

2002/03 Childcare and Early Years Workforce survey

Overview Report

May 2004

SureStart



Evidence
& research

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1 Introduction

1.1 The Department for Education and Skills (DfES) commissioned MORI to undertake a series of surveys to detail the childcare and early years workforce. Separate surveys were conducted for eight different types of childcare and early years settings.

1.2 In 2002/03 the survey has been conducted a third time, to track change since 2001 among the childcare sectors and to collect baseline data among early years sectors that are surveyed for the first time this year.

CHILDCARE

- Day nurseries and other full-day provision
- Playgroups and pre-schools
- Out of school clubs
- Holiday clubs
- Childminders.

EARLY EDUCATION

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

1.3 These surveys are reported in detail in separate, sector specific reports. This report seeks to draw together the findings of the surveys by looking at similarities and differences across the sectors.

1.4 This Overview Report draws comparisons between sectors. Findings from the holiday clubs report is not included in this analysis. This reflects uncertainty about the number of holiday clubs, which means that it has not been possible to ensure the reliability of the sample. A summary of the key findings from this survey is contained in the appendices.

1.5 The Government is committed to improving access to good quality childcare, early learning and family support. Ensuring all children get a sure start in life, and help secure a better future for families and stronger and safer communities.

1.6 There is clear evidence of the benefits to children of pre school provision, particularly those who are disadvantaged. This is especially true when good quality childcare is delivered alongside early years education, and health and family support. This was confirmed in the report of the Government's interdepartmental childcare review "Delivering for Children and Families", (published in November 2002).

1.7 In 2002, Government policy on childcare, early education and Sure Start local programmes was brought together in a single interdepartmental Unit, called Sure Start Unit. This Unit reports to Ministers in both the Department for Education and Skills and the Department for Work and Pensions.

- 1.8** The overall aim of the Sure Start initiative is to increase the availability of childcare and early education, and work with parents to be, parents and children to promote the physical, intellectual and social development of babies and young children. Particularly those who are disadvantaged, so they can flourish at home and at school, and to enable their parents to work, learn and train to help contribute to the ending of child and family poverty.
- 1.9** Sure Start's key overall objectives, following the Spending Review 2002, are to:
- transform education, health and family support services for children under 5 and their families;
 - increase the availability of high quality childcare for all age groups whose parents need it; and
 - meet the needs of the most disadvantaged, so children can fulfil their potential and parents can find ways out of poverty.
- 1.10** Further information about Sure Start and its programmes can be found on www.surestart.gov.uk.
- 1.11** The Government has a range of goals and targets in relation to childcare and early years. These include: sustaining the expansion in childcare which has already enabled new childcare places for 1.6 million children to be created, so over 2 million children benefit by 2006 and growth continues through to 2008; guaranteeing a free, part time early education place for all 3 year olds whose parents want it, in April 2004; establishing new provision in the most disadvantaged communities; and maintaining and enhancing the quality and standards of provision and the skills and size of the workforce.
- 1.12** The Government is committed to supporting the childcare workforce and recognises the important role it has in ensuring children get a sure start in life and in supporting families. It's *'Every Child Matters'* Green Paper in September 2003, and its Next Steps document published in March 2004, stressed the importance of: improving the skills and effectiveness of all those who work with children and making this a more attractive career option; and of health, educational and social care professionals working together effectively in locations such as schools and children's centres.
- 1.13** In order to help monitor progress towards meeting targets and strengthening provision for young children and families, the DfES conducted surveys of the childcare workforce in England in 1998 and 2001.
- 1.14** In 2002/3 the survey was conducted a third time, to track change since 2001 among childcare audiences and to collect baseline data among early years audiences that are surveyed for the first time. Although the survey has been published in April 2004, telephone interviews were carried out between December 2002 – May 2003.
- 1.15** The surveys examine some of the key characteristics of the sector and its workforce, including:
- the number of registered and enrolled places
 - staffing levels
 - characteristics of staff, including demographics and pay
 - staff qualifications and training
 - recruitment and retention.
- 1.16** The surveys provide a useful source of factual data about the sector on which national and local level policy makers can draw.

STUDY DESIGN

- 1.17** The bullet points below summarise the methodology adopted for the survey. Full methodological details are provided in the appendices.
- Interviews were conducted in England for each type of setting.
 - The sample was stratified to ensure equal reliability by region and a representative random sample was interviewed within each region. The profile of the achieved sample was also monitored by levels of deprivation and rurality.
 - Data are weighted by region to ensure aggregate data is representative and reflects the true profile of full daycare providers according to provisional Ofsted data at January – March 2003.
 - Interviews were conducted by telephone using CATI (Computer Assisted Telephone Interviewing), by MORI Telephone Surveys during the period 18th February to 2nd April 2003.
 - The target respondent was the senior manager.
- 1.18** Where appropriate, comparison is made between these findings and those of the previous childcare workforce surveys, conducted for the Department in 2001 by SQW and the NOP Research Group. However, some caution must be applied as different sources of data were used to inform the weighting and grossing of data each year. In 2001, data from the Children’s Day Care Facilities Survey (March 2001) were used to weight and gross full daycare, playgroups, childminders and out of school clubs data. In 2003, population data were taken from the Ofsted registration database (January to March 2003) for full daycare, playgroups and childminders – this is a more reliable source.
- 1.19** Ofsted became responsible for registration of Children’s daycare facilities during the period between the 2001 survey and this one, some of the data they received from local authorities were of mixed quality and there was a process of cleansing data. This included removal from records of some childcare providers which were no longer operational – which is likely to have affected comparisons between the 2001 and 2003 figures for total enrolments, providers and workforce numbers. For out of school clubs population data were taken from the ChildcareLink database as at the 7th December.
- 1.20** Anomalies have been identified in some sections of the 2001 survey, following comparisons with the 2002/03 data. The 2001 data has been corrected and revised figures have been used where comparisons are drawn. Checks have been carried out on all reports and no further anomalies were found.

REPORT STRUCTURE

- 1.21** The remainder of this report is structured as follows:
- Section 2 – Summary of the key issues.
 - Section 3 – The Development of Childcare and Early Years Provision.
 - Section 4 – Workforce Composition.
 - Section 5 – Workforce qualifications and training.
 - Section 6 – Recruitment and retention.

2 Summary of Key Issues

INTRODUCTION

This section gives a brief outline of the key changes within the childcare sector. We are able to compare our findings in 2002/3 with information collected on the Childcare sector in 2001 but as this is the first year we have collected information on the Early Years sector we can only look at the snap shot of information it has given us. For the first time we have also collected information on settings in the 20% most deprived wards which will help inform our ongoing commitment to promote the growth of childcare in disadvantaged areas.

2.1 Number of Providers

- Since 2001, the number of full daycare providers has increased by 28%, while the number of Playgroup providers has reduced by 15%. Many pre-schools and playgroups are converting to full daycare. The Department is actively encouraging this conversion by offering assistance to playgroups to extend their service to full daycare and more readily meet parental needs.
- 2003 sees a continued increase in the average size of provider.
- The total number of childcare places was 1,250,000. There was a change to the question about childcare places since the 2001 Survey. In 2003 the question asked about registered full time places for 0–7 year olds, whereas in 2001 it asked about 0–7 year olds and also about children over 8, and any other places (not registered). As a result comparisons should not be made with the 2001 data.

2.2 Pay

- Pay levels have not changed markedly from 2001 to 2003.

2.3 Qualifications and Training

- The proportion of **managers** in full daycare, playgroups and out of school clubs who hold at least Level 3 qualifications (i.e. up to and **above** Level 3) has risen to 85% for full daycare, 77% for playgroups and 64% for out of school clubs.
- Among full daycare the proportion of supervisors and other paid childcare staff holding Level 2 qualifications has risen from 11% in 2001 to 21% in 2003. A decrease can be seen in those holding Level 3, a fall from 60% in 2001 to 51% in 2003. Presumably, this reflects the continued expansion of the full daycare sector and the subsequent increase in numbers of more junior staff, who are more likely to hold Level 2 rather than Level 3 qualifications.

- The proportion of childminders reported as holding 'any relevant qualification' has risen dramatically from 34% in 2001 to 64% in 2003.

2.4 Recruitment and Retention

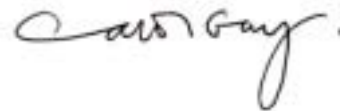
- Around half to three quarters of all settings have been involved in recruiting over the last 12 months, illustrating the continued fluidity of the childcare and early years workforce.
- Many settings also lost staff in the last 12 months, but at a lower rate than they were recruiting. Out of school clubs and full daycare settings have the highest turnover rates (23% and 18%) and primary schools the lowest (9%).
- Reflecting the continued growth in full daycare, this was the only sector to see employment growth levels rise, from 11% in 2001 to 13% in 2003. Employment growth for out of school clubs in 2003 was significantly lower than in 2001 (13% compared to 32%).

2.5 Business Operation and Performance

- Patterns of ownership vary between childcare settings. Three quarters of full daycare settings are in the private sector, whilst two thirds of playgroups are in the voluntary sector. Across full daycare, playgroups and out of school clubs, voluntary sector ownership has seen an increase in 2003.
- Overall, the childcare sector shows a small improvement in profitability. Full daycare and childminders (private sector) are most likely to run profitably, whilst playgroups and out of school clubs (voluntary sector) are more likely to break even.

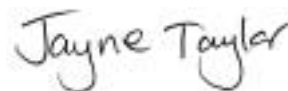
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3 The Development of Childcare and Early Years Provision

INTRODUCTION

- 3.1** This section outlines how the different childcare sectors have developed since the last workforce survey report in 2001. In particular, it discusses where provision is increasing and decreasing, and the patterns that appear to emerge from the study findings. For early years sector, baseline data are provided allowing comparison in future years.

NUMBER OF PROVIDERS

CHILDCARE

- 3.2** The period 1998 – 2001 saw considerable expansion in full daycare and out of school clubs (increases of 42% and 86%), whilst the number of childminders fell significantly and playgroups also declined (-23% and -10%).
- 3.3** 2003 sees continued expansion in the full daycare sector, but a levelling off in the numbers of out of school clubs, pointing towards possible stability in this sector. Decline in the number of playgroups continues whilst the previous fall in numbers of childminders also levels off.
- 3.4** Although the decline in playgroups continues this is not a loss in provision but reflects the department's policy of encouraging playgroups to convert to full daycare by offering assistance to playgroups to extend their services to full day care. Parents require different services and many are seeking full day care, as opposed to the part time care traditionally available through playgroups. Full day care is more likely to enable them sufficient childcare to take up employment, training or educational opportunities.

Table 3.1: **Number of Providers**

	2001	2003	% change
Base: All providers	No	No	±%
Childcare			
Full daycare	7,800	10,000	+28
Playgroups	14,000	11,900	-15
Out of school clubs	4,900	4,500	-8
Childminders	72,300	72,900	+1
Early Years			
Nursery schools	–	500	–
Primary schools with nursery and reception classes	–	6,300	–
Primary schools with reception classes	–	9,200	–

Full daycare, playgroups and childminders source 2003: Ofsted, January – March 2003
 Out of school clubs source 2003: ChildcareLink December 2002
 All childcare audiences source 2001: Children’s Day Care Facilities Survey, March 2001
 Early years audiences source 2003: DfES Edubase 2002

3.5 Percentage of settings established for five years or more by type of setting:

- 59% Out of school clubs
- 58% Childminders
- 73% Full daycare
- 91% Playgroups

NUMBERS AND GEOGRAPHICAL SPREAD

CHILDCARE

3.6 The number of settings in the top 20% most deprived areas is measured for the first time and stands at 24% for out of school clubs, 24% for full daycare, 18% for childminders and 14% for playgroups.

Table 3.2: **Number of Childcare Settings by Region and Top 20% Most Deprived Wards (%)**

	<i>Full daycare</i>	<i>Playgroups</i>	<i>Out of school clubs</i>	<i>Childminder</i>
Base: All providers	%	%	%	%
Region				
East Midlands	8 (0)	9 (0)	9 (+3)	8 (-1)
East of England	9 (+1)	15 (+1)	11 (+2)	12 (0)
London	16 (-1)	10 (0)	12 (-5)	15 (-1)
Yorkshire and Humberside	10 (0)	8 (0)	10 (-1)	9 (+1)
North East	4 (+1)	3 (0)	5 (0)	5 (+1)
North West	13 (-2)	11 (-1)	15 (-1)	12 (0)
South East	18 (+2)	20 (0)	14 (+3)	19 (-1)
South West	11 (-1)	14 (0)	10 (-1)	10 (0)
West Midlands	12 (0)	9 (0)	13 (-1)	10 (+1)
Type of Area				
Top 20% most deprived wards	24(NA)	14(NA)	24(NA)	18(NA)

Source: MORI

Note: Figures in brackets show 2003 – 2001 percentage change

Note: Table percentages may not add up to 100% as a result of rounding

EARLY YEARS

- 3.7** The number of early years settings in the top 20% most deprived areas varied greatly – 11% of primary schools with reception classes, 50% of primary schools with nursery and reception classes and 53% of nursery schools.
- 3.8** Primary schools with nursery and reception classes and nursery schools are heavily concentrated in urban areas (87% and 92% respectively), unlike primary schools with reception classes (46%).

Table 3.3: **Number of Childcare Settings by Region and Top 20% Most Deprived Wards (%)**

	Nursery	Primary with nursery and reception	Primary with reception
	%	%	%
Base: All providers			
Region			
East Midlands	–	7	11
East of England	–	9	13
London	–	20	4
Yorkshire and Humberside	–	14	9
North East	–	9	3
North West	–	18	14
South East	–	6	20
South West	–	4	17
Midlands	–	13	9
North/Midlands	59	–	–
South/East	41	–	–
Type of Area			
Top 20% most deprived wards	53	50	11

Source: MORI

Note: Table percentages may not add up to 100% as a result of rounding

NUMBER OF PLACES

CHILDCARE

3.9 The total number of places was 1,250,000. There was a change to the question about childcare places since the 2001 Survey. In 2003 the question asked about registered full time places for 0–7 year olds, whereas in 2001 it asked about 0–7 year olds and also about children over 8, and any other places (not registered). As a result comparisons should not be made with the 2001 data.

Table 3.4: **Average Number of Places per Setting (0-7 year olds)**

	2003
	No
Base: All providers	
Childcare	
Full daycare	44
Playgroups	27
Out of school clubs	37
Childminders	5
Early Years	
Nursery schools	58
Primary schools with nursery and reception classes	79
Primary schools with reception classes	35

Source: MORI

Note: See paragraph 3.9.

EARLY YEARS

3.10 Primary schools with nursery and reception classes have the largest number of places per setting, followed by nursery schools. Primary with reception classes have just 35 places per setting on average but are larger in London with 51 places per setting, compensating to some extent for the relatively smaller number of providers.

3.11 Capacity tends to be greater in higher population density areas.

Table 3.5: **Number of Places (0-7 year olds)**

	2003
	No
Base: All providers	
Childcare	
Full daycare	431,600
Playgroups	325,300
Out of school clubs	165,100
Childminders	328,300
Total	1,250,300
Early Years	
Nursery schools	26,900
Primary schools with nursery and reception classes	494,500
Primary schools with reception classes	321,700
Total	843,100

Source: MORI

Note: See paragraph 3.9.

NUMBER OF CHILDREN ENROLLED

CHILDCARE

- 3.12** The average number of enrolments has risen from 3.66 to 3.94 per childminder.
- 3.13** Average enrolments across the other childcare sectors have tended to fall: full daycare from 68 to 66; playgroups from 42 to 40 and out of school clubs 65 to 60. The Department is encouraging the move from sessional care to full daycare. Although there is a decline in the number of playgroups the Department is encouraging this conversion by offering assistance to playgroups to extend their service.
- 3.14** The drop in the number of enrolments per setting is consistent with a shift in the pattern of use of places, with more parents leaving their children for a full day (e.g. whilst they work) rather than part-day. This implies fewer children sharing places.

EARLY YEARS

- 3.15** As with number of places, the fewest children enrolled per setting are found in primary schools with reception classes. The numbers enrolled in nursery schools and primary schools with nursery and reception classes are highest in the most deprived areas.
- 3.16** There appears to be excess capacity in primary schools with reception classes and primary schools with nursery and reception.

Table 3.6: **Number of Children Enrolled (0-7 and 8+ year olds)**

	2001 ¹	2003	% change
Base: All providers	No	No	±%
Childcare			
Full daycare	539,200	649,400	+20
Playgroups	589,400	469,900	-20
Out of school clubs	324,200	271,900	-16
Childminders	264,600	287,100	+9
Total	1,717,400	1,678,300	-2
Early Years			
Nursery schools	-	35,850	-
Primary schools with nursery and reception classes	-	475,400	-
Primary schools with reception classes	-	276,500	-
Total	-	787,750	-

Source: MORI

¹ Some figures have changed due to anomalies corrected since publication of the 2001 survey.

- 3.17** Ratios among childcare settings are not rising at the same rate as in the period 1998 – 2001 (except for childminders). When ratios rise, we assume that there is more take up generally (higher number of enrolled to places) or more take up of part time places in particular.

Table 3.7: **Ratio of Enrolments to Places (0-7 year olds)**

	2003
	No
Base: All providers	
Childcare	
Full daycare	1.47
Playgroups	1.43
Out of school clubs	0.97
Childminders	0.87
<hr/>	
Early Years	
Nursery schools	1.33
Primary schools with nursery and reception classes	0.96
Primary schools with reception classes	0.86

Source: MORI

Note: Ratio calculated by dividing number of enrolments by places (0-7 year olds)

The total number of places was 1,250,000. There was a change to the question about childcare places since the 2001 Survey. In 2003 the question asked about registered full time places for 0-7 year olds, whereas in 2001 it asked about 0-7 year olds and also about children over 8, and any other places (not registered). As a result comparisons should not be made with the 2001 data.

4 Workforce Composition

INTRODUCTION

4.1 This section looks at the composition of the workforce. It covers the following issues:

- Size of workforce
- Age
- Under represented groups (gender, ethnicity, disabilities)
- Pay

4.2 The Childcare workforce overall has grown by 2%, from 274,500 in 2001 to 279,100 in 2002/03. This is driven by the expansion of the full daycare workforce, greater than the decline in playgroups and out of school clubs.

There was a greater increase in total hours worked since the Labour Force Survey shows that the average number of hours per worker in the sector rose by 12%. Hours worked also differ dramatically between types of provider, for example staff in full day care settings working longer average hours than in playgroups.

SIZE OF WORKFORCE

CHILDCARE

4.3 The full daycare workforce continues to grow, reflecting the increase in capacity reported above. The rise also demonstrates the ability of the sector to continue to attract new workers.

4.4 The average number of staff per place over the whole 0–7 age group sector has moved closer to the minimum requirement of one employee to four places (i.e. 1:4) for two year olds, and is still well within the 1:8 ratio for 3–7 years olds.

4.5 In addition to other employed staff, many providers also made use of volunteers, trainees and agency staff. One in three full daycare settings used agency staff compared to one in ten for out of school and playgroups.

Table 4.1: **Number of Paid Employees**

	2001	2003	% change
Base: All paid staff in provision	No	No	±%
Childcare			
Full daycare	94,300	111,100	+18
Playgroups	79,800	69,600	-13
Out of school clubs	28,100	25,500	-9
Childminders	72,300	72,900	+1
Total	274,500	279,100	+2
Early Years			
Nursery schools	–	4,350	–
Primary schools with nursery and reception classes	–	43,900	–
Primary schools with reception classes	–	34,300	–
Total	–	82,550	–

Source: MORI

EARLY YEARS

- 4.6** Use of unpaid volunteers was highest (40% of all staff) in primary schools with reception classes. 26% of nursery staff were volunteers and 30% of staff in primary schools with nursery and reception classes were volunteers.
- 4.7** Larger early years settings tend to employ more paid staff (11 on average in nursery schools, 10 in primary schools with nursery and reception classes and 6 in primary schools with reception classes).
- 4.8** Nursery schools and primary schools with nursery and reception classes were much more likely to use agency staff – 74% and 71%, respectively, compared with 59% for primary schools with reception classes.

AGE

CHILDCARE

- 4.9** In the playgroup and childminder sectors around half of the workforce is aged under forty, this rises to nearly two thirds for out of school clubs and three quarters for full daycare. Overall, the 50+ years age bracket has increased on average by 3% whilst the 20-24 years age bracket has fallen by the same amount.
- 4.10** Childminder and playgroup staff continue to have a slightly older profile, whilst full daycare is the most successful at attracting younger people.

EARLY YEARS

- 4.11** Paid staff are predominantly aged 30 and above, but around two in five are under 40. There is a very similar age profile across all three types of setting.

4.12 This represents a slightly older profile than the female working population at large (according to Labour Force Survey), where 16% are under the age of 25.

Table 4.2: **Age of Paid Workforce (%)**

	16-19	20-24	25-29	30-39	40-49	50+
Base: All paid staff in provision	%	%	%	%	%	%
Childcare						
Full daycare	11	30	18	17	13	7
Playgroups	2	5	7	40	33	13
Out of school clubs	9	18	12	24	21	12
Childminders			6*	42	34	18
Early Years						
Nursery schools	1	6	7	27	32	23
Primary schools with nursery and reception classes	1	6	12	29	31	19
Primary schools with reception classes	1	5	10	25	36	21

Source: MORI

Note: * 20-29 years

Note: Table percentages may not add up to 100% as don't know/refused not shown

UNDER REPRESENTED GROUPS

CHILDCARE

4.13 The childcare workforce continues to be predominantly female. The out of school sector has the highest proportion of male workers – just under one in ten of the workforce. It would appear that men are still not attracted to childcare as a full-time career, although a significant number are prepared to work (probably part-time) in out of school clubs.

4.14 The proportion of those with disabilities remains a small minority (1-2%), whilst the proportion of ethnic minority staff holds level – an average of around 8% across the childcare sector.

EARLY YEARS

4.15 While the sector is not very good at attracting men or workers who have a disability, nursery schools and primary schools with nursery and reception classes do employ a relatively high percentage of workers from minority ethnic groups. This is largely due to more nursery schools and primary schools with nursery and reception classes being based in London, and in deprived and urban areas, where the proportion of the minority ethnic population tends to be high.

Table 4.3: **Paid Workforce Composition**

	<i>Male</i>	<i>Disability</i>	<i>Ethnicity</i>
Base: All paid staff in provision	%	%	%
Childcare			
Full daycare	2	1	8
Playgroups	1	1	4
Out of school clubs	9 (-2)	2	9 (-4)
Childminders	1	2 (+1)	13 (+2)
Early Years			
Nursery schools	1	1	11
Primary schools with nursery and reception classes	1	1	9
Primary schools with reception classes	2	*	2

Source: MORI

Note: Figures in brackets show 2003 – 2001 percentage change

Note: * equals less than 1% but greater than 0.5%

PAY

CHILDCARE

- 4.16** Pay levels have not changed markedly from 2001 to 2003. There is some rise among ‘other staff’ (not supervisors) slightly above inflation, which may indicate the impact of minimum wage among this group. ‘Supervisors’ pay levels have not risen at all. This may be due to the rise in pay for lower paid staff.
- 4.17** Out of school staff, continue to be slightly better paid (average hourly pay for ‘other staff’ £5.30 compared to £5.00/£4.80 among playgroups and full daycare).

EARLY YEARS

- 4.18** Nursery school workers attract the highest pay, £25,400 overall for those paid annually and £7.08 per hour for those paid by the hour – comparable figures for primary schools with nursery and reception classes and primary schools with reception classes are £21,900/£6.63 and £20,500/£6, respectively.
- 4.19** On average, heads/early years co-ordinators are paid £36,500 in nursery schools, £31,000 in primary schools with nursery and reception classes and £29,000 in primary schools with reception classes.
- 4.20** Pay is very similar to the national average amongst settings and the top 20% most deprived wards, across all three types of setting.

Table 4.4: **Pay for Paid Staff (paid per hour)**

	2001	2003	Top 20% most deprived wards (2003)
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Base: All paid staff in provision

Childcare

Full daycare	Supervisors	£5.50	£5.50	£5.50
	Other staff	£4.50	£5.00	£5.00
Playgroups	Supervisors	£5.50	£5.60	£5.30
	Other staff	£4.50	£4.80	£4.70
Out of school clubs	Supervisors	£6.00	£5.90	£6.00
	Other staff	£4.90	£5.30	£5.40

Early Years

Nursery schools	Nursery nurses	–	£7.50	£7.90
	Other staff	–	£6.30	£6.30
Primary schools with nursery and reception classes	Nursery nurses	–	£7.50	£7.20
	Other staff	–	£6.00	£5.70
Primary schools with reception classes	Nursery nurses	–	£6.90	£6.90
	Other staff	–	£5.90	£5.90

Source: MORI

5 Workforce Qualifications and Training

INTRODUCTION

- 5.1** The quality of childcare and early years provision is dependent on the staff employed. This section looks at the qualifications and training received by staff.

QUALIFICATIONS

CHILDCARE – SENIOR STAFF

- 5.2** The national standards for under eight’s daycare and childminding require that the registered provider in a daycare setting (full daycare, sessional out of school clubs and crèches) have a person in charge, who is present, who is qualified to Level 3 or above. In full day care settings supervisors must also hold a Level 3 qualification. Where a provider does not meet the qualification requirement of the national standards, he/she may agree an action plan with the Ofsted Childcare Inspector, detailing how this requirement will be met.
- 5.3** The proportion of managers in these three groups who hold at least Level 3 qualifications (i.e. Level 3 and **above**) has risen to 85% for full daycare, 77% for playgroups and 64% for out of school clubs.

Table 5.1: **Qualifications of Managers/Heads/Early Years Co-ordinators (% holding)**

	Level 2	Level 3	Level 4/5
	%	%	%
Childcare			
Full daycare	6	66 (+4)	20 (+4)
Playgroups	8 (-8)	67 (+9)	10 (+1)
Out of school clubs	12 (-5)	52 (+12)	12 (-3)
Childminders	7 (+2)	15 (+1)	1 (-2)
Early Years			
Nursery schools	1	18	76
Primary schools with nursery and reception classes	1	16	80
Primary schools with reception classes	4	14	78

Some figures have changed due to anomalies corrected since publication of the 2001 survey

Source: MORI

Note: Figures in brackets show 2003 – 2001 percentage change

5.4 The national standards require that childminders have completed a local authority approved childminder pre-registration course within 6 months of commencing childminding. Over three quarters (77%) reported having attended a preparatory or introductory course of training when they were first registered (up from two thirds in 2001).

5.5 The proportion of childminders reported as holding 'any relevant qualification' has risen dramatically from 34% in 2001 to 64% in 2003. Overall, a third now hold a Level 3 qualification (32%) up from just 14% in 2001.

EARLY YEARS – SENIOR STAFF

5.6 The majority of heads/early years co-ordinators are qualified to at least Level 4, virtually all to Level 3.

5.7 Most common qualifications are a B Ed and PGCE Teaching Certificate.

CHILDCARE – OTHER STAFF

5.8 Among playgroups and out of school clubs, the level of qualifications held by supervisors and other paid childcare staff combined remains fairly static. Around a third are qualified to Level 3 and one in five to Level 2, similar to 2001.

5.9 However, among full daycare settings the proportion of staff holding Level 2 qualifications has risen from 11% in 2001 to 21% in 2003. But a decrease can be seen in those holding Level 3, a fall from 60% in 2001 to 51% in 2003. Presumably, this reflects the continued expansion of the full daycare sector and the subsequent increase in numbers of more junior staff, who are more likely to hold Level 2 rather than Level 3 qualifications.

Table 5.2: **Qualifications of Supervisors/Nursery Nurses and other Paid Childcare and Early Years Staff (% holding)**

	Level 2	Level 3	Level 4/5
	%	%	%
Childcare			
Full daycare	21 (+10)	51 (-9)	3 (+1)
Playgroups	18 (-3)	34 (+1)	3 (+1)
Out of school clubs	19 (+1)	28 (-3)	2 (-1)
Early Years			
Nursery schools	10	66	3
Primary schools with nursery and reception classes	9	54	3
Primary schools with reception classes	9	34	3

Some figures have changed due to anomalies corrected since publication of the 2001 survey

Source: MORI

Note: Figures in brackets show 2003-2001 percentage change

EARLY YEARS – OTHER STAFF

- 5.10** Like heads/early years co-ordinators, early years teachers are generally very highly qualified, to at least Level 4 – and virtually all to Level 3. The most common qualifications are BEd and PGCE Teaching Certificate.
- 5.11** Nursery nurses in the early years sector are most commonly qualified to Level 3. The pattern is very similar across all types of settings.
- 5.12** Only around half of the other paid support staff employed in nursery schools, primary schools with nursery and reception classes or primary schools with reception classes have any relevant qualifications, but between one in five (primary schools with reception classes) and one in three (nursery schools) are currently working towards a qualification.

STAFF TRAINING

CHILDCARE

- 5.13** Nearly half of all group childcare settings report having a training budget. The highest average spend per head is in full daycare (£368) followed by out of school clubs (£148).
- 5.14** However, these figures should be treated with some caution because in both years nearly half of senior managers did not know how much had been spent on training and although interviewees were asked to exclude money obtained via grants in their response, in some cases this information may not have been available.
- 5.15** For this period the main funding streams for training the workforce were through the Learning and Skills Council and two funding streams allocated to Local Authorities and their Early Years Development and Childcare Partnerships. One of these being the training element (£7m) of the Childcare Grant and the other from the European Social Fund for Unblocking Barriers to Training for Individuals.
- 5.16** Childminders tend to access less training – due to constraints faced by this sector in terms of time available for training and the availability of suitable cover (just 1% employed an assistant). However, there has been a large increase in training undertaken – a rise from 41% in 2001 to 61% in 2003.

Table 5.3: **Training Budget and Spend**

	<i>Have training budget</i>	<i>Average spend/head</i>
	%	£
Childcare		
Full daycare	50	368
Playgroups	43	61
Out of school clubs	44	148
Childminders	–	80
Early Years		
Nursery schools	97	359
Primary schools with nursery and reception classes	84	573
Primary schools with reception classes	88	750

Source: MORI

EARLY YEARS

- 5.17** More providers have a training budget than a formal training plan. Nursery schools undertake more training (virtually all have a training budget), but spend less per member of staff than other early years providers.
- 5.18** Primary schools with nursery and reception classes and primary schools with reception classes in larger settings are more likely to have both a training plan and a training budget.
- 5.19** However, these figures should be treated with some caution because in both years nearly a quarter of heads in nursery schools and over half of early years co-ordinators in primary schools did not know how much had been spent on training and although interviewees were asked to exclude money obtained via grants in their response, in some cases this information may not have been available.
- 5.20** For this period the main funding for training the workforce were two funding streams allocated to Local Authorities and their Early Years Development and Childcare Partnerships. One of these being the Early Years Training and Development grant (£7million) and the other Foundation Stage funding (£32 million). Funding was also available through the Learning and Skills Council and the European Social Fund for Unblocking Barriers to Training

AVAILABILITY OF TRAINING

CHILDCARE

- 5.21** The majority of managers in group childcare settings (73% to 83%) are satisfied with the current training provision – even though the level of qualifications held by their staff fall short of government targets (only a third to a half of staff hold a Level 3 qualification).
- 5.22** Fewer childminders are satisfied with current levels of training provision (49%) – but the proportion saying it is ‘about right’ has grown significantly since 2001, when only a quarter (27%) were satisfied.

EARLY YEARS

5.23 Nursery school heads are the most satisfied with the levels of training received by their staff.

5.24 A higher proportion of primary schools have training budgets than have written training plans.

Table 5.4: **Training Provision**

	<i>Training plan</i>	<i>About right</i>	<i>Too much</i>	<i>Too little</i>
Base: All providers	%	%	%	%
Childcare				
Full daycare	70	78	2	19
Playgroups	53	83	2	14
Out of school clubs	62	73	2	23
Childminders	12	49	3	8
Early Years				
Nursery schools	81	85	1	13
Primary schools with nursery and reception classes	66	71	1	28
Primary schools with reception classes	69	74	1	23

Source: MORI

Note: Table percentages may not add up to 100% as 'don't knows' not shown

6 Recruitment and Retention

INTRODUCTION

6.1 Growth is needed in the overall childcare workforce to meet the targets in the National Childcare Strategy. Therefore, this chapter considers issues around the recruitment of staff and equally importantly, the extent to which the sector as a whole is retaining them.

RECRUITMENT

6.2 Given that the full daycare sector is still expanding, it is not surprising to see that around three quarters of settings have been involved in recruiting over the last 12 months. A similar proportion of nursery schools have also been involved in recruiting.

6.3 Over half of playgroups, out of school clubs, and primary schools with nursery and reception classes have also had to recruit in the last year – illustrating the fluidity of the childcare and early years workforce.

Table 6.1: **Recruitment in the Last 12 Months**

	<i>% of Settings Recruiting¹</i>	<i>Recruitment Rate²</i>
	%	
Childcare		
Full daycare	74	31 (-5)
Playgroups	57	22 (-5)
Out of school clubs	60	36 (-20)
Early Years		
Nursery schools	78	24
Primary schools with nursery and reception classes	61	20
Primary schools with reception classes	45	23

Source: MORI

Base: ¹ All providers

Note: ² This is calculated by dividing the total number recruited by the total number currently employed plus those leaving their current employment minus those recruited. It should be noted that this recruitment rate therefore includes the 'churn within the sector' as well as staff being recruited to the sector

Note: Figures in brackets show percentage change 2003-2001

- 6.4** Around half of full daycare and out of school clubs reported difficulties filling vacancies over the previous 12 months, as did a third of nursery schools, a quarter of playgroups and primary schools with nursery and reception classes and 1 in 8 of primary schools with reception classes.
- 6.5** Difficulties were reported in the recruitment of supervisors as well as childcare staff among all the group childcare settings, and the recruitment of early years teachers in particular among early years settings. The top issue mentioned among all of the settings were the general lack of applicants as well as a shortage of experience and qualifications.

EMPLOYEE TURNOVER

- 6.6** The turnover rate is higher in childcare settings than early years, with out of school clubs having the highest turnover. Many settings are also losing staff, though at a lower rate than they are recruiting. When looking at these figures it is important to note that the survey is unable to capture staff lost through settings that have closed.
- 6.7** Nursery schools have the highest proportion of staff losses (and highest turnover rate) among early years settings – primary schools with reception classes the least. Full daycare settings have the highest proportion of staff losses but not the highest turnover rate within the childcare sector.

Table 6.2: **Staff Turnover**

	% losing staff ¹	Turnover rate ²
	%	
Childcare		
Full daycare	69	18 (-2)
Playgroups	49	14 (-1)
Out of school clubs	54	23 (-2)
Early years		
Nursery schools	55	11
Primary schools with nursery and reception classes	39	9
Primary schools with reception classes	24	9

Source: MORI

Base: ¹ All providers

Note: Figures in brackets show percentage change 2003-2001

Note: ² This is calculated by dividing the total number leaving their employment by the total currently employed less the difference between those recruited and those leaving their current employment. It should be noted that this turnover rate therefore includes the 'churn within the sector' as well as staff leaving the sector

7 Business Operation and Performance

INTRODUCTION

7.1 This section considers the business characteristics and performance of the childcare sector only. It covers the following issues:

- Ownership
- Profitability
- Business management

OWNERSHIP

7.2 Patterns of ownership differ markedly between different kinds of provision. Full daycare settings are mostly in the private sector (78%, down 3% from 2001). Playgroups are mostly in the voluntary sector (68%, up 13% from 2001). The majority of out of school clubs are based in the private and voluntary sector. Overall, the voluntary sector has increased its share of the sector across all types of provision.

Table 7.1: **Ownership of Provision (%)**

	<i>Full daycare</i>	<i>Playgroups</i>	<i>Out of school clubs</i>
	%	%	%
Private sector	78 (-3)	26 (-2)	36 (-1)
Voluntary sector	9 (+4)	68 (+13)	40 (+8)
Local authority	6 (0)	4 (0)	10 (-3)
School/college ¹	7 (+6)	2 (-2)	14 (-5)
Other	4 (-5)	4 (-10)	4 (-3)

Some figures have changed due to anomalies corrected since the 2001 publication.

Source: MORI

Note¹: Please note that this is shown for 'school' only in 2001 figures

Note: Table percentages may not add up to 100% due to rounding

Note: Figures in brackets show 2003-2001 percentage change

PROFITABILITY

7.3 Business performance varies considerably, full daycare and childminders (private sector) are most likely to run profitable operations, and playgroups and out of school clubs (voluntary sector) more likely to break even. Overall, there is a small improvement in profitability.

Table 7.2: **Business Performance (%)**

	<i>Profitable</i>	<i>Break even</i>	<i>Making a loss</i>
Base: All providers	%	%	%
Full daycare	43 (-1)	27 (-4)	12 (+2)
Playgroups	28 (+3)	56 (+2)	11 (-5)
Out of school clubs	29 (0)	42 (-2)	19 (-2)
Childminders	57 (+1)	33 (0)	7 (-1)

Some figures have changed due to anomalies corrected since the 2001 publication.

Source: MORI

Note: Table percentages may not add up to 100% due to exclusion of don't knows

Note: Figures in brackets show 2003-2001 percentage change

Table 7.3: **Full Daycare Business Performance by Ownership (%)**

	<i>Profitable</i>	<i>Break even</i>	<i>Making a loss</i>
Base: All providers	%	%	%
Private sector	52	22	9
Voluntary sector	19	52	22
Local authority	5	26	29
School	13	43	30
Other	25	41	21

Source: MORI

Note: Table percentages may not add up to 100% due to exclusion of don't knows

Table 7.4: **Playgroups Business Performance by Ownership (%)**

	<i>Profitable</i>	<i>Break even</i>	<i>Making a loss</i>
Base: All providers	%	%	%
Private sector	40	51	7
Voluntary sector	24	58	13
Local authority	26	53	9
School	17	48	6
Other	13	72	12

Source: MORI

Note: Table percentages may not add up to 100% due to exclusion of don't knows

Table 7.5: **Out of School Clubs Business Performance by Ownership (%)**

	<i>Profitable</i>	<i>Break even</i>	<i>Making a loss</i>
Base: All providers	%	%	%
Private sector	41	33	13
Voluntary sector	23	49	24
Local authority	11	43	31
School	33	39	16
Other	18	52	26

Source: MORI

Note: Table percentages may not add up to 100% due to exclusion of don't knows

BUSINESS MANAGEMENT

7.4 There are noticeable differences in the proportions of organisations with a business or training plan. Both are more prevalent in the full daycare and out of schools sectors.

Table 7.6: **Business and Training Plans (% providers having a plan)**

	<i>Full daycare*</i>	<i>Playgroups*</i>	<i>Out of school clubs*</i>	<i>Childminder</i>
Base: All providers	%	%	%	%
Business Plan	56	35	57	17
Training Plan	70	53	62	12

Source: MORI

Note: *Business plan updated in last two years

Appendix A: Summary of Holiday Club Provision

CHARACTERISTICS OF PROVISION

1. The total number of holiday clubs was 2,781.
2. A third of settings were run by a voluntary/community or church group, and a similar proportion were owned by the manager or are part of a chain.
3. Almost three quarters of holiday clubs had been operating for over five years, indicating stability in the sector.
4. Around a quarter of holiday clubs were making a profit, but a fifth were operating at a loss.

PLACES AND CHILDREN

5. The total number of childcare places for 0-7 year olds in holiday clubs was 121,700 and 122,800 children 0-7 were enrolled¹.
6. The average number of childcare places for 0-7 year olds was 44.7 and the average number of children aged 0-7 years enrolled was 44.1.

CHARACTERISTICS OF STAFF

7. The overall number of paid and unpaid staff was 26,600. The number of paid staff was 21,900 and the number of unpaid volunteer staff was 4,700.
8. Three in five paid staff were aged between 20 and 39 and one fifth were male. Ten percent were from an ethnic minority group and two percent had a disability.
9. The average hours worked per week by paid childcare staff was 31½, with all types of staff apart from other paid childcare staff, tending to work full time (over 30 hours a week).
10. Just seven percent of settings had used agency staff in the last 12 months.
11. The average salary for paid childcare staff was £6,000 per annum and for those paid hourly it was £6.20 per hour. The average annual salary for senior managers was £12,900 per annum.

¹ It should be noted that some places are part-time places – i.e one place could be used by more than one child. For example one place could be used by one child in the morning and another in the afternoon. 121,700 childcare places were obtained from a base of 2,725 providers, 56 providers did not give this information.

TRAINING

- 12. Over two thirds of senior managers felt that the amount of training received by their staff in the last year was about right, but one quarter thought they had received too little.
- 13. Two thirds of holiday clubs had a training plan, and three in five had a training budget.
- 14. Average spend on training in the past year among those with a training budget was around £1,200, an average of £50 per paid member of staff.

QUALIFICATIONS OF STAFF

- 15. Over two in five of paid childcare staff and play workers hold some kind of qualification relevant to working with children or young people. Overall, one in seven hold a qualification at Level 2 and a quarter at Level 3.
- 16. Two in five managers were qualified to Level 3 and a further one in eight were qualified to Level 4. Most supervisors, around two in five, were qualified to Level 3. Only just over one quarter of other paid childcare staff hold any qualifications, with just one in seven qualified to Level 2 and one in fourteen qualified to Level 3.
- 17. Around a quarter of paid childcare staff were currently working towards a new qualification, the majority were not.
- 18. One in five senior managers were NVQ assessors.

RECRUITMENT AND RETENTION

- 19. In total, around 10,000 paid childcare staff were recruited in the last 12 months. This gave an overall recruitment rate² of 56%.
- 20. Adverts in the local press and word of mouth were the most common methods of recruiting new staff.
- 21. Two in five holiday clubs had had a great deal or a fair amount of difficulty in recruiting staff in the last 12 months.
- 22. The average length of service amongst all paid staff at their current setting was three years and four months, rising to six years and nine months for senior managers.
- 23. Around two in five settings had lost at least one paid member of staff in the previous 12 months, with a total of 5,900 staff leaving across all settings.
- 24. Of those who left the organisation in the last 12 months, it was believed that two in five (41%) obtained other posts in the childcare and early years sector; one in four (26%) went to jobs in other sectors and one in ten (10%) didn't take up any other employment.
- 25. The staff turnover rate³ across the whole sector was 33%, and employment growth⁴ was 23%.

2 This is calculated by dividing the total number recruited by total currently employed plus those leaving their current employment minus those recruited. It should be noted that this recruitment rate therefore includes the 'churn within the sector' as well as staff being recruited to the sector.

3 This is calculated by dividing the total number leaving their employment by the total currently employed less the difference between those recruited and those leaving their current employment. It should be noted that this turnover rate therefore includes the 'churn within the sector' as well as staff leaving the sector.

4 This is calculated by dividing net change in staff by the total currently employed less the difference between those recruited and those leaving their current employment. It should be noted that this growth rate therefore includes the 'churn within the sector' as well as numbers of individuals both joining and leaving the sector.

Appendix B: Technical Details

SAMPLE SOURCES

EARLY YEARS

The sample frame for the surveys of early years providers – nursery schools, primary schools with nursery and reception classes, and primary schools with reception classes – comprised of all relevant providers on the DfES Edubase of all education establishments in the UK. The database provided was current at 13 November 2002. Establishments that had taken part in other research for DfES recently were excluded from the sample frame.

Audiences were defined as follows:

- Nursery schools: all nursery schools;
- Primary schools with nursery and reception classes: primary schools coded as having nursery classes, and primary schools that were not flagged as having nursery classes on the database but where the lowest age of pupils was 3 years⁴;
- Primary schools with reception classes: primary schools coded as having no nursery classes, and where the lowest age of pupil was 4 or 5.

CHILDCARE

The main sample frame for childcare audiences – childminders, full daycare providers, playgroups, out of school clubs and holiday clubs – comprised of all relevant providers on the Childcarelink database held by Opportunity Links. The database was current at 7 December 2002.

However, Childcarelink was not felt to contain details of all providers in all parts of the country. Therefore some individual Childcare Information Services (CISs) were contacted to obtain further leads. Additional contact details were obtained and included in the sample frame from: Essex, Dudley, Medway and Leeds.

Before drawing the sample, all childcare providers who had not given consent for their contact details to be made available for research were excluded from the sample frame.

It should be noted that the day nursery⁴ (full daycare) audience was actually defined as including several types of providers on the Childcarelink database: full-day nurseries; combined nursery centres; extended day playgroups; early excellent centres and private nursery schools. This was to bring the audience definition in line with the National Daycare Standards category “full daycare” which will define the audience for future surveys.

4 This is calculated by dividing net change in staff by the total currently employed less the difference between those recruited and those leaving their current employment. It should be noted that this growth rate therefore includes the ‘churn within the sector’ as well numbers of individuals both joining and leaving the sector.

In the 2001 survey, this audience was only comprised of two categories: day nurseries and private nursery schools. However, findings from 2002/03 have been analysed focussing on just the two categories surveyed last year – day nurseries and private nursery schools – to allow comparison with findings from the 2001 survey.

For both childcare and early years audiences, the profile of the universe and populations (after certain records had been excluded) were checked, in terms of level of rurality, and levels of deprivation according to the Index of Multiple Deprivation (IMD), in order to maintain the representativeness of the population. They were found to be similar.

SAMPLING

Target sample sizes were 850 for all audiences except nursery schools. For nursery schools, a target of 200 interviews was set, reflecting that only 245 sample leads were available (all available leads were issued for fieldwork for this audience).

Sampling for early years audiences was conducted by MORI, whilst sampling for childcare audiences was carried out by Opportunity Links, with input from MORI.

For all audiences (except nursery schools), the sample was stratified by region in such a way as to equalise reliability of findings in each area. Samples for early years audiences were then ordered, within each region, by local authority area, and then by level of deprivation, level of rurality and number of children, before leads were selected at random.

Samples for childcare audiences were ordered, within each region, by childcare information service area, and then level of deprivation and level of rurality, before leads were selected at random.

For early years audiences, sufficient leads were drawn to allow for a response rate of 70% assuming that 100% of leads were eligible. For day nursery and playgroup audiences, sufficient leads were drawn to allow for an eligibility rate of 90% and a response rate of 80%. For childminders, and out of school clubs sufficient leads were drawn to allow for an eligibility rate of 80% and a response rate of 80%. For holiday schemes, sufficient leads were drawn to allow for an eligibility rate of 80% and a response rate of 60%.

In addition, some reserve sample was drawn in advance for contingency.

Some broad quotas were also set to monitor the profile of the achieved sample by level of deprivation, and level of rurality.

QUESTIONNAIRE DESIGN AND PILOTING

One core questionnaire was used for all audiences, except childminders who had a different questionnaire. In addition, the questionnaire was versioned somewhat between early years and childcare audiences.

In the main, the survey replicated the questionnaire from the 2001 survey to allow comparability of findings. However, it was up-dated, developed and fine-tuned by MORI in close consultation with colleagues at DfES.

A pilot was conducted in November 2002 to test the questionnaire wording and interview length, and the final questionnaires incorporated some minor changes to address issues emerging from the pilot.

FIELDWORK AND SURVEY ADMINISTRATION

Prior to fieldwork, all organisations in the samples were mailed an advance letter explaining about the survey and encouraging participation. In addition, for all audiences except childminders, a form was enclosed prompting respondents to collect information about staff qualifications and pay prior to the interview.

The survey interviews were conducted by telephone using CATI (computer assisted telephone interviewing) by MORI Telephone Surveys. Fieldwork for early years audiences was conducted during the period 9 December 2002 and 11 March 2003. Fieldwork for day nurseries, playgroups and out of school clubs was conducted during the period 14 February – 2 April 2003. Fieldwork among childminders was conducted from 7 February to 11 March and holiday schemes during the Easter holidays and the two weeks following, 14 April – 12 May 2003.

In order to maximise response rates, all organisations were called at least 12 times or until a definite outcome was achieved. In addition, respondents who refused to be interviewed, were contacted a second time by a MORI Telephone Surveys Supervisor.

ACHIEVED SAMPLES AND RESPONSE RATES

Details of the number of interviews achieved, response rates, and outcomes for all sample leads are provided in the table below.

Response rates and sample outcomes by audience

	Nursery schools	Primary with nursery and reception classes	Primary with reception but no nursery classes	Play-groups	Child-minders	Full daycare	Out of school clubs	Holiday clubs
	N	N	N	N	N	N	N	N
Telephone numbers issued	245	1,325	1,229	1,383	1,440	1,238	1,396	1,711
Successful interviews	200	850	850	850	850	850	850	850
Unadjusted response rate	82%	64%	69%	61%	59%	69%	61%	50%
Unsuccessful:								
Bad numbers	4	9	2	70	52	50	191	191
Ineligible	5	29	18	70	149	76	259	375
Not available in fieldwork	1	30	6	4	2	6	11	23
Adjusted response rate	85%	68%	71%	69%	69%	74%	75%	65%
Refused/stopped part way	6	191	214	132	131	198	126	116
No interview achieved after 12 calls/region, deprivation or rurality quota reached/not needed	29	216	139	257	255	108	150	347

Source: MORI

DATA ANALYSIS AND WEIGHTING

Data analysis and weighting were carried out by MORI Telephone Surveys.

Questions where there were 10% or more "other" responses were also back-coded by MTS.

Data among all audiences was weighted by region to adjust for the regionally stratified sample design and to ensure that findings were representative of providers across England as a whole. In addition, figures were grossed up to the current estimated national totals of providers across the country.

- For early year's audiences, data are weighted and grossed using population and profile data from the DfES Edubase of all early years providers, current at 7 December 2002. However, adjustments were also made to the target population and profiles on a regional basis in light of findings from the survey on level of ineligibility within the sample. The proportion of leads found to be ineligible were: 4.0% among nursery schools; 5.1% among primary schools with nursery classes; 2.1% among primary schools with nursery and reception classes.

- For childcare audiences: day nurseries, playgroups and childminders data are weighted and grossed using population and profile data from Ofsted records as at January – March 2003. Some caution should be exercised when comparing 2003 to 2001 findings as different sources of data were used to inform the weighting and grossing of data each year.
- For out of school clubs and holiday schemes, data are weighted according to population and profile data from the ChildcareLink database as at 7 December 2002. For out of school clubs and holiday schemes, as with early years audiences, adjustments were made to the target population and profiles on a regional basis in light of findings from the survey on level of ineligibility within the sample (as data weighted back to ChildcareLink database rather than Ofsted). The proportion of leads found to be ineligible were: 18.6% among out of school clubs and 21.9% among holiday schemes.
- It should be noted that 2002/03 data for out of school clubs are representative of those held on the Opportunity Links database but that care should be taken when comparing with findings in 2001 as different sources of data were used to inform the weighting and grossing of data. The Opportunity Links database in 2002/03 is likely to be a less accurate source. Like the other childcare audiences, out of school clubs were weighted by region and also by whether single (out of school only) or dual provider to ensure aggregate data is representative and reflects the true profile of out of school clubs according to the ChildcareLink database as at 7 December 2002. Those out of school clubs with no paid staff were also excluded from interview.
- For holiday schemes there is no comparison to be made with 2001, as the data was neither weighted nor grossed in that year. It should be noted that 2002/03 data for holiday schemes are representative of those held on the Opportunity Links database but that this is likely to be a less accurate source than Ofsted. Like the other childcare audiences, holiday schemes were weighted by region and also by whether single (holiday club only) or dual provider and by whether multi-provider to ensure aggregate data is representative and reflects the true profile of out of school clubs according to the ChildcareLink database as at 7 December 2002. Those holiday clubs with no paid staff or multi-provider duplicates were also excluded from interview.

The weighting process had an impact on the effective sample sizes of the eight audiences. The actual and effective sample sizes are provided in the table below.

Actual and Effective Sample Sizes

	<i>Actual sample</i>	<i>Effective sample</i>
	N	N
Base: All providers		
Nursery schools	200	199
Primary schools with nursery and reception classes	850	733
Primary schools with reception classes	850	726
Playgroups	850	745
Full daycare	850	777
Childminders	850	762
Out of school clubs	850	769
Holiday schemes	850	667

Source: MORI

Appendix C: Statistical Reliability

SAMPLING TOLERANCE

Respondents represent only samples of total populations, so we cannot be certain that the figures obtained are exactly those we would have if everybody had taken part ("true values").

However, we can predict the variation between the sample results and the true values from knowledge of the size of the samples on which results are based and the number of times a particular answer is given. The confidence with which we make this prediction is usually chosen to be 95% – that is, the chances are 95 in 100 that the true value will fall within a specified range.

The table below illustrates the predicted ranges for different sample sizes and percentage results at the "95% confidence interval".

Size of sample on which survey result is based

Effective sample size	Approximate sampling tolerances applicable to percentages at or near these levels		
	10% or 90% ±	30% or 70% ±	50% ±
50	8	13	14
100	6	9	10
200	4	6	7
400	3	5	5
800	2	3	4

For example, with a sample size of 200 where 30% give a particular answer, the chances are 19 in 20 that the true value – which would have been obtained if the whole population had been interviewed – will fall within the range of +6 percentage points from the sample result i.e., between 24% and 36%.

COMPARING SUB-GROUPS

When results are compared between separate groups within a sample, the difference may be "real" or it may occur by chance (because not everyone in the population has been interviewed). To test if the difference is a real one, that is, if it is "statistically significant", we again have to know the size of the samples, the percentage of respondents giving a certain answer and the degree of confidence chosen.

If we assume a "95% confidence interval", the differences between the results of two groups must be greater than the values given in the table below:

Size of sample on which survey result is based

*Approximate sampling tolerances applicable to percentages
at or near these levels*

Effective sample size	10% or 90%	30% or 70%	50%
	±	±	±
50 and 50	12	18	20
100 and 100	8	13	14
300 and 300	5	7	8
600 and 600	3	5	6

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