Department for Education

Survey of Childcare and Early Years Providers and COVID-19 – Wave 2

Research report, December 2020

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Department for Education

Government Social Research

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Acknowledgements

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We would also like to give particular thanks to all the providers who responded to the request to complete the survey.

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Notes on the data

- In wave 2 of this survey, 95% of all providers reported being open. This compares to a maximum of 80% reported by the Department for Education's Local Authorities Early Years attendance data collection for the dates of 24 September to 15 October 2020. Whilst there are different methods of data collection between the two sources, it is possible that the sample for this survey was biased towards those settings that were open and away from those which were temporarily or permanently closed.
- Wave 1 of this survey was conducted 2 to 20 July and the results of this can be found here: https://www.gov.uk/government/publications/survey-of-childcare-and-early-years-providers-and-covid-19-coronavirus
- Wave 2 of the survey was conducted between 25 September to 18 October
- Where comparisons have been made within wave 2 data in this report, these have not been statistically significantly tested. Where comparisons between wave 1 and wave 2 data have been made, these have been tested for statistical significance where appropriate, and the results of this testing have been indicated in the report.
- When the symbol '^' features in figures or tables this means that results have been subject to statistical testing to determine whether the difference between wave 1 and wave 2 was statistically significant at 5% level. Only certain response options have been tested for statistical significance to avoid issues of multiple comparisons. '*' indicates that the within-provider difference between wave 1 and wave 2 was statistically significant at 5% level
- Figures with an unweighted base of between 30 to 50 have been highlighted as having a low base. Figures with an unweighted base of less than 30 have been suppressed.
- Some figures may not sum to the total due to rounding.
- We asked providers to consider that 'before COVID-19' was before March 2020.
- We asked providers to think of a 'typical day' or 'typical week' when thinking about before COVID-19.
- Group-based providers who are part of a chain answered about provision run by their own branch.

Executive Summary

The Department for Education commissioned NatCen Social Research and Frontier Economics to conduct wave two of an online survey with childcare providers entitled the Survey of Childcare and Early Years Providers and COVID-19 (SCEYP COVID). The purpose of this study was to understand how childcare providers have responded to the pandemic, the status of childcare provision and any potential longer-term consequences for the childcare market. This report presents findings from wave 2 of the survey. Findings from wave 1 can be found here: https://www.gov.uk/government/publications/survey-of-childcare-and-early-years-providers-and-covid-19-coronavirus

The study

A nationally representative sample of group-based providers (GBPs), school-based providers (SBPs) and childminders (CMs) were invited to complete a 5-10-minute online survey between 25 September and 18 October.

Topics covered in the survey include:

- Operating models
- Expectations for January
- Attendance
- Workforce
- Finances
- Financial sustainability

In total, 4,149 providers participated in the study; 518 SBPs, 1,601 GBPs and 2,030 CMs.

A new question was added to wave 2 to ask temporarily closed providers when they expect to open their provision again.

Key findings

Operating models

- The majority of providers reported being open at the time of the survey. Ninety-eight per cent of SBPs, 98% of GBPs and 92% of CMs reported being open.

- For all three provider types, this is significantly higher than at wave 1 (94%, 81% and 80%, respectively).
- All three open provider types were significantly more likely to be open 5 days a week at wave 2 than at wave 1.
- Open SBPs and open CMs were significantly more likely to be open for more than 8 hours a day at wave 2 than at wave 1.

Expectations for January

- In January, open SBPs, GBPs and CMs expect a minimal reduction in their opening days a week compared to before COVID-19. Additionally, on average, they expect to approximately be open for the same hours per day than before Covid-19.

Attendance

- For open SBPs, GBPs and CMs, there was a reduction in the average expected children versus attended children for all age groups at wave 2.

Workforce

- Open SBPs had an average of 9 paid staff working full time at wave 1 and 11 staff working full-time at wave 2. They had an average of 6 staff working part-time at wave 1 and 5 staff working part-time at wave 2.
- Open GBPs had an average of 4 paid staff were working full-time at both waves 1 and 2 and an average of 4 staff were part-time at both waves 1 and 2.
- Seventy-five per cent of open GBPs have made use of the scheme at any point at wave 2, compared to 10% of open SBPs

Finances

- Open SBPs, GBPs and CMs received less weekly income from parent-paid fees, on average, than expected.
- On average, open SBPs expected to receive £945 per week from parent-paid fees but received, on average £511 at the time of the survey.
- On average, open GBPs expected to receive £3,736 per week from parent-paid fees but received, on average £2,054 at the time of the survey.
- On average, open CMs expected to receive £555 per week from parent-paid fees but received, on average £390 at the time of the survey.

Financial sustainability

- As in wave 1, open GBPs and CMs were asked, based on what they knew about the current situation and upcoming developments (for example, changes to the Coronavirus Job Retention Scheme from August onwards), for how long they were reasonably confident that it would be financially sustainable to continue to run their childcare provision[1].
- Significantly fewer open GBPs and open CMs believe it would be financially sustainable to continue to run their childcare provision for another year or longer at wave 2 (42% and 51%, respectively) compared to wave 1 (45% and 55%, respectively).

[1] SBPs were not asked this question as the decision to run provision is usually part of wider decisions concerning the larger school strategy.

Introduction

Childcare provision in England is made up of approximately 33% of group-based providers (GBPs), 12% of school-based providers (SBPs) and 54% of childminders (CMs)[2].

The COVID-19 pandemic and subsequent lockdown has resulted in a large amount of change for the childcare sector in England. From 23 March 2020, the Government instructed the temporary closure of early years settings, except for children of key workers and vulnerable children[3]. Later, the Government instructed that children were able to return to early years settings from 1 June[4]. During the Autumn term, the Government continued to pay funding to local authorities for the free entitlements for two, three and four-year-olds, even if the provider had to close (for public health reasons) or there were no children attending due to COVID-19[5].

For further details about the context and other Government support that was offered to childcare providers, please see the wave 1 report here: https://www.gov.uk/government/publications/survey-of-childcare-and-early-years-providers-and-covid-19-coronavirus

The study

The Department for Education commissioned NatCen Social Research and Frontier Economics to undertake wave two of the Survey of Childcare and Early Years Providers and COVID-19 (SCEYP COVID). This short survey aimed to understand how childcare providers in England have responded to the pandemic, the status of childcare provision and the potential longer-term consequences for the childcare market.

The survey specifically covered the topics of operating models, expectations for January, child attendance, workforce, provider finances and financial sustainability.

A nationally representative, randomly selected sub-sample of providers from the postponed mainstage SCEYP 2020 sample were invited to take part[6]. SBPs, GBPs and CMs were invited to take part in the survey.

Providers were invited to complete a 5-10-minute web-survey between 25 September–18 October 2020

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[2] Survey of Childcare and Early Years Providers: Main Summary, England, 2019
[3] Press release: Schools, colleges and early years settings to close
[4] Guidance: Our plan to rebuild: The UK Government's COVID-19 recovery strategy
[5] News story: Free childcare offers to continue during coronavirus closures
[6] Collection: Statistics: childcare and early years

In total, 4,149 providers participated in the study; 518 SBPs, 1,601 GBPs and 2,030 CMs.

The data has been weighted to provide a stand-alone snapshot that is representative of all providers in England and of the three provider types separately.

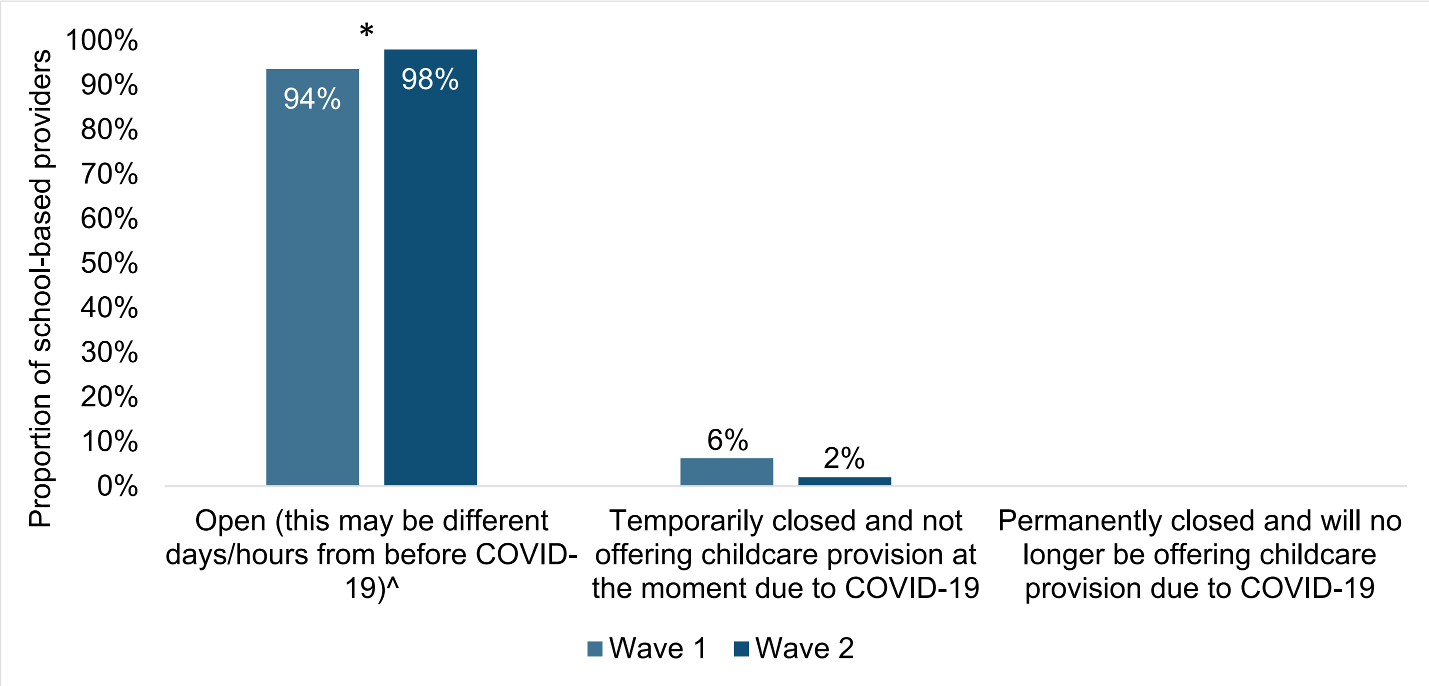
More information is provided in the technical report published alongside this release.

Operating models

Operating status

At wave 2, the majority of school-based providers (SBPs) reported being open at the time of the survey (98%) (Figure 1; Accompanying W2 Table 1 and W1/W2 Table 1). This is significantly higher than the proportion of SBPs who reported being open at wave 1 (94%). At wave 2, 2% of SBPs reported being temporarily closed.

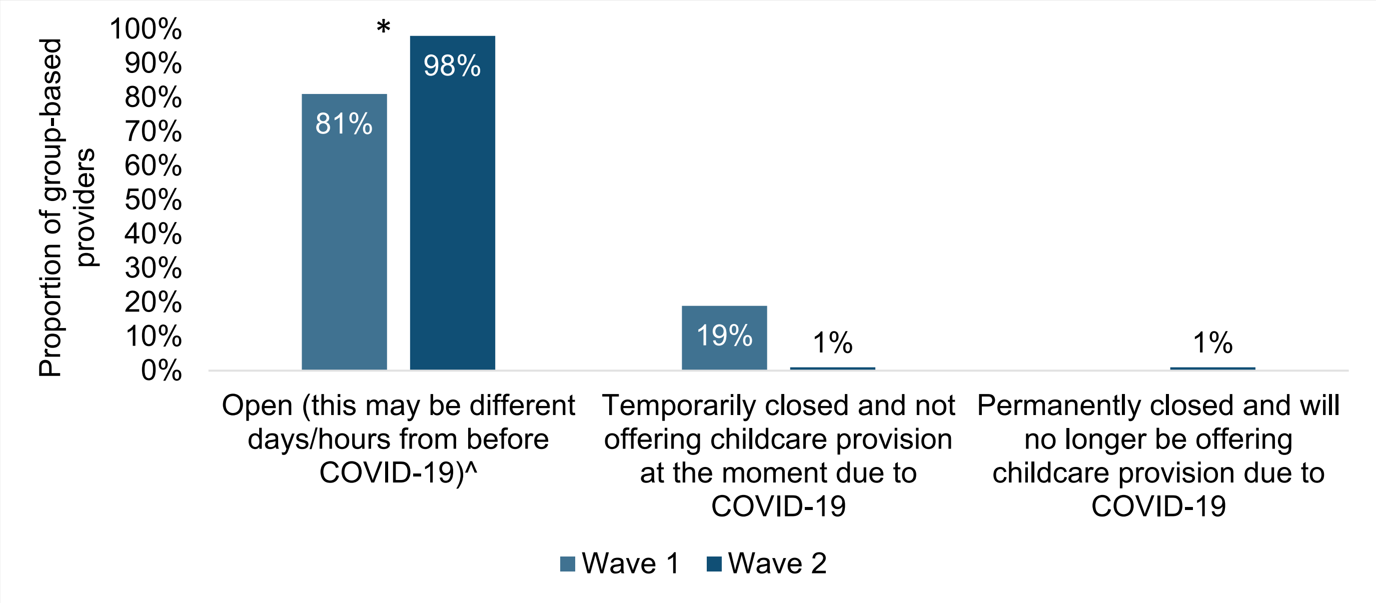
Figure 1: Operating status for school-based providers at waves 1 and 2



*Notes: ^ indicates results subject to statistical testing to determine whether difference between wave 1 and wave 2 statistically significant at 5% level * indicates that the within-provider difference between wave 1 and wave 2 was statistically significant at the 5% level*

At wave 2, the majority of group-based providers (GBPs) reported being open at the time of the survey (98%) (Figure 2; Accompanying W2 Table 1 and W1/W2 Table 1). This is significantly higher than the proportion of GBPs who reported being open at wave 1 (81%). At wave 2, 1% of GBPs reported being temporarily closed and a further 1% reported being permanently closed.

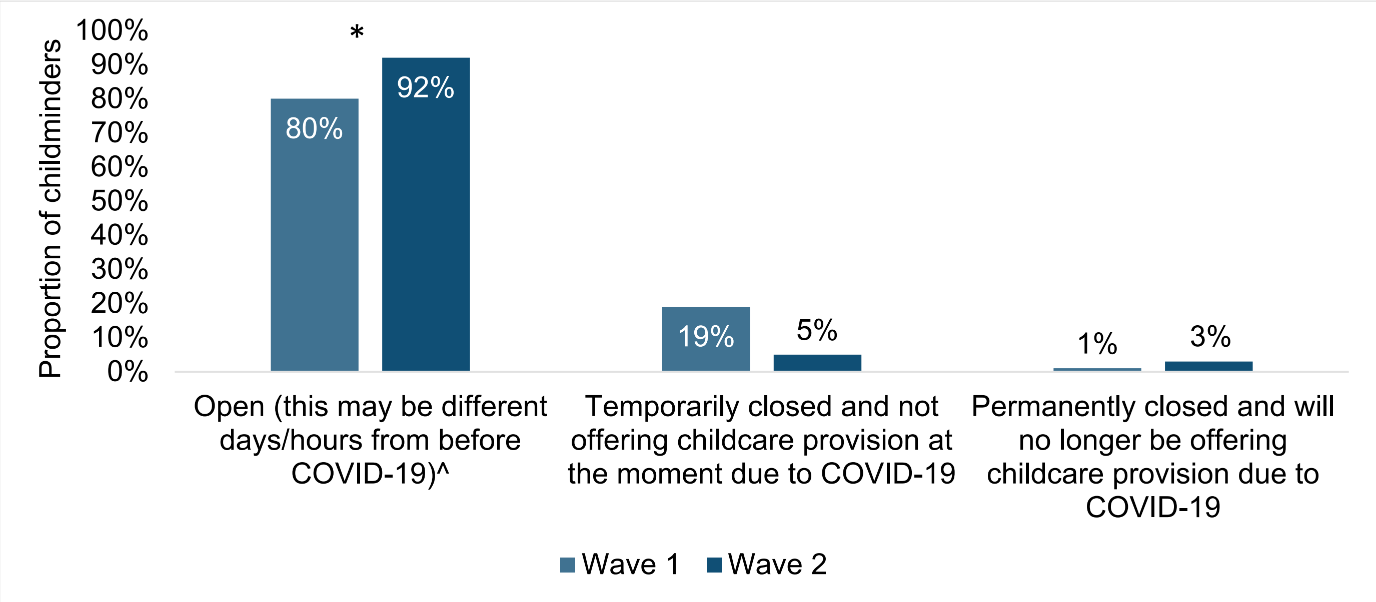
Figure 2: Operating status for group-based providers at waves 1 and 2



*Notes: ^ indicates results subject to statistical testing to determine whether difference between wave 1 and wave 2 statistically significant at 5% level * indicates that the within-provider difference between wave 1 and wave 2 was statistically significant at the 5% level*

At wave 2, the majority of childminders (CMs) reported being open at the time of the survey (92%) (Figure 3; Accompanying W2 Table 1 and W1/W2 Table 1). This is significantly higher than the proportion of CMs who were open at wave 1 (80%). At wave 2, 5% of CMs reported being temporarily closed and a further 3% reported being permanently closed.

Figure 3: Operating status for childminders at waves 1 and 2

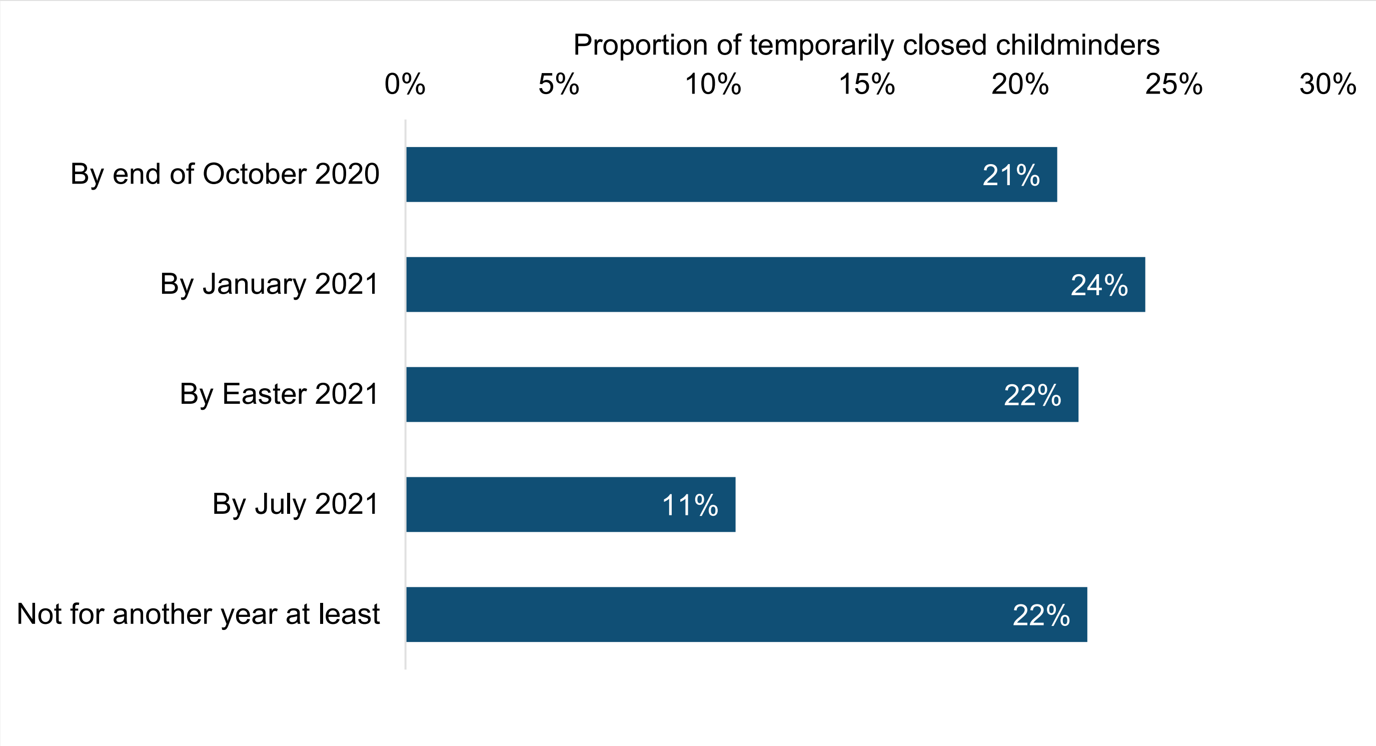


Notes: ^ indicates results subject to statistical testing to determine whether difference between wave 1 and

*wave 2 statistically significant at 5% level * indicates that the within-provider difference between wave 1 and wave 2 was statistically significant at the 5% level*

New to wave 2, temporarily closed providers were asked to select when they expected to be open again. The data for GBPs and SBPs has been suppressed due to low unweighted base sizes and so only data for CMs is included here. Twenty-one per cent of temporarily closed CMs had expected to open again by the end of October 2020. Twenty-two per cent of temporarily closed CMs did not expect to open again for another year at least. (Figure 4; Accompanying W2 Table 2).

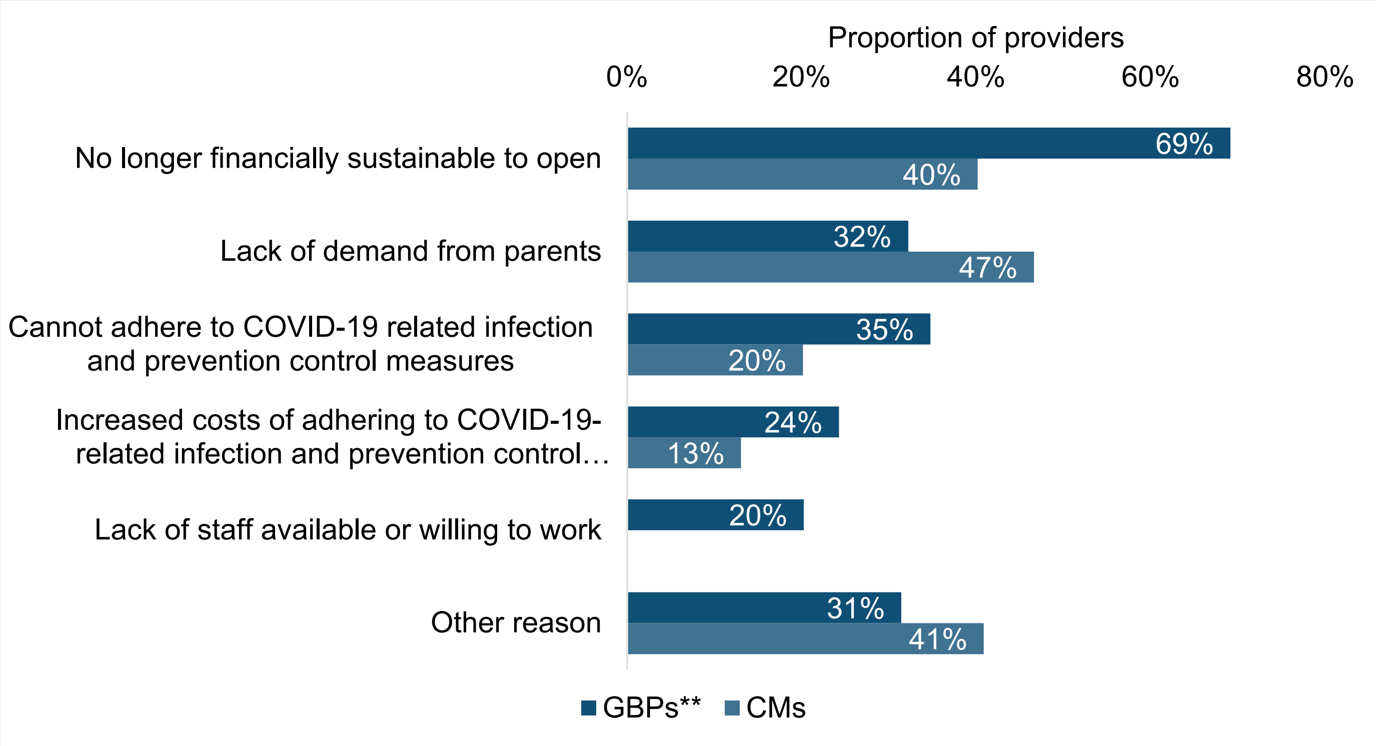
Figure 4: Expected re-opening time for temporarily closed childminders



Notes: Data for SBPs and GBPs has been suppressed due to very low unweighted base size.

The small proportion of temporarily or permanently closed providers were asked to select the reason for their closure. The most common reason for GBPs at wave 2 was that it was no longer financially sustainable to open (69%). For CMs, the most common reason was a lack of demand from parents (47%). Data for SBPs has been suppressed due to low unweighted base sizes (Figure 5; Accompanying W2 Table 8).

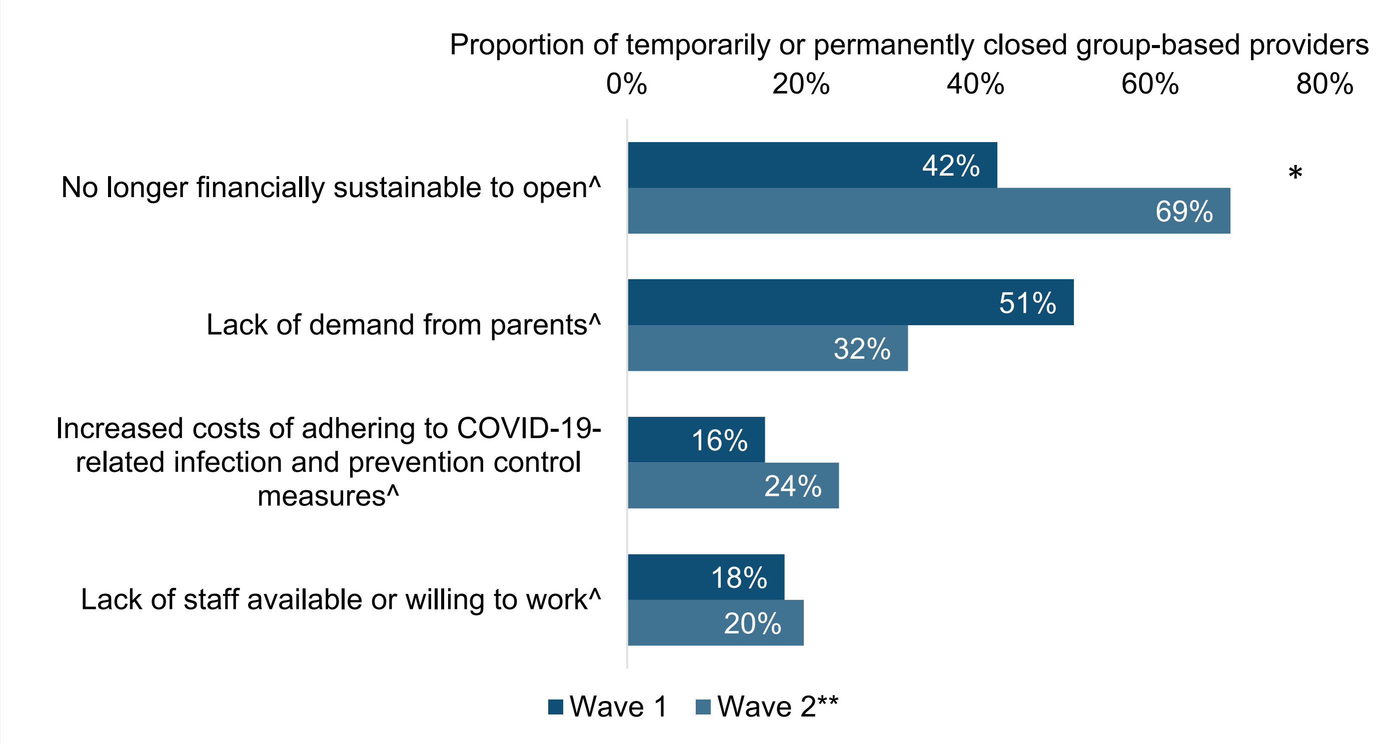
Figure 5: Proportion of providers who reported being temporarily or permanently closed due to the below reasons, by provider type



*Notes: Data for SBPs has been suppressed due to very low unweighted base size. ** Low unweighted base so findings should be treated as indicative only*

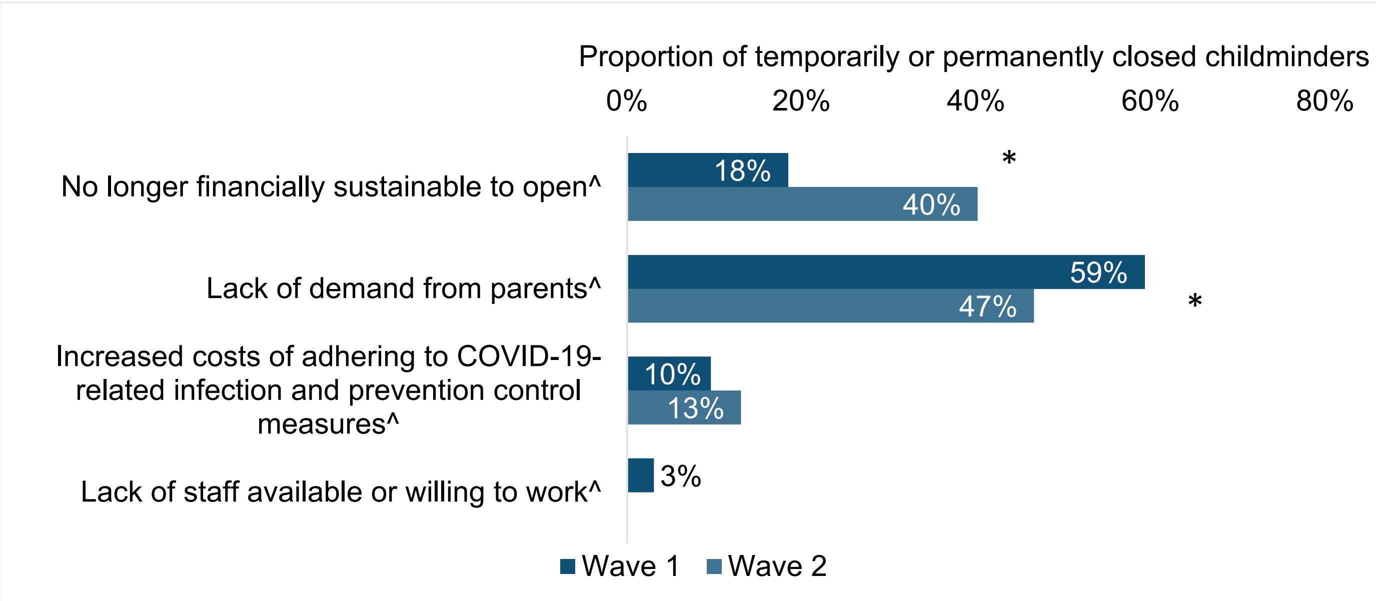
Four of the response options to this question were selected for statistical significance testing between waves 1 and 2. Of the small proportion of providers who were closed, significantly more GBPs and CMs selected that they were temporarily or permanently closed because it was ‘no longer financially sustainable to open’ at wave 2 (69% GBPs, 40% CMs) compared to wave 1 (42% GBPs, 18% CMs) (Figure 6 (GBP) and Figure 7 (CM), Accompanying W1/W2 Table 4)

Figure 6: Proportion of group-based providers who reported being temporarily or permanently closed due to the below reasons, waves 1 and 2



*Notes: ^ indicates results subject to statistical testing to determine whether difference between wave 1 and wave 2 statistically significant at 5% level * indicates that the within-provider difference between wave 1 and wave 2 was statistically significant at the 5% level. Data for SBPs has been suppressed due to very low unweighted base size. ** Low unweighted base so findings should be treated as indicative only*

Figure 7: Proportion of childminders who reported being temporarily or permanently closed due to the below reasons, waves 1 and 2



Notes: ^ indicates results subject to statistical testing to determine whether difference between wave 1 and

*wave 2 statistically significant at 5% level * indicates that the within-provider difference between wave 1 and wave 2 was statistically significant at the 5% level. Data for SBPs has been suppressed due to very low unweighted base size.*

Opening days

At waves 1 and 2, open providers were asked how many days they were currently open at the time of the survey.

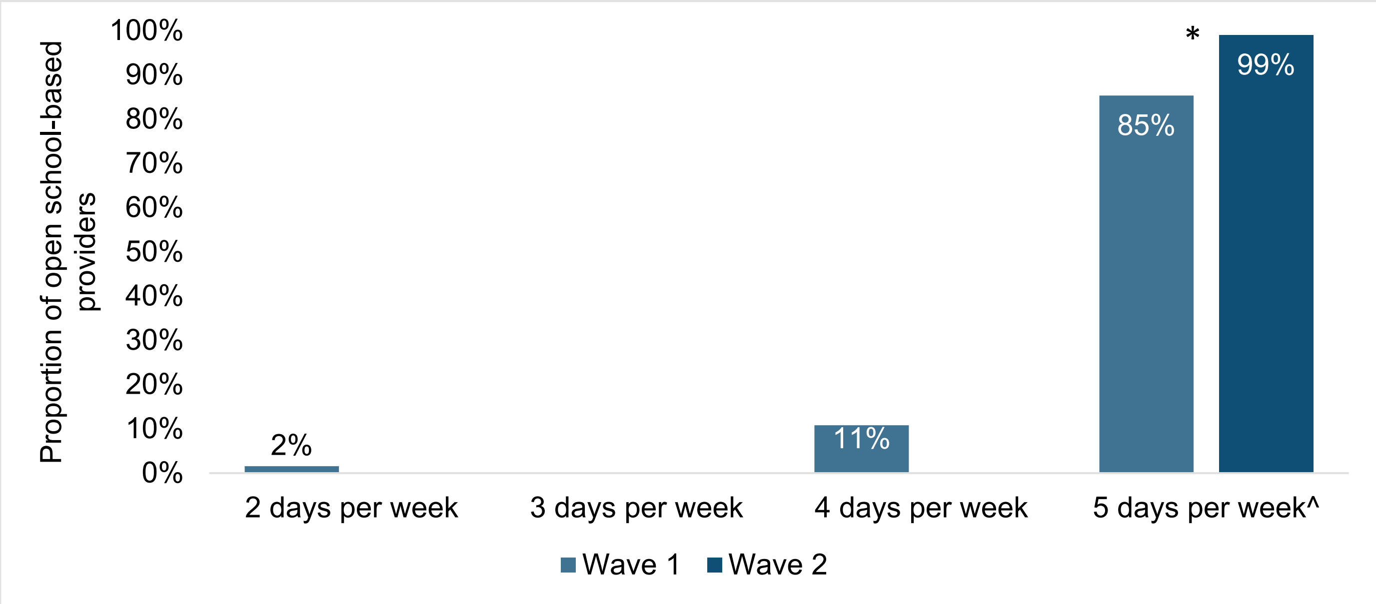
Open SBPs were, on average, open for 4.8 days per week at wave 1 and 5 days per week at wave 2. On average, open GBPs were open for 4.5 days per week at wave 1 and 4.9 days per week at wave 2. Open CMs were, on average, open for 4 days per week at wave 1 and 4.5 days per week at wave 2. These mean differences have not been tested for statistical significance. (Table 1; W1 Table 4, Accompanying W2 Table 4).

Table 1: Mean opening days per week, at waves 1 and 2, by provider type

Timepoint:	**Open SBPs**	**Open GBPs**	**Open CMs**
Mean opening days per week, wave 1	4.8	4.5	4.0
Mean opening days per week, wave 2	5.0	4.9	4.5
Unweighted base: All open providers *Wave 1:* *Wave 2:*	 *373* *510*	 *1109* *1571*	 *1790* *1870*

The distribution of opening days per week at the time of the survey for waves 1 and 2 for open providers shows that 85% of open SBPs were open for five days a week at wave 1 compared to 99% at wave 2. (Figure 8; Accompanying W1/W2 Table 2). This difference was significant.

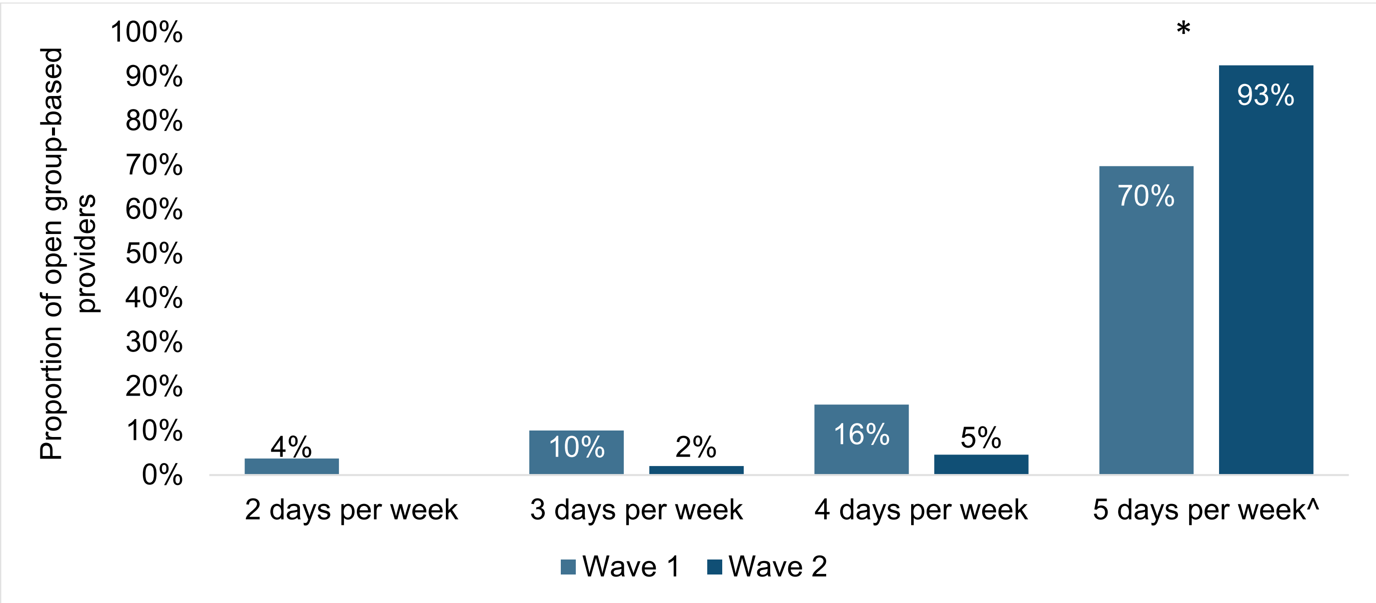
Figure 8: Distribution of open school-based providers' opening days per week, waves 1 and 2



*Notes: ^ indicates results subject to statistical testing to determine whether difference between wave 1 and wave 2 statistically significant at 5% level * indicates that the within-provider difference between wave 1 and wave 2 was statistically significant at the 5% level. Some data is suppressed because of low number of observations*

The distribution of opening days per week for waves 1 and 2 for open providers shows that 70% of open GBPs were open for five days a week at wave 1 compared to 93% at wave 2. (Figure 9; Accompanying W1/W2 Table 2). This difference was significant.

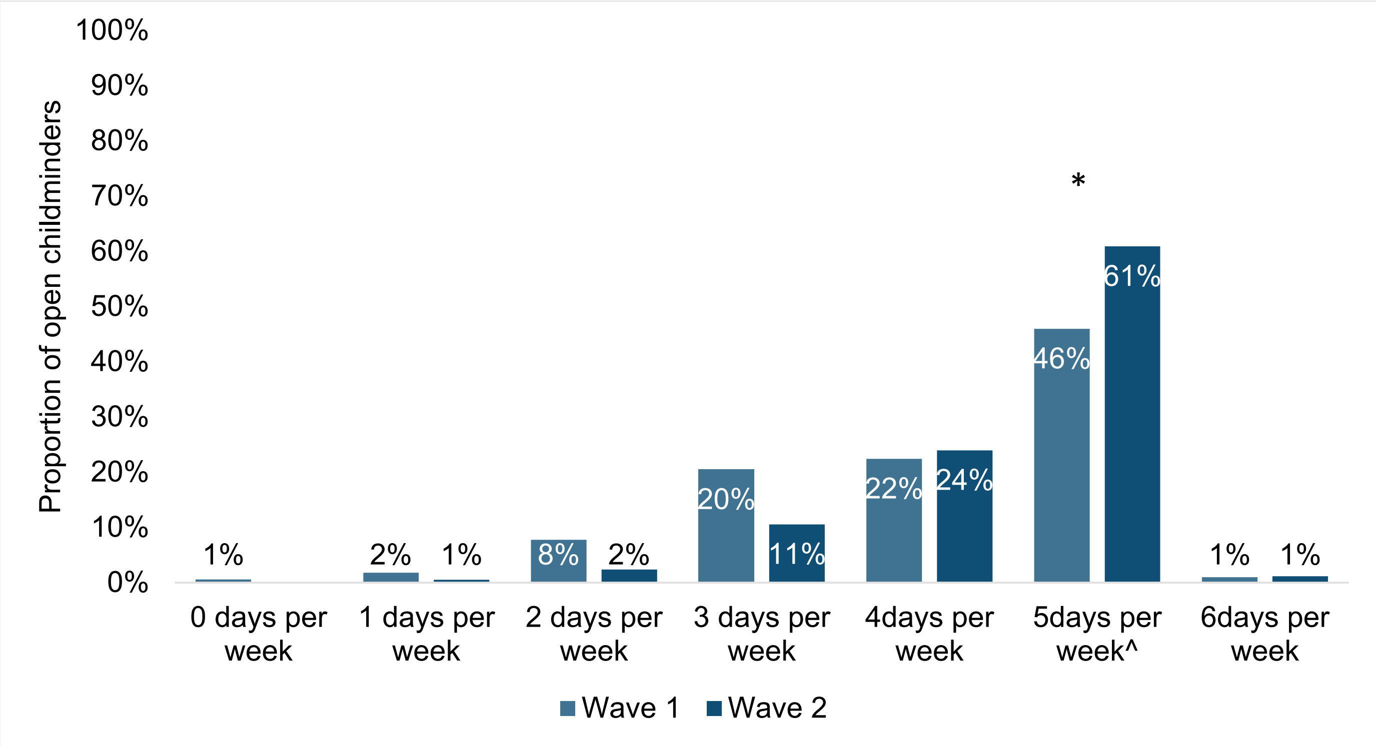
Figure 9: Distribution of open group-based providers' opening days per week, waves 1 and 2



*Notes: ^ indicates results subject to statistical testing to determine whether difference between wave 1 and wave 2 statistically significant at 5% level * indicates that the within-provider difference between wave 1* *and wave 2 was statistically significant at the 5% level. Some data is suppressed because of low number of observations*

The distribution of opening days per week for waves 1 and 2 for open providers shows that 46% of open CMs were open for five days a week at wave 1 compared to 61% at wave 2. (Figure 10; Accompanying W1/W2 Table 2). This difference was significant.

Figure 10: Distribution of open childminders' opening days per week, before waves 1 and 2



*Notes: ^ indicates results subject to statistical testing to determine whether difference between wave 1 and wave 2 statistically significant at 5% level * indicates that the within-provider difference between wave 1 and wave 2 was statistically significant at the 5% level. Some data is suppressed because of low number of observations*

Opening hours

Open providers were asked how many hours they were open per day at the time of the survey.

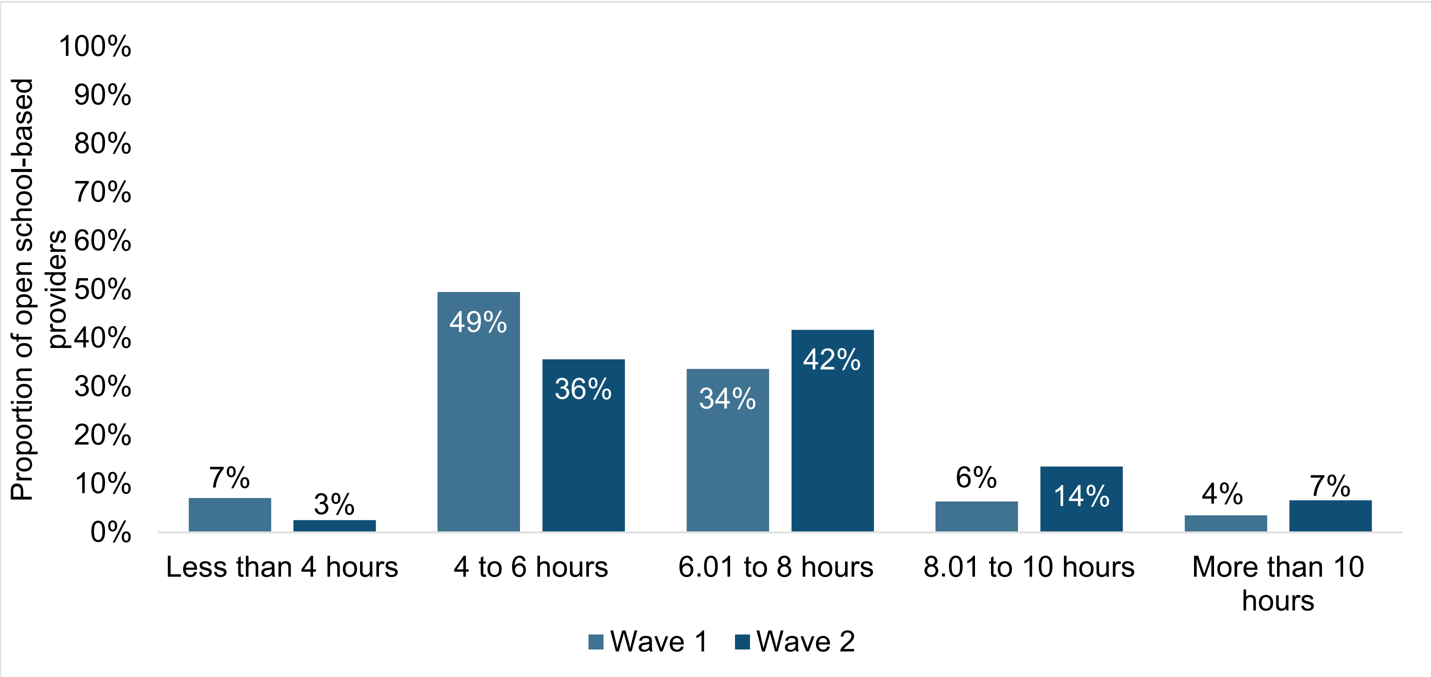
Open SBPs were, on average, open for 6.4 hours a day at wave 1 and 7.1 hours at wave 2. Open GBPs were, on average, open for 7.2 hours per day at wave 1 and 7.6 hours per day at wave 2. Open CMs were, on average, open for 8.4 hours per day at wave 1 and 9.1 hours per day at wave 2. These mean differences have not been tested for statistical significance. (Table 2; W1 Table 6, Accompanying W2 Table 6).

Table 2: Mean opening hours per day at waves 1 and 2, by provider type

Timepoint:	Open SBPs	Open GBPs	Open CMs
Mean opening hours per day, wave 1	6.4	7.2	8.4
Mean opening hours per day, wave 2	7.1	7.6	9.1
Unweighted base: All open providers	*373* *509*	*1110* *1571*	*1789* *1869*

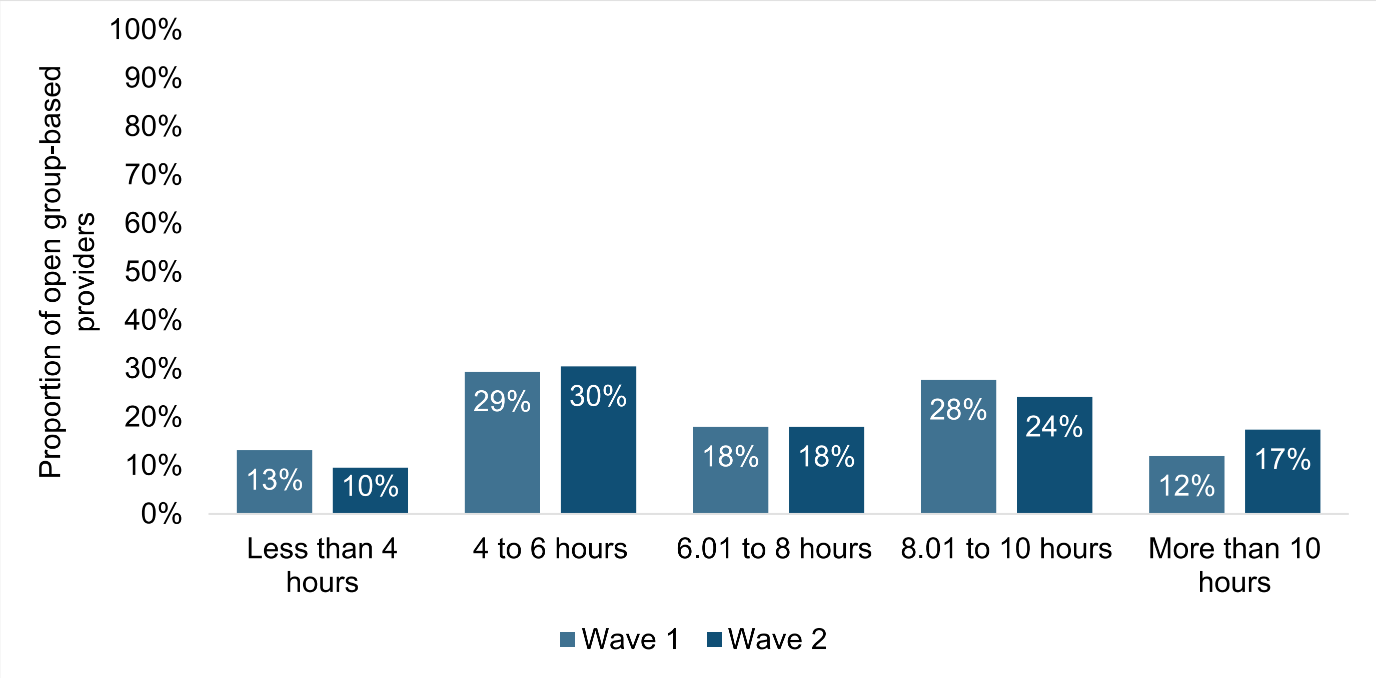
When looking at the distribution of opening hours per day at waves 1 and 2, 10% of open SBPs were open for more than 8 hours per day at wave 1. At wave 2, 20% of open SBPs were open for more than 8 hours per day. This difference was significantly different (Figure 11; Accompanying W1/W2 Table 3).

Figure 11: Distribution of open school-based providers' opening hours per day, waves 1 and 2



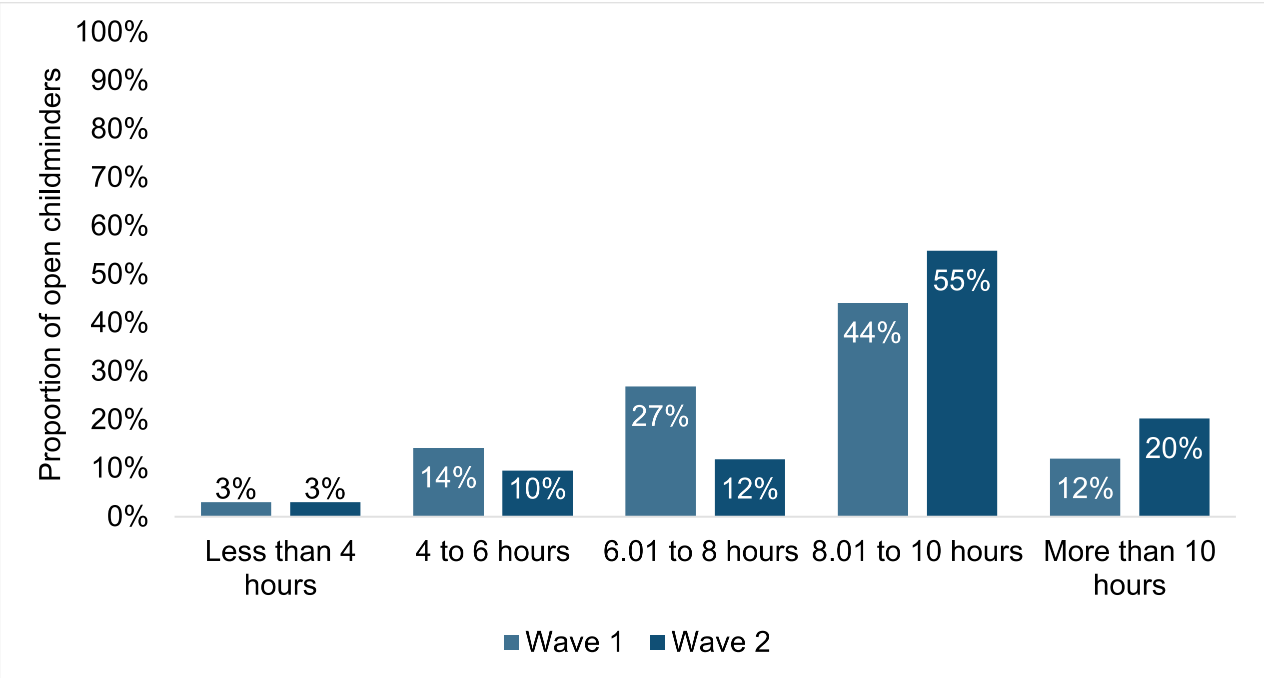
At wave 1, 40% of open GBPs were open for more than 8 hours per day. At wave 2, 42% of open GBPs were open for more than 8 hours per day. This difference was not significantly different (Figure 12; Accompanying W1/W2 Table 3).

Figure 12: Distribution of open group-based providers' opening hours per day, waves 1 and 2



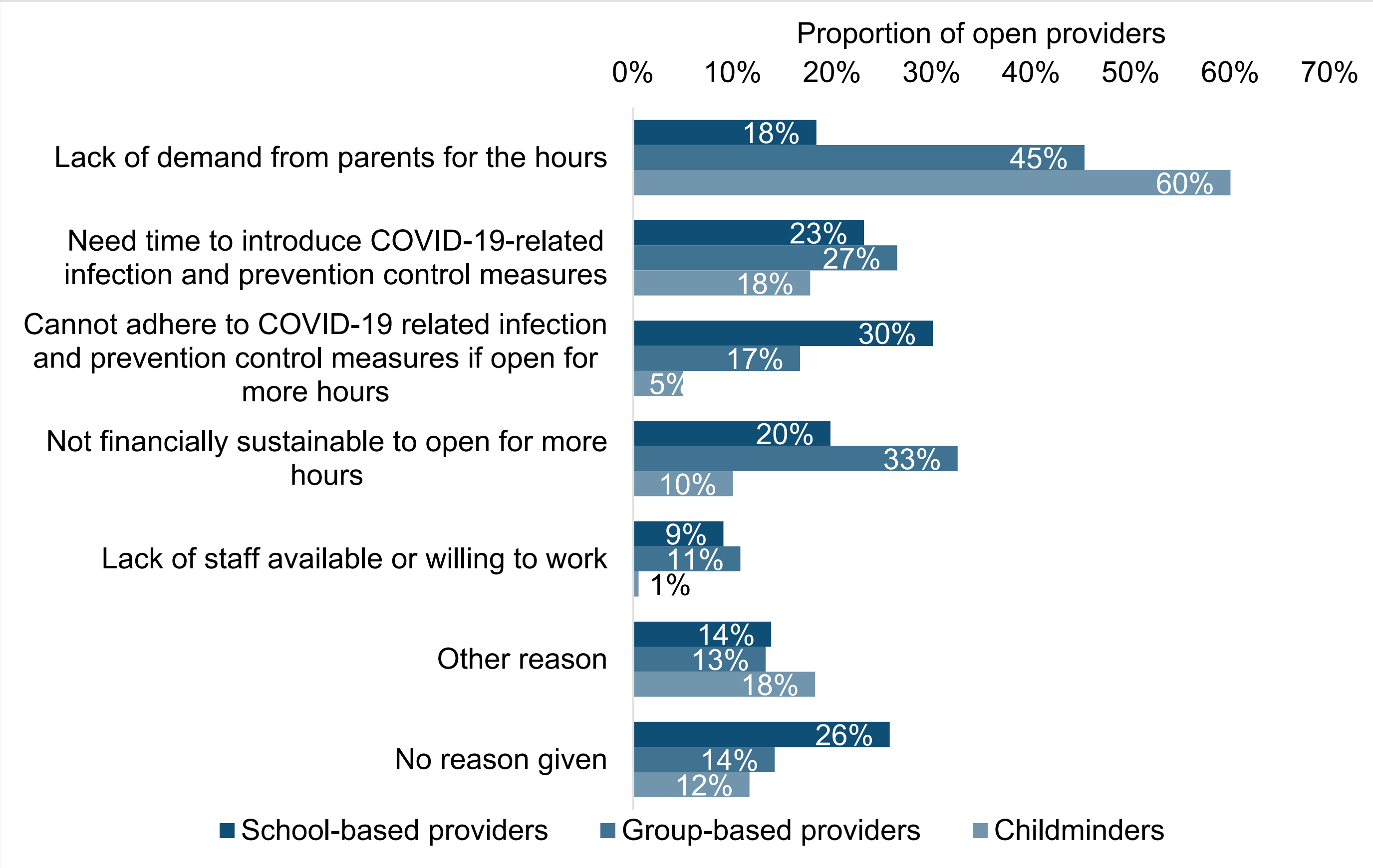
At wave 1, 56% of open CMs were open for more than 8 hours per day. At wave 2, 75% of open CMs were open for more than 8 hours per day. This difference was significantly different (Figure 12; Accompanying W1/W2 Table 3).

Figure 13: Distribution of open childminders' opening hours per day, waves 1 and 2



Open providers with a reduction in their opening days or hours were asked to select the reasons behind the reduction. For this question, data from wave 2 is not compared to wave 1 because of the addition of ‘no reason given’ in wave 2, therefore limiting comparability. At wave 2, the most common reason for reduced operating hours for open GBPs and CMs was a lack of demand from parents (45% and 60%, respectively). For open SBPs, the most common reason was not being able to adhere to COVID-19 related infection and prevention control measures if open for more hours (30%) (Figure 14; Accompanying W2 Table 7).

Figure 14: Proportion of open providers who reported a reduction in opening days/hours due to the below reasons, by provider type



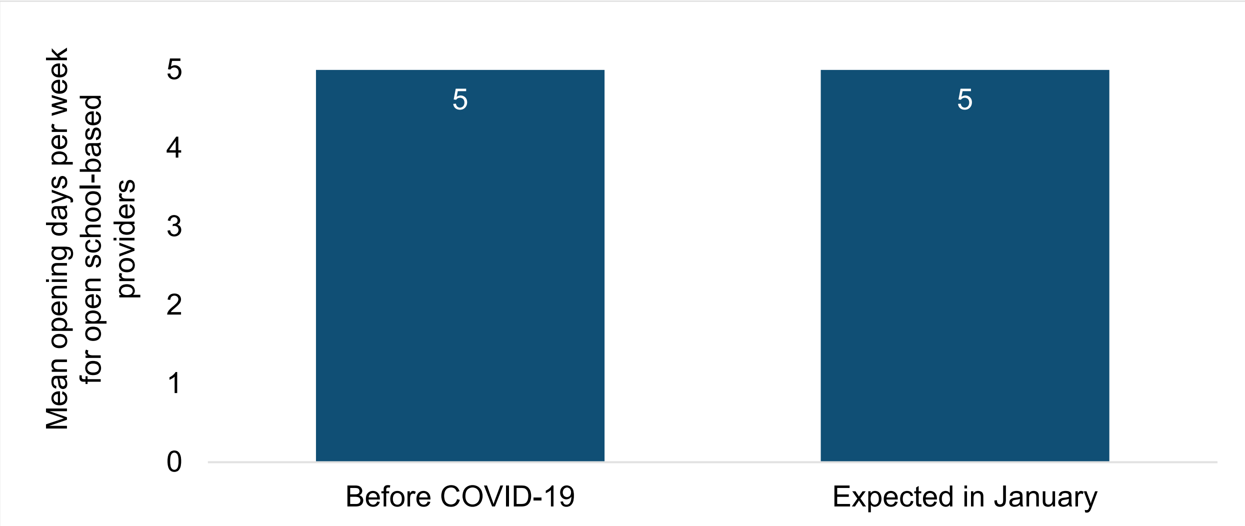
Expectations for January

Opening days

All providers were asked about the number of days they were open in a typical week before COVID-19 and, for those providers who were open or temporarily closed at the time of the survey, how many days per week they expected to be open in January 2021. Data is only presented here for providers that reported being open at wave 2. No differences between before COVID-19 and expected in January at wave 2 have been tested for statistical significance, whereas differences for expecting to be open 5 days a week in the following term between waves 1 and 2 have been tested for significant differences.

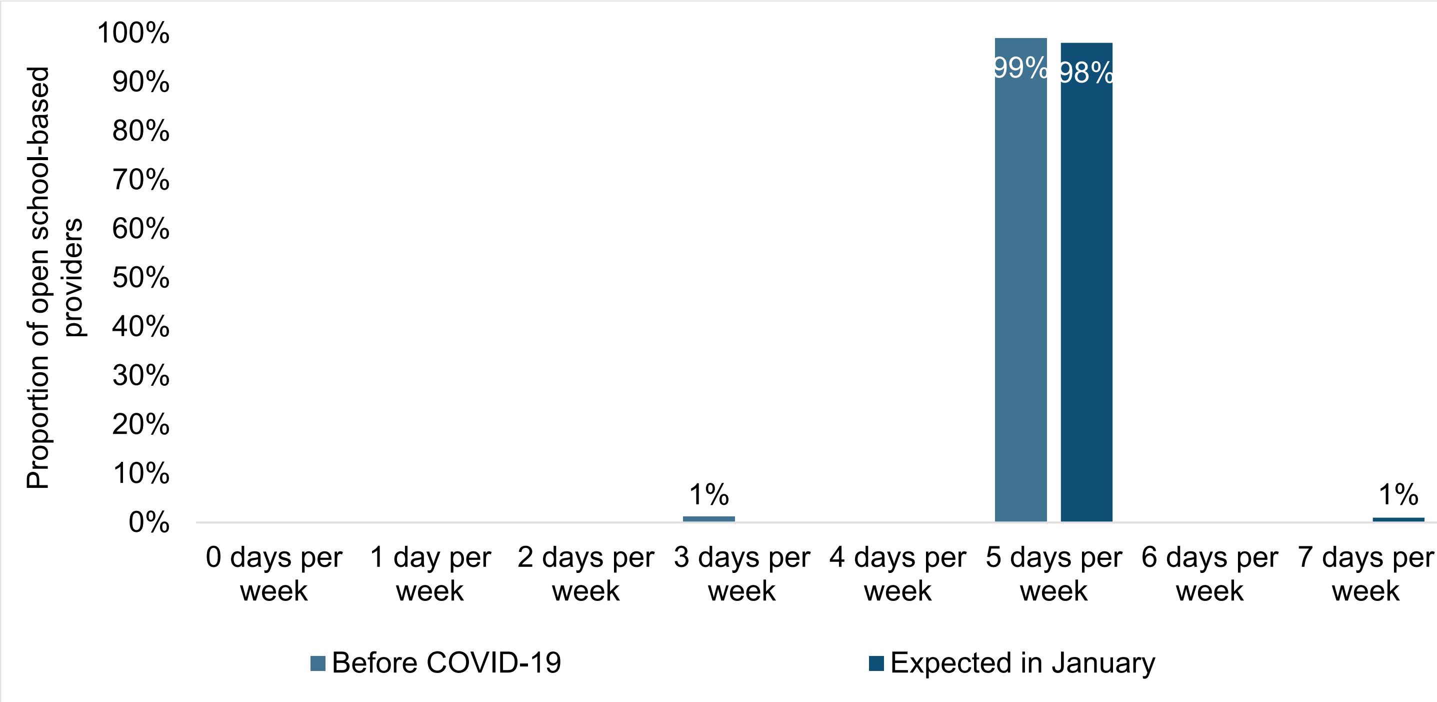
School-based providers (SBPs) who were open at the time of the survey were, on average, open for 5 days a week before COVID-19 and expect to be open for 5 days a week in January (Figure 15; Accompanying W2 Tables 3 and 9).

Figure 15: Mean opening days per week for open school-based providers, before COVID-19 and expected in January



When looking at the distribution of opening days before COVID-19 and expectations for January, 98% of open SBPs expect to be open for 5 days a week in January; 99% of open SBPs were open 5 days a week before COVID-19 (Figure 16; Accompanying W2 Tables 3 and 9). There was no significant difference between the proportion of open SBPs that expected to be open 5 days a week in the following term at waves 1 and 2 (Accompanying W1/W2 Table 5).

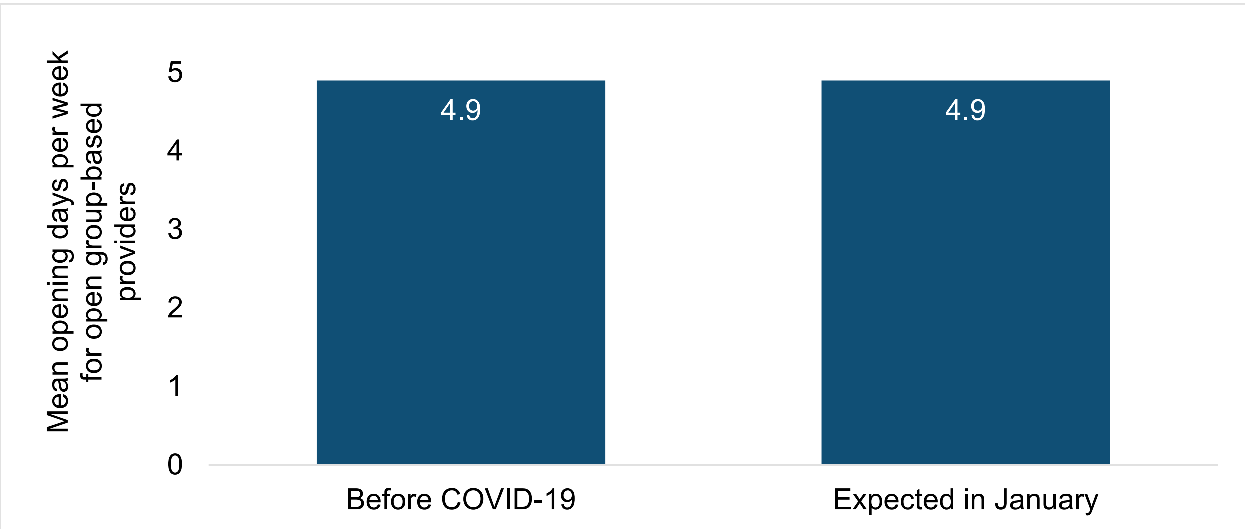
Figure 16: Distribution of open school-based providers' opening days per week, before COVID-19 and expected in January



Notes: Some options are suppressed because of low number of observations.

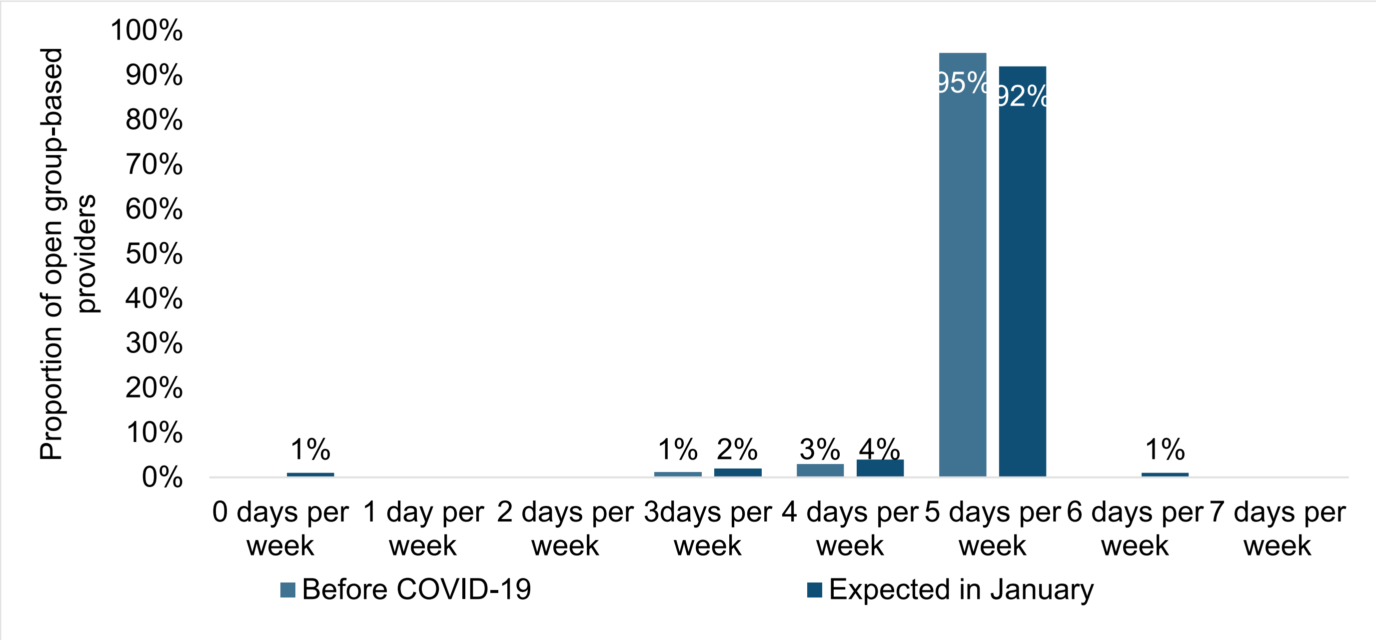
Group-based providers (GBPs) who were open at the time of the survey were, on average, open for 4.9 days a week before COVID-19 and expect to be open for 4.9 days a week in January (Figure 17; Accompanying W2 Tables 3 and 9).

Figure 17: Mean opening days per week for open group-based providers, before COVID-19 and expected in January



When looking at the distribution of opening days before COVID-19 and expectations for January, 92% of open GBPs expect to be open for 5 days a week in January; 95% of open GBPs were open 5 days a week before COVID-19 (Figure 18; Accompanying W2 Tables 3 and 9). There was no significant difference between the proportion of open GBPs that expected to be open 5 days a week in the following term at waves 1 and 2.

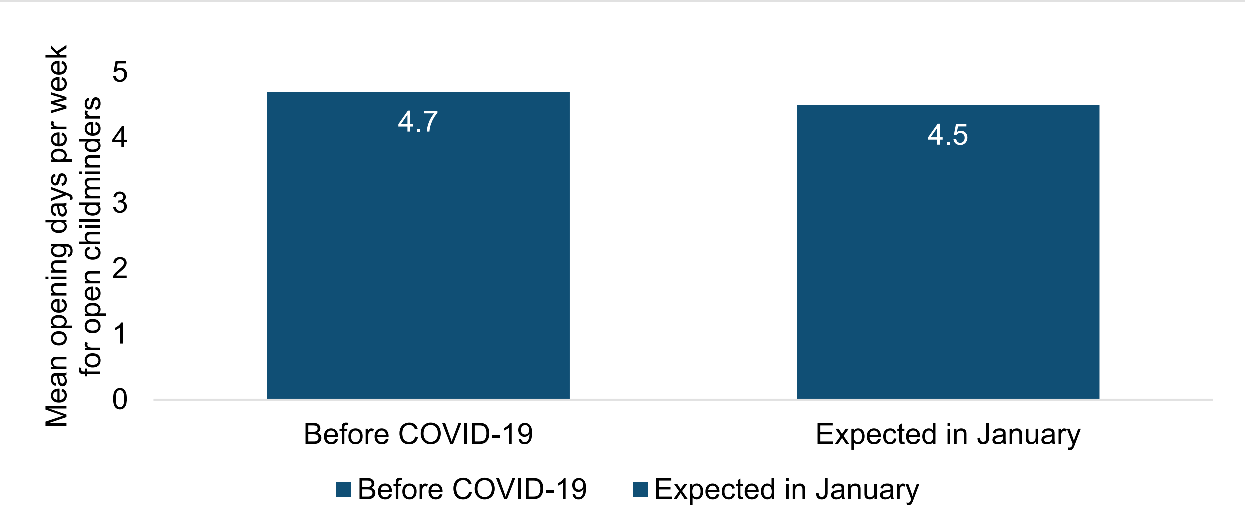
Figure 18: Distribution of open group-based providers' opening days per week, before COVID-19 and expected in January



Notes: Some options are suppressed because of low number of observations.

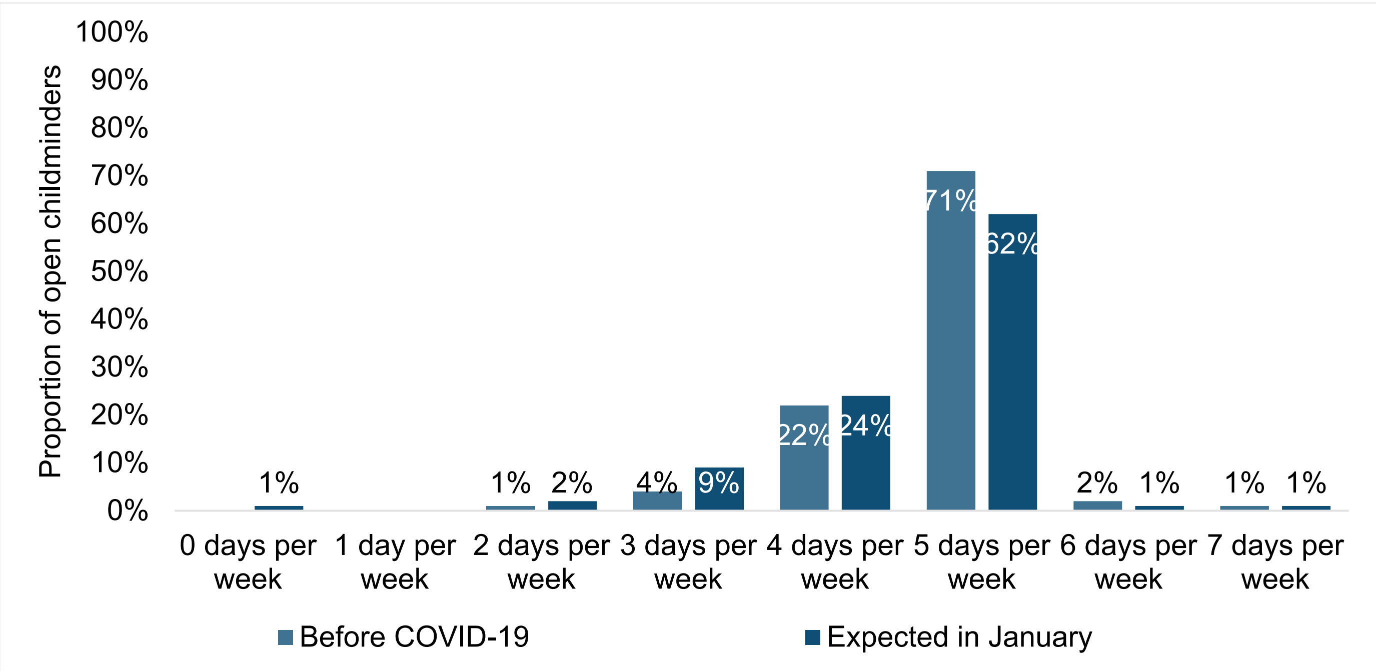
Open childminders (CMs) expect a minimal reduction in their opening days per week in January compared to before COVID-19 (Figure 19; Accompanying W2 Tables 3 and 9). Open CMs were, on average, open for 4.7 days a week before COVID-19 and expect to be open for 4.5 days a week in January.

Figure 19: Mean opening days per week for open childminders, before COVID-19 and expected in January



When looking at the distribution of opening days before COVID-19 and expectations for January, 62% of open CMs expect to be open 5 days a week in January, compared to 71% before COVID-19 (Figure 20; Accompanying Tables 3 and 9). Twenty-four per cent of open CMs expect to be open for 4 days per week in January, compared to 22% before COVID-19. One per cent of open CMs expect to be open 0 days a week in January. There was no significant difference between the proportion of open CMs that expected to be open 5 days a week in the following term at waves 1 and 2.

Figure 20: Distribution of open childminders' opening days per week, before COVID-19 and expected in January



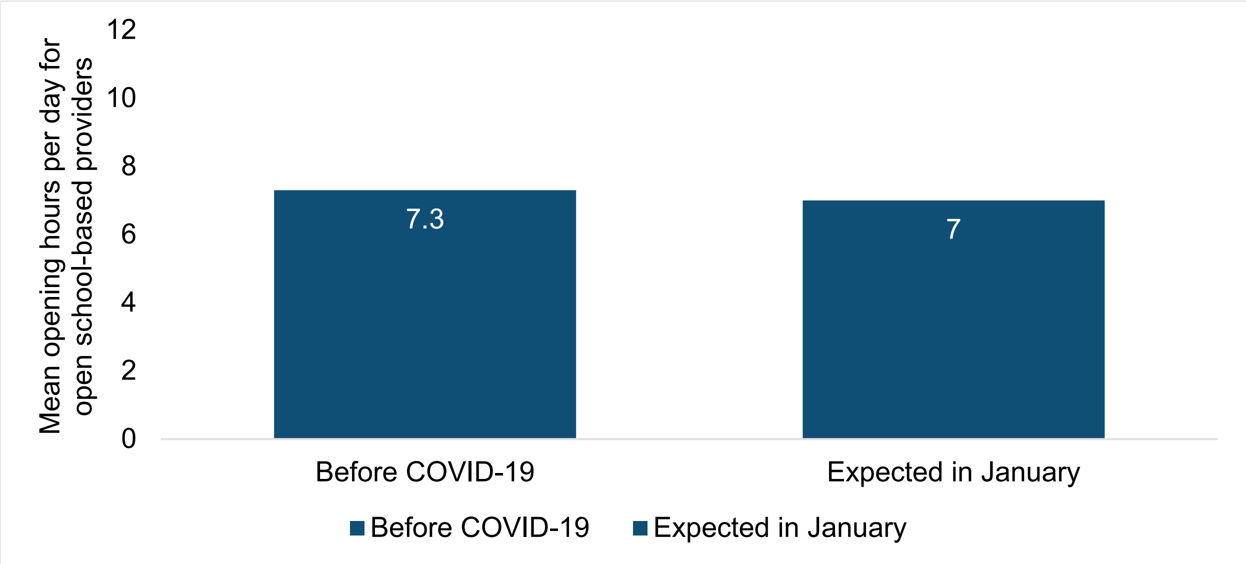
Notes: Some options are suppressed because of low number of observations.

Opening hours

Providers were asked about their opening hours per day on a typical day before COVID-19 and, for those providers who were open or temporarily closed at the time of the survey, how many hours they expected to be open per day in January 2021. Data is only presented here for providers that reported being open at wave 2. No differences between before COVID-19 and expected in January at wave 2 have been tested for statistical significance, whereas differences for expecting to be open 8 hours a day in the following term between waves 1 and 2 have been tested for significant differences.

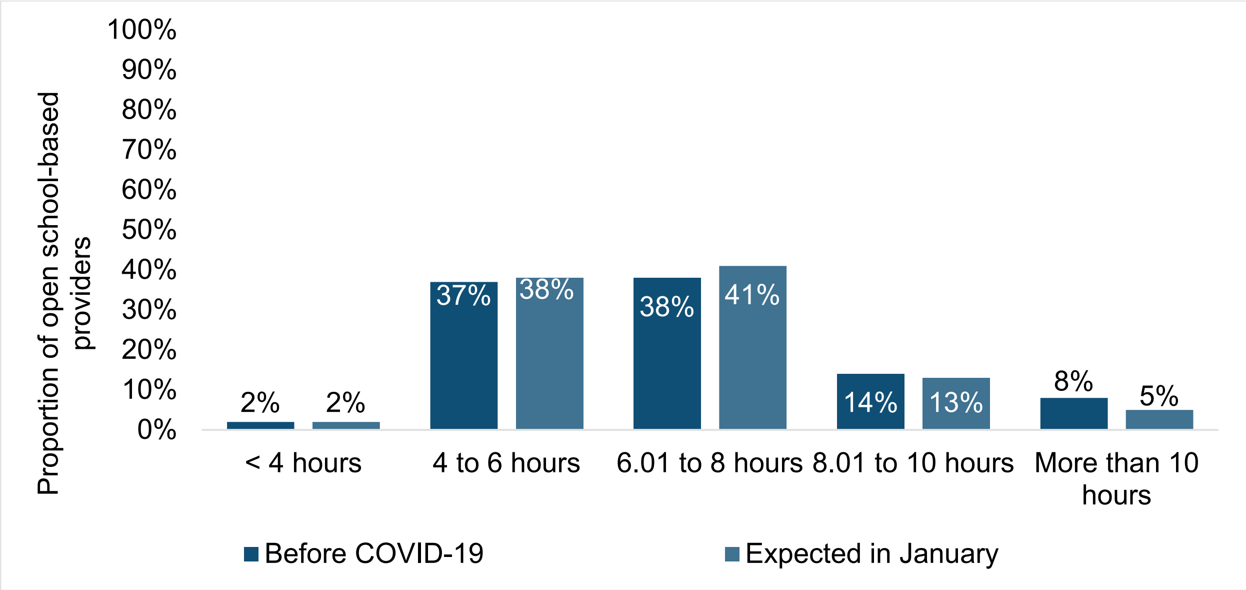
In January, open SBPs expect, on average, to be open for approximately the same number of hours a day than before COVID-19 (Figure 21; Accompanying W2 Tables 5 and 10). Open SBPs were, on average, open for 7.3 hours a day before COVID-19 and expect to be open for 7 hours a day in January.

Figure 21: Mean opening hours per day for open school-based providers, before COVID-19 and expected in January



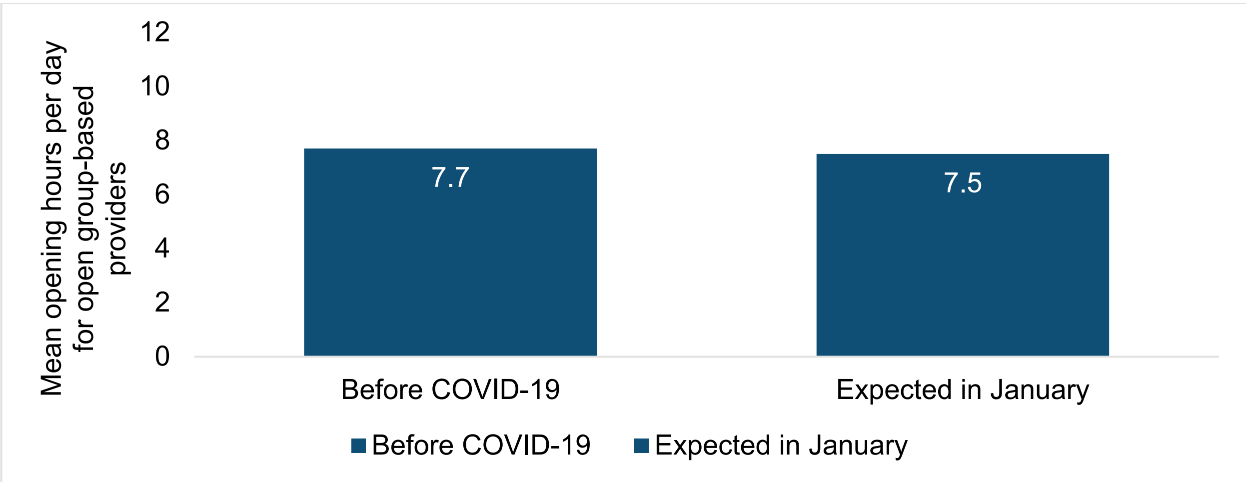
When looking at the distribution of opening hours before COVID-19 and expected in January, 5% of open SBPs expect to be open for more than 10 hours a day, compared to 8% before COVID-19 (Figure 22; Accompanying W2 Tables 5 and 10). There was no significant difference between the proportion of open SBPs that expected to be open more than 8 hours a day the following term at waves 1 and 2.

Figure 22: Distribution of open school-based providers' opening hours per day, before COVID-19 and expected in January



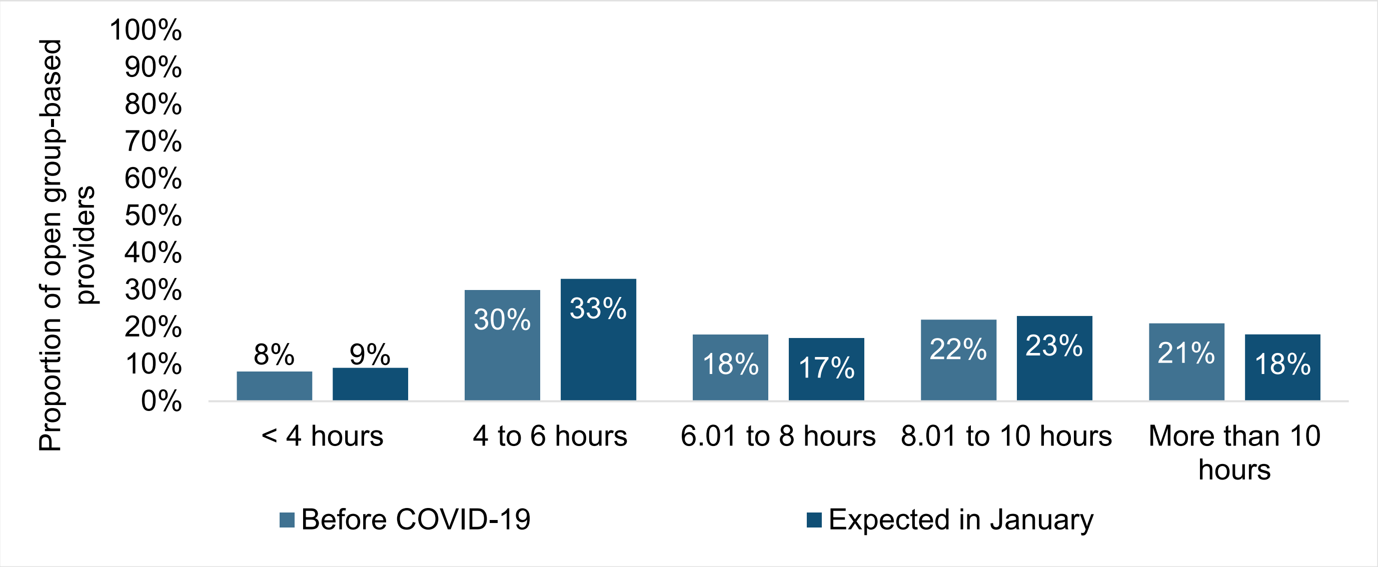
In January, open GBPs expect, on average, to be open for approximately the same number of hours a day than before COVID-19 (Figure 23; Accompanying W2 Tables 5 and 10). Open GBPs were, on average, open for 7.7 hours a day before COVID-19 and expect to be open for 7.5 hours a day in January.

Figure 23: Mean opening hours per day for open group-based providers, before COVID-19 and expected in January



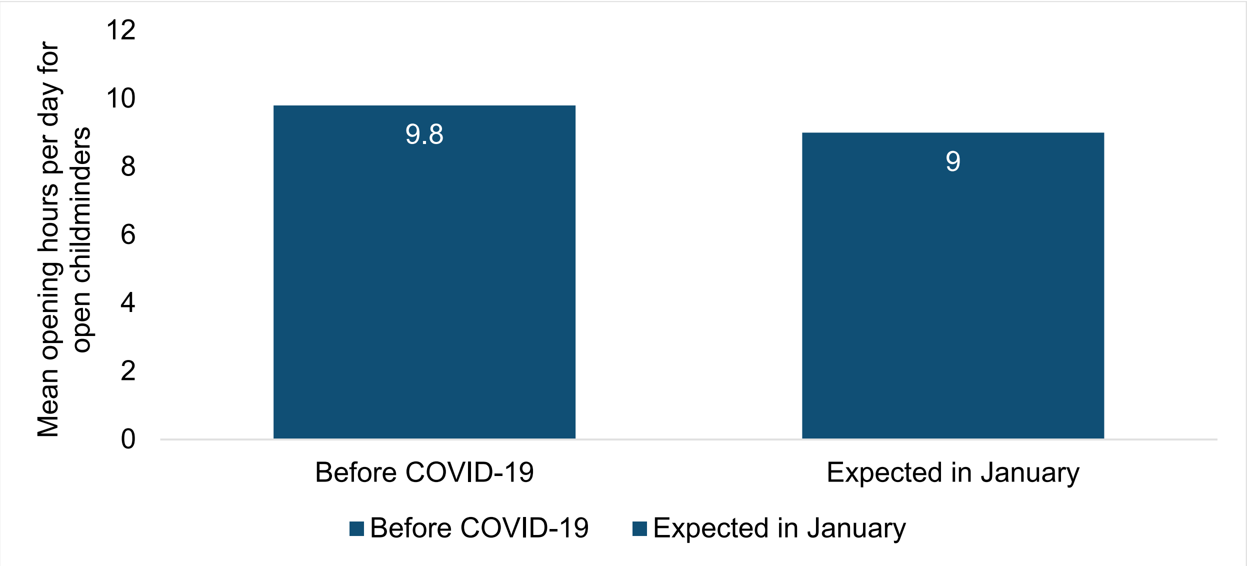
When looking at the distribution of opening hours before COVID-19 and expected in January, 18% of open GBPs expect to be open for more than 10 hours a day, compared to 21% before COVID-19 (Figure 24; Accompanying W2 Tables 5 and 10). One percent of open GBPs expect to be open for 0 hours per day in January. There was a significant difference between the proportion of open GBPs that expected to be open more than 8 hours a day the following term at waves 1 (49%) than at wave 2 (41%) (Accompanying W1/W2 Table 6).

Figure 24: Distribution of open group-based providers' opening hours per day, before COVID-19 and expected in January



In January, open CMs expect, on average, to be open for fewer hours per day than before COVID-19 (Figure 23; Accompanying W2 Tables 5 and 10). CMs who were open at the time of the survey were, on average, open for 9.8 hours a day before COVID-19 and expect to be open for 9 hours a day in January.

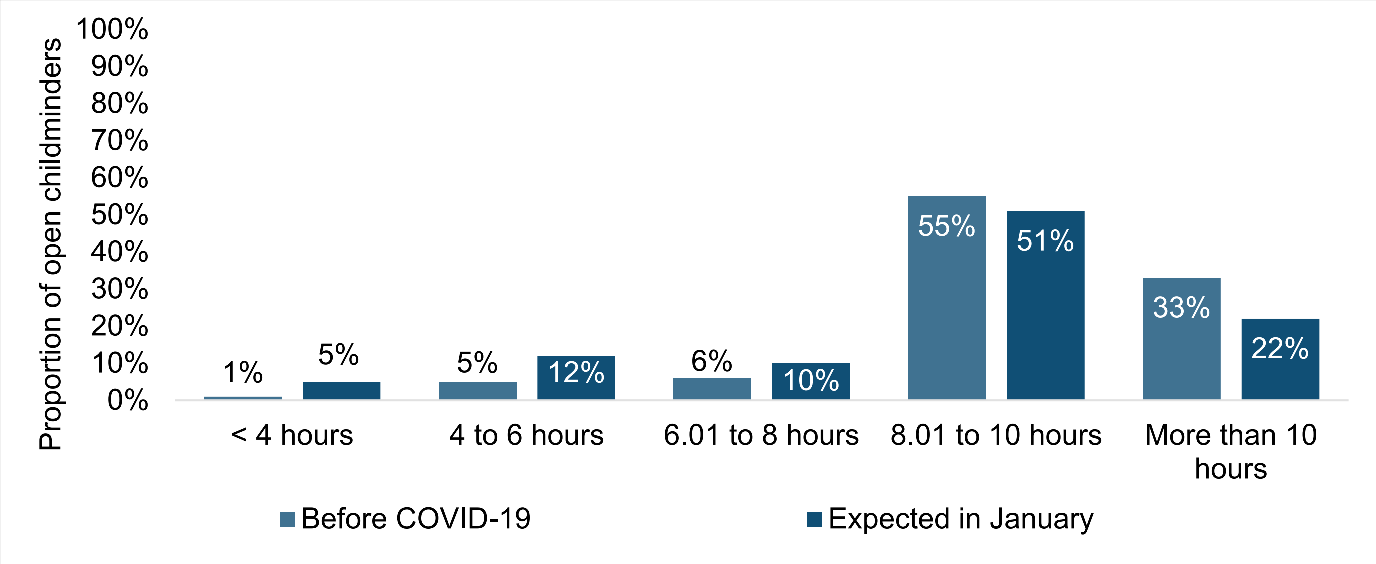
Figure 25: Mean opening hours per day for open childminders, before COVID-19 and expected in January



When looking at the distribution of opening hours before COVID-19 and expected in January, 22% of open CMs expect to be open for more than 10 hours a day in January; 33% of open CMs were open for more than 10 hours per day before COVID-19 (Figure

24; Accompanying W2 Tables 5 and 10). Two percent of open CMs expect to be open for 0 hours per day in January. There was no significant difference between the proportion of open CMs that expected to be open more than 8 hours a day the following term at waves 1 and 2.

Figure 26: Distribution of open childminders' opening hours per day, before COVID-19 and expected in January



Attendance

Providers were asked about the number of children they expected to attend their setting in a typical week during the 2020 autumn term[7]. For providers who were open at the time of the survey, they were asked how many children did attend. To allow for a comparison between these, only providers who reported being open at the time of the survey are compared. Data is presented for wave 2 only due to expected differences in attendance between wave 1 in the summer term and wave 2 in the autumn term, regardless of coronavirus.

On average, open school-based providers (SBPs), expected 4 two-year old children to attend during a typical week in the 2020 autumn term and at the time of the survey, 3 two-year old children attended their setting (Table 3; Accompanying W2 Tables 12 and 16). Open SBPs expected, on average, 33 three and four-year old pre-school children to attend and at the time of the survey, 27 children attended their setting (Table 3, Accompanying W2 Tables 13 and 17).

On average, open group-based providers (GBPs), expected 14 two-year old children and at the time of the survey 11 two-year old children attended their setting (Table 3; Accompanying Tables 12 and 16). On average, they expected 22 three and four-year old pre-school children and 17 attended (Table 3; Accompanying W2 Tables 13 and 17).

Open childminders (CMs), expected, on average, 2 two-year old children and, on average, 1 child aged 2 attended their setting at the time of the survey (Table 3; Accompanying W2 Tables 12 and 16). They expected, on average, 2 three and four-year old pre-school children and 1 child aged three or four attended (Table 3; Accompanying W2 Tables 13 and 17).

[7] Providers were asked about the expected number of children in the autumn 2020 term, rather than number attending before COVID-19 because of the differences in attendance rates in the autumn term compared to the spring term.

Table 3: Mean number of children expected in a typical week during autumn 2020 term and mean number of children that actually attended, for open providers only

Age category:	Open SBPs: Expected	Open SBPs: Attended	Open GBPs: Expected	Open GBPs: Attended	Open CMs: Expected	Open CMs: Attended
Under age two	1	0	6	5	2	1
Age two	4	3	14	11	2	1
Three and four-year-old pre-school children	33	27	22	17	2	1
School aged children aged 4 or over[8]	-	-	17	11	4	3
Unweighted base: Open providers	*Between 506-509*	*Between 508-509*	*Between 1534-1558*	*Between 1554-1565*	*Between 1930-1959*	*Between 1813-1837*

Note: numbers have been rounded to whole numbers. Unweighted bases range due to different number of providers answering each question.

[8] Figures for school age children not shown for SBPs. SBPs covers nursery provision only, not reception classes.

Workforce

Open group-based providers (GBPs) and school-based providers (SBPs) were asked how many paid staff were involved in the delivery of their provision, including how many were working full-time and how many were working part-time at the time of the survey[9]. Here, this data was compared between waves 1 and 2. The data described in the text have not been tested for statistical significance, unless specified.

Open SBPs had, on average, 9 paid staff working full time at wave 1 and 11 staff working full-time at wave 2 (Table 4; Accompanying W1 and W2 Table 27). They had an average of 6 staff working part-time at wave 1 and 5 staff working part-time at wave 2 (Table 4; Accompanying W1 and W2 Table 28). There were no significant differences in the proportion of open SBPs reporting that 5 or less members of staff were working full-time or part-time between waves 1 and 2 (Accompanying W1/W2 Tables 9 and 10).

Open GBPs had, on average, 4 paid staff working full-time at both waves 1 and 2 and an average of 4 paid staff working part-time at both waves 1 and 2 (Table 4; Accompanying W1 and W2 Tables 27 and 28). The proportion of open GBPs who reported that 5 or less members of staff were currently working part-time significantly decreased from 76% at wave 1 to 70% at wave 2. There was no significant difference in the proportion of open GBPs reporting that 5 or less members of staff were working full-time between waves 1 and 2 (Accompanying W1/W2 Tables 9 and 10).

Table 4: Open group-based provider and school-based provider mean number of paid staff at waves 1 and 2

Staff category:	Open SBPs: Mean number of staff at wave 1	Open SBPs: Mean number of staff at wave 2	Open GBPs: Mean number of staff at wave 1	Open GBPs: Mean number of staff at wave 2
Full-time (30 hours+)	9	11	4	4
Part-time (<30hours)	6	5	4	4
Furloughed (full-time)	1	0	3	0
Furloughed (part-time)[10]	N/A	0	N/A	1

[9] Childminders (CMs) were not asked this question, due to the low number of CMs employing staff.
[10] On 29 May, the Chancellor announced upcoming changes to the Coronavirus Job Retention Scheme. These changes included new flexibility, meaning from 1 July, employers could bring back to work employees that have previously been furloughed for any amount of time and any shift pattern, while still being able to claim the Coronavirus Job Retention Scheme grant for their normal hours not worked. Wave 1 of this survey asked in general about number of furloughed staff but wave 2 separated this out into part-time and full-time furloughed staff.

Total (sum all rows above)	16	16	9	9
Unweighted base	*Full-time: 364* *Other: 363*	*Full-time: 505* *Part time: 503* *Furlough: 505*	*Full-time: 1,093* *Part-time: 1,097* *Furlough: 1,088*	*Full-time: 1549* *Part-time: 1550* *Furlough full-time: 1530* *Furlough part-time: 1528*

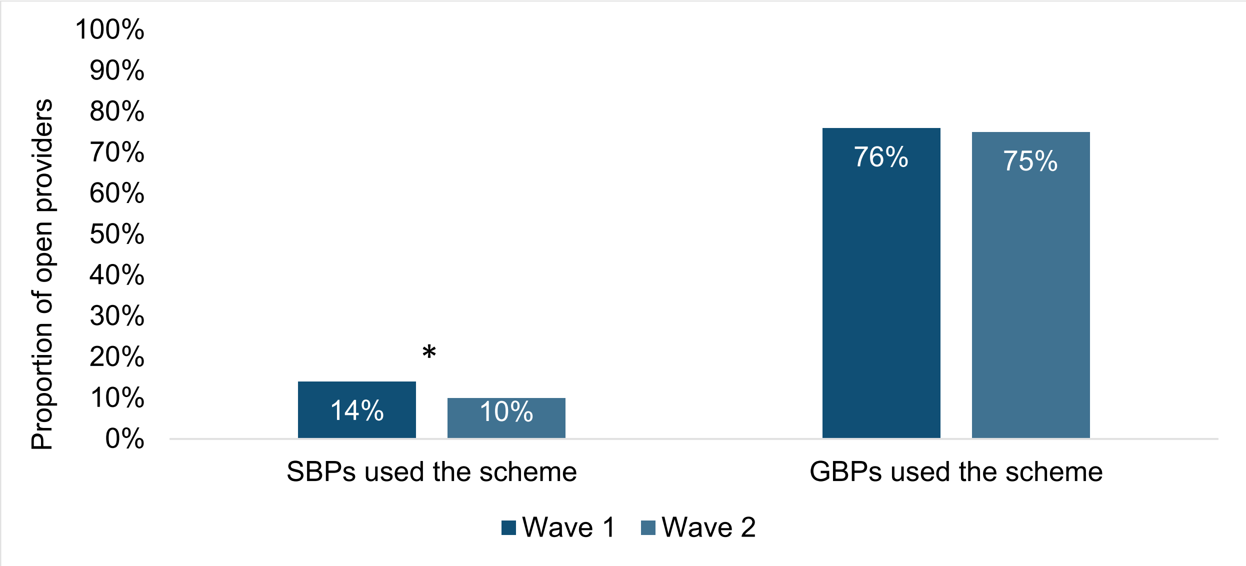
Notes: The staff numbers for SBPs are higher than in the main SCEYP, therefore, caution should be taken when making comparisons to the main SCEYP and when making conclusions about the whole SBP workforce. Numbers have been rounded to whole numbers. Unweighted bases range due to different number of providers answering each question. Mean differences in the table have not been tested for significant differences.

Open providers were also asked about the number of staff that were currently on furlough as part of the Coronavirus Job Retention Scheme (CJRS). At the time of the survey, open SBPs reported having an average of 0 members of staff on furlough and open GBPs reported having an average of 1 member of staff on part-time furlough (Table 4; Accompanying W2 Table 29).

Seventy-five per cent of open GBPs have made use of the scheme at any point at wave 2, compared to 10% of open SBPs (Figure 23; Accompanying Table W2 31 and W1/W2 Table 12). There were no significant differences in the proportion of open GBPs that have made use of the CRJS at any point, across waves 1 and 2. There was a significant difference between the proportion of open SBPs who reported making use of the CJRS (14% at wave 1 and 10% at wave 2). It is important to note that the furlough scheme could only be used by settings to cover up to the proportion of their salary bill which could be considered to have been paid for from their private income (and in line with the appropriate guidance). SBPs receive a majority of their funding from the funded entitlements[11], which may account for their reduced use of the scheme.

[11] https://www.gov.uk/government/publications/providers-finances-survey-of-childcare-and-ey-providers-2019

Figure 27: Proportion of open school-based and group-based providers that have made use of the Coronavirus Job Retention Scheme at any point in waves 1 and 2

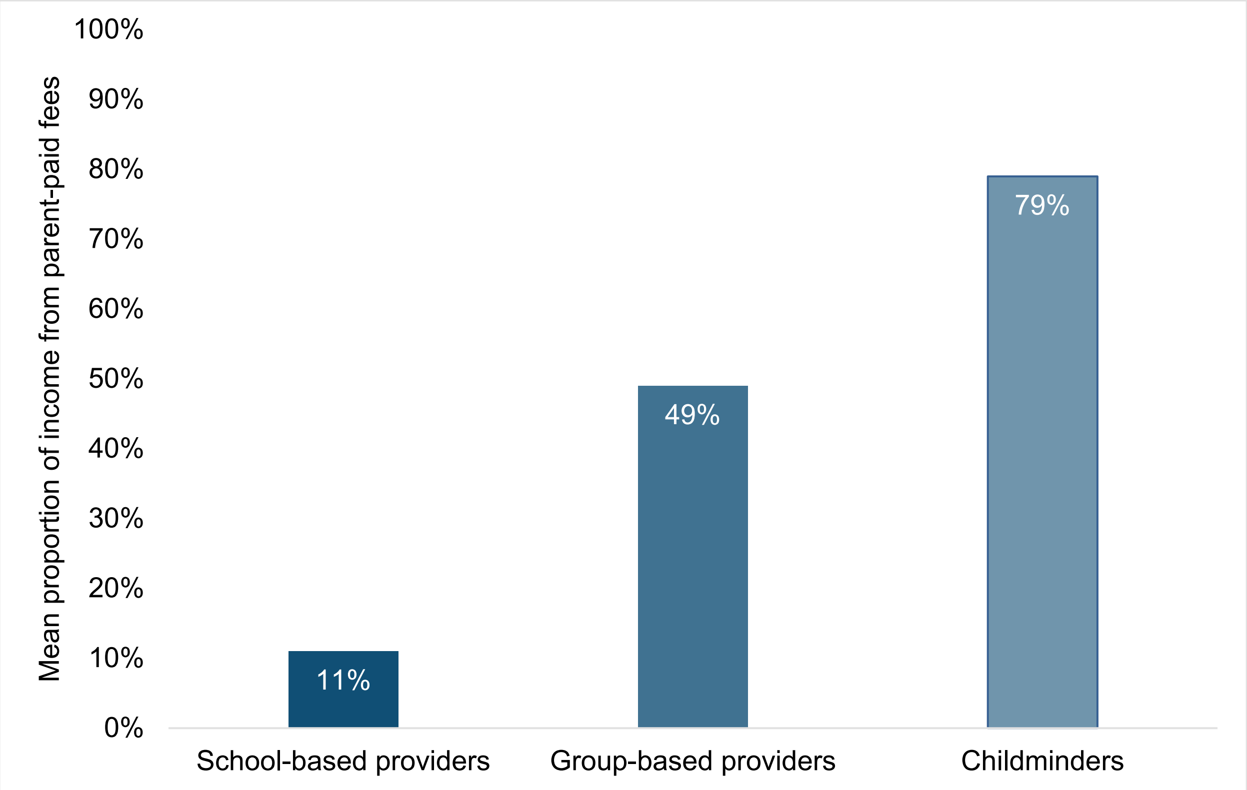


Finances

During the pandemic, the Government continued to pay funding to local authorities for the free entitlements for two, three and four-year-olds, even if the provider had to close or there were no children attending due to COVID-19 and therefore the main financial loss that providers likely experienced would be the loss of income from parent-paid fees, due to reduced attendance rates. Therefore, parent-paid fees are the focus of this section.

To understand the impact of the loss of these fees, all providers were asked approximately what proportion of their total income typically came from parent-paid fees. As can be seen in Figure 24 (Accompanying W2 Table 19), at wave 2 the mean proportion of income was highest for childminders (CMs; 79%), then group-based providers (GBPs; 49%) and was lowest for school-based providers (SBPs; 11%).

Figure 28: Mean proportion of income from parent-paid fees before COVID-19, by provider type, wave 2 only



Providers were asked how much income they would have been expecting to receive from parent-paid fees for a typical week during the 2020 autumn term and how much they actually received.[12] Data is presented for wave 2 only due to expected differences in attendance between wave 1 in the summer term and wave 2 in the autumn term,

[12] Providers were asked about the expected income from parent-paid fees in the autumn 2020 term, rather than this income before COVID-19 because of the differences in attendance rates, and therefore income, in the autumn term compared to the spring term.

regardless of coronavirus, and therefore potentially expected differences in parent-paid income.

Open SBPs, GBPs and CMs received less weekly income, on average, than expected. On average, SBPs expected to receive £945 per week from parent-paid fees but received, on average £511 at the time of the survey (Table 5, Accompanying W2 Tables 20 and 21). On average, GBPs expected to receive £3,736 per week from parent-paid fees but received, on average £2,054 at the time of the survey. On average, CMs expected to receive £555 per week from parent-paid fees but received, on average £390 at the time of the survey.

Table 5: Mean and median weekly income from parent-paid fees, expected and received at the time of the survey

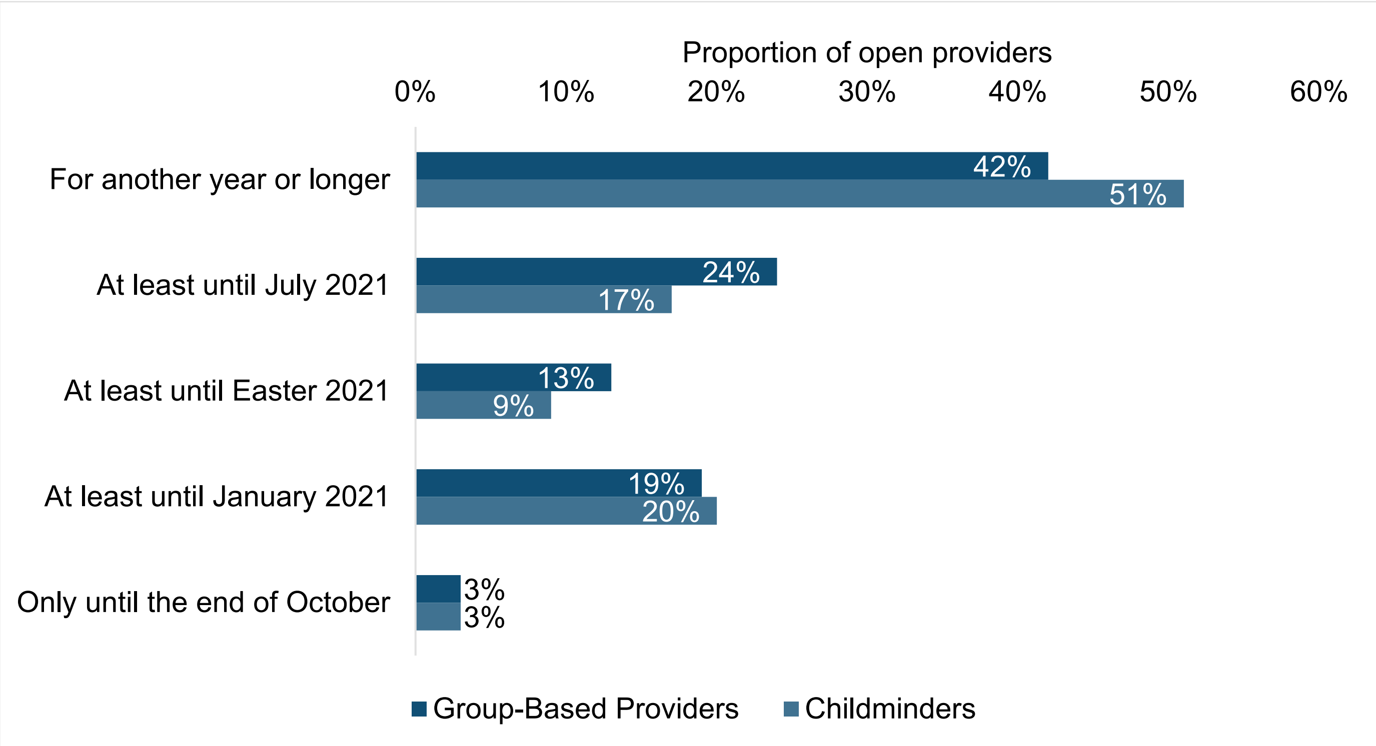
Expected weekly income at wave 2	**Open SBPs**	**Open GBPs**	**Open CMs**
Mean	£945	£3,736	£555
Median	£0	£1,000	£400
Unweighted base: Open providers	*429*	*1370*	*1678*
Received weekly income at time of survey at wave 2	**Open SBPs**	**Open GBPs**	**Open CMs**
Mean	£511	£2,054	£390
Median	£0	£600	£300
Unweighted base: Open providers	*436*	*1377*	*1679*

Financial sustainability

Open group-based providers (GBPs) and open childminders (CMs) were asked, based on what they knew about the current situation and upcoming developments, for how long they were reasonably confident that it would be financially sustainable to continue to run their childcare provision for[13].

At wave 2, 42% of open GBPs and 51% of open CMs reported that they believe it will be financially sustainable to continue for another year or longer (Figure 25; Accompanying W2 Table 22). 3% of open GBPs and 3% of open CMs reported that it will be financially sustainable to continue only until the end of October and 19% of open GBPs and 20% of open CMs reported that it will be financially sustainable to continue at least until January 2021.

Figure 29: Proportion of open providers reporting how long they believe it would be financially sustainable to continue to run their childcare provision

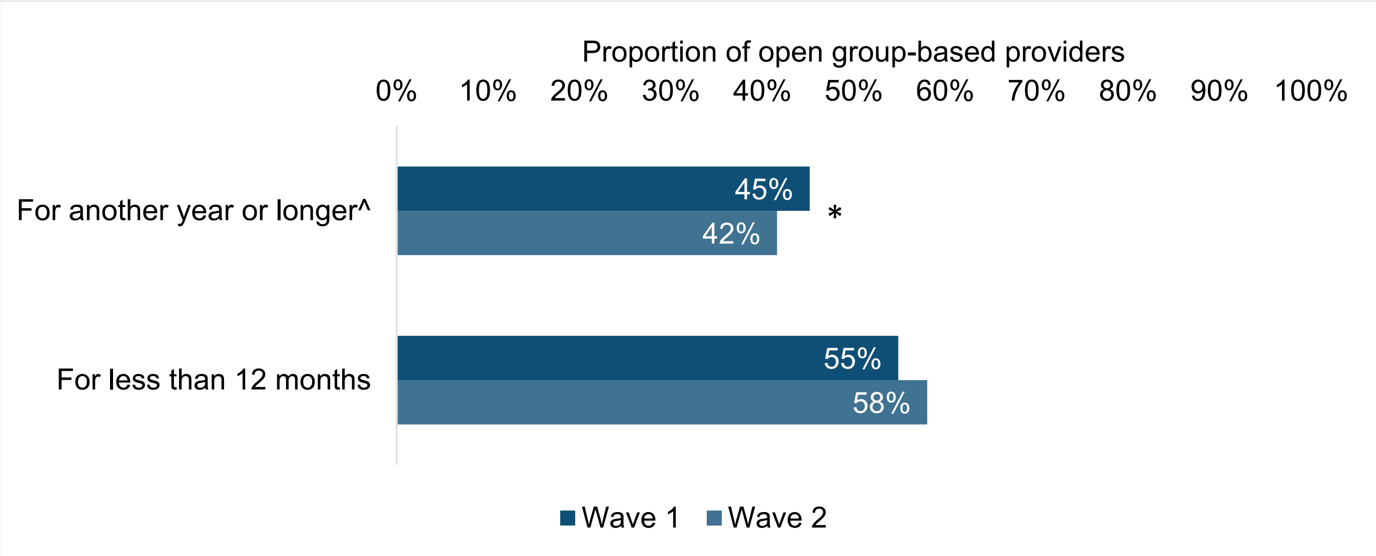


To compare any statistically significant differences between responses to this question in wave 1 and wave 2, those selecting 'for another year or longer' were compared. As can be seen in Figure 26, significantly fewer open GBPs believe it would be financially sustainable to continue to run their childcare provision for another year or longer at wave 2 (42%) compared to wave 1 (45%). As can be seen in Figure 27, significantly fewer

[13] School-based providers (SBPs) were not asked this question as the decision to run provision is part of wider decisions concerning the larger school strategy

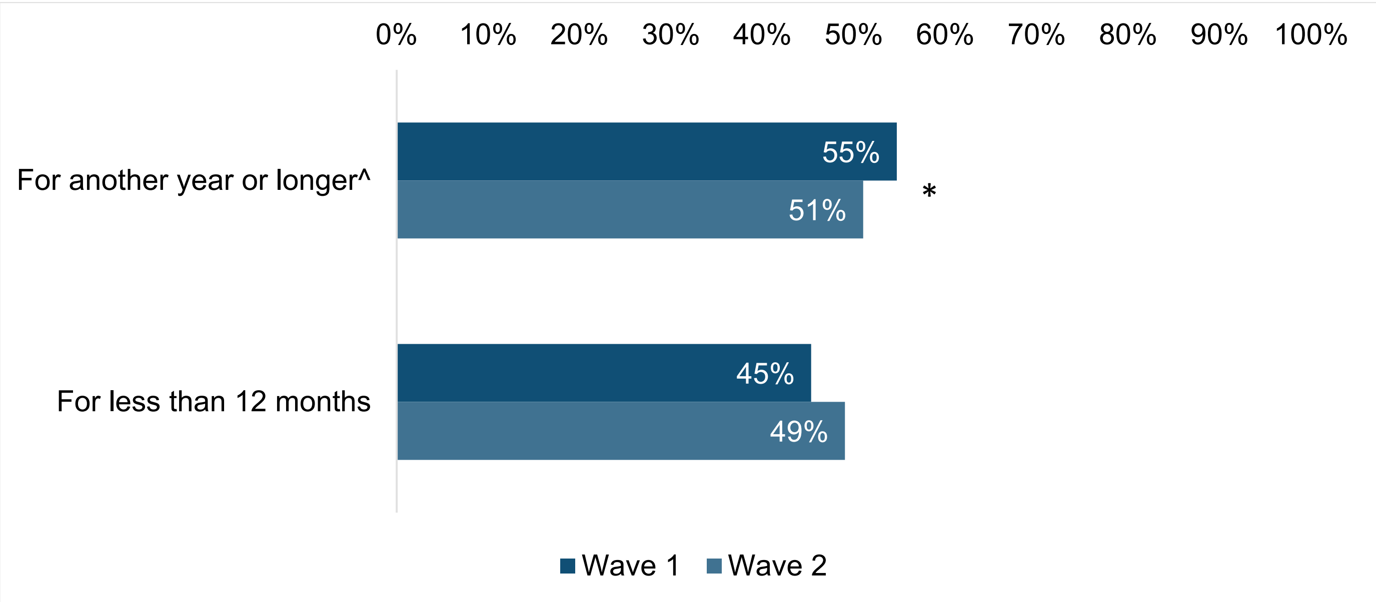
open CMs believe it would be financially sustainable to continue to run their childcare provision for another year or longer at wave 2 (51%) compared to wave 1 (55%) (Accompanying W1/W2 Table 7).

Figure 30: Proportion of open group-based providers reporting how long they believe it would be financially sustainable to continue to run their childcare provision, waves 1 and 2



*Notes: ^ indicates results subject to statistical testing to determine whether difference between wave 1 and wave 2 statistically significant at 5% level * indicates that the within-provider difference between wave 1 and wave 2 was statistically significant at the 5% level*

Figure 31: Proportion of open childminders reporting how long they believe it would be financially sustainable to continue to run their childcare provision, waves 1 and 2

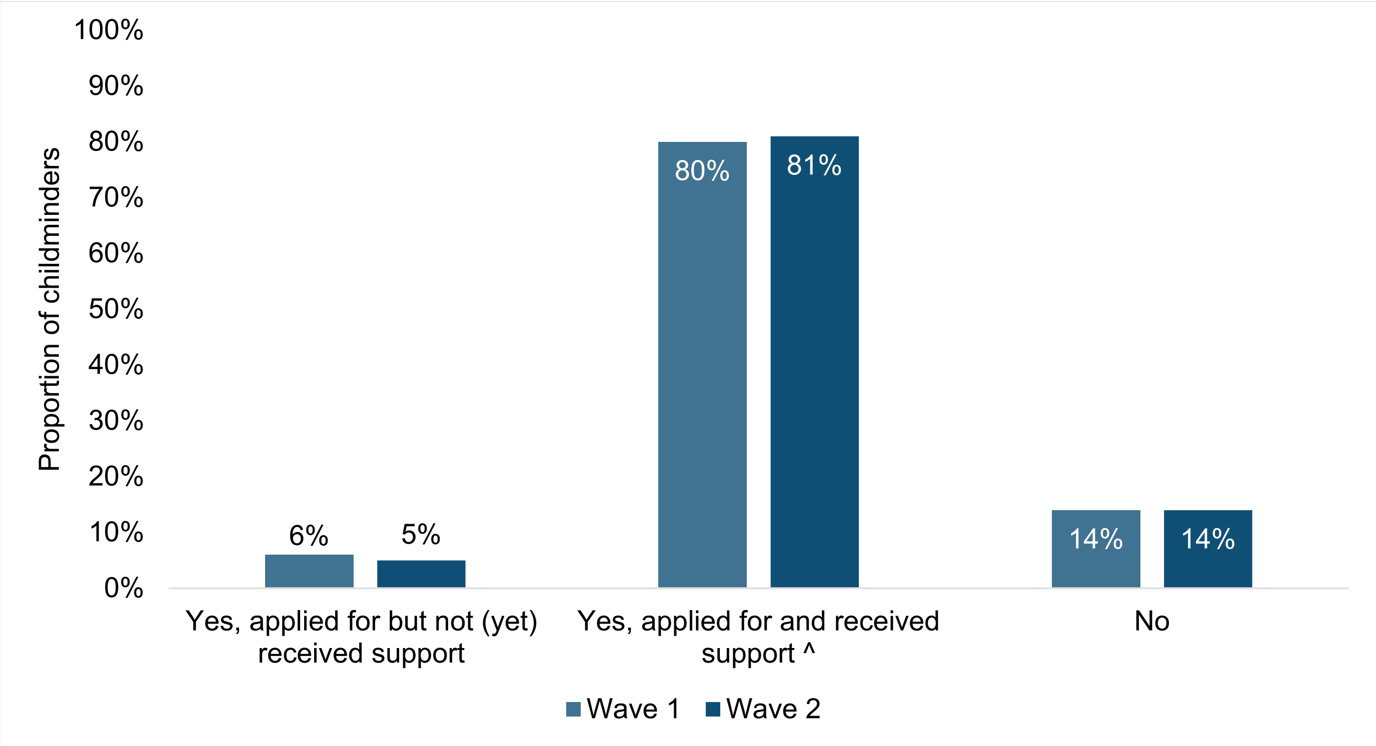


Notes: ^ indicates results subject to statistical testing to determine whether difference between wave 1 and

*wave 2 statistically significant at 5% level * indicates that the within-provider difference between wave 1 and wave 2 was statistically significant at the 5% level*

Childminders were asked whether they had applied for any financial support from the government due to loss of income, for example via the Self-Employment Income Support Scheme or the Small Business Grant Scheme. As can be seen in Figure 28 (Accompanying W2 Table 23), at wave 2, the majority of all CMs (86%) had applied for financial support from the Government. Of these 81% have received support and 5% have applied for but not (yet) received support. There were no significant differences in the proportion of childminders that have made use of Government financial support between waves 1 and 2 (Accompanying W1/W2 Table 8)

Figure 32: Proportion of all childminders that have made use of Government financial support



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