1%	*	*
Level 8	0%	0%	0%	0%	0%	0%	0%	0%	0%	*	0%	0%	0	*	0%
Overseas	1%	1%	*	0%	0%	1%	0%	*	1%	*	0%	*	0	*	*
Other	0%	*	0%	2%	*	*	1%	1%	1%	*	*	1%	*	1%	1%
Don't know	1%	1%	*	3%	2%	2%	5%	4%	4%	6%	3%	7%	7%	9%	5%
No qualification	13%	17%	20%	29%	35%	18%	16%	21%	18%	28%	27%	19%	18%	25%	30%
At least level 1	86%	80%	80%	67%	63%	81%	78%	75%	76%	66%	72%	74%	74%	65%	64%
At least level 2	81%	76%	75%	59%	59%	77%	73%	69%	70%	59%	70%	70%	70%	60%	58%
At least level 3	46%	42%	45%	25%	26%	46%	49%	43%	42%	31%	46%	47%	46%	38%	38%
At least level 5	4%	3%	4%	5%	2%	7%	5%	5%	7%	4%	12%	10%	10%	8%	8%
At least level 6	2%	2%	2%	3%	2%	5%	3%	3%	4%	2%	5%	6%	4%	3%	4%

Base: All other early years support staff in early years providers in maintained schools 2011, 2010, 2009, 2008, 2007

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

6.8 Qualified Teacher Status

Paid staff who held a qualification of at least level 5 were asked an additional question about whether they had Qualified Teacher Status (QTS). Table 6.21 shows the proportion of all paid childcare staff, and the proportion of paid staff with at least a level 5 qualification, that held QTS in each of the different types of childcare setting.

6.8.1 Childcare settings

Overall, very low proportions of paid staff in childcare settings held QTS (see table 6.21), ranging from eight per cent (for full day care settings in children's centres) to two per cent (amongst childminders).

Taken as a proportion of paid staff who held a qualification of at least level 5, around one-third of staff in sessional settings (32 per cent) and out of school clubs (36 per cent in after school clubs and 31 per cent in holiday clubs) held QTS. These proportions were higher than the proportion of full day care staff qualified to at least level 5 who held QTS (21 per cent).

The proportion of staff qualified to at least level 5 holding QTS has declined in all types of group based childcare provider since 2008. However, due to the general long-term increase in the proportion of staff qualified to at least level 5, this has resulted in no real change in the proportion of all staff holding QTS.

	QTS (% of all staff)				QTS (% of staff with at least a level 5 qualification)			
	2011	2010	2009	2008	2011	2010	2009	2008
Full day care	3%	3%	3%	2%	21%	24%	33%	36%
<i>Full day care in children's centres</i>	8%	6%	7%	5%	27%	26%	34%	32%
Sessional	4%	4%	3%	3%	32%	44%	49%	54%
After school	4%	5%	4%	3%	36%	36%	42%	45%
Holiday clubs	4%	4%	5%	5%	31%	33%	43%	49%
Childminders	2%	2%	2%	n/a	†	†	†	n/a

Base: All paid childcare staff 2011, 2010, 2009, 2008; All paid childcare staff with at least a level 5 qualification 2011, 2010, 2009, 2008

6.8.2 Early years provision in maintained schools

Table 6.22 shows the proportion of all paid childcare staff, and the proportion of paid staff with at least a level 5 qualification, that held QTS in each of the different types of early years setting.

A much higher proportion of paid staff in early years settings held QTS than was the case in the childcare settings. Of all paid staff in early years settings, around three in ten in nursery schools (29 per cent) and around four in ten in primary schools (39 per cent in primary schools with nursery and reception classes, and 44 per cent in primary schools with reception classes only) held QTS.

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

Focusing on paid staff with at least a level 5 qualification, between 73 per cent (in nursery schools) and 85 per cent (in primary schools with nursery and reception classes) held QTS.

These figures were in line with those obtained in the 2010 survey.

	QTS (% of all staff)				QTS (% of staff with at least a level 5 qualification)			
	2011	2010	2009	2008	2011	2010	2009	2008
Nursery schools	29%	28%	32%	29%	73%	73%	80%	80%
Primary schools with nursery and reception classes	39%	39%	39%	36%	85%	88%	87%	85%
Primary schools with reception but no nursery classes	44%	43%	41%	41%	83%	87%	87%	87%

Base: All paid early years staff 2011, 2010, 2009, 2008; All paid early years staff with at least a level 5 qualification 2011, 2010, 2009, 2008

6.8.3 QTS by deprivation

Table 6.23 analyses QTS in relation to the deprivation index, comparing the 30 per cent most deprived areas with the 70 per cent least deprived areas. The figures were typically very similar between the two types of area. The largest differences between areas are associated with low base sizes, as highlighted in the table, and should be viewed with caution.

	QTS (% of all staff)				QTS (% of staff with at least a level 5 qualification)			
	30% most deprived areas		70% least deprived areas		30% most deprived areas		70% least deprived areas	
Childcare	2011	2010	2011	2010	2011	2010	2011	2010
Full day care	3%	3%	4%	3%	15%	19%	23%	27%
<i>Full day care in children's centres</i>	8%	5%	9%	11%	25%	19%	32%	45%
Sessional	3%	6%	4%	4%	17%†	46%	38%	43%
After school clubs	6%	5%	4%	4%	39%	†	34%	41%
Holiday clubs	3%	4%	4%	4%	24%	29%	34%	35%
Childminders	0%	2%	3%	2%	†	47%	†	55%
Early years providers								
Nursery schools	29%	28%	28%	28%	70%	75%	78%	71%
Primary schools with nursery and reception classes	39%	38%	39%	39%	85%	89%	84%	87%
Primary schools with reception but no nursery classes	43%	39%	44%	44%	84%	83%	83%	87%

Base: All paid childcare staff 2011, 2010; All paid childcare staff with at least a level 5 qualification 2011, 2010. All paid early years staff 2011, 2010; All paid early years staff with at least a level 5 qualification 2011, 2010

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

6.8.4 QTS by region

Tables 6.24a and 6.24b show how the proportion of staff with QTS varies by region in each of the different types of provider. Figures are again shown based firstly on all paid staff (Table 6.24a) and then based only on those with at least a level 5 qualification (Table 6.24b).

As a proportion of all paid staff, the only significant differences were that holiday club staff in the North East and South West were more likely to hold QTS than those in England as a whole.

Regional base sizes are generally very small when analysing QTS as a proportion of paid staff qualified to at least level 5, but figures are shown in 6.24b where base sizes allow.

	East Midlands	East of England	London	North East	Yorkshire & Humberside	North West	South East	South West	West Midlands
Childcare									
Full day care	2%	2%	4%	0%	4%	4%	4%	6%	2%
<i>Full day care in children's centres</i>	2%	1%	13%	3%‡	7%	4%	13%	8%	11%
Sessional	3%	3%	4%	1%	2%	5%	1%	8%	5%
After school clubs	4%	4%	3%	3%	5%	4%	5%	5%	7%
Holiday clubs	3%	3%	6%	8%	3%	3%	4%	6%	2%
Early years providers									
Nursery schools	29%‡	29%	27%	33%	32%	30%	24%	†	26%
Primary schools with nursery and reception classes	37%	38%	40%	44%	38%	41%	37%	37%	39%
Primary schools with reception but no nursery classes	45%	41%	44%	43%‡	45%	46%	42%	46%	45%
<i>Base: All paid childcare staff 2011. All paid early years staff 2011</i>									

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

Table 6.24b Proportion of level 5 qualified paid early years staff with Qualified Teacher Status, by region									
	East Midlands	East of England	London	North East	Yorkshire & Humberside	North West	South East	South West	West Midlands
Childcare									
Full day care	†	12%‡	22%	†	18%	21%	28%	30%	14%‡
<i>Full day care in children's centres</i>	†	†	38%	†	19%‡	†	†	22%‡	27%‡
Sessional	29%‡	45%‡	27%‡	†	†	32%‡	16%‡	52%‡	†
After school clubs	†	†	†	†	40%‡	37%‡	47%‡	34%‡	40%‡
Holiday clubs	25%‡	†	46‡	†	19%‡	23%‡	36%‡	36%‡	23%‡
Early years providers									
Nursery schools	85%‡	72%‡	89%‡	68%‡	62%‡	62%	71%‡	†	73%‡
Primary schools with nursery and reception classes	81%	83%	87%	83%	85%	85%	88%	76%	85%
Primary schools with reception but no nursery classes	79%	84%	92%‡	†	86%	83%	86%	83%	80%

Base: All paid childcare staff with at least a level 5 qualification 2011. All paid early years staff with at least a level 5 qualification 2011

6.9 Early Years Professional Status

Paid staff in childcare settings who held at least a relevant level 6 qualification were asked whether they had Early Years Professional Status (EYPS). Table 6.25 shows the proportion of all staff, as well as the proportion of level 6 qualified staff, holding EYPS in each of the different group based childcare settings.⁵⁹

Generally the proportion of all staff holding EYPS⁶⁰ was low across all childcare settings, though it should be remembered that EYPS had only existed for four years at the time of this survey (since 2007). It ranged from three per cent in sessional and holiday club settings to nine per cent in children's centres providing full day care. Across all providers, there has been a slight increase from 2010.

Focusing on those staff holding at least a level 6 qualification, the proportion holding EYPS ranged from 33 per cent (in sessional settings) to 47 per cent (in after school clubs).

⁵⁹ It should be noted that there is an apparent discrepancy between the number of EYPs calculated by using the proportion of paid childcare staff with EYPS (e.g. in Table 6.25) with the overall numbers in the workforce (given in Table 5.1a), and the data held by the Training Agency, who are responsible for the EYPS programme. There are a number of possible explanations:

- 1) The wide margins of error associated with extrapolating small percentages up to population figures.
- 2) Possible over reporting by managers who include those in training for EYPS as well as those who have achieved EYPS.
- 3) There may be some double counting since we know some EYPs work in more than one setting and may therefore have been reported more than once.

It is important that these factors are understood in making any projection of EYPS numbers from data given in this survey report.

⁶⁰ Please refer to footnote above regarding discrepancies in the EYPS data.

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

	EYP Status (% of all staff)			EYP Status (% of staff with at least a level 6 qualification)		
	2011	2010	2009	2011	2010	2009
Full day care	5%	4%	3%	46%	43%	41%
<i>Full day care in children's centres</i>	9%	7%	5%	41%	36%	37%
Sessional	3%	2%	2%	33%	32%	36%
After school	4%	2%	2%	47%	26%‡	30%
Holiday clubs	3%	2%	3%	39%‡	30%	30%

Base: All paid childcare staff 2011, 2010, 2009; All paid childcare staff with at least a level 6 qualification 2011, 2010, 2009

6.9.1 EYP Status by deprivation

Table 6.26 shows the proportion of staff holding EYPS⁶¹ analysed by deprivation (again showing the proportion amongst all staff as well as the proportion amongst level 6 qualified staff).

In all types of setting the proportions holding EYPS were very similar in the 30 per cent most deprived areas and 70 per cent least deprived areas. Base sizes for many of the provider types were small and the data should be viewed bearing this in mind.

	EYPS (% of all staff)				EYPS ⁶² (% of staff with at least a level 6 qualification)			
	30% most deprived areas		70% least deprived areas		30% most deprived areas		70% least deprived areas	
	2011	2010	2011	2010	2011	2010	2011	2010
Full day care	5%	4%	5%	3%	47%	46%	45%	42%
<i>Full day care in children's centres</i>	10%	7%	7%	6%	43%	39%	37%	28%‡
Sessional	3%	3%	3%	2%	28%‡	32%	35%	33%‡
After school clubs	5%	2%	4%	2%	50%‡	†	46%	29%‡
Holiday clubs	3%	3%	3%	2%	40%	27%‡	39%	32%

Base: All paid childcare staff 2011, 2010; All paid childcare staff with at least a level 6 qualification 2011, 2010

⁶¹ Please refer to footnote above regarding discrepancies in the EYPS data.

⁶² Please refer to footnote in section 6.9 regarding discrepancies in the EYPS data.

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

6.10 Staff with QTS and EYP Status

Table 6.28 shows the proportion of all staff, and the proportion of staff with at least a level 6 qualification, in group based childcare settings that hold both QTS and EYPS.

Only between one and two per cent of staff in all types of group based childcare setting had both QTS and EYPS,⁶³. As a proportion of those qualified to at least level 6, between 10 per cent (in sessional settings) and 20 per cent (in after school clubs) held both QTS and EYPS.

	QTS and EYP Status (% of all staff)			QTS and EYP Status (% of staff with at least a level 6 qualification)		
	2011	2010	2009	2011	2010	2009
Full day care	1%	1%	1%	12%	13%	18%
<i>Full day care in children's centres</i>	2%	2%	2%	12%	9%	16%
Sessional	1%	1%	1%	10%	17%	17%
After school	2%	1%	1%	20%	12%	17%
Holiday clubs	2%	1%	2%	18%	16%	18%

Base: All paid childcare staff 2011, 2010, 2009; All paid childcare staff with at least a level 6 qualification 2011, 2010, 2009.

Table 6.29 shows the proportion of all paid staff with both QTS and EYPS,⁶⁴ analysed by the level of deprivation of the areas they were based in. There were no statistically significant differences between areas of high and low deprivation for any of the various types of childcare setting.

	30% most deprived areas			70% least deprived areas		
	2011	2010	2009	2011	2010	2009
Full day care	1%	1%	1%	2%	1%	1%
<i>Full day care in children's centres</i>	2%	2%	3%	3%	1%	1%
Sessional	1%	2%	1%	1%	1%	1%
After school clubs	3%	1%	1%	1%	1%	1%
Holiday clubs	2%	1%	1%	2%	1%	2%

Base: All paid childcare staff 2011, 2010, 2009

⁶³ Please refer to footnote in section 6.9 regarding discrepancies in the EYPS data.

⁶⁴ Please refer to footnote in section 6.9 regarding discrepancies in the EYPS data.

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

6.11 Qualifications being worked towards

Tables 6.31a, 6.31b and 6.32 show the type of qualifications being worked towards by all paid staff in each specific type of childcare and early years provider.

Paid staff in full day care settings and holiday clubs were more likely than those in other childcare settings to be working towards a qualification (27 per cent for full day care and 25 per cent within holiday clubs). One in five paid staff were working towards a qualification in after school clubs (21 per cent) and sessional settings (20 per cent). Amongst the different types of childcare provider, childminders were the least likely to be working towards a qualification (15 per cent).

Staff in full day care settings (including those based in children's centres) were most likely to be working towards a level 3 (eight per cent), level 5 (six per cent) or level 6 (seven per cent) qualification. In all other childcare settings the most common qualification to be working towards was level 3.

Across all types of provider, there has been a decline in the past few years in the proportion of staff working towards qualifications. This trend is to be expected (to some extent) as the proportion of staff already holding qualifications has increased.

In full day care settings, the proportion of paid staff working towards a qualification fell from 35 per cent in 2009 to 27 per cent in 2011. Over the same period, the proportion in sessional settings fell from 27 per cent to 20 per cent, in after school clubs from 28 per cent to 21 per cent, in holiday clubs from 29 per cent to 25 per cent, and amongst childminders from 21 per cent to 15 per cent.

In general, paid staff working for early years providers in maintained schools were less likely to be working towards a qualification than those in childcare settings. This may reflect the fact that early years staff already tended to be qualified to a high level (as discussed earlier in this chapter). Around one in six paid staff in nursery schools were working towards a qualification (16 per cent), while lower proportions were working towards a qualification in the primary school settings (10 per cent in primary schools with nursery and reception classes and nine per cent in primary schools with reception but no nursery classes).

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

Table 6.31a Highest relevant qualification being worked towards by all paid childcare staff															
	Full day care					Full day care in children's centres					Sessional				
	2011	2010	2009	2008	2007	2011	2010	2009	2008	2007	2011	2010	2009	2008	2007
Level 1	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*
Level 2	2%	2%	3%	3%	4%	1%	1%	1%	2%	2%	1%	2%	3%	3%	5%
Level 3	8%	10%	10%	11%	14%	4%	6%	6%	8%	9%	8%	10%	11%	11%	13%
Level 4	3%	5%	9%	7%	7%	3%	6%	7%	6%	8%	2%	2%	4%	3%	3%
Level 5	6%	7%	7%	4%	4%	5%	8%	8%	6%	8%	4%	4%	4%	2%	3%
Level 6 or above	7%	8%	7%	5%	3%	9%	9%	12%	10%	9%	4%	4%	3%	3%	2%
Other	*	*	*	*	1%	*	*	*	1%	1%	*	1%	*	*	1%
Don't know	1%	1%	1%	3%	2%	3%	4%	2%	5%	3%	1%	2%	*	2%	3%
Not working towards a qualification	72%	68%	64%	66%	65%	74%	65%	62%	62%	60%	79%	76%	72%	74%	70%
<i>All working towards a qualification</i>	27%	31%	35%	31%	31%	23%	30%	36%	32%	36%	20%	22%	27%	24%	27%
<i>Base: All paid childcare staff 2011, 2010 (module B), 2009, 2008 (module B), 2007 (module B)</i>															

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

Table 6.31b Highest relevant qualification being worked towards by all paid childcare staff															
	After school clubs					Holiday clubs					Childminders				
	2011	2010	2009	2008	2007	2011	2010	2009	2008	2007	2011	2010	2009	2008	2007
Level 1	*	*	*	*	*	*	*	*	*	*	1%	*	*	1%	1%
Level 2	3%	4%	5%	5%	6%	2%	3%	4%	4%	6%	1%	1%	1%	1%	2%
Level 3	9%	11%	11%	14%	14%	8%	11%	11%	12%	13%	8%	10%	12%	14%	16%
Level 4	2%	3%	4%	3%	5%	4%	4%	4%	3%	5%	1%	2%	2%	2%	1%
Level 5	3%	3%	4%	2%	3%	5%	6%	3%	3%	3%	2%	3%	3%	2%	1%
Level 6 or above	3%	5%	4%	4%	3%	6%	7%	7%	6%	7%	2%	2%	2%	1%	*
Other	*	1%	*	1%	1%	*	1%	*	1%	1%	0%	0%	0%	N/A	0%
Don't know	4%	2%	2%	4%	3%	3%	5%	4%	4%	5%	1%	2%	3%	3%	2%
Not working towards a qualification	75%	71%	70%	67%	65%	72%	64%	66%	66%	59%	84%	80%	76%	75%	78%
<i>All working towards a qualification</i>	21%	25%	28%	28%	31%	25%	30%	29%	29%	34%	15%	18%	21%	22%	21%

Base: All paid childcare staff 2011, 2010 (module B), 2009, 2008 (module B), 2007 (module B). All childminders 2011, 2010, 2009, 2008, 2007

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

Table 6.32 Highest relevant qualification being worked towards by all paid early years staff															
	Nursery schools					Primary schools with nursery and reception classes					Primary schools with reception but no nursery classes				
	2011	2010	2009	2008	2007	2011	2010	2009	2008	2007	2011	2010	2009	2008	2007
Level 1	0%	0%	0%	0%	*	*	*	*	*	*	*	*	*	*	*
Level 2	1%	1%	1%	2%	2%	*	1%	1%	1%	1%	*	1%	1%	2%	1%
Level 3	4%	5%	4%	6%	4%	3%	3%	4%	3%	4%	2%	3%	4%	3%	3%
Level 4	1%	3%	2%	1%	3%	1%	1%	2%	1%	2%	*	1%	1%	*	1%
Level 5	3%	3%	4%	3%	5%	2%	2%	2%	2%	3%	1%	2%	2%	3%	3%
Level 6 or above	7%	6%	4%	6%	7%	4%	4%	5%	5%	3%	4%	4%	5%	4%	4%
Other	0%	0%	0%	N/A	0%	0%	0%	0%	N/A	0%	0%	0%	0%	N/A	0%
Don't know	1%	2%	1%	2%	1%	2%	5%	3%	4%	2%	4%	6%	7%	4%	3%
Not working towards a qualification	83%	80%	83%	79%	77%	88%	84%	83%	84%	82%	87%	83%	80%	83%	82%
All working towards a qualification	16%	18%	16%	20%	22%	10%	11%	14%	12%	14%	9%	11%	13%	13%	12%

Base: All paid early years staff 2011, 2010, 2009, 2008, 2007

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

6.11.1 Qualification worked towards by deprivation

Tables 6.33a, 6.33b and 6.34 show the proportion of staff in areas of high and low deprivation that are working towards qualifications.

Staff in after school clubs were slightly more likely to be working towards a qualification if they were based in the 30 per cent most deprived areas (23 per cent compared with 20 per cent in the less deprived areas). Childminders were also more likely to be working towards a qualification if they were based in the 30 per cent most deprived areas (19 per cent compared with 14 per cent in the 70 per cent least deprived areas). In full day care settings staff were equally likely to be working towards qualifications regardless of the level of deprivation and there were no differences for any of the other types of childcare provider in 2011.

For all types of early years setting, there was no difference in the proportion of staff working towards a qualification in the 30 per cent most deprived areas compared to those in the 70 per cent least deprived areas. This represents a change from 2010, when staff in deprived areas were more likely to be working towards a qualification.

	Full day care				<i>Full day care in children's centres</i>				Sessional			
	30% most deprived areas		70% least deprived areas		30% most deprived areas		70% least deprived areas		30% most deprived areas		70% least deprived areas	
	2011	2010	2011	2010	2011	2010	2011	2010	2011	2010	2011	2010
Level 1	*	*	*	*	*	*	0%	0%	*	*	*	*
Level 2	2%	1%	3%	2%	1%	1%	1%	2%	1%	2%	1%	2%
Level 3	8%	9%	9%	10%	4%	6%	4%	7%	7%	9%	9%	10%
Level 4	3%	4%	3%	5%	3%	6%	2%	6%	2%	3%	2%	2%
Level 5	6%	8%	6%	6%	5%	10%	6%	3%	3%	6%	4%	3%
Level 6 or above	8%	9%	6%	7%	9%	8%	9%	12%	6%	6%	4%	4%
Other	*	*	*	*	*	*	0%	1%	0%	1%	*	*
Don't know	2%	3%	1%	1%	2%	4%	5%	3%	2%	4%	1%	1%
Not working towards a qualification	71%	66%	72%	68%	75%	65%	72%	67%	78%	69%	79%	77%
All working towards a qualification	27%	31%	27%	31%	23%	31%	22%	29%	21%	26%	19%	21%

Base: All paid childcare staff 2011, 2010 (module B)

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

	After school clubs				Holiday clubs				Childminders			
	30% most deprived areas		70% least deprived areas		30% most deprived areas		70% least deprived areas		30% most deprived areas		70% least deprived areas	
	2011	2010	2011	2010	2011	2010	2011	2010	2011	2010	2011	2010
Level 1	*	*	*	*	*	0%	*	*	1%	1%	1%	*
Level 2	4%	3%	2%	4%	2%	2%	2%	3%	0%	3%	1%	*
Level 3	8%	13%	9%	10%	8%	9%	8%	12%	13%	13%	7%	9%
Level 4	4%	1%	2%	3%	5%	5%	4%	3%	1%	2%	1%	2%
Level 5	4%	3%	3%	3%	6%	7%	4%	5%	1%	3%	2%	3%
Level 6 or above	4%	9%	3%	4%	5%	9%	6%	6%	2%	5%	3%	2%
Other	*	3%	*	1%	*	1%	*	1%	0%	0%	0%	0%
Don't know	4%	2%	4%	2%	4%	5%	2%	5%	1%	3%	1%	2%
Not working towards a qualification	72%	66%	76%	73%	69%	64%	73%	65%	80%	72%	85%	82%
All working towards a qualification	23%	29%	20%	24%	26%	31%	24%	30%	19%	25%	14%	16%

Base: All paid childcare staff 2011, 2010 module B

	Nursery schools				Primary schools with nursery and reception classes				Primary schools with reception but no nursery classes			
	30% most deprived areas		70% least deprived areas		30% most deprived areas		70% least deprived areas		30% most deprived areas		70% least deprived areas	
	2011	2010	2011	2010	2011	2010	2011	2010	2011	2010	2011	2010
Level 1	0%	0%	0%	0%	0%	0%	*	*	*	1%	*	*
Level 2	1%	1%	1%	1%	*	1%	*	1%	*	*	*	1%
Level 3	4%	4%	5%	5%	3%	4%	2%	2%	3%	2%	2%	3%
Level 4	1%	3%	1%	2%	*	1%	1%	*	*	3%	*	1%
Level 5	4%	4%	2%	2%	1%	2%	2%	2%	3%	4%	1%	1%
Level 6 or above	8%	7%	5%	4%	4%	5%	4%	4%	3%	5%	4%	4%
Other	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Don't know	1%	2%	1%	2%	1%	4%	3%	6%	4%	7%	5%	6%
Not working towards a qualification	82%	77%	85%	84%	89%	83%	88%	84%	86%	77%	87%	84%
All working towards a qualification	17%	20%	14%	14%	10%	13%	10%	10%	10%	16%	9%	10%

Base: All paid early years staff 2011, 2010

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

6.11.2 Working towards a qualification by region

Table 6.35 shows the proportion of staff working towards any type of qualification according to the region in which their setting is based.

In general there was relatively little difference in the proportion of staff working towards qualifications in each of the regions, but there were some exceptions. In nursery schools, the proportion working towards a qualification were higher in the East Midlands (23 per cent) than in England as a whole (16 per cent). In full day care settings, the proportion working towards a qualification was highest in London (34 per cent), while in sessional care the highest proportion was to be found in Yorkshire and Humberside (26 per cent).

Table 6.35 Proportion of staff working towards any relevant qualification, by region									
	East Midlands	East of England	London	North East	Yorkshire & Humberside	North West	South East	South West	West Midlands
Early years providers									
Nursery schools	23%	13%	15%	13%	19%	15%	16%	17%	18%
Primary schools with nursery and reception classes	8%	14%	9%	11%	11%	10%	9%	12%	7%
Primary schools with reception but no nursery classes	7%	10%	7%	11%	12%	12%	8%	8%	6%
Childcare									
Full day care	20%	25%	34%	28%	29%	24%	27%	26%	26%
<i>Full day care in children's centres</i>	†	29%	21%	19%	24%	18%	28%	26%	19%
Sessional	18%	17%	18%	25%	26%	18%	25%	20%	14%
After school clubs	20%	19%	18%	23%	28%	15%	26%	18%	25%
Holiday clubs	26%	32%	26%	17%	26%	22%	24%	21%	27%
Childminders	6%	16%	18%		18%	16%	13%	17%	12%
<i>Base: All paid childcare staff 2011. All paid early years staff 2011. All childminders 2011</i>									

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

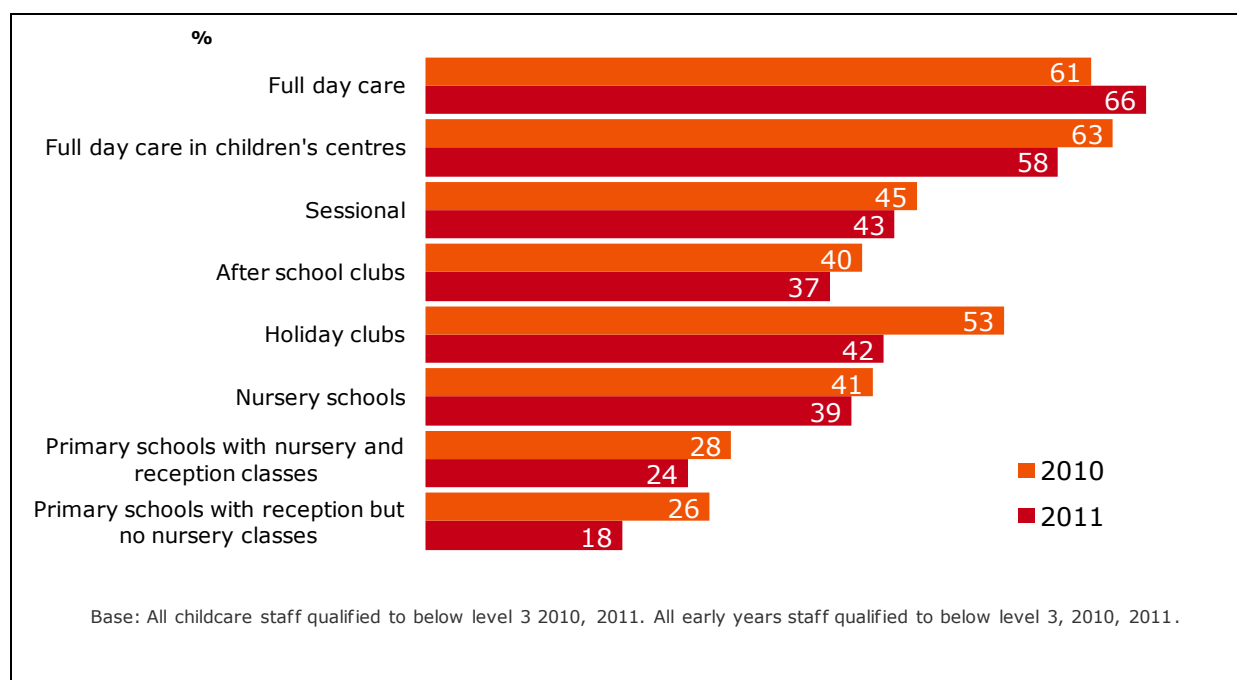
6.11.3 Proportion of staff qualified to below level 3 currently working towards a higher qualification

Chart 6.1 shows the proportion of paid staff qualified to below level 3 who were working towards a qualification of level 3 or higher in 2011 and 2010.

The proportion was highest amongst staff working in full day care settings (66 per cent, an increase from 61 per cent in 2010). Around four in ten staff qualified below level 3 were working towards a qualification at level 3 or higher in sessional settings (43 per cent), holiday clubs (42 per cent) and after school settings (37 per cent). The proportion in holiday clubs declined from 53 per cent in 2010 to 42 per cent in 2011.

Four in ten (39 per cent) nursery school staff qualified below level 3 were working towards a qualification at level 3 or higher, a higher proportion than was to be found in primary schools with nursery and reception classes (24 per cent) and primary schools with reception but no nursery classes (18 per cent, a decrease from 26 per cent in 2010).

Chart 6.1 Proportion of paid staff qualified to below level 3 who were working towards a relevant qualification of level 3 or higher in 2010 and 2011



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

6.12 Providers with at least one graduate member of staff

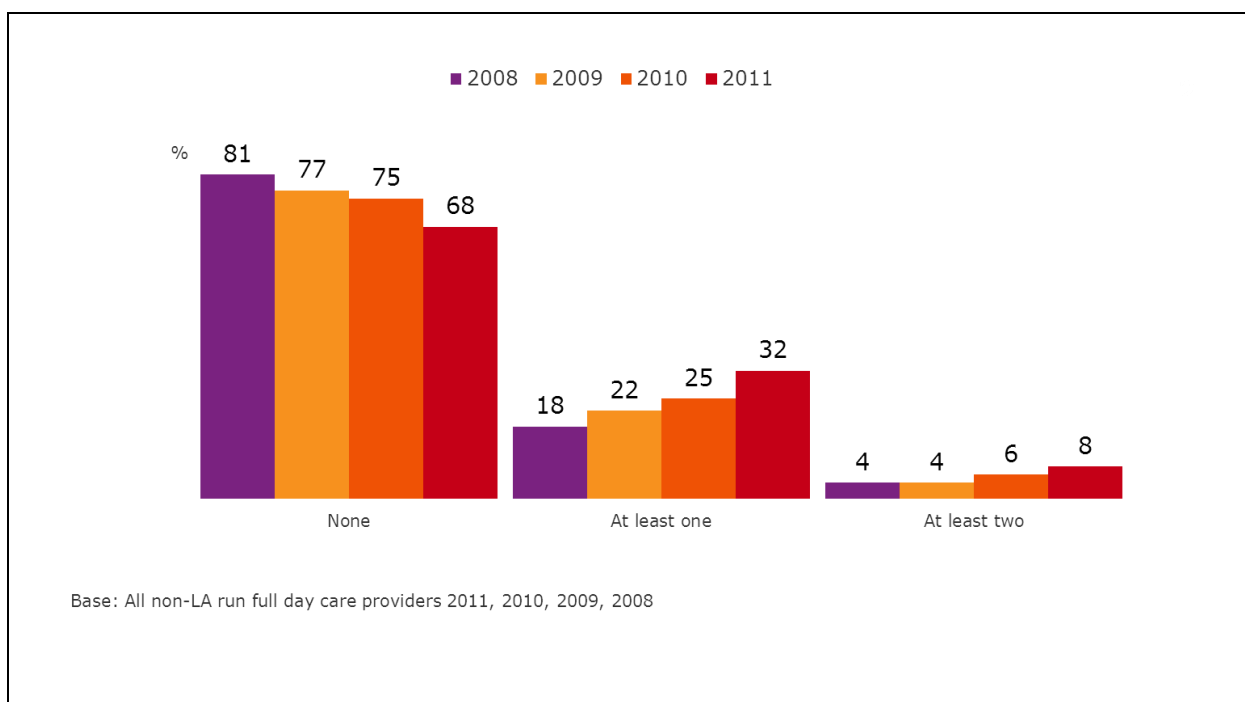
Full day care providers which were not run by a local authority were asked how many graduate staff they currently had that held Early Years Professional Status (EYPS). The previous Government set a target of ensuring that every full day care setting would have at least one graduate with EYPS, while those in the most deprived areas were to have at least two graduates. The current Government has set no such target but there remains a focus on having a graduate led sector and the Government, therefore, continues to invest funding in the EYPS programme.

Chart 6.2 shows how the number of graduates with EYPS working in non-LA run full day care settings has changed over time.

Overall, there had been a steady increase in the number of settings with at least one EYPS graduate, rising from 18 per cent in 2008 to 32 per cent in 2011. The proportion with at least two EYPS graduates increased more slowly, rising from four per cent in 2008 to eight per cent in 2011.

There was no difference between the 30 per cent most deprived areas and other areas in this regard.

Chart 6.2 Number of graduates with EYP Status in non-LA run full day care settings

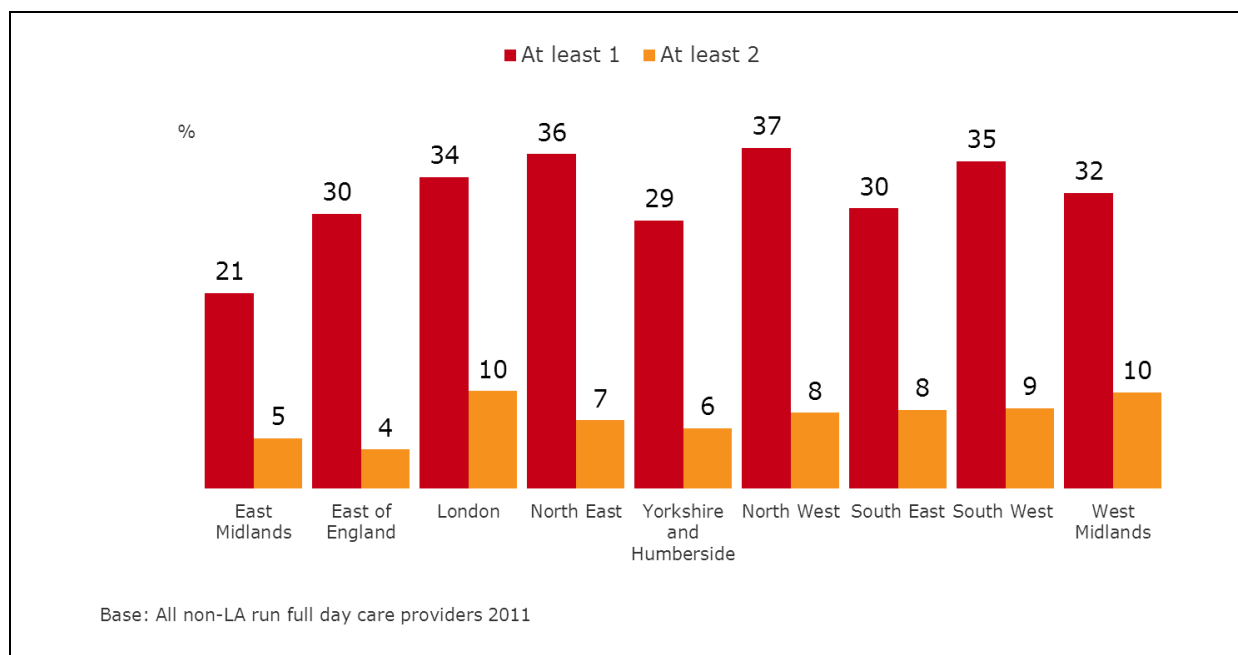


N.B. As detailed in chapter 2, it was necessary to employ a new sampling approach in 2010. This may have impacted on trends between 2010 and previous years - the data should be viewed bearing this in mind.

Chart 6.3 shows the proportion of non-LA run full day care settings with at least one or two EYPS graduates according to the region they are based in.

Providers were least likely to have at least one graduate with EYPS in the East Midlands (21 per cent). Settings were more likely to have a graduate with EYPS in the North East (36 per cent) and the North West (37 per cent).

Chart 6.3 Number of graduates with EYP Status in non-LA run full day care settings, by region



6.13 Graduate staff working towards EYP Status

Amongst those providers that were not run by a local authority and did not have any graduate staff with EYPS, around one in three (36 per cent) had staff working towards EYPS. This is a relatively large decrease from previous years when around half were working towards EYPS (52 per cent in 2010 and 49 per cent in 2009).

Nine per cent of such settings had at least two members of staff working towards EYPS in 2011.

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

Chart 6.4 Number of staff working towards EYP Status, in non-LA run full day care settings with no graduates with EYP Status

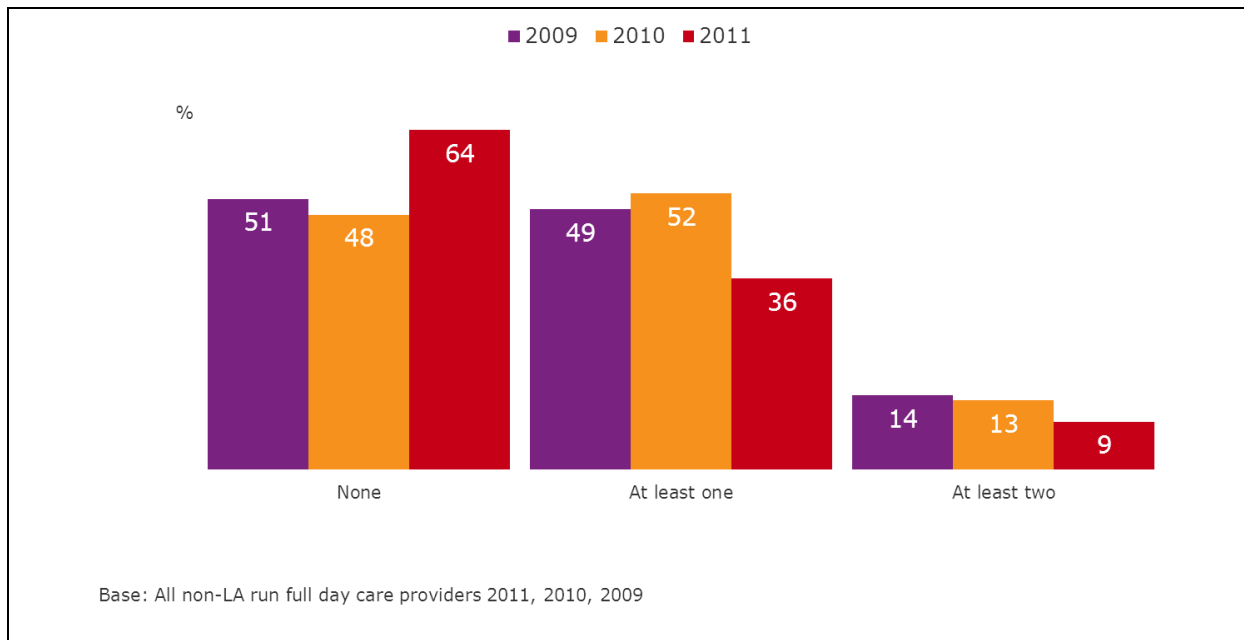
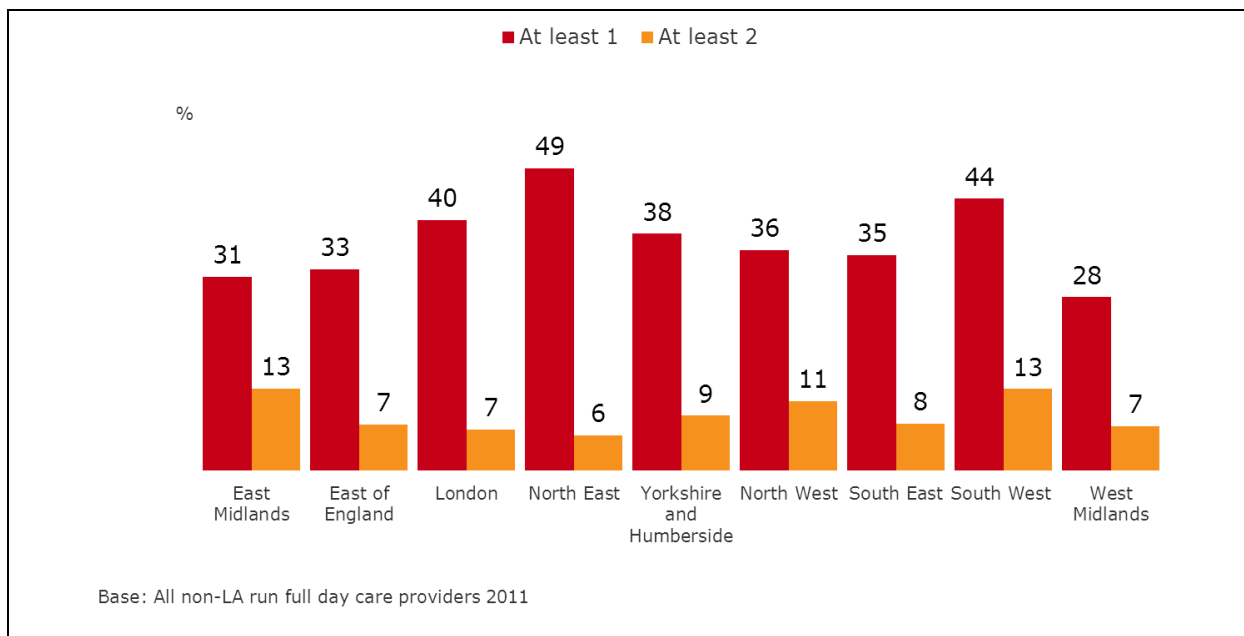


Chart 6.5 shows regional analysis of the number of staff in each setting working towards EYPS.

Those in the North East were more likely to have at least one member of staff working towards EYPS (49 per cent) than those in the West Midlands (28 per cent). However, those in the North East were also the least likely to have at least two members of staff working towards EYPS (six per cent).

Chart 6.5 Number of staff working towards EYP Status, in non-LA run full day care settings with no graduates with EYP Status, by region



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

7. Profitability

7.1 Profitability

Tables 7.22a and 7.22b show the proportion of providers reporting whether they made a profit or surplus, covered their costs or operated at a loss.⁶⁵

Full day care providers were the most likely to report making a profit or surplus in 2011 (35 per cent, compared to 30 per cent for sessional providers, 28 per cent for after school clubs and 27 per cent for holiday clubs). However, full day care settings in children's centres were the least likely to report a profit or surplus (15 per cent). The proportion of settings making a profit had not changed since 2010.

Children's centres had the highest proportion of loss making settings - 31 per cent, compared to 22 per cent for after school clubs, 18 per cent for holiday clubs, 14 per cent for sessional providers and 12 per cent for full day care providers. The proportion of full day care settings, sessional settings and holiday clubs operating at a loss decreased between 2010 and 2011. The proportion of after school clubs and full day care settings in children's centres operating at a loss remained stable over the same period. The fact that the proportion of settings making a loss had not increased in 2011 is an encouraging sign bearing in mind the continuing economic turbulence in the wider economy.

It should be noted that there are differences between the proportion of settings recorded as making a profit in the Childcare and Early Years Providers Survey and the proportion that was recorded in the Childcare Provider Finances Survey (which was a standalone survey conducted in 2012 with the aim of providing a more in-depth understanding of the finances of providers in the childcare sector)⁶⁶.

The Childcare Provider Finances Survey looked at group-based settings as a single combined entity and found that 63 per cent of them had made a profit, 11 per cent broke even, 24 per cent had made a loss and two per cent recorded a 'don't know' response. Reflecting the specific, financial focus of the questionnaire, respondents to the Childcare Provider Finances Survey were asked a detailed series of questions about their income streams and costs prior to answering the question about profitability. As such, they were able to give a far clearer assessment of precisely whether their setting made a profit, broke even or made a loss.

⁶⁵ For-profit organisations were asked if they had made a profit and not-for-profit organisations were asked if they had made a surplus.

⁶⁶ Brind, R., Norden, N., Oseman, D. (2012), Childcare Provider Finances Survey, DFE Research Report DFE-RR213.

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

The more general nature of the Childcare and Early Years Providers survey means that respondents often answered in a less specific manner when discussing their finances, as can be seen by the comparatively high level of respondents giving 'don't know' responses (between 10 per cent and 18 per cent, depending on provider type) and saying that their setting had covered costs (ranging between 35 per cent and 46 per cent).⁶⁷

In absolute terms, the Childcare Provider Finances Survey should be seen as giving the most accurate record of the proportion of profit making and loss making settings. Nevertheless, the data on profitability recorded in the Childcare and Early Years Providers Survey still gives a valuable snapshot of whether providers' financial situation has strengthened or weakened over time.

⁶⁷ It should also be noted that direct comparison between the two surveys is made difficult because of differences in the question wording used in each survey, as well as differences in the time at which the surveys were conducted. The wording of the question in the Childcare and Early Years Providers Survey was:

"In the most recent financial year, has [setting name] made a profit, just covered its costs or operated at a loss?"

The equivalent wording in the Childcare Provider Finances Survey was:

"Over the 12 month period ending [date of setting's most recent financial reporting period], after all costs were deducted, including any wages drawn by the owner or owners, did your setting...make a profit or surplus / break even / or make a loss?"

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

Table 7.22a Profitability															
	Full day care					Full day care in children's centres					Sessional				
	2011	2010	2009	2008	2007	2011	2010	2009	2008	2007	2011	2010	2009	2008	2007
Made a profit or surplus	35%	33%	34%	34%	30%	15%	11%	10%	10%	7%	30%	28%	28%	32%	30%
Covering costs	36%	33%	34%	33%	33%	36%	35%	37%	34%	24%	46%	46%	51%	43%	47%
Operating at a loss	12%	19%	13%	16%	18%	31%	33%	34%	34%	52%	14%	20%	15%	16%	14%
Don't know	16%	14%	18%	18%	19%	18%	21%	19%	21%	17%	10%	6%	6%	9%	9%

Base: Module A childcare providers 2011, 2010, 2009, 2008, 2007

Table 7.22b Profitability										
	After school clubs					Holiday clubs				
	2011	2010	2009	2008	2007	2011	2010	2009	2008	2007
Made a profit or surplus	28%	30%	23%	24%	24%	27%	29%	23%	25%	27%
Covering costs	35%	40%	44%	39%	42%	39%	36%	43%	41%	39%
Operating at a loss	22%	20%	22%	24%	24%	18%	23%	23%	26%	24%
Don't know	14%	10%	11%	12%	11%	15%	12%	11%	8%	10%

Base: Module A childcare providers 2011, 2010, 2009, 2008, 2007

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

Tables 7.23a and 7.23b show provider profitability broken down by the level of deprivation of the areas in which different types of setting are based. As was the case in 2010 (and 2009), providers operating in the 70 per cent least deprived areas were more likely to report a profit or surplus than those in the 30 per cent most deprived areas. This was observed across types of provider.

Inversely, as one might expect, the proportion of loss making settings in the most deprived areas was generally higher than the proportion in the least deprived areas (the one exception being for sessional care, where the difference was not statistically significant). This pattern arose in 2010 and has continued in 2011. However, in 2009 there were no differences in the proportion of loss making settings in areas with differing levels of deprivation, apart from in after school clubs, where settings in the 30 per cent most deprived areas were more likely to be loss making.

The decline in the proportion of loss making full day care and sessional settings between 2010 and 2011 was seen across both areas of high and low deprivation.

Base sizes for children's centres offering full day care in the least deprived areas are low and any differences for this group should therefore be viewed with caution.

	Full day care				<i>Full day care in children's centres</i>				Sessional			
	30% most deprived areas		70% least deprived areas		30% most deprived areas		70% least deprived areas		30% most deprived areas		70% least deprived areas	
	2011	2010	2011	2010	2011	2010	2011	2010	2011	2010	2011	2010
Made a profit or surplus	24%	30%	39%	35%	9%	10%	27% [†]	†	19%	21%	32%	29%
Covering costs	39%	28%	36%	35%	39%	34%	30% [†]	†	48%	42%	46%	47%
Operating at a loss	19%	24%	10%	17%	35%	33%	21% [†]	†	18%	27%	13%	19%
Don't know	18%	17%	15%	13%	16%	23%	21% [†]	†	15%	10%	9%	5%

Base: Module A childcare providers 2011, 2010

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

Table 7.23b Provider profitability by deprivation								
	After school clubs				Holiday clubs			
	30% most deprived areas		70% least deprived areas		30% most deprived areas		70% least deprived areas	
	2011	2010	2011	2010	2011	2010	2011	2010
Made a profit or surplus	20%	17%	31%	34%	18%	21%	32%	33%
Covering costs	32%	45%	36%	39%	43%	38%	38%	35%
Operating at a loss	32%	27%	18%	18%	23%	26%	16%	21%
Don't know	16%	11%	14%	9%	16%	15%	14%	11%

Base: Module A childcare providers 2011, 2010

Table 7.24 shows the proportion of all group based childcare providers that made a profit or a loss in each given region.

In most regions, between a quarter and a third of providers made a profit in 2011. Settings in the East of England and the South East were the most likely to report a profit in 2011 (37 per cent and 35 per cent respectively). As was the case in 2009 and 2010, settings in the North East were the least likely to report a profit in 2011 (19 per cent).

The proportion of providers reporting a financial loss varied relatively little from region to region, ranging from 13 to 19 per cent in 2011. However, the proportion of settings in the North East making a loss has considerably decreased from around 30 per cent in 2009 and 2010 to 18 per cent in 2011. This meant that in 2011 the North East was no longer the region with the highest proportion of childcare providers making a loss, having fallen in line with other regions like London and Yorkshire & Humberside (respectively 18 per cent and 19 per cent in 2011). This downward trend in the proportion of settings making a loss between 2010 and 2011 was visible in all regions with the exception of the West Midlands.

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

Government Office Region	Proportion of all providers who made a profit in the last 12 months			Proportion of all providers who made a loss in the last 12 months		
	2011	2010	2009	2011	2010	2009
East Midlands	30%	26%	26%	13%	20%	17%
East of England	37%	34%	30%	16%	22%	18%
London	26%	26%	26%	18%	21%	17%
North East	19%	23%	16%	18%	30%	29%
Yorkshire & Humberside	28%	33%	30%	19%	20%	14%
North West	32%	32%	29%	16%	20%	19%
South East	35%	35%	33%	13%	19%	16%
South West	31%	28%	33%	13%	22%	18%
West Midlands	31%	30%	25%	16%	15%	16%

Base: Module A childcare providers 2011, 2010, 2009

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

Appendix 1 – Additional tables

Additional Tables - Chapter 3

	2011		2010		2009		2008		2007	
	30% most deprived areas	70% least deprived areas	30% most deprived areas	70% least deprived areas	30% most deprived areas	70% least deprived areas	30% most deprived areas	70% least deprived areas	30% most deprived areas	70% least deprived areas
	No.	No.	No.	No.	No.	No.	No.	No.	No.	No.
Full day care	4,400	13,200	4,300	12,400	3,700	10,500	4,000	9,900	4,000	9,500
<i>Full day care in children's centres</i>	400	150	600	200	750	300	700	300	750	200
Sessional	1,600	6,300	1,600	6,700	1,200	6,600	1,500	7,000	1,500	7,300
After school clubs	2,600	7,400	2,400	7,100	2,400	5,500	2,600	6,200	2,500	6,000
Holiday clubs	2,500	5,400	2,400	5,300	1,800	4,600	1,800	4,700	1,800	4,000
Childminders	9,500	39,300	9,200	38,200	9,200	41,800	11,200	45,000	10,600	49,200
Childcare total	20,600	71,600	19,900	69,600	18,300	69,000	21,700	73,100	21,200	76,200
Nursery schools	250	150	250	150	300	†	250	150	300	150
Primary schools with nursery and reception classes	2,900	3,800	2,800	3,900	2,900	3,800	3,300	3,400	3,000	3,800
Primary schools with reception but no nursery classes	1,100	7,500	850	7,700	700	7,900	900	7,800	1,200	7,700
Early years total	4,300	11,500	3,900	11,800	3,800	11,900	4,500	11,400	4,500	11,700

Base: Childcare providers 2011, 2010, 2009, 2008, 2007. Early years provision in maintained schools 2011, 2010, 2009, 2008, 2007

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

Table 3.3a Distribution of providers by Region									
	Full day care	<i>Full day care in children's centres</i>	Sessional	After school clubs	Holiday clubs	Childminders	Nursery schools	Primary schools with nursery and reception classes	Primary schools with reception but no nursery
	No.	No.	No.	No.	No.	No.	No.	No.	No.
Total number of providers	17,600	550	7,900	10,000	7,900	48,800	400	6,700	8,600
East Midlands	1,400	#	750	900	800	4,200	#	450	1,000
East	1,900	#	1,100	950	800	5,600	#	650	1,100
London	2,500	150	1,200	1,300	1,000	8,500	80	1,300	300
North East	2,200	150	900	1,600	1,300	6,600	70	1,500	1,000
Yorkshire & Humberside									
North West	2,400	70	900	1,800	1,200	5,500	70	1,100	1,200
South East	3,200	60	1,400	1,200	1,100	9,800	#	500	1,700
South West	2,200	50	900	900	750	4,600	#	250	1,500
West Midlands	1,900	60	750	1,400	950	4,000	60	900	750
<i>Base: Childcare providers 2011. Early years provision in maintained schools 2011</i>									

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

	Full day care					Full day care in children's centres					Sessional				
	2011	2010	2009	2008	2007	2011	2010	2009	2008	2007	2011	2010	2009	2008	2007
Total number of providers	17,600	16,700	14,100	13,800	13,600	550	800	1,000	1,000	1,000	7,900	8,300	7,800	8,500	8,700
Private or Voluntary	16,100	14,900	12,400	12,000	11,500	200	250	400	300	350	7,400	7,900	7,400	7,900	8,200
<i>Private</i>	10,700	9,800	9,300	9,000	8,700	90	150	200	#	150	2,700	2,600	2,200	2,500	2,500
<i>Voluntary</i>	5,400	5,000	3,100	3,000	2,800	90	150	#	200	200	4,800	5,300	5,200	5,400	5,700
Maintained	1,400	1,800	1,400	1,500	1,700	400	550	550	700	550	500	550	350	500	550
<i>Local Authority</i>	850	1,000	#	700	800	300	450	500	600	450	350	350	#	#	#
<i>School/college</i>	600	800	#	800	900	90	90	#	#	#	150	200	#	#	#
<i>Other</i>	90	250	#	400	#	#	#	#	#	#	20	100	#	#	#

Base: Childcare providers 2011, 2010, 2009, 2008, 2007

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

	After school clubs					Holiday Clubs				
	2011	2010	2009	2008	2007	2011	2010	2009	2008	2007
Total number of providers	10,000	9,500	7,900	8,800	8,400	7,900	7,700	6,400	6,500	5,800
Private or Voluntary	6,700	6,300	5,400	5,900	5,700	5,900	5,800	4,700	4,700	4,400
<i>Private</i>	4,300	3,700	2,900	3,300	3,500	3,900	3,700	2,400	2,500	2,400
<i>Voluntary</i>	2,500	2,600	2,500	2,600	2,200	2,000	2,100	2,300	2,200	1,900
Maintained	3,200	3,300	2,400	2,700	2,700	1,900	2,000	1,500	1,600	1,500
<i>Local Authority</i>	500	700	#	800	650	450	750	900	900	800
<i>School/college</i>	2,700	2,600	1,900	2,000	2,100	1,500	1,200	600	600	700
<i>Other</i>	90	50	#	#	#	100	100	#	#	#

Base: Childcare providers 2011, 2010, 2009, 2008, 2007

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

Additional Tables - Chapter 4

	Full day care	Full day care in children's centres	Sessional	After school clubs	Holiday clubs	Childminders	Nursery schools	Primary schools with nursery and reception classes	Primary schools with reception but no nursery classes
	No.	No.	No.	No.	No.	No.	No.	No.	No.
Total number of places	721,500	28,800	251,000	357,400	339,300	236,900	25,900	489,100	286,900
East Midlands	56,900	400	23,200	31,600	34,500	20,900	1,800	32,300	30,200
East	73,300	2,300	39,200	30,200	41,300	29,800	3,000	41,500	35,500
London	100,900	6,800	38,400	54,100	49,400	37,200	5,600	121,000	15,200
North East, Yorkshire & Humberside	93,300	6,600	24,800	52,000	53,000	33,200	3,700	101,500	28,000
North West	114,300	3,900	28,100	68,600	51,800	27,100	4,100	73,500	39,400
South East	124,700	2,900	46,800	44,300	43,200	48,000	2,700	38,100	65,200
South West	79,100	2,200	26,300	29,000	31,400	21,800	1,500	15,100	46,100
West Midlands	78,900	3,600	24,100	47,500	34,600	18,700	3,400	66,200	27,300

Base: Childcare providers 2011. Early years provision in maintained schools 2011

	Full day care					Full day care in children's centres				
	2011	2010	2009	2008	2007	2011	2010	2009	2008	2007
Total number of places	721,500	716,700	647,800	620,700	596,500	28,800	40,300	50,600	50,000	51,100
Private or Voluntary	657,700	626,400	567,500	535,600	510,200	9,300	13,000	18,900	14,200	17,700
Private	497,600	464,200	466,900	436,700	417,300	4,300	5,900	9,800	5,300	8,300
Voluntary	160,100	162,300	100,600	98,900	92,900	5,000	7,100	9,100	8,900	9,300
Maintained	60,200	83,800	63,400	62,900	67,200	19,700	27,800	30,300	34,600	31,100
Local Authority	34,100	46,200	28,200	29,800	32,600	15,700	23,300	26,400	29,600	27,100
School/college	26,100	37,500	35,200	33,100	34,600	4,000	4,500	3,900	5,000	4,000
Other	4,400	14,400	16,100	26,100	14,500	300	1,100	1,200	1,700	2,700

Base: Childcare providers 2011, 2010, 2009, 2008, 2007

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

	After school clubs					Holiday Clubs				
	2011	2010	2009	2008	2007	2011	2010	2009	2008	2007
Total number of places	357,400	368,100	272,500	282,700	259,900	339,300	349,400	260,400	262,600	230,300
Private or Voluntary	235,600	239,400	187,300	193,600	176,100	252,900	254,000	184,100	183,500	163,100
<i>Private</i>	<i>151,100</i>	<i>135,500</i>	<i>107,300</i>	<i>111,800</i>	<i>113,700</i>	<i>168,900</i>	<i>169,000</i>	<i>97,000</i>	<i>105,800</i>	<i>97,000</i>
<i>Voluntary</i>	<i>84,600</i>	<i>103,900</i>	<i>80,000</i>	<i>81,800</i>	<i>62,500</i>	<i>84,000</i>	<i>84,900</i>	<i>87,100</i>	<i>77,800</i>	<i>66,100</i>
Maintained	119,800	130,900	81,400	84,500	84,600	83,100	98,800	63,800	67,700	65,700
<i>Local Authority</i>	<i>15,400</i>	<i>25,900</i>	<i>18,700</i>	<i>27,900</i>	<i>19,600</i>	<i>19,500</i>	<i>45,200</i>	<i>43,000</i>	<i>42,000</i>	<i>39,700</i>
<i>School/college</i>	<i>104,400</i>	<i>105,000</i>	<i>62,700</i>	<i>56,500</i>	<i>65,000</i>	<i>63,600</i>	<i>53,600</i>	<i>20,800</i>	<i>25,700</i>	<i>26,000</i>
<i>Other</i>	<i>3,700</i>	<i>1,200</i>	<i>6,900</i>	<i>6,600</i>	<i>4,600</i>	<i>4,600</i>	<i>6,000</i>	<i>12,800</i>	<i>13,300</i>	<i>6,000</i>

Base: Childcare providers 2011, 2010, 2009, 2008, 2007

	Sessional				
	2011	2010	2009	2008	2007
Total number of places	251,000	251,000	227,900	243,500	248,100
Private or Voluntary	237,800	238,500	216,700	226,800	232,000
<i>Private</i>	<i>93,700</i>	<i>91,200</i>	<i>67,900</i>	<i>71,400</i>	<i>70,200</i>
<i>Voluntary</i>	<i>144,100</i>	<i>147,300</i>	<i>148,800</i>	<i>155,400</i>	<i>161,700</i>
Maintained	15,900	17,200	10,300	14,200	15,400
<i>Local Authority</i>	<i>9,800</i>	<i>10,200</i>	<i>5,600</i>	<i>7,700</i>	<i>8,600</i>
<i>School/college</i>	<i>6,100</i>	<i>6,900</i>	<i>4,700</i>	<i>6,500</i>	<i>6,800</i>
<i>Other</i>	<i>400</i>	<i>2,600</i>	<i>2,000</i>	<i>3,800</i>	<i>3,300</i>

Base: Childcare providers 2011, 2010, 2009, 2008, 2007

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

	Full day care	<i>Full day care in children's centres</i>	Sessional	After school clubs	Holiday clubs
	No.	No.	No.	No.	No.
Under 2 years old	195,200	7,800	16,000	8,400	27,400
2 years old	287,600	12,000	87,700	11,000	34,900
3 years old	357,100	14,000	137,000	19,100	43,500
4 years old	79,400	3,000	28,300	52,100	41,500
5 to 7 years old	19,500	1,000	5,800	185,900	112,800
8 to 10 years old	20,400	600	4,700	189,400	94,500
11 years or older	8,800	50	1,200	20,900	26,100

Base: Childcare providers 2011

	Full day care	<i>Full day care in children's centres</i>	Sessional	After school clubs	Holiday clubs
Under 2 years old	20%	20%	6%	2%	7%
2 years old	30%	31%	31%	2%	9%
3 years old	37%	36%	49%	4%	11%
4 years old	8%	8%	10%	11%	11%
5 to 7 years old	2%	3%	2%	38%	30%
8 to 10 years old	2%	2%	2%	39%	25%
11 years or older	1%	*	*	4%	7%

Base: Childcare providers 2011

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

Additional Tables - Chapter 5

	Full day care		<i>Full day care in children's centres</i>		Sessional		After school clubs		Holiday clubs	
	No.	%	No.	%	No.	%	No.	%	No.	%
Total staff	219,300	100	8,600	100	63,500	100	68,500	100	75,200	100
Senior manager	17,500	8	610	7	7,800	12	10,400	15	8,100	11
Supervisors	122,700	56	5,300	62	32,400	51	33,000	48	38,400	51
Other paid childcare staff	57,200	26	2,000	23	15,500	24	19,900	29	22,300	30
Students on placements	17,000	8	660	8	4,900	8	4,300	6	4,300	6
Volunteers	5,700	3	300	3	4,500	7	2,000	3	3,700	5

Base: Childcare providers 2011

	Private		Voluntary		Local Authority		School/college		Other	
	No.	%	No.	%	No.	%	No.	%	No.	%
Total paid staff	138,700	100%	41,100	100%	†	†	†	†	†	†
Senior managers	10,600	8%	5,300	12%	†	†	†	†	†	†
Supervisors	88,700	64%	23,700	58%	†	†	†	†	†	†
Other paid staff	40,100	29%	12,200	30%	†	†	†	†	†	†

Base: All paid staff in full day care providers 2011

	Private		Voluntary		Local Authority		School/college		Other	
	No.	%	No.	%	No.	%	No.	%	No.	%
Total paid staff	†	†	†	†	4,200	100%	†	†	†	†
Senior managers	†	†	†	†	320	8%	†	†	†	†
Supervisors	†	†	†	†	3,000	71%	†	†	†	†
Other paid staff	†	†	†	†	890	21%	†	†	†	†

Base: All paid staff in full day care in children's centres 2011

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

Table 5.6g Numbers and proportions of paid staff by staff level and ownership: sessional										
	Private		Voluntary		Local Authority		School/college		Other	
	No.	%	No.	%	No.	%	No.	%	No.	%
Total paid staff	21,800	100%	30,200	100%	†	†	†	†	†	†
Senior managers	2,700	12%	4,600	15%	†	†	†	†	†	†
Supervisors	13,300	61%	16,600	55%	†	†	†	†	†	†
Other paid staff	5,900	27%	9,100	30%	†	†	†	†	†	†

Base: All paid staff in sessional providers 2011

Table 5.6h Numbers and proportions of paid staff by staff level and ownership: after school clubs										
	Private		Voluntary		Local Authority		School/ college		Other	
	No.	%	No.	%	No.	%	No.	%	No.	%
Total paid staff	29,300	100%	15,400	100%	†	†	14,600	100%	†	†
Senior managers	4,400	15%	2,500	16%	†	†	2,900	20%	†	†
Supervisors	15,500	53%	7,800	51%	†	†	8,400	58%	†	†
Other paid staff	9,600	33%	5,400	35%	†	†	3,600	25%	†	†

Base: All paid staff in after school clubs 2011

Table 5.6i Numbers and proportions of paid staff by staff level and ownership: holiday clubs										
	Private		Voluntary		Local Authority		School/college		Other	
	No.	%	No.	%	No.	%	No.	%	No.	%
Total paid staff	36,400	100%	15,700	100%	†	†	9,300‡	100%‡	†	†
Senior managers	4,000	11%	2,000	12%	†	†	1,600‡	17%‡	†	†
Supervisors	21,700	59%	8,700	53%	†	†	4,600‡	48%‡	†	†
Other paid staff	10,800	30%	5,600	34%	†	†	3,300‡	35%‡	†	†

Base: All paid staff in holiday clubs 2011

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

	Nursery schools		Primary schools with nursery and reception classes		Primary schools with reception but no nursery classes	
	No.	% of all staff	No.	% of all staff	No.	% of all staff
Head teacher/Early years or foundation stage co-ordinator	400	7%	6,500	10%	8,300	18%
Early years teachers	1,100	17%	14,200	22%	7,300	15%
Nursery nurses	2,600	42%	18,000	28%	7,900	17%
Early years support staff	1,000	17%	12,400	19%	10,600	22%
Students on placements	750	12%	6,600	10%	4,200	9%
Volunteers	350	6%	6,500	10%	8,900	19%

Base: Early years provision in maintained schools 2011

	Full day care					Full day care in children's centres					Sessional				
	2011	2010	2009	2008	2007	2011	2010	2009	2008	2007	2011	2010	2009	2008	2007
All paid staff	32	32	34	34	33	34	34	34	34	34	22	22	19	19	18
Senior managers	35	35	37	36	37	36	36	37	36	37	26	25	24	24	23
Supervisory staff	34	34	36	35	35	35	35	35	35	35	24	23	20	20	19
Other paid childcare staff	29	30	32	31	30	32	32	32	32	32	18	18	15	16	14

Base: All paid childcare staff 2011, 2010, 2009, 2008, 2007

	After school clubs					Holiday clubs				
	2011	2010	2009	2008	2007	2011	2010	2009	2008	2007
All paid staff	21	22	19	18	18	29	30	29	27	29
Senior managers	26	27	25	24	24	33	34	34	33	35
Supervisory staff	22	23	19	19	19	30	32	30	29	30
Other paid childcare staff	17	18	15	15	14	24	26	26	23	26

Base: All paid childcare staff 2011, 2010, 2009, 2008, 2007

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

Table 5.14c Hours worked (mean) in childcare providers by staff level; type of ownership and profit making status: full day care

	Private	Voluntary	Local authority	School/college	Other	Profit	Not-for-profit
All paid staff	35	25	33	33	†	35	27
Senior managers	37	30	†	†	†	38	31
Supervisory staff	36	26	34	33‡	†	36	29
Other paid childcare staff	32	20	32‡	31‡	†	33	23

Base: All paid staff in full day care providers 2011

Table 5.14d Hours worked (mean) in childcare providers by staff level; type of ownership and profit making status: full day care in children's centres

	Private	Voluntary	Local authority	School/college	Other	Profit	Not-for-profit
All paid staff	34	34	34	34	†	34	34
Senior managers	†	†	36	†	†	36	36
Supervisory staff	35	34	34	35	†	35	34
Other paid childcare staff	33‡	34‡	30	31‡	†	30	33

Base: All paid staff in full day care in children's centres 2011

Table 5.14e Hours worked (mean) in childcare providers by staff level; type of ownership and profit making status: sessional

	Private	Voluntary	Local authority	School/college	Other	Profit	Not-for-profit
All paid staff	26	19	29	29	†	27	20
Senior managers	28	24	†	†	†	29	24
Supervisory staff	28	20	30‡	29‡	†	29	21
Other paid childcare staff	21	15	†	†	†	22	16

Base: All paid staff in sessional providers 2011

Table 5.14f Hours worked (mean) in childcare providers by staff level; type of ownership and profit making status: after school clubs

	Private	Voluntary	Local authority	School/college	Other	Profit	Not-for-profit
All paid staff	26	18	17	15	†	24	18
Senior managers	29	25	†	22	†	28	24
Supervisory staff	27	19	17‡	15	†	24	18
Other paid childcare staff	22	13	†	12	†	21	13

Base: All paid staff in after school clubs 2011

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

Table 5.14g Hours worked (mean) in childcare providers by staff level; type of ownership and profit making status: holiday clubs

	Private	Voluntary	Local authority	School/ college	Other	Profit	Not-for-profit
All paid staff	32	24	23	22	35‡	30	25
Senior managers	37	32	†	27‡	†	34	32
Supervisory staff	34	26	25	24	†	32	26
Other paid childcare staff	29	20	18‡	18	†	26	20

Base: All paid staff in holiday clubs 2011

Table 5.15a Hours worked (mean) by area deprivation

	30% most deprived areas	70% least deprived areas
Full day care	34	32
<i>Full day care in children's centres</i>	35	33
Sessional providers	27	21
After school clubs	23	20
Holiday clubs	29	28
Nursery schools	31	30
Primary schools with nursery and reception classes	30	28
Primary schools with reception but no nursery classes	27	26

Base: Childcare providers 2011. Early years provision in maintained schools 2011

Table 5.17c Average hourly pay (mean) by staff type and type of ownership: full day care

	Private	Voluntary	Local authority	School/ college	Other
All paid staff	£7.50	£7.90	£11.50	£9.70	†
Senior managers	£10.30	£10.00	†	†	†
Supervisors	£7.70	£8.00	£12.70	£9.90‡	†
Other paid staff	£6.40	£6.70	£8.20‡	£7.60‡	†

Base: All paid staff in full day care providers 2011

Table 5.17d Average pay (mean) by staff type and type of ownership: full day care in children's centres

	Private	Voluntary	Local authority	School/ college	Other
All paid staff	£8.20	£10.20	£12.40	£11.80	†
Senior managers	†	†	£17.60	†	†
Supervisors	£8.50	£10.80	£13.00	£11.80	†
Other paid staff	£6.70‡	£8.20‡	£8.80	£10.00‡	†

Base: All paid staff in full day care in children's centres 2011

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

	Private	Voluntary	Local authority	School/ college	Other
All paid staff	£7.50	£7.90	£10.30	£9.60†	†
Senior managers	£9.20	£9.70	†	†	†
Supervisors	£7.60	£7.90	£10.20†	£8.70†	†
Other paid staff	£6.60	£6.90	†	†	†

Base: All paid staff in sessional providers 2011

	Private	Voluntary	Local authority	School/ college	Other
All paid staff	£7.40	£8.20	£9.40	£9.80	†
Senior managers	£9.70	£11.20	†	£13.90	†
Supervisors	£7.50	£8.30	£9.20†	£9.40	†
Other paid staff	£6.40	£6.90	†	£8.20	†

Base: All paid staff in after school clubs 2011

	Private	Voluntary	Local authority	School/ college	Other
All paid staff	£7.40	£8.00	£9.50	£9.50	£24.90†
Senior managers	£10.90	£10.70	†	£11.70†	†
Supervisors	£7.60	£8.20	£9.80	£10.40	†
Other paid staff	£6.20	£6.90	£8.60†	£7.20	†

Base: All paid staff in holiday clubs 2011

	Full day care		Full day care in children's centres		Sessional		After school clubs		Holiday clubs	
	30% most deprived areas	70% least deprived areas	30% most deprived areas	70% least deprived areas	30% most deprived areas	70% least deprived areas	30% most deprived areas	70% least deprived areas	30% most deprived areas	70% least deprived areas
All paid staff	£8.20	£7.70	£11.50	£10.80	£8.20	£7.80	£8.80	£8.00	£8.50	£8.00
Senior managers	£11.20	£10.40	£15.80	£17.60	£10.70	£9.70	£11.50	£11.30	£11.30	£10.90
Supervisors	£8.40	£7.90	£12.00	£11.70	£8.10	£7.90	£8.90	£8.00	£8.70	£8.30
Other paid staff	£6.70	£6.60	£8.70	£7.90	£6.50	£6.80	£7.00	£6.80	£7.30	£6.80

Base: All paid staff in childcare settings 2011

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

Table 5.17i Average (mean) pay by profit making status and qualification of senior manager: full day care				
	Profit making status		Qualification of senior manager	
	Not-for-profit	For Profit	Not graduate led	Graduate led
All paid staff	£8.10	£7.70	£7.70	£8.10
Senior managers	£10.40	£10.70	£10.10	£11.90
Supervisors	£8.30	£8.00	£8.00	£8.30
Other paid staff	£6.90	£6.40	£6.60	£6.70

Base: All paid staff in full day care providers 2011

Table 5.17j Average (mean) pay by profit making status and qualification of senior manager: full day care in children's centres				
	Profit making status		Qualification of senior manager	
	Not-for-profit	For Profit	Not graduate led	Graduate led
All paid staff	£10.50	£12.10	£9.90	£12.50
Senior managers	£15.20	£17.50	£13.90	£18.60
Supervisors	£11.30	£12.50	£10.20	£13.30
Other paid staff	£8.00	£9.00	£7.90	£8.80

Base: All paid staff in full day care in children's centres 2011

Table 5.17k Average (mean) pay by profit making status and qualification of senior manager: sessional				
	Profit making status		Qualification of senior manager	
	Not-for-profit	For Profit	Not graduate led	Graduate led
All paid staff	£8.00	£7.60	£7.80	£8.00
Senior managers	£9.90	£9.70	£9.60	£10.80
Supervisors	£8.10	£7.70	£7.90	£8.00
Other paid staff	£6.90	£6.60	£6.80	£6.90

Base: All paid staff in sessional providers 2011

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

	Profit making status		Qualification of senior manager	
	Not-for-profit	For Profit	Not graduate led	Graduate led
All paid staff	£8.60	£7.90	£7.90	£9.10
Senior managers	£11.60	£11.20	£10.30	£15.20
Supervisors	£8.90	£7.80	£8.00	£9.00
Other paid staff	£7.20	£6.60	£6.80	£7.20

Base: All paid staff in after school clubs 2011

	Profit making status		Qualification of senior manager	
	Not-for-profit	For Profit	Not graduate led	Graduate led
All paid staff	£8.50	£8.00	£8.00	£8.50
Senior managers	£10.60	£11.50	£10.80	£11.80
Supervisors	£8.80	£8.20	£8.10	£9.10
Other paid staff	£7.30	£6.70	£7.00	£6.80

Base: All paid staff in holiday clubs 2011

	Nursery schools		Primary schools with nursery and reception classes		Primary schools with reception but no nursery classes	
	30% most deprived areas	70% least deprived areas	30% most deprived areas	70% least deprived areas	30% most deprived areas	70% least deprived areas
All paid staff	£14.50	£14.40	£14.60	£14.70	£15.00	£14.90
Head teacher/Early years coordinator	£29.00	£30.00‡	£25.00	£24.00	£23.00‡	£23.00
Early years teachers	£22.40	£22.90	£20.30	£20.60	£21.50‡	£20.50
Nursery Nurses	£11.50	£11.40	£10.90	£10.60	£11.10‡	£9.90
Other paid childcare staff	£8.60	£9.10‡	£8.80	£8.80	£8.80	£9.00

Base: All paid staff in early years settings in maintained schools 2011

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

Appendix 2 – Unweighted base sizes

Childcare providers 2011: Full day care (946); Full day care in children's centres (279); Sessional (875); After school clubs (873); Holiday clubs (808).

Childcare providers 2010: Full day care (1802); Full day care in children's centres (337); Sessional (1314); After school clubs (1034); Holiday clubs (1091).

Childcare providers 2009: Full day care (880); Full day care in children's centres (250); Sessional (860); After school clubs (847); Holiday clubs (733).

Childcare providers 2008: Full day care (2,006); Full day care in children's centres (388); Sessional (1,138); After school clubs (1,229); Holiday clubs (728).

Childcare providers 2007: Full day care (2,000); Full day care in children's centres (509); Sessional (1,139); After school clubs (1,183); Holiday clubs (732).

Childcare providers 2006: Full day care (3,322); Sessional (1,172); After school clubs (969); Holiday clubs (756).

Childcare providers 2005: Full day care (1,171); Sessional (1,007).

Childcare providers 2003: Full day care (850); Sessional (850); After school clubs (850); Holiday clubs (850).

Childcare providers 2001: Full day care (850); Sessional (868); After school clubs (850).

All children's centres 2011: (1,959).

All children's centres 2010: (1,738).

All children's centres 2009: (711).

All children's centres 2008: (1,123).

All children's centres 2007: (509).

All full day care, full day care in children's centres and sessional providers 2011: (946); (279); (1,959).

All full day care, full day care in children's centres and sessional providers 2010: (1802); (337); (1314).

All full day care, full day care in children's centres and sessional providers 2009: (880); (250); (860).

All full day care, full day care in children's centres and sessional providers 2008: (2,006); (388); (1,138).

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

All full day care, full day care in children’s centres and sessional providers 2007: (2,000); (509); (1,139).

Childcare providers with 3 and 4 year olds 2011: Full day care (929); Full day care in children’s centres (270); Sessional (849); After school clubs (706).

Childcare providers with 3 and 4 year olds 2010: Full day care (1762); Full day care in children’s centres (314); Sessional (856); After school clubs (791); Holiday clubs (797)

Childcare providers with 3 and 4 year olds 2009: Full day care (856); Full day care in children’s centres (236); Sessional (850); After school clubs (611); Holiday clubs (453)

All respondents in childcare surveys 2011: (3,781)

All respondents in childcare surveys 2010: (5,578).

All respondents in childcare surveys 2009: (3,570).

All respondents in childcare surveys 2008: (5,489).

All respondents in childcare surveys 2007: (5,563).

All paid childcare staff 2011: Full day care (5,026); Full day care in children’s centres (1,493); Sessional (4,182); After school clubs (3,988); Holiday clubs (4,105).

All paid childcare staff 2010: Full day care (9,815); Full day care in children’s centres (1,867); Sessional (6,288); After school clubs (4,649); Holiday clubs (5,609).

All paid childcare staff 2009: Full day care (4,934); Full day care in children’s centres (1,394); Sessional (4,160); After school clubs (3,797); Holiday clubs (3,739).

All paid childcare staff 2008: Full day care (11,376); Full day care in children’s centres (2,191); Sessional (5,568); After school clubs (5,344); Holiday clubs (3,572).

All paid childcare staff 2007: Full day care (11,693); Full day care in children’s centres (2,382); Sessional (5,590); After school clubs (5,123); Holiday clubs (3,667).

All paid childcare staff including childminders 2011: Full day care (5,026); Full day care in children’s centres (1,493); Sessional (4,182); After school clubs (3,988); Holiday clubs (4,105); Childminders (855).

All paid childcare staff including childminders 2010: Full day care (9,815); Full day care in children’s centres (1,867); Sessional (6,288); After school clubs (4,649); Holiday clubs (5,609); Childminders (900).

All paid childcare staff including childminders 2009: Full day care (4,934); Full day care in children’s centres (1,394); Sessional (4,160); After school clubs (3,797); Holiday clubs (3,739); Childminders (849).

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

All paid childcare staff including childminders 2008: Full day care (11,376); Full day care in children's centres (2,191); Sessional (5,568); After school clubs (5,344); Holiday clubs (3,572); Childminders (850).

All paid childcare staff including childminders 2007: Full day care (11,693); Full day care in children's centres (2,382); Sessional (5,590); After school clubs (5,123); Holiday clubs (3,667); Childminders (845).

All paid childcare staff 2006: Full day care (19,264); Full day care in children's centres (1,502); Sessional (5,714); After school clubs (4,578); Holiday clubs (3,869).

All paid childcare staff 2005: Full day care (6,532); Sessional (4,776); Out of school (5,041).

All paid childcare staff 2003: Full day care (9,567); Sessional (4,812); After school clubs (4,898); Holiday clubs (6,359).

All paid staff in full day care providers 2011: (5,026).

All paid staff in full day care providers 2010: (9,815).

All paid staff in full day care providers 2009: (4,934).

All paid staff in full day care providers 2008: (11,376).

All paid staff in full day care providers 2007: (11,693).

All paid staff in full day care in children's centres 2011: (1,493).

All paid staff in full day care in children's centres 2010: (1,867).

All paid staff in full day care in children's centres 2009: (1,394).

All paid staff in full day care in children's centres 2008: (2,191).

All paid staff in full day care in children's centres 2007: (2,382).

All paid staff in sessional providers 2011: (4,182).

All paid staff in sessional providers 2010: (6,288).

All paid staff in sessional providers 2009: (4,160).

All paid staff in sessional providers 2008: (5,568).

All paid staff in sessional providers 2007: (5,590).

All paid staff in after school clubs 2011: (3,988).

All paid staff in after school clubs 2010: (4,649).

All paid staff in after school clubs 2009: (3,797).

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

All paid staff in after school clubs 2008: (5,344).

All paid staff in after school clubs 2007: (5,123).

All paid staff in holiday clubs 2011: (4,105).

All paid staff in holiday clubs 2010: (5,609).

All paid staff in holiday clubs 2009: (3,739).

All paid staff in holiday clubs 2008: (3,572).

All paid staff in holiday clubs 2007: (3,667).

Childcare providers 30% most deprived areas 2011: Full day care (232); Full day care in children's centres (194) Sessional (165); After school clubs (221); Holiday clubs (231).

Childcare providers 30% most deprived areas 2010: Full day care (443); Full day care in children's centres (245) Sessional (224); After school clubs (272); Holiday clubs (334).

Childcare providers 30% most deprived areas 2009: Full day care (221); Full day care in children's centres (250) Sessional (122); After school clubs (244); Holiday clubs (199).

Childcare providers 30% most deprived areas 2008: Full day care (557); Full day care in children's centres (423) Sessional (193); After school clubs (344); Holiday clubs (198).

Childcare providers 30% most deprived areas 2007: Full day care (568); Full day care in children's centres (372) Sessional (183); After school clubs (334); Holiday clubs (219).

Childcare providers 30% most deprived areas 2006: Full day care (896); Full day care in children's centres (164); Sessional (1,172); After school clubs (273); Holiday clubs (251).

Childminders 2011: (855).

Childminders 2010: (900).

Childminders 2009: (849).

Childminders 2008: (850).

Childminders 2007: (845).

Childminders 2006: (723).

Childminders 2005: (1,132).

Childminders 2003: (850).

All childminders who have not expanded in the last 12 months 2011: (737).

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

All childminders who have not expanded in the last 12 months 2010: (753).

All childminders who have not expanded in the last 12 months 2009: (730).

All children childminders look after in typical week 2011: (4,035).

All children childminders look after in typical week 2010: (4,215).

All children childminders look after in typical week 2009: (4,009).

All children childminders look after in school holidays 2011: (2,585).

All children childminders look after in school holidays 2010: (2,803).

All children childminders look after in school holidays 2009: (2,609).

All childminders who look after 3 and 4 year olds 2011: (171).

All childminders who look after 3 and 4 year olds 2010: (164).

All childminders who look after 3 and 4 year olds 2009: (101).

All paid childcare staff with at least a level 6 qualification 2011: Full day care (557); Full day care in children's centres (346); Sessional (327); After school clubs (358); Holiday clubs (392).

All paid childcare staff with at least a level 6 qualification 2010: Full day care (880); Full day care in children's centres (398); Sessional (425); After school clubs (382); Holiday clubs (517).

All paid childcare staff with at least a level 6 qualification 2009: Full day care (384); Full day care in children's centres (222); Sessional (210); After school clubs (260); Holiday clubs (344).

All paid childcare staff with at least a level 5 qualification 2011: Full day care (817); Full day care in children's centres (479); Sessional (462); After school clubs (519); Holiday clubs (584).

All paid childcare staff with at least a level 5 qualification 2010: Full day care (1,327); Full day care in children's centres (514); Sessional (583); After school clubs (562); Holiday clubs (757).

All paid childcare staff with at least a level 5 qualification 2009: Full day care (588); Full day care in children's centres (300); Sessional (305); After school clubs (351); Holiday clubs (474).

All paid childcare staff with at least a level 5 qualification 2008: Full day care (902); Full day care in children's centres (367); Sessional (353); After school clubs (425); Holiday clubs (387).

All senior managers in childcare providers 2011: Full day care (928); Full day care in children's centres (278); Sessional (851); After school clubs (833); Holiday clubs (799).

All senior managers in childcare providers 2010: Full day care (1,765); Full day care in children's centres (332); Sessional (1,241); After school clubs (1,004); Holiday clubs (1,065).

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

All senior managers in childcare providers 2009: Full day care (871); Full day care in children's centres (247); Sessional (817); After school clubs (810); Holiday clubs (708).

All senior managers in childcare providers 2008: Full day care (1,958); Full day care in children's centres (380); Sessional (1,066); After school clubs (1,136); Holiday clubs (706).

All senior managers in childcare providers 2007: Full day care (1,955); Full day care in children's centres (392); Sessional (1,027); After school clubs (1,106); Holiday clubs (697).

All senior managers in childcare providers 2006: Full day care (3,209); Full day care in children's centres (209); Sessional (1,032); After school clubs (908); Holiday clubs (725).

All senior managers in childcare providers 2003: Full day care (850); Sessional (868); Out of school (no base size available).

All supervisors in childcare providers 2011: Full day care (2,494); Full day care in children's centres (792); Sessional (2,122); After school clubs (1,934); Holiday clubs (2,029).

All supervisors in childcare providers 2010: Full day care (4,876); Full day care in children's centres (928); Sessional (3,132); After school clubs (2,253); Holiday clubs (2,692).

All supervisors in childcare providers 2009: Full day care (2,422); Full day care in children's centres (722); Sessional (2,031); After school clubs (1,813); Holiday clubs (1,752).

All supervisors in childcare providers 2008: Full day care (5,403); Full day care in children's centres (1,109); Sessional (2,574); After school clubs (2,414); Holiday clubs (1,600).

All supervisors in childcare providers 2007: Full day care (5,350); Full day care in children's centres (8,466); Sessional (2,483); After school clubs (2,338); Holiday clubs (1,661).

All supervisors in childcare providers 2006: Full day care (9,073); Full day care in children's centres (609); Sessional (2,586); After school clubs (2,060); Holiday clubs (1,756).

All supervisors in childcare providers 2003: Full day care (5,384); Sessional (1,967); Out of school (no base size available)

All other paid childcare staff 2011: Full day care (1,604); Full day care in children's centres (423); Sessional (1,209); After school clubs (1,221); Holiday clubs (1,277).

All other paid childcare staff 2010: Full day care (3,174); Full day care in children's centres (607); Sessional (1,915); After school clubs (1,422); Holiday clubs (1,852).

All other paid childcare staff 2009: Full day care (1,641); Full day care in children's centres (425); Sessional (1,312); After school clubs (1,174); Holiday clubs (1,279).

All other paid childcare staff 2008: Full day care (4,015); Full day care in children's centres (702); Sessional (1,928); After school clubs (1,794); Holiday clubs (1,266).

All other paid childcare staff 2007: Full day care (3,893); Full day care in children's centres (731); Sessional (1,884); After school clubs (1,679); Holiday clubs (1,309).

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

All other paid childcare staff 2006: Full day care (6,168); Full day care in children's centres (391); Sessional (1,935); After school clubs (1,510); Holiday clubs (1,295).

All other paid childcare staff 2003: Full day care (3,333); Sessional (1,995); Out of school (no base size available).

Early Years provision in maintained schools 2011: Nursery schools (202); Primary schools with nursery and reception classes (788); Primary schools with reception but no nursery classes (729).

Early Years provision in maintained schools 2010: Nursery schools (196); Primary schools with nursery and reception classes (795); Primary schools with reception but no nursery classes (711).

Early Years provision in maintained schools 2010: Nursery schools (196); Primary schools with nursery and reception classes (795); Primary schools with reception but no nursery classes (711).

Early Years provision in maintained schools 2009: Nursery schools (100); Primary schools with nursery and reception classes (516); Primary schools with reception but no nursery classes (480).

Early Years provision in maintained schools 2008: Nursery schools (179); Primary schools with nursery and reception classes (561); Primary schools with reception but no nursery classes (579).

Early Years provision in maintained schools 2007: Nursery schools (201); Primary schools with nursery and reception classes (755); Primary schools with reception but no nursery classes (640).

Early Years provision in maintained schools 2006: Nursery schools (188); Primary schools with nursery and reception classes (535); Primary schools with reception but no nursery classes (513).

Early Years provision in maintained schools 2003: Nursery schools (200); Primary schools with nursery and reception classes (850); Primary schools with reception but no nursery classes (850).

Early years provision in maintained schools 30% most deprived areas 2011: Nursery schools (119); Primary schools with nursery and reception classes (341); Primary schools with reception but no nursery classes (92).

Early years provision in maintained schools 30% most deprived areas 2010: Nursery schools (112); Primary schools with nursery and reception classes (321); Primary schools with reception but no nursery classes (77).

Early years provision in maintained schools 30% most deprived areas 2009: Nursery schools (64); Primary schools with nursery and reception classes (206); Primary schools with reception but no nursery classes (43).

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

Early years provision in maintained schools 30% most deprived areas 2008: Nursery schools (108); Primary schools with nursery and reception classes (270); Primary schools with reception but no nursery classes (59).

Early years provision in maintained schools 30% most deprived areas 2007: Nursery schools (126); Primary schools with nursery and reception classes (304); Primary schools with reception but no nursery classes (88).

Early years provision in maintained schools 30% most deprived areas 2006: Nursery schools (107); Primary schools with nursery and reception classes (262); Primary schools with reception but no nursery classes (513).

All early years providers who look after 3 and 4 year olds 2011: Nursery schools (196); Primary schools with nursery and reception classes (764); Primary schools with reception but no nursery classes (710).

All early years providers who look after 3 and 4 year olds 2009: Nursery schools (95); Primary schools with nursery and reception classes (485); Primary schools with reception but no nursery classes (432).

All respondents in early years survey 2011: (1,719).

All respondents in early years survey 2010: (1,702).

All respondents in early years survey 2009: (1,096).

All respondents in early years survey 2008: (1,319).

All respondents in early years survey 2007: (1,596).

All paid staff in all nursery schools 2011: (1,172).

All paid staff in all nursery schools 2010: (1,169).

All paid staff in all nursery schools 2009: (608).

All paid staff in all nursery schools 2008: (1,071).

All paid staff in all nursery schools 2007: (1,181).

All paid staff in all primary schools with nursery and reception classes 2011: (4,253).

All paid staff in all primary schools with nursery and reception classes 2010: (4,224).

All paid staff in all primary schools with nursery and reception classes 2009: (2,771).

All paid staff in all primary schools with nursery and reception classes 2008: (2,923).

All paid staff in all primary schools with nursery and reception classes 2007: (4,025).

All paid staff in all primary schools with reception but no nursery classes 2011: (2,579).

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

All paid staff in all primary schools with reception but no nursery classes 2010: (2,550).

All paid staff in all primary schools with reception but no nursery classes 2009: (1,651).

All paid staff in all primary schools with reception but no nursery classes 2008: (1,930).

All paid staff in all primary schools with reception but no nursery classes 2007: (2,148).

All paid early years staff 2011: Nursery schools (1,172); Primary schools with nursery and reception classes (4,253); Primary schools with reception but no nursery classes (2,579).

All paid early years staff 2010: Nursery schools (1,169); Primary schools with nursery and reception classes (4,224); Primary schools with reception but no nursery classes (2,550).

All paid early years staff 2009: Nursery schools (608); Primary schools with nursery and reception classes (2,771); Primary schools with reception but no nursery classes (1,651).

All paid early years staff 2008: Nursery schools (1,071); Primary schools with nursery and reception classes (2,923); Primary schools with reception but no nursery classes (1,930).

All paid early years staff 2007: Nursery schools (1,181); Primary schools with nursery and reception classes (4,025); Primary schools with reception but no nursery classes (2,148).

All paid early years staff 2006: Nursery schools (1,107); Primary schools with nursery and reception classes (2,688); Primary schools with reception but no nursery classes (1,593).

All paid early years staff 2003: Nursery schools (2,518); Primary schools with nursery and reception classes (8,623); Primary schools with reception but no nursery classes (5,315).

All other early years coordinators / head teachers in early years providers in maintained schools 2011: Nursery schools (202); Primary schools with nursery and reception classes (768); Primary schools with reception but no nursery classes (701).

All other early years coordinators / head teachers in early years providers in maintained schools 2010: Nursery schools (195); Primary schools with nursery and reception classes (777); Primary schools with reception but no nursery classes (691).

All other early years coordinators / head teachers in early years providers in maintained schools 2009: Nursery schools (100); Primary schools with nursery and reception classes (497); Primary schools with reception but no nursery classes (458).

All other early years coordinators / head teachers in early years providers in maintained schools 2008: Nursery schools (179); Primary schools with nursery and reception classes (545); Primary schools with reception but no nursery classes (550).

All other early years coordinators / head teachers in early years providers in maintained schools 2007: Nursery schools (201); Primary schools with nursery and reception classes (748); Primary schools with reception but no nursery classes (622).

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

All other early years coordinators / head teachers in early years providers in maintained schools 2006: Nursery schools (186); Primary schools with nursery and reception classes (497); Primary schools with reception but no nursery classes (431).

All other early years coordinators / head teachers in early years providers in maintained schools 2003: (No base size available).

All qualified early years teachers in early years providers in maintained schools 2011: Nursery schools (346); Primary schools with nursery and reception classes (1,247); Primary schools with reception but no nursery classes (573).

All qualified early years teachers in early years providers in maintained schools 2010: Nursery schools (345); Primary schools with nursery and reception classes (1,252); Primary schools with reception but no nursery classes (629).

All qualified early years teachers in early years providers in maintained schools 2009: Nursery schools (182); Primary schools with nursery and reception classes (817); Primary schools with reception but no nursery classes (373).

All qualified early years teachers in early years providers in maintained schools 2008: Nursery schools (317); Primary schools with nursery and reception classes (837); Primary schools with reception but no nursery classes (517).

All qualified early years teachers in early years providers in maintained schools 2007: Nursery schools (342); Primary schools with nursery and reception classes (1,124); Primary schools with reception but no nursery classes (500).

All qualified early years teachers in early years providers in maintained schools 2006: Nursery schools (322); Primary schools with nursery and reception classes (773); Primary schools with reception but no nursery classes (398).

All qualified early years teachers in early years providers in maintained schools 2003: (No base size available).

All nursery nurses in early years providers in maintained schools 2011: Nursery schools (399); Primary schools with nursery and reception classes (1,312); Primary schools with reception but no nursery classes (572).

All nursery nurses in early years providers in maintained schools 2010: Nursery schools (386); Primary schools with nursery and reception classes (1,220); Primary schools with reception but no nursery classes (494).

All nursery nurses in early years providers in maintained schools 2009: Nursery schools (195); Primary schools with nursery and reception classes (804); Primary schools with reception but no nursery classes (297).

All nursery nurses in early years providers in maintained schools 2008: Nursery schools (352); Primary schools with nursery and reception classes (899); Primary schools with reception but no nursery classes (346).

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

All nursery nurses in early years providers in maintained schools 2007: Nursery schools (397); Primary schools with nursery and reception classes (1,173); Primary schools with reception but no nursery classes (385).

All nursery nurses in early years providers in maintained schools 2006: Nursery schools (373); Primary schools with nursery and reception classes (844); Primary schools with reception but no nursery classes (299).

All nursery nurses in early years providers in maintained schools 2003: (No base size available).

All other early years support staff in early years providers in maintained schools 2011: Nursery schools (225); Primary schools with nursery and reception classes (926); Primary schools with reception but no nursery classes (733).

All other early years support staff in early years providers in maintained schools 2010: Nursery schools (243); Primary schools with nursery and reception classes (995); Primary schools with reception but no nursery classes (736).

All other early years support staff in early years providers in maintained schools 2009: Nursery schools (131); Primary schools with nursery and reception classes (653); Primary schools with reception but no nursery classes (523).

All other early years support staff in early years providers in maintained schools 2008: Nursery schools (224); Primary schools with nursery and reception classes (684); Primary schools with reception but no nursery classes (629).

All other early years support staff in early years providers in maintained schools 2007: Nursery schools (241); Primary schools with nursery and reception classes (980); Primary schools with reception but no nursery classes (641).

All other early years support staff in early years providers in maintained schools 2006: Nursery schools (226); Primary schools with nursery and reception classes (574); Primary schools with reception but no nursery classes (465).

All other early years support staff in early years providers in maintained schools 2003: (No base size available).

All paid early years staff with at least a level 5 qualification 2011: Nursery schools (629); Primary schools with nursery and reception classes (2,215); Primary schools with reception but no nursery classes (1,428).

All paid early years staff with at least a level 5 qualification 2010: Nursery schools (584); Primary schools with nursery and reception classes (2,111); Primary schools with reception but no nursery classes (1,354).

All paid early years staff with at least a level 5 qualification 2009: Nursery schools (307); Primary schools with nursery and reception classes (1,345); Primary schools with reception but no nursery classes (824).

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

All paid early years staff with at least a level 5 qualification 2008: Nursery schools (504); Primary schools with nursery and reception classes (1,371); Primary schools with reception but no nursery classes (943).

All paid early years staff with at least a level 5 qualification 2007: Nursery schools (575); Primary schools with nursery and reception classes (1,825); Primary schools with reception but no nursery classes (1,097).

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

Appendix 3 – Glossary

Attendees: as some children may attend a setting on a part-time basis, it is possible that the number of attendees may exceed the number of registered places (as two part-time children attending on different days or at different times would effectively occupy a single registered place).

Disability: the Disability Discrimination Act (DDA) defines a disabled person as someone who has a “*physical or mental impairment that has a substantial and long-term adverse effect on his or her ability to carry out normal day-to-day activities*”⁶⁸. For the purposes of the survey, it was made clear that children with Special Educational Needs (SEN) should be counted as having a disability.

Index of Multiple Deprivation (IMD): measures deprivation at the “*small area level*”⁶⁹ and is used to define the 30 per cent most deprived and 70 per cent least deprived areas referred to throughout the report. The index analyses a number of defined characteristics of deprivation (including Income deprivation, Employment deprivation, Health deprivation and disability, Education, skills and training deprivation, Barriers to Housing and Services, Living environment deprivation and Crime). More deprived areas will experience a higher number of these characteristics of deprivation.

Ownership: the term ownership refers to the type of organisation responsible for owning and managing a provider. For the purposes of the report, five different ownership scenarios have been used. These are Private (owner/manager or part of a group or chain), Voluntary (church, charity or committee), Local Authority, School/College and Other (hospitals and other answers that could not be included in any of the existing categories). In a small proportion of cases, a single setting under joint ownership may fall into more than one of these categories.

Registered places: as part of their registration process, Ofsted inform providers of the maximum number of children they can look after – this defines their number of registered places. This is based on ages of children and number of staff.

Registered provision: any person who is rewarded for looking after children under eight for more than two hours a day must register with Ofsted. If the provider is planning to offer early years education, they are also inspected for the quality of the provision by Ofsted.

Settings (maintained): Maintained settings include Nursery schools, Primary schools with reception but no nursery classes and Primary schools with reception and nursery classes. They have different characteristics to other providers, as they are funded by Local Authorities and there is no charge to parents for using them.

⁶⁸ http://www.direct.gov.uk/en/DisabledPeople/RightsAndObligations/DisabilityRights/DG_4001069

⁶⁹ <http://www.communities.gov.uk/documents/communities/pdf/131209.pdf>

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

Settings (types of): the survey focuses on a number of different types of childcare setting:

- **Full day care:** defined as facilities that provide on-site day care for children under five for a continuous period of four hours or more in any day, in premises which are not domestic premises.
- **Sessional care:** defined as facilities where children under five attend day care for no more than five sessions a week, each session being less than a continuous period of four hours in any day. Where two sessions are offered in any one day, there is a break between sessions with no children in the care of the provider.
- **After school clubs:** defined as facilities providing after school activities or childcare during term time to school aged children aged under eight, for more than two hours in any day and more than five days a year.
- **Holiday clubs:** defined as facilities providing holiday activities or childcare during any school holidays to school aged children aged under eight, for more than two hours in any day and more than five days a year.
- **Children’s centres:** defined as centres providing a variety of advice and support for parents and carers. Their services are available from pregnancy through to the time when a child goes into reception class at primary school. For the purposes of this survey, analysis has focused on any full day care provision offered by these establishments on site⁷⁰.
- **Childminders:** defined as individuals registered with Ofsted to look after one or more children under the age of eight to whom they are not related, on domestic premises, for reward and for a total of more than two hours in any day.
- **Nursery schools:** these “provide education for children under the age of five and over the age of two.” Maintained nursery schools generally accept children in term time.
- **Primary schools with reception but no nursery classes:** some primary schools are able to admit four and five year old children into a reception class. Such classes operate throughout the school year.
- **Primary schools with reception and nursery classes:** some primary schools offer both nursery and reception classes, and again, these operate throughout the school year.

Staff (seniority): the survey focuses on a number of different types of staff:

- **Senior manager:** the person with overall responsibility for managing the provision in a setting.
- **Qualified early years teachers:** hold qualified teacher status (QTS), a requirement for anyone who wants to teach in a maintained school in England and Wales. An undergraduate degree and some form of teacher training is compulsory for new QTS recipients.
- **Supervisory staff:** are defined as those who are qualified to supervise a group of children on their own. They do not necessarily supervise other members of staff.

⁷⁰ http://www.direct.gov.uk/en/Parents/Preschooldevelopmentandlearning/NurseriesPlaygroupsReceptionClasses/DG_173054

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

- **Nursery nurses:** meet the same criteria as supervisory staff, but are based in maintained settings (and do not hold QTS).
- **Other paid childcare staff / Other paid early years support staff:** are defined as other members of paid staff who are not qualified to supervise a group of children on their own but who are involved in running the childcare / early years sessions. These may include classroom assistants or other support staff.
- **Childminders:** are not required to hold any formal qualifications but must complete a local authority approved training course and a first aid course appropriate to infants and children within six months of beginning working as a childminder. They are also obliged to keep up to date first aid certificates.

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

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