



Department  
for Education

# **Childcare and Early Years Providers Survey 2013**

**TNS BMRB Executive Summary  
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Prepared by:

Richard Brind, Stephen McGinigal, James Lewis and Shadi Ghezelayagh (TNS BMRB),  
with Heather Ransom, Jennifer Robson, Cathy Street and Zoe Renton (NCB Research  
Centre)

# 1 Summary

## 1.1 Introduction

The 2013 Childcare and Early Years Providers Survey was commissioned by the Department for Education and conducted by TNS BMRB, collecting a wide range of information about childcare and early years provision across England in 2013. The survey covered topics including the number and characteristics of providers, and the number of children attending provision. It also measured the composition and qualifications of the workforce, as well as the financial aspects of provision.

The survey covered a number of different types of childcare provision, including group-based provision, out of school provision and childminders. It also collected information about early years settings in maintained schools.

Where appropriate, the findings from the 2013 survey have been compared with those from similar surveys conducted since 1998.

## 1.2 Key findings

More detailed key findings are to be found in summary boxes at the start of each chapter in this report. However, some of the findings of note from the 2013 survey include:

### **Number of settings**

- The long term increase in the number of full day care providers continued in 2013, though the rate of increase appears to have slowed. In total there were 17,900 full day care settings in 2013 (compared to 17,600 in 2011).
- The number of settings offering sessional care fell from 7,900 in 2011 to 7,100 in 2013, continuing a long term decline (and driven by a decrease in the number of sessional settings in the 70 per cent least deprived areas).
- The number of active childminders fell from 48,800 in 2011 to 46,100 in 2013. While there had been a pause in the longer term decline in the number of childminders (both registered and active) in 2011, the downwards trend recommenced in 2013.

### **Places and attendance**

- The number of registered places in full day care settings rose by ten per cent between 2011 and 2013. This rate of growth was faster than the increase in the number of full day care settings and was driven by an increase in the number of places that each setting offered.

- Between 2011 and 2013, the number of full day care places in the 30 per cent most deprived areas rose by 19,600 (an increase of 10 per cent), while the number of sessional places in those areas rose by 20,500 (an increase of 42 per cent).

### **Funded provision**

- 74 per cent of full day care settings and 68 per cent of sessional settings were delivering funded provision for two year olds at the time of the survey (September to December 2013).
- Seven per cent of childminders were delivering funded provision for two year olds at the time of the survey. However, signs were positive that their role in the funded provision would increase over time, with around a quarter (23 per cent) of those who do not currently offer it planning to start delivering the provision before the start of the 2014-15 academic year and a further 25 per cent planning to offer the provision at some later date.

### **Staffing**

- Reflecting the increase in the number of full day care settings, the total number of full day care staff also increased between 2011 and 2013, rising by six per cent.
- Apprentices accounted for a small but significant proportion of the workforce in different types of group-based and out of school settings (three to six per cent).
- Reflecting the increasing qualification levels of staff, pay levels within the sector increased more quickly than pay in the broader UK economy between 2011 and 2013.

### **Qualifications**

- The proportion of staff holding qualifications relevant to working with children and young people continued to increase in 2013.
- The proportion of staff in sessional settings with at least a level 3 (A level or equivalent) qualification rose from 79 per cent in 2011 to 84 per cent in 2013. This represents significant progress since 2008, when only 61 per cent of sessional staff held such qualifications.
- There was also an increase in the proportion of staff with at least a level 3 (A level or equivalent) qualification in full day care settings (from 84 per cent in 2011 to 87 per cent in 2013).

- An increase in the proportion of childminders with at least a level 3 (A level or equivalent) qualification (from 59 per cent to 66 per cent between 2011 and 2013) was driven by an improvement in the 70 per cent least deprived areas.

## **Finances**

- Many providers had been limiting their fee increases and childminders were the least likely to have increased fees, with only 23 per cent having done so in the past year.
- Less than half of sessional settings (47 per cent) reported an increase in fees in the past 12 months and there was a similar situation amongst full day care settings (53 per cent).
- Only a third of out of school settings had increased fees in the past year (32 per cent of before school and after school settings).
- The proportion of sessional settings operating at a loss increased from 14 per cent in 2011 to 21 per cent in 2013.

## **1.3 Methodology**

The main survey interviews were conducted using a computer assisted telephone interviewing (CATI) method, between 24<sup>th</sup> September and 20<sup>th</sup> December 2013.

A total of 10,271 interviews were conducted with providers based in England. Of these, 7,578 interviews were with group-based and out of school providers, 902 were with childminders and 1,791 were with school-based providers.

The results were weighted and grossed to provide national estimates.

The 2013 survey is the eleventh in a series of surveys which have tracked changes to the sector over time, during which there have been a number of updates to the survey design. Questionnaire content has been amended over the years, while changes to the way in which Ofsted collects information about providers has also necessitated significant changes to the way in which the sampling for the survey is conducted. Furthermore, there have been changes to the way in which certain types of care are defined.

As such, while many trends are consistent, it should be borne in mind that some changes in the data from year to year may be influenced by the points above. The text of this key findings section, as well as the text of the main report, focuses on those changes where trends are reliable.

A more detailed summary of changes to the survey over time, and of the technical aspects of the project, can be found in Appendix 1 and in the Technical Appendix which is published alongside this report.

## 1.4 Additional Information

Copies of all of the reports can be downloaded free of charge from:

<http://www.gov.uk/government/organisations/department-for-education/about/statistics>

Further information about this research can be obtained from Maura Lantrua, Childcare, Special Educational Needs & Children's Strategy - Research & Analysis, Department for Education, Sheffield.

Email: [Maura.LANTRUA@education.gsi.gov.uk](mailto:Maura.LANTRUA@education.gsi.gov.uk)

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