



National Survey for Wales 2014-15 Childcare

25 August 2016
SB 38/2016

A set of questions on childcare was included in the National Survey to provide further evidence to support childcare policy development. Questions were asked of parents about their use, availability and their satisfaction with childcare.

Key findings

- 49% of parents with children aged 0 to 14 said that they used childcare.
- 77% of these parents used unpaid family or friends to care for their children; 24% combined this with more formal childcare.
- 46% find it difficult to afford childcare; 52% of those with children aged 3 or 4 find it difficult.
- 40% with a child aged 5 to 14 find it difficult to get childcare during the school holidays.
- 64% said that they did, or would be able to, access Welsh language childcare.
- 93% were satisfied with the quality of the formal childcare they use (69% very satisfied, 24% fairly satisfied).

46%
find it
difficult
to afford
childcare



About this bulletin

This bulletin provides more detailed analysis of the results for the questions on **childcare** which were included for the first time in the National Survey for Wales 2014-15.

The full questionnaire is available on the [National Survey web pages](#).

Additional tables can be accessed via [StatsWales](#).

In this bulletin

Introduction	p2
Childcare questions	p3
Use of childcare	p3
Types of childcare	p5
Affordability	p7
Welsh language childcare	p8
Satisfaction with quality	p9
Key quality information	p11
Terms and definitions	p15

The National Survey for Wales covers a wide variety of topics affecting people and their local area. The headline results from the 2014-15 survey, based on over 14,000 face-to-face interviews, were first published in June 2015. An expanded version of the National Survey began in 2016 covering similar topics as well as a selection of topics from four other surveys that it has replaced. The first results from the new survey will be published in June 2017.

Introduction

In 2013 the Welsh Government's [Building a Brighter Future: Early Years and Childcare Plan](#) set out their commitment to improve the life chances and outcomes of all children in Wales.

The plan states that: *“Attending a high-quality childcare setting or early years education provider has a significant influence on a child’s development, especially those children who come from a disadvantaged background. Affordable, flexible and accessible childcare also enables parents to work or access training, and supports our drive to increase economic growth, tackle poverty and reduce inequalities.”*

It also states that the Welsh Government wishes to: *“improve the quality of childcare, develop proposals for flexible delivery of Flying Start childcare, parenting and early language support, consider a more flexible approach to the Foundation Phase, look at ways to improve the availability of wrap-around holiday childcare and play provision.”*

The National Survey questions on childcare were introduced in order to provide further evidence to support the policy development around childcare, to provide an evidence base and to help inform the progress of these initiatives. The questions asked will help determine whether factors such as the lack of childcare or its cost or inaccessibility may influence a parent’s decision not to work, or to work fewer hours. The availability of Welsh-medium childcare provision is also of particular interest to the Welsh Government.

The Building a Brighter Future policy will be refreshed over the coming months and the results from the National Survey will be used to inform both the plan and the Welsh Government’s free childcare offer.

The full questionnaire and results on childcare as well as a range of other National Survey topics can be found on the [National Survey for Wales web pages](#). Additional tables can be accessed via [StatsWales](#). More information about the survey methodology, potential uses of the results, and definitions of terms used in the bulletin, can be found in the [Key Quality Information](#) section at the end of this bulletin.

Childcare questions

Questions on childcare were asked for the first time in the 2014-15 National Survey for Wales. The majority of the questions asked were based on a set of questions used in the [Scottish Household Survey](#). In common with the National Survey, the Scottish Household Survey (SHS) is a continuous survey based on a sample of the general population in their own homes. The SHS covers a wide range of topics, and in 2003 it included a module on childcare. This module contained questions on different types of childcare arrangements, satisfaction with childcare and reasons for using childcare in relation to demographic characteristics. The results were then used together with findings from the wider survey to analyse the types of provision and whether satisfaction with childcare varied with the type of childcare provider used.

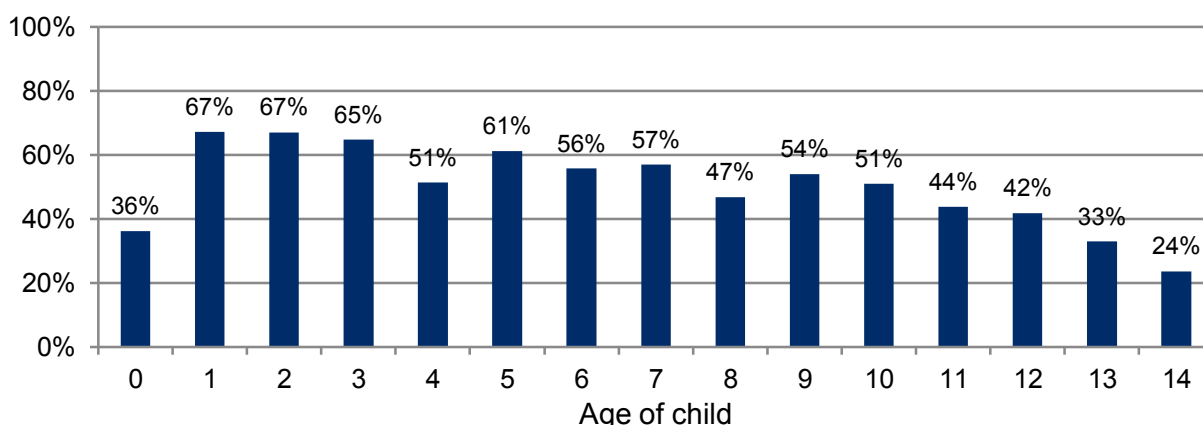
In the National Survey any respondent who was a parent/guardian of a child living in the household and aged 0 to 14 was asked the childcare questions. If there was more than one child in the house then one child was selected at random and the respondent was asked to think about this child when answering. They were initially asked if they ever needed to arrange for their child to be looked after so that they could work, study or go to training.¹ If they answered 'Yes' they were then asked who looked after their child followed by a series of questions relating to the types of childcare used and whether they were satisfied with it.

This bulletin analyses the results from the survey and the factors associated with the use of childcare and satisfaction with it.

Use of childcare

49% of parents with a child aged 0 to 14 said that they did need to use childcare. This varied by the age of the child asked about.

Chart 1: Need to arrange childcare, to work, study or go on training, by age of the child

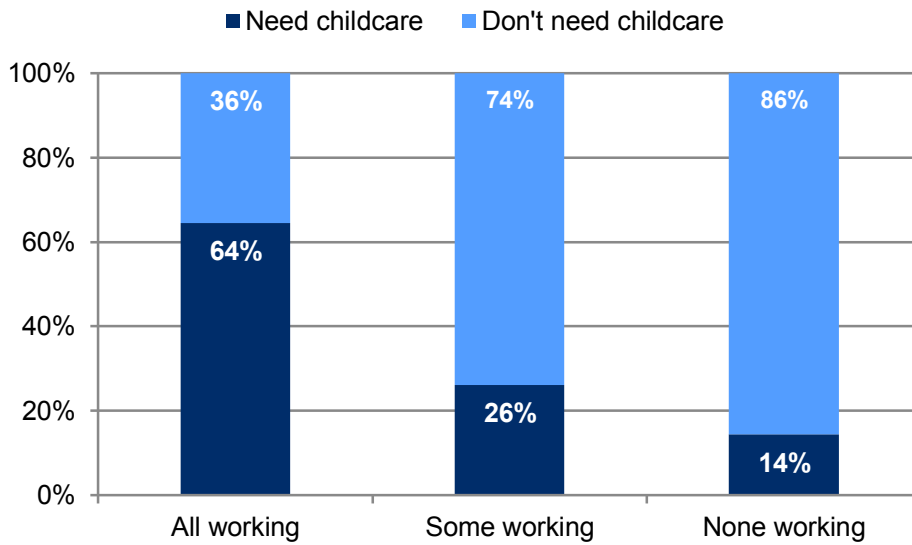


As shown in Chart 1, where the child is under a year old only around a third of parents needed to arrange childcare, this increased to over two thirds by the time the child is one. This is likely to be due to parental maternity/paternity leave covering some or all of a child's first year. From the age of 3 onwards, the need to arrange childcare shows, in general, a gradual decline as the age of the child increases.

¹ Parents were asked not to include childcare provided by their spouse/partner/the other parent or step parent

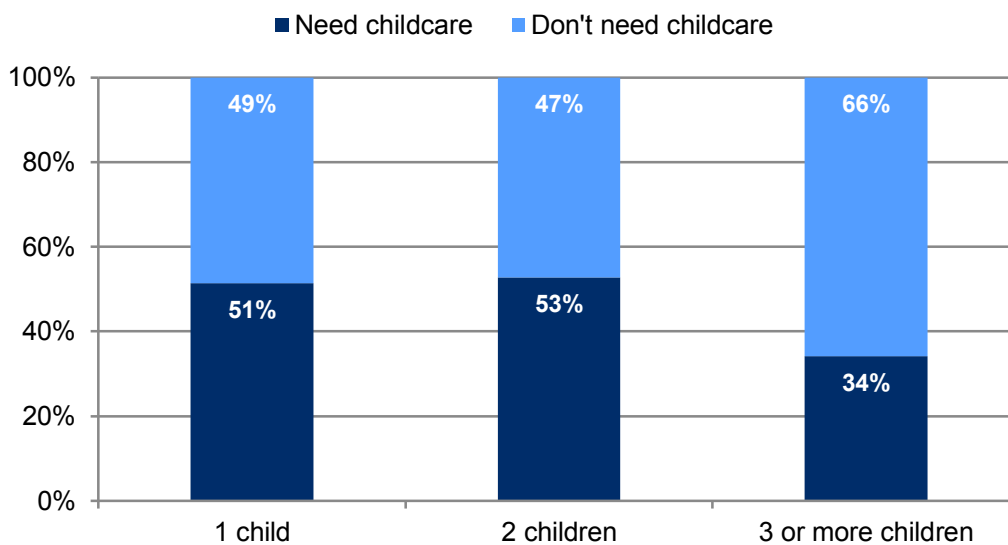
Chart 2 shows the need for childcare based on the employment status of the adult(s) in the household.

Chart 2: Need to arrange childcare, by employment status of household



It seems likely that the 14% of people in households where no-one was working required the childcare in order to study /train. Interestingly, 36% of households with children where both adults are working did not need to arrange childcare. This may be explained by the child being of school age and parents arranging their working hours to suit their childcare needs.

Chart 3: Need to arrange childcare, by number of children in household

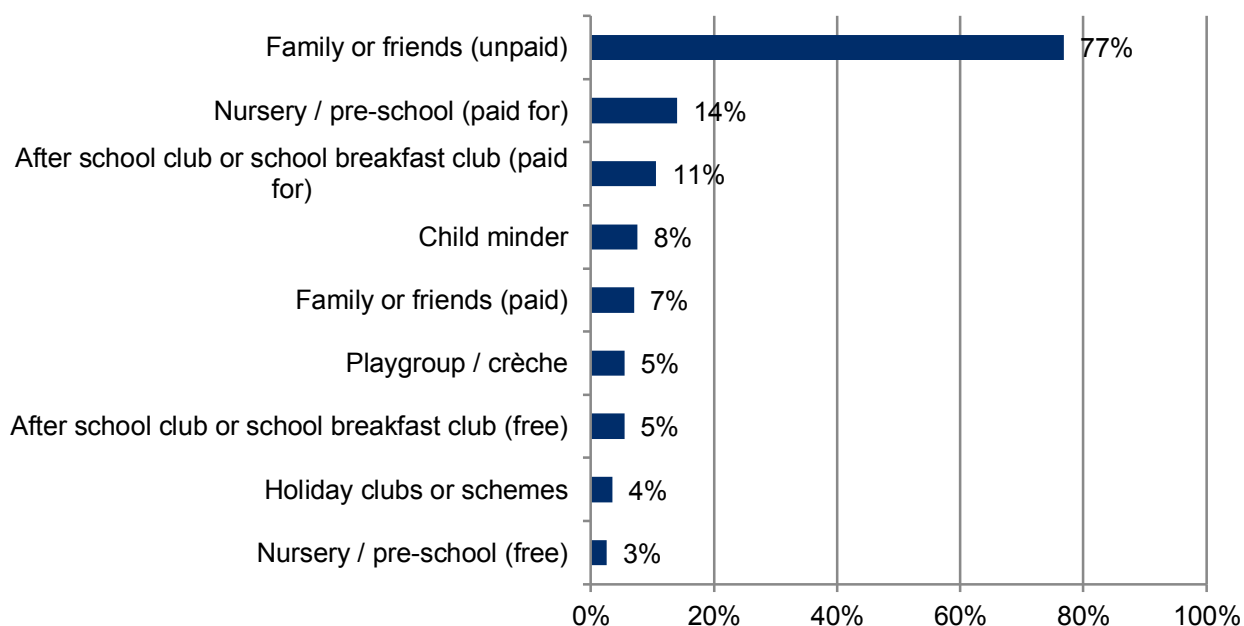


The presence of other children in the household also appeared to influence whether parents needed to arrange childcare. Chart 3 shows that households with either one or two children have similar childcare needs (approximately 50% require childcare and 50% don't). However, where a household has three or more children 66% of people said they did not need to arrange childcare so that they could work, study or go on training. This suggests that for the majority of larger families at least one parent remains at home to provide childcare.

Types of childcare

The types of childcare available varied widely and respondents could select more than one type of provision from a list of options which are shown in Chart 4 below.

Chart 4: Type of childcare used ^(a)



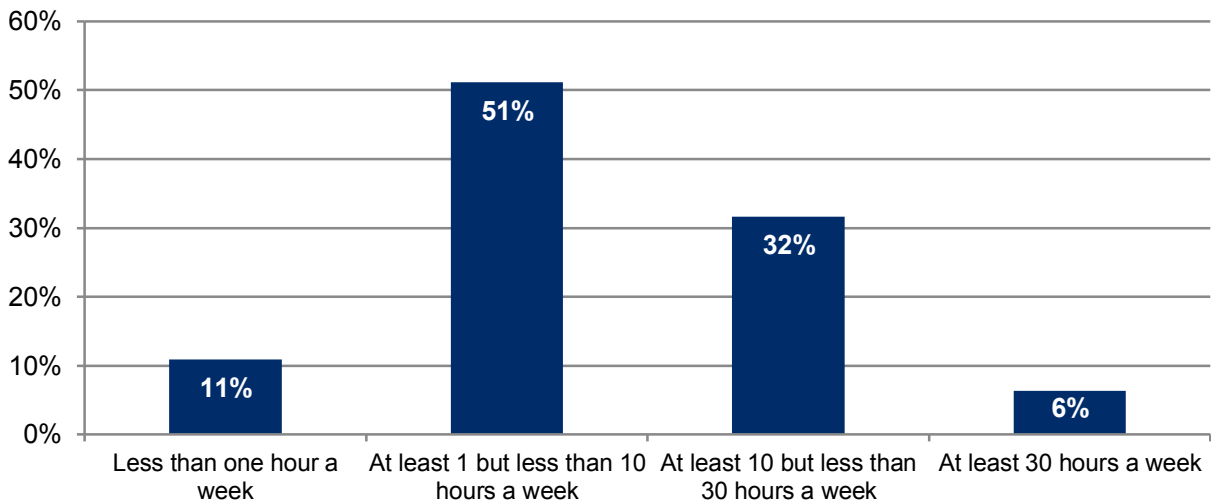
(a) 'Babysitter who comes to your house', 'Nanny', 'no-one' and 'other type of formal childcare' have been excluded from the chart as less than 1% gave these responses

By far the most popular form of childcare chosen was that given by friends or family for free – 77% of parents needing childcare selected this option. Whilst this was the most commonly-selected method for children of all ages, 30% of people also used other methods of childcare. The next most frequently-chosen method of childcare provision was attendance at a paid for nursery or pre-school (14% of parents) followed by paid for after-school or breakfast club provision (11%).

92% of people who were studying or working, and with a child aged 12 to 14, used unpaid family and friends to care for their child.

Those who did use family or friends for free were asked to provide the number of hours they cared for their child on an average week so that they could go to work. Chart 5 shows that 51% of childcare provided by family or friends was for between 1 and 10 hours per week and a further 32% for between 10 and 30 hours. 6% said that family and friends looked after their child for at least thirty hours per week.

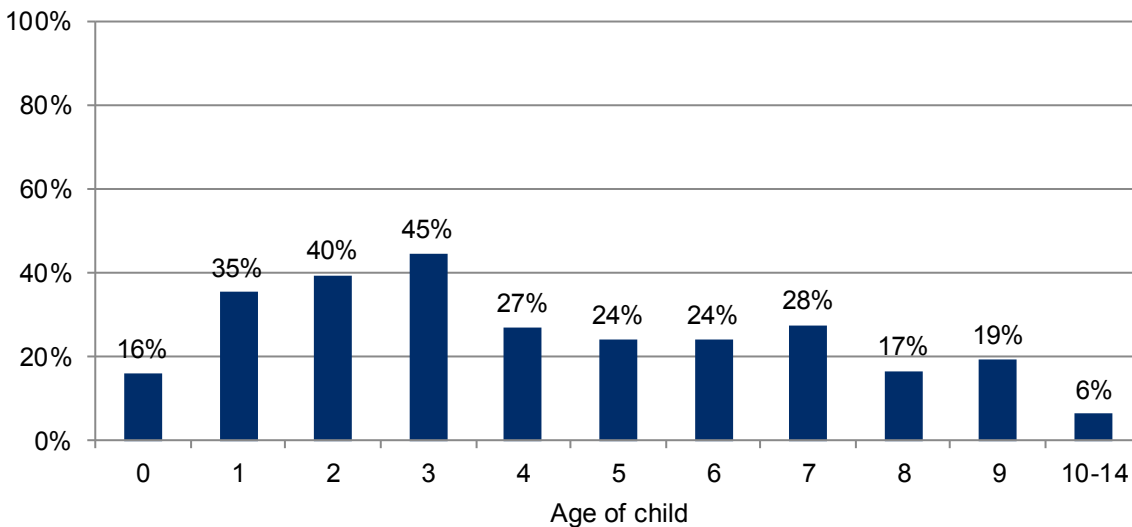
Chart 5: Hours per week the child is looked after by family or friends for free



Formal childcare

Parents who used formal types of childcare (that is, any childcare which wasn't provided by family or friends) were then asked a series of questions relating to their satisfaction with different elements of the provision. Chart 6 shows the proportion of parents who used formal childcare, by the age of the child.

Chart 6: Using formal childcare, by age of the child

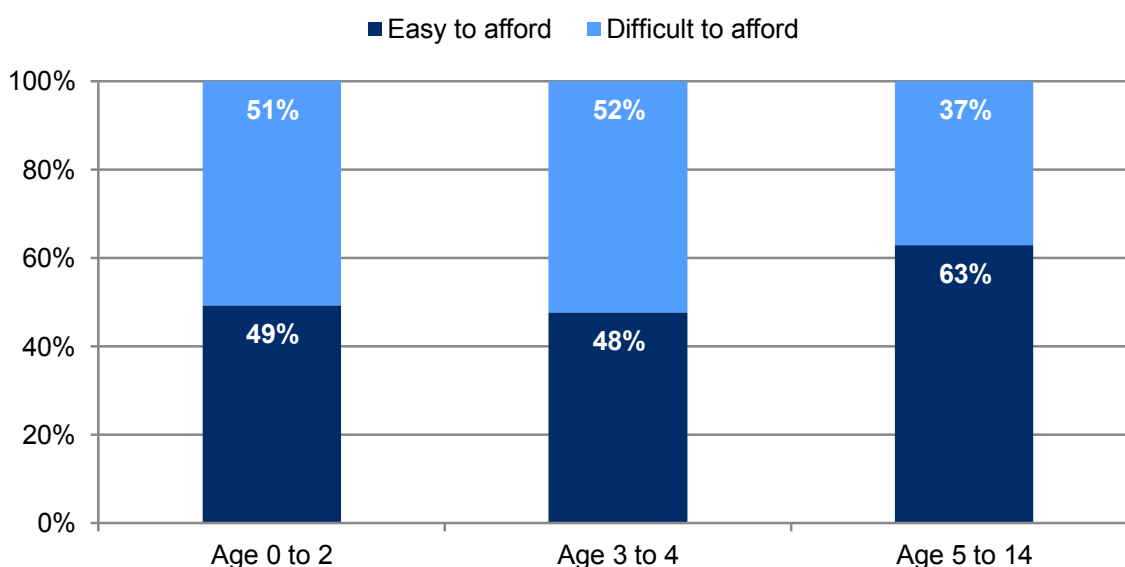


The proportion of parents who use formal childcare increases with the age of the child up to the age of 3, then drops once the child is 4 years old, presumably due to the child going to school.

Affordability of childcare

The first of these questions asked how easy or difficult parents found it to afford childcare for their child. This question was only relevant to the sub-group of parents who used formal childcare and the results are therefore based on the childcare arrangements for approximately 650 children. For this reason the categories 'Very easy' and 'Fairly easy' have been combined, as have 'Fairly difficult' and 'Very difficult'. Chart 7 shows that for children aged 0 to 2 there is a nearly equal split between those who find it easy and those who find it difficult to afford childcare. There are similar proportions for children aged 3 to 4, while a different pattern is seen for school aged children (aged 5 to 14) with 63% finding it easy to afford childcare and 37% finding it difficult to afford.

Chart 7: Ability to afford childcare, by age of child



Availability of childcare

Parents using formal childcare (both free and paid for) were then asked three questions on how easy or difficult they found it to get childcare at different times of the day and year.

Irrespective of child age the majority (over 70%) of these parents found it easy to find childcare that fitted in with their working hours.

Parents were also asked how easy or difficult it was to arrange childcare for their child during the school holidays and after school. Table 1 shows that for children aged 3 and over, the most difficult period of time for parents to cover was getting childcare during school holidays.

Table 1: Difficulty in getting childcare for different periods, by age of child

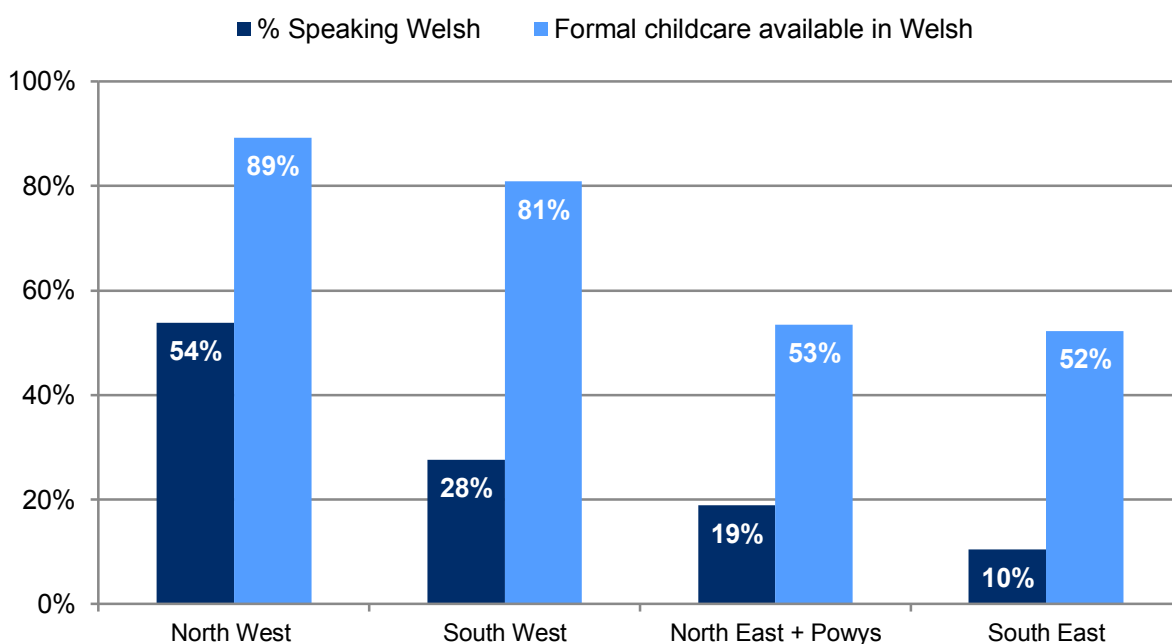
	to fit in with working hours	during school holidays	after school
Age 0 to 2	22%	16%	19%
Age 3 to 4	25%	38%	33%
Age 5 to 14	29%	40%	21%

In general the table shows that the parents, who have least difficulty in finding appropriate childcare, in all three timeframes, are those with children aged below 3. This perhaps reflects the fact that parents of very young children are likely to have year-round care arrangements where school holidays have less significance.

Welsh language childcare

The National Survey also asked a question regarding formal childcare provision (not family or friends) in the Welsh language.

Chart 8: Availability (parental opinion) of Welsh language childcare, by area²



Parents were asked whether they could get Welsh language childcare for their child or whether they thought they would be able access this type of childcare if they wanted to. 64% of people said that they did, or would be able to, access Welsh language childcare.

[Previous analysis of the National Survey](#) showed that 20% of people in Wales report that they can speak Welsh.

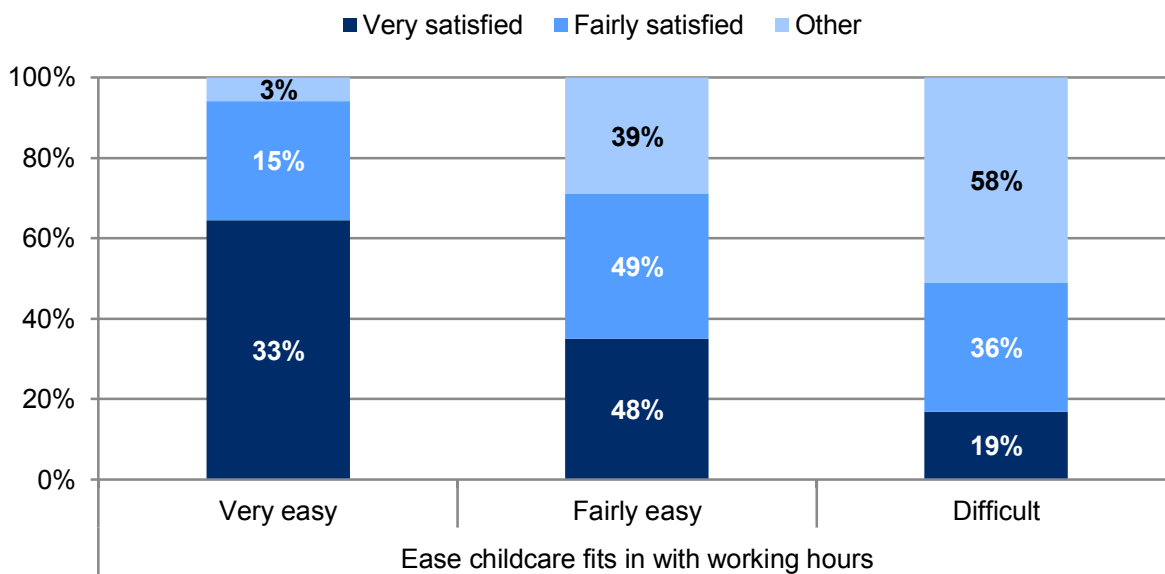
² For this chart 'North West' consists of Isle of Anglesey, Gwynedd and Conwy, 'South West' consists of Ceredigion, Pembrokeshire, Carmarthenshire and Swansea, 'North East and Powys' consists of Denbighshire, Flintshire, Wrexham and Powys. All other local authorities are categorised as 'South East'

Chart 8 shows an East -West split in the in the availability of Welsh language childcare by area, with just over half the parents using formal childcare in the South East, North East and Powys stating that they would be able to get childcare provision in the Welsh language, compared with 89% in the North West and 81% in the South West, where there are higher proportions of people who speak Welsh.

Satisfaction with the quality of childcare

Parents using formal childcare were asked about their satisfaction with its quality. 93% of parents were satisfied (69% very satisfied, 24% fairly satisfied). With 5% saying they were neither satisfied nor dissatisfied, this left 2% who were dissatisfied with the quality of childcare. Chart 9 shows that 33% of people who were very satisfied with the quality of their child’s childcare also found it very easy to get childcare that fitted in with their working hours. At the same time nearly a fifth (19%) of people who were also very satisfied with the quality had found it difficult to get childcare that fitted in with their working hours. Of the small group of people who were not satisfied with the quality of childcare, the majority (58%) found it difficult to fit it in with their working hours.

Chart 9: Satisfaction with quality of childcare by ease that childcare fits in with working hours



More in-depth analysis³ was carried out looking at the ‘very satisfied’ sub-group. A number of other factors from the survey results were considered as possible predictors for people’s satisfaction with the quality of childcare. These possible factors included: parental age, parental gender, child age, tenure type, highest qualification (of parent), Welsh speaking ability (of parent), satisfaction with play opportunities in the local area, ease of getting childcare that fits in with working hours, material deprivation and number of children in the family.

The findings from this analysis indicate that when all these factors are held constant the only one that has a significant influence on parents being ‘very satisfied’ was tenure type. Parents who were owner-occupiers had a higher likelihood of being ‘very satisfied’ with the quality of childcare, compared with parents who were living in a private rented property. This finding confirms similar

³ Logistic regression – for details see [Key Quality Information](#)

results found in a simple cross-tabulation of satisfaction with quality of childcare by tenure type. However, the reasons why tenure is a predictor of satisfaction are not explained by the analysis; this would require further investigation to understand. For example, tenure may be related to some other factor which has not been included in this analysis.

Key quality information

Background

The National Survey for Wales 2012-15 was carried out by TNS-BMRB and Beaufort Research on behalf of the Welsh Government. The results reported in this bulletin are based on interviews completed in 2014-15 (1st April 2014 – 12th April 2015 (fieldwork was extended slightly beyond the one year mark, in order to increase the achieved sample size).

Each year approximately 25,000 addresses were chosen randomly from the Royal Mail's Small User Postcode Address File. Interviewers visited each address, randomly selected one adult (aged 16+) in the household, and carried out a 25-minute face-to-face interview with them, which asked for their opinions on a wide range of issues affecting them and their local area. A total of 14,285 interviews were achieved in 2014-15.

Interpreting the results

Percentages quoted in this bulletin are based on only those respondents who provided an answer to the relevant question. Missing answers occur for several reasons, including refusal or an inability to answer a particular question and cases where the question is not applicable to the respondent.

Where a relationship has been found between two factors, this does not mean it is a causal relationship. More detailed analysis is required to identify whether one factor causes change in another.

Throughout this release, references are made to other sources of information. These sources have been identified by the National Survey team, through discussions with policy and analytical colleagues, and through a [comparability study](#) undertaken in early 2012. Checks are in place to ensure the quoted figures are the most up-to-date figures available at the time of publication.

The results of the National Survey are weighted to compensate for unequal selection probabilities and differential non-response (i.e. to ensure that the age and sex distribution of the final dataset matches that of the Welsh population).

National Statistics status

The [United Kingdom Statistics Authority](#) has designated these statistics as National Statistics, in accordance with the Statistics and Registration Service Act 2007 and signifying compliance with the [Code of Practice for Official Statistics](#).

National Statistics status means that official statistics meet the highest standards of trustworthiness, quality and public value.

All official statistics should comply with all aspects of the Code of Practice for Official Statistics. They are awarded National Statistics status following an assessment by the UK Statistics Authority's regulatory arm. The Authority considers whether the statistics meet the highest standards of Code compliance, including the value they add to public decisions and debate.

It is Welsh Government's responsibility to maintain compliance with the standards expected of National Statistics. If we become concerned about whether these statistics are still meeting the appropriate standards, we will discuss any concerns with the Authority promptly. National Statistics

status can be removed at any point when the highest standards are not maintained, and reinstated when standards are restored.

Well-being of Future Generations Act (WFG)

The Well-being of Future Generations Act 2015 is about improving the social, economic, environmental and cultural well-being of Wales. The Act puts in place seven well-being goals for Wales. These are for a more equal, prosperous, resilient, healthier and globally responsible Wales, with cohesive communities and a vibrant culture and thriving Welsh language. Under section (10)(1) of the Act, the Welsh Ministers must (a) publish indicators (“national indicators”) that must be applied for the purpose of measuring progress towards the achievement of the Well-being goals, and (b) lay a copy of the national indicators before the National Assembly. The 46 national indicators were laid in March 2016.

Information on indicators and associated technical information - [How do you measure a nation's progress? - National Indicators](#)

Further information is available - [Well-being of Future Generations \(Wales\) Act 2015](#).

The statistics included in this release could also provide supporting narrative to the national indicators and be used by public services boards in relation to their local well-being assessments and local well-being plans.

Quality report

A summary [quality report](#) is available, containing more detailed information on the quality of the survey as well as a summary of the methods used to compile the results.

Sampling variability

Estimates from the National Survey are subject to a margin of uncertainty. Part of the uncertainty comes from the fact that any randomly-selected sample of the population will give slightly different results from the results that would be obtained if the whole population was surveyed. This is known as sampling error.⁴ Confidence intervals can be used as a guide to the size of the sampling error. These intervals are calculated around a survey estimate and give a range within which the true value is likely to fall. In 95% of survey samples, the 95% confidence interval will contain the ‘true’ figure for the whole population (that is, the figure we would get if the survey covered the entire population). In general, the smaller the sample size the wider the confidence interval. Confidence intervals are included in the tables of survey results published on [StatsWales](#).

As with any survey, the National Survey is also subject to a range of other sources of error: for example, due to non-response; because respondents may not interpret the questions as intended or may not answer accurately; and because errors may be introduced as the survey data is processed. These kinds of error are known as non-sampling error, and are discussed further in the [quality report](#) for the survey.

⁴ Sampling error is discussed in more detail in the [Quality Report](#) for the National Survey.

Significant differences

Where the text of this release notes a difference between two National Survey results (in the same year), we have checked to ensure that the confidence intervals for the two results do not overlap. This suggests that the difference is statistically significant (but as noted above, is not as rigorous as carrying out a formal statistical test), i.e. that there is less than a 5% (1 in 20) chance of obtaining these results if there is no difference between the same two groups in the wider population.

Checking to see whether two confidence intervals overlap is less likely than a formal statistical test to lead to conclusions that there are real differences between groups. That is, it is more likely to lead to "false negatives": incorrect conclusions that there is no real difference when in fact there is a difference. It is also less likely to lead to "false positives": incorrect conclusions that there **is** a difference when there is in fact none. Carrying out many comparisons increases the chance of finding false positives. Therefore, when many comparisons are made the conservative nature of the test is an advantage because it reduces (but does not eliminate) this chance.

Where National Survey results are compared with results from other sources, we have not checked that confidence intervals do not overlap.

Regression analysis

There are different types of regression analysis that are used for different purposes. The type used here is called binary logistic regression. This is the regression technique most commonly used for survey data.

We used logistic regression to isolate the specific effects of individual factors (such as age and gender) on a particular outcome (such as satisfaction with quality of childcare). It allows us to look at the effect of each factor separately while keeping constant a range of other factors.

Using the statistical model that was produced, we were then able to explore the link between each factor and satisfaction with childcare, by adjusting the values in the statistical model for each respondent. This is sometimes known as average marginal effect. The results provide an indication of which characteristics/situations have the strongest influence on the original question (e.g. satisfaction with quality of childcare) when all other factors within the model are held constant. More details about how we did the analysis are available on request.

Technical report

More detailed information on the survey methodology is set out in the [technical report](#) for the survey.

Revisions

More information on our [revisions policy](#) is available.

Release policy

Information about the process for releasing new results is available from the Welsh Government's [statistics web pages](#).

Availability of datasets

The data behind the charts and tables in this release are published in spreadsheets on [StatsWales](#). An anonymised version of the annual datasets (from which some information is removed to ensure confidentiality is preserved), together with supporting documentation, has been deposited with the [UK Data Archive](#). For more information, please contact us (see below).

Further uses of the results

The results will be used extensively by Welsh Government policy teams, but they are also relevant to a wide range of other external organisations and individuals.

Further details

The document is available at:

<http://gov.wales/statistics-and-research/national-survey/?tab=current&lang=en>

Next update

This is not a regular output.

We want your feedback

We welcome any feedback on any aspect of these statistics which can be provided by email to surveys@wales.gsi.gov.uk

Open Government Licence

All content is available under the [Open Government Licence v3.0](#), except where otherwise stated.



Terms and definitions

Household

A household is defined as one person living alone or a group of people (not necessarily related) living at the same address with common housekeeping – that is, sharing a living room or sitting room or at least one meal a day.

People

Within this bulletin, 'people' refers only to adults aged 16 and over.

Parent

Within this bulletin, 'parent' refers to parent or legal guardian.