



Department  
for Education

# **Survey of Childcare and Early Years Providers and COVID-19**

**Research report**

**October 2020**

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**Department for Education**



Government  
Social Research

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## Notes on the data

- In this survey, 82% of all providers reported being open at the time of the survey. This compares to a maximum of 62% reported by the Department for Education's [Local Authorities Early Years attendance data collection](#) for the dates of 9 and 16 July 2020. Whilst there are different methods of data collection between the two sources, it is possible that the sample for this survey was biased towards those settings that were open and away from those which were temporarily or permanently closed.
- Where comparisons have been made within this report, these have not been statistically significantly tested.
- We asked providers to consider that 'before COVID-19' was before March 2020.
- We asked providers to think of a 'typical day' or 'typical week' when thinking about before COVID-19.
- Group-based providers who are part of a chain answered about provision run by their own branch.

## Executive Summary

The Department for Education commissioned NatCen Social Research and Frontier Economics to conduct an online survey with childcare providers entitled the Survey of Childcare and Early Years Providers and COVID-19 (SCEYP COVID). The purpose of this study was to understand how childcare providers have responded to the pandemic, the status of childcare provision and any potential longer-term consequences for the childcare market.

### The study

A nationally representative sample of group-based providers (GBPs), school-based providers (SBPs) and childminders (CMs) were invited to complete a 5-10-minute online survey between 2 July and 20 July. It is important to acknowledge that, given the fast pace of the Coronavirus pandemic, key announcements had occurred since the survey was launched<sup>1</sup> and that providers' responses related to experiences and expectations in July.

Topics covered in the survey include:

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

In total, 4,012 providers participated in the study; 396 SBPs, 1,368 GBPs and 2,248 CMs.

### Key findings

#### Operating models

- The majority of providers were open at the time of the survey (94% SBPs, 81% GBPs and 80% CMs).

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<sup>1</sup> For example, one key announcement was that the Government would continue with the block funding of free entitlement places in the Autumn, regardless of child attendance. See: [News story: Free childcare offers to continue during coronavirus closures](#)



- Just under a fifth of GBPs and CMs reported being temporarily closed at the time of the survey (19% GBPs, 19% CMs).
- Temporarily or permanently closed providers most commonly selected a lack of demand from parents as the reason for closure (46% of SBPs, 51% of GBPs, and 59% of CMs).
- Seventy per cent of open GBPs were open for five days a week at the time of the survey, compared with 95% of open GBPs before COVID-19. Forty-six per cent of open CMs were open for five days a week at the time of the survey, compared with 71% of open CMs before COVID-19.
- Twelve per cent of open GBPs were open for more than 10 hours per day at the time of the survey, compared to 27% of open GBPs before COVID-19. For CMs, 12% of open CMs were open for more than 10 hours a day at the time of the survey, compared with 34% of open CMs before COVID-19.
- Open GBPs and CMs with reduced hours most commonly selected a lack of demand from parents for the hours as the reason behind reduced opening days or hours (53% and 83%, respectively). SBPs most commonly selected that they were operating at reduced hours because they cannot adhere to COVID-19 related infection and prevention control measures if open for more hours (53%).

## Expectations for September

- Ninety per cent of open or temporarily closed GBPs expected to be open for 5 days a week in September, compared to 93% who were open 5 days a week before COVID-19. Sixty-two per cent of open or temporarily closed CMs expected to be open 5 days a week in September, compared to 70% before COVID-19
- Eighteen per cent of open and temporarily closed GBPs expected to be open for more than 10 hours a day in September, compared to 24% before COVID-19. Twenty-two per cent of open or temporarily closed CMs expected to be open for more than 10 hours a day, compared to 31% before COVID-19.

## Attendance

- Overall, for GBPs and CMs open at the time of survey, approximately half the average number of three-and four-year old children expected in a typical week attended the childcare setting at the time of the survey. For SBPs, approximately a third of three-and-four-year old children expected in a typical week attended the setting.

## Workforce

- Open GBPs had, on average, 11 paid staff before COVID-19, consisting of an average of 6 paid staff working full-time and an average of 5 paid staff working part-time. At the time of the survey, open GBPs had an average of 4 paid staff working full-time and 4 paid staff working part-time.
- Open SBPs had, on average, 16 paid staff before COVID-19, consisting of an average of 10 paid staff working full-time and an average of 5 paid staff working part-time. At the time of the survey, open SBPs had an average of 9 paid staff working full-time and 6 paid staff working part-time.
- Seventy-six per cent (76%) of open GBPs have made use of the Coronavirus Job Retention Scheme (CJRS) at any point, compared to 14% of open SBPs. At the time of the survey, open SBPs had an average of 1 staff furloughed and open GBPs had an average of 3 staff furloughed. It is important to note that early years settings could access the CJRS to cover up to the proportion of their salary bill which could be considered to have been paid for from their private income and so the setting was not entirely funded by the free entitlement or other Government sources. SBPs receive a majority of their funding from the free entitlements<sup>2</sup>, which may account for their reduced use of the scheme.

## Finances

- Typically, childminders received, on average, 79% of their income from parent-paid fees. For GBPs, parent-paid fees made up 50% of their income and for SBPs it made up 10% of their income.
- On average, open SBPs expected to receive £784 per week from parent-paid fees and received £198 at the time of the survey. On average, open GBPs expected to receive £3,644 per week from parent-paid fees and received £1,265 at the time of the survey. On average, open CMs expected to receive £553 per week from parent-paid fees and received £267 at the time of the survey.

## Financial sustainability

- Open GBPs and CMs were asked, based on what they knew about the current situation and upcoming developments (for example, changes to the Coronavirus Job Retention Scheme from August onwards), for how long they were reasonably confident that it would be financially sustainable to continue to run their childcare provision<sup>3</sup>. It is important to note that this survey was conducted before the Government's announcement on 20 July that Local Authorities would continue to

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<sup>2</sup> [Provider finances: evidence from early years providers 2019](#)

<sup>3</sup> SBPs were not asked this question as the decision to run provision is usually part of wider decisions concerning the larger school strategy.

be funded for the Autumn term at broadly the levels they would have expected to see in the 2020 autumn term had there been no coronavirus outbreak, which may or may not have influenced how open GBPs or open CMs may have responded to this question. Furthermore, it is likely that providers answered this based on parent demand and child attendance in July, which has since increased; an estimated 761,000 children attended early years settings on 15 October<sup>4</sup>.

- Forty-five per cent of open GBPs and 55% of open CMs reported that it will be financially sustainable to continue for another year or longer.

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<sup>4</sup> [Attendance in education and early years settings during the coronavirus \(COVID-19\) outbreak](#). Due to many children attending EY settings on a part-time basis, and some children not being present due to normal sickness or holiday absence, we would not expect all children to be in attendance on the day of the data collection.

## Introduction

Childcare provision in England is made up of approximately 33% of group-based providers (GBPs), 12% of school-based providers (SBPs) and 54% of childminders (CMs)<sup>5</sup>. Whilst CMs make up a large proportion of the providers in England, they make up a smaller proportion of the childcare places available due to the number of children they are able to look after; 66% of childcare places are provided by GBPs, 20% by SBPs and 14% by CMs<sup>5</sup>.

Childcare providers typically receive their income from parent-paid fees, free entitlement funding and from other sources, such as charitable donations or additional charges. On average, all providers received 59% of their income from parent-paid fees in 2019, with 29% from free entitlement funding and 12% from other sources<sup>6</sup>. However, this does vary greatly by provider type; 47% of private providers, 25% of voluntary providers and 75% of childminder's income comes from parent-paid fees. This is in comparison to nursery classes and maintained nursery schools, whereby 12% and 10% respectively of their income comes from parent-paid fees. Most of the remainder of their income comes from Government free-entitlement funding.

The COVID-19 pandemic and subsequent lockdown has resulted in a large amount of change for the childcare sector in England. From 23 March 2020, the Government instructed the temporary closure of early years settings, except for children of key workers and vulnerable children<sup>7</sup>. Later, the Government instructed that children were able to return to early years settings from 1 June<sup>8</sup>. During the pandemic, the Government continued to pay funding to local authorities for the free entitlements for two, three and four-year-olds, even if the provider had to close or there were no children attending due to COVID-19<sup>9</sup>. Therefore, the biggest financial challenge for childcare providers is the reduction in income from parent-paid fees due to lowered attendance rates. As described above, SBPs are less reliant on parent-paid fees than GBPs and CMs. Because of the difference in sources of income, and the greater financial risk to GBPs and CMs, who are more reliant on parent-paid fees, there are some sections of this report that primarily focus on GBPs and CMs, rather than SBPs.

In addition to the continuation of the free entitlement funding, other Government support was available to childcare providers, which includes:

- The Coronavirus Job Retention Scheme (CJRS): employers could apply for a grant to cover up to 80% of an employee's regular wages, up to a monthly cap of £2,500.

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<sup>5</sup> [Survey of Childcare and Early Years Providers: Main Summary, England, 2019](#)

<sup>6</sup> [Provider finances: evidence from early years providers 2019](#)

<sup>7</sup> [Press release: Schools, colleges and early years settings to close](#)

<sup>8</sup> [Guidance: Our plan to rebuild: The UK Government's COVID-19 recovery strategy](#)

<sup>9</sup> [News story: Free childcare offers to continue during coronavirus closures](#)

Early years settings could access the CJRS to cover up to the proportion of their salary bill which could be considered to have been paid for from their private income. From 1 July 2020, employers were able to bring back employees who had been previously furloughed for any amount of time and shift pattern, whilst still be able to claim a grant for the hours not worked<sup>10</sup>.

- The Self-Employment Income Support Scheme: eligible self-employed individuals (almost entirely childminders) were able to claim a grant if their business has been adversely affected due to COVID-19. Two grants were available, the first grant was for 80% of their gross profits and the second for 70% of their gross profits<sup>11</sup>.
- Business rates relief: The Chancellor of the Exchequer announced that private early years and childcare settings will be eligible for a business rates holiday for one year. That means non-local authority providers of childcare (registered with Ofsted and providing EYFS) will not be charged business rates in 2020. Nurseries which are eligible for a charitable status relief will also not be charged business rates in 2020 to 2021. Some settings operate from shared spaces which may also benefit from a 100% rates relief<sup>12</sup>

## The study

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

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

A nationally representative, randomly selected sub-sample of providers from the postponed mainstage SCEYP 2020 sample were invited to take part<sup>13</sup>. SBPs, GBPs and CMs were invited to take part in the survey.

Providers were invited to complete a 5-10-minute web-survey between 2 July – 20 July 2020

In total, 4,012 providers participated in the study; 396 SBPs, 1,368 GBPs and 2,248 CMs.

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<sup>10</sup> [Collection: Coronavirus Job Retention Scheme](#)

<sup>11</sup> [Guidance: Check if you can claim a grant through the Self-Employment Income Support Scheme](#)

<sup>12</sup> [Business rates: nursery \(childcare\) discount 2020 to 2021: coronavirus response](#)

<sup>13</sup> [Collection: Statistics: childcare and early years](#)

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

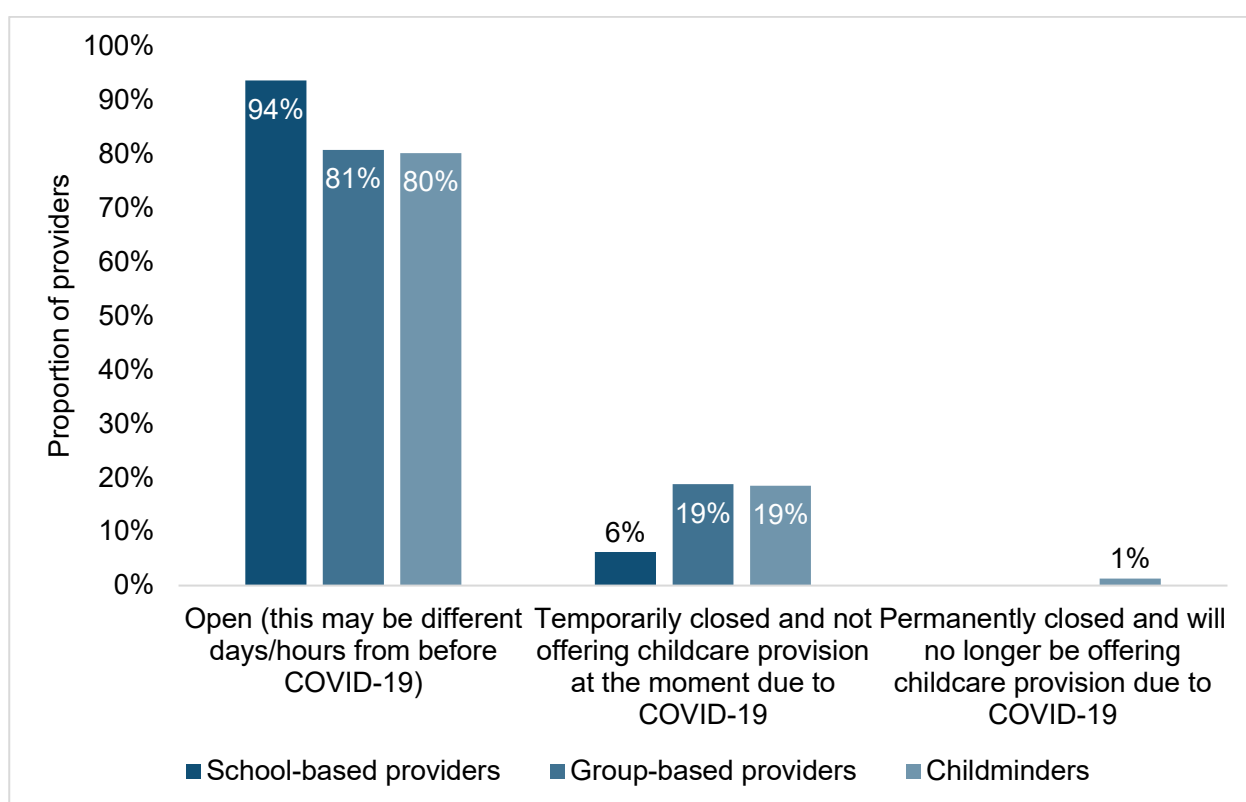
More information is provided in the technical report published alongside this release.

# Operating models

## Operating status

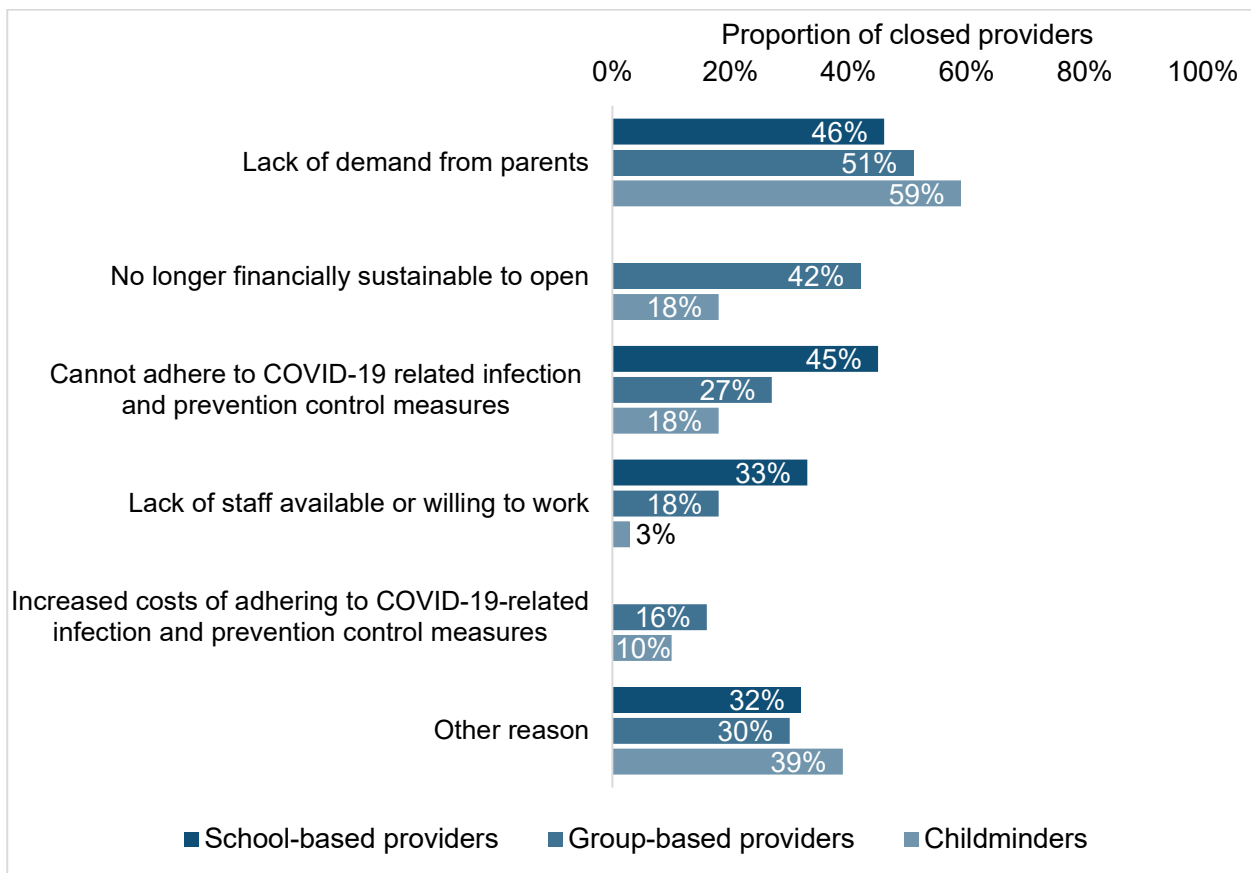
The majority of providers reported being open at the time of the survey (Figure 1; Accompanying Table 2). Ninety-four per cent of school-based providers (SBPs), 81% of group-based providers (GBPs) and 80% of childminders (CMs) were open at the time of the survey, though this may have been with different opening hours/days. Nineteen per cent of GBPs, 19% of CMs and 6% of SBPs reported being temporarily closed due to COVID-19. One per cent of CMs reported being permanently closed due to COVID-19.

**Figure 1: Operating status at time of the survey, by provider type**



Temporarily or permanently closed providers most commonly selected a lack of demand from parents as the reason for closure (46% of SBPs, 51% of GBPs, and 59% of CMs; Figure 2; Accompanying Table 8). In addition, 42% of temporarily or permanently closed GBPs selected that it was no longer financially sustainable to open and 45% of temporarily or permanently closed SBPs selected that they were closed because they cannot adhere to COVID-19 related infection and prevention control measures.

**Figure 2: Proportion of providers who reported being temporarily or permanently closed due to the below reasons, by provider type**



*Notes: Low unweighted base for SBPs so these findings should be interpreted with caution. SBP figures are not presented for two options due to data being suppressed because of low number of observations.*

## Opening days

Providers were asked how many days they were open in a typical week before COVID-19 and, for those providers who were open at the time of the survey, how many days they were currently open. To allow for a comparison between these two time-points, only providers who reported being open at the time of the survey are compared.

Open SBPs were, on average, open for 5 days per week before COVID-19, compared to 4.8 days per week at the time of the survey (Table 1; before COVID-19 figures, author calculations; at the time of the survey figures, Accompanying Table 4). Open GBPs were, on average, open for 5 days before COVID-19, compared to 4.5 days at the time of the survey (Accompanying Tables 3 and 4). Open CMs were, on average, open for 4.7 days per week before COVID-19, compared to 4 days at the time of the survey (Accompanying Tables 3 and 4).

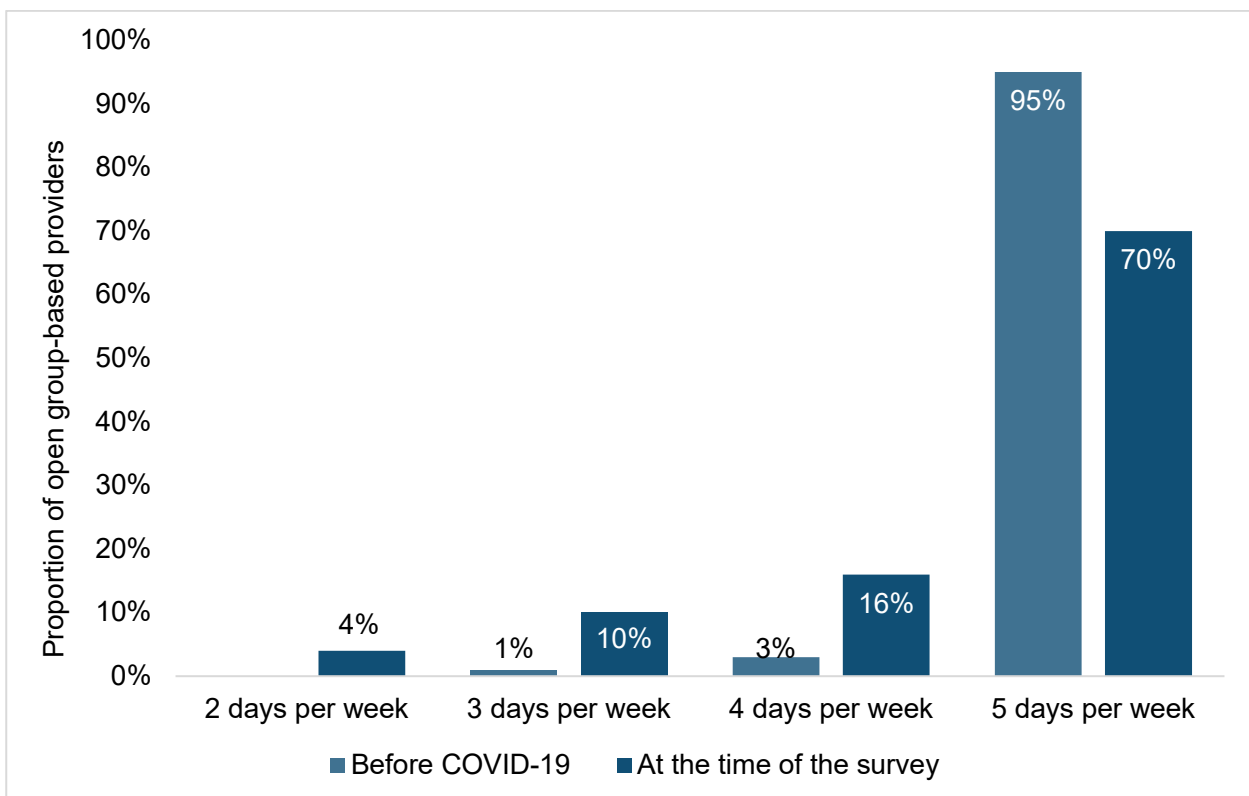


**Table 1: Mean opening days per week, before COVID-19 and at time of the survey, by provider type**

Timepoint:	Open SBPs	Open GBPs	Open CMs
Mean opening days per week, before COVID-19	5.0	5.0	4.7
Mean opening days per week, at the time of the survey	4.8	4.5	4.0
<i>Unweighted base: All open providers</i>	373	1109	1790

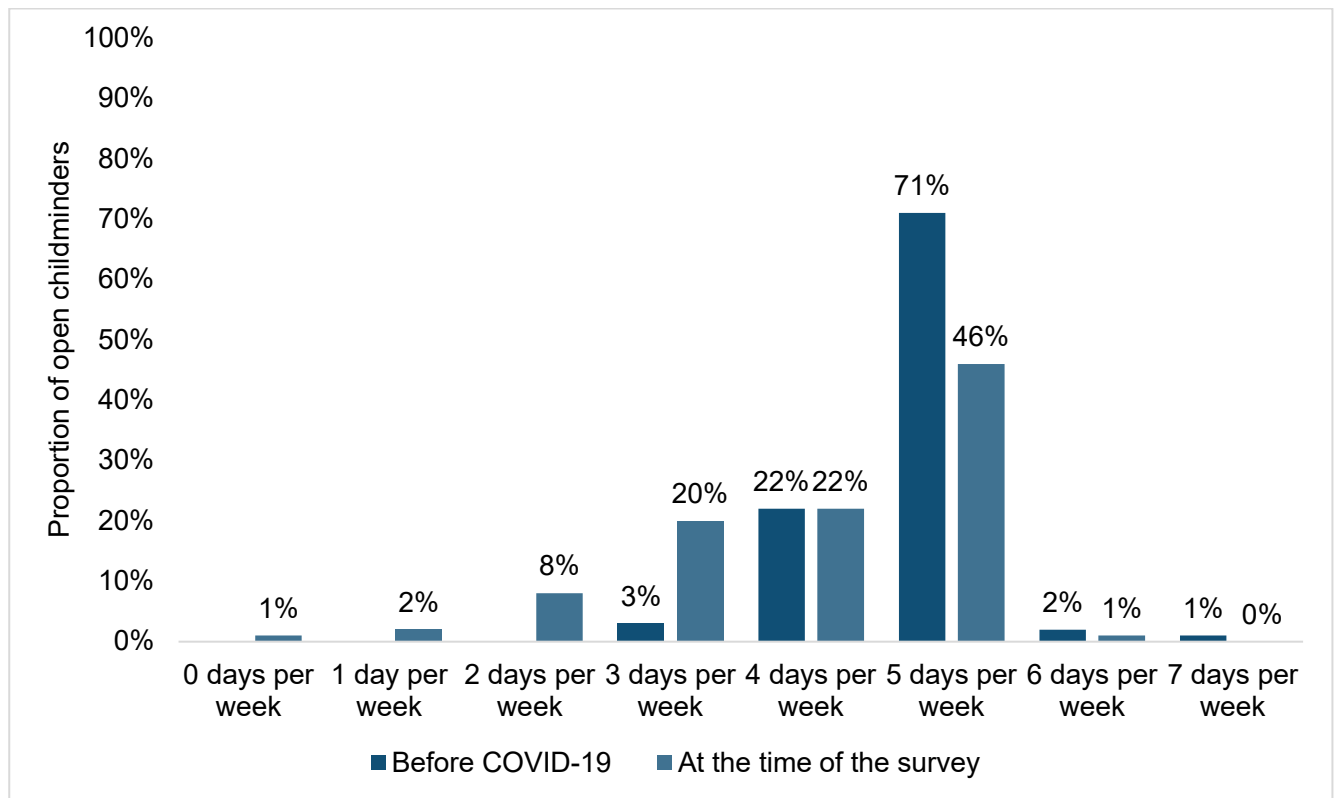
The distribution of opening days per week before COVID-19 and at the time of the survey for open providers shows that 95% of open GBPs were open for five days a week before COVID-19, compared with 70% of open GBPs at the time of the survey (Figure 3; Accompanying Tables 3 and 4). Three per cent of open GBPs were open for four days a week before COVID-19 compared to 16% at the time of the survey. One per cent of open GBPs were open for three days a week before COVID-19 compared to 10% at the time of the survey.

**Figure 3: Distribution of open group-based providers' opening days per week, before COVID-19 and at the time of the survey**



Seventy-one per cent of open CMs were open for five days a week before COVID-19, compared with 46% of open CMs at the time of the survey (Figure 4; Accompanying Tables 3 and 4). Twenty-two per cent of open CMs were open for four days a week both before COVID-19 and at the time of the survey. Three per cent of open CMs were open for three days a week before COVID-19 compared to 20% at the time of the survey.

**Figure 4: Distribution of open childminders' opening days per week, before COVID-19 and at the time of the survey**



## Opening hours

Providers were asked how many hours they were open on a typical day before COVID-19 and, for those providers who were open at the time of the survey, how many days they were currently open. As before, to allow for a comparison between these two time-points, only providers who reported being open at the time of the survey are compared.

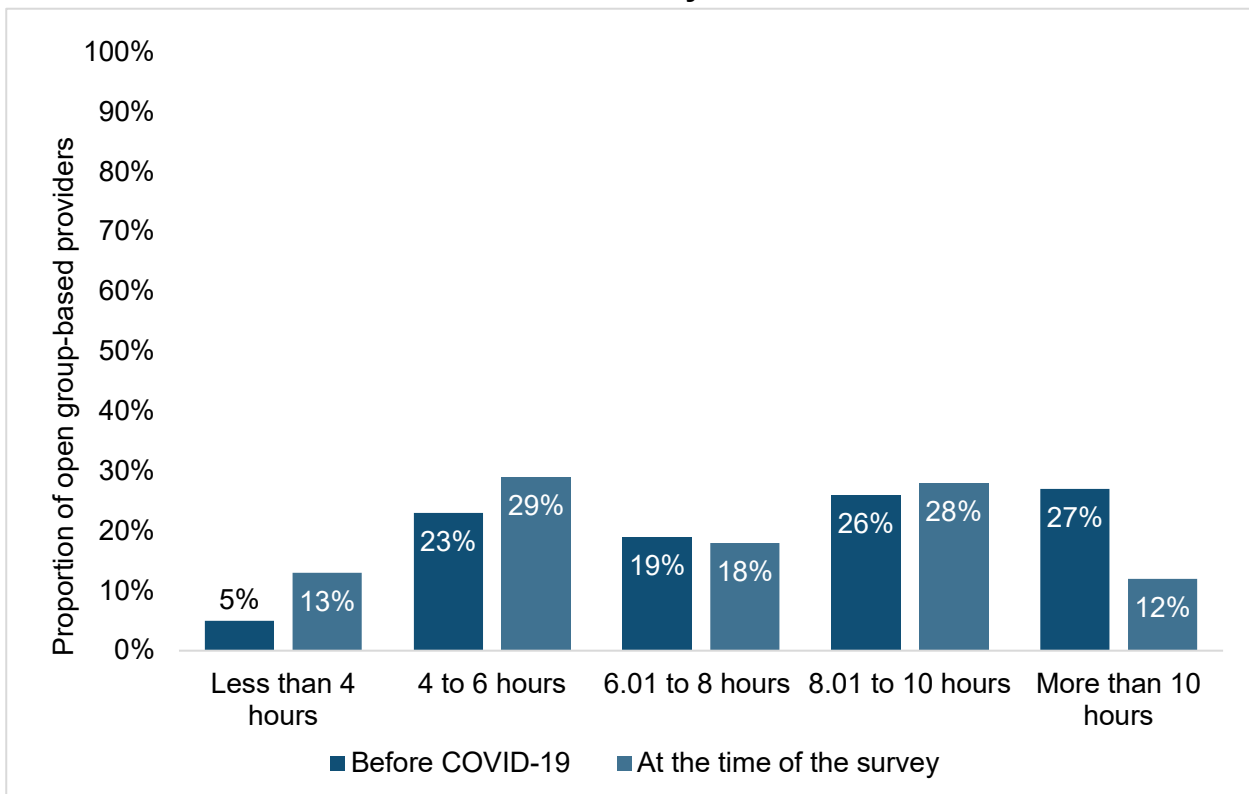
Open SBPs were, on average, open for 7.4 hours a day before COVID-19, compared to 6.4 hours at the time of the survey (Table 2; before COVID-19 figures, author calculations; at the time of the survey figures, Accompanying Table 6). Open GBPs were, on average, open for 8.4 hours per day before COVID-19, compared to 7.2 hours at the time of the survey (Accompanying Tables 5 and 6). Open CMs, were open, on average, for 10 hours per day before COVID-19, compared to 8.4 hours at the time of the survey (Accompanying Tables 5 and 6).

**Table 2: Mean opening hours per day, before COVID-19 and at time of the survey, by provider type**

Timepoint:	Open SBPs	Open GBPs	Open CMs
Mean opening hours per day before COVID-19	7.4	8.4	10.0
Mean opening hours per day at the time of the survey	6.4	7.2	8.4
<i>Unweighted base: All open providers</i>	373	1110	1789

When looking at the distribution of opening hours per day before COVID-19 and at the time of the survey, 27% of open GBPs were open for more than 10 hours per day before COVID-19, compared to 12% of open GBPs at the time of the survey (Figure 5; Accompanying Tables 5 and 6). Five per cent of open GBPs were open for less than 4 hours before COVID-19, compared to 13% of open GBPs at the time of the survey.

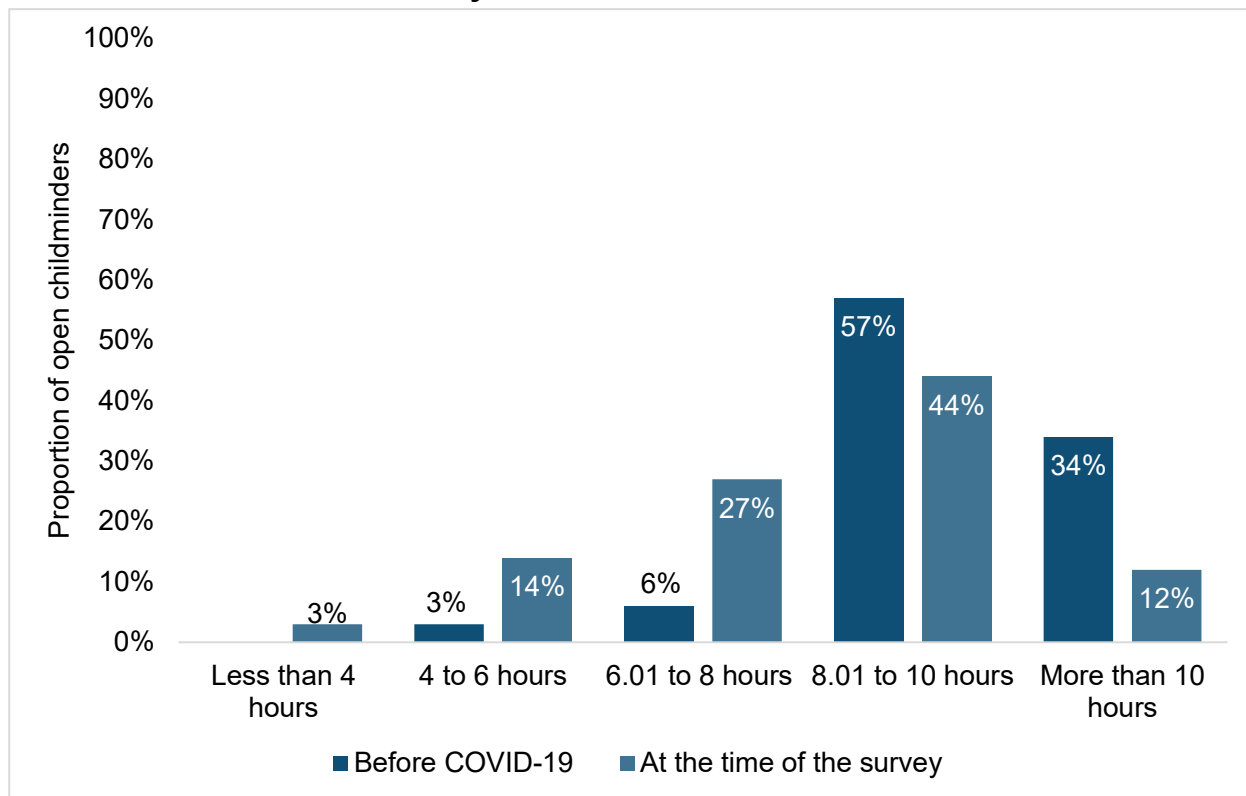
**Figure 5: Distribution of open group-based providers' opening hours per day, before COVID-19 and at the time of the survey**



For childminders, 34% of open CMs were open for more than 10 hours a day before COVID-19, compared with 12% of open CMs at the time of the survey (Figure 6; Accompanying Tables 5 and 6). Fifty-seven per cent of open GBPs were open for

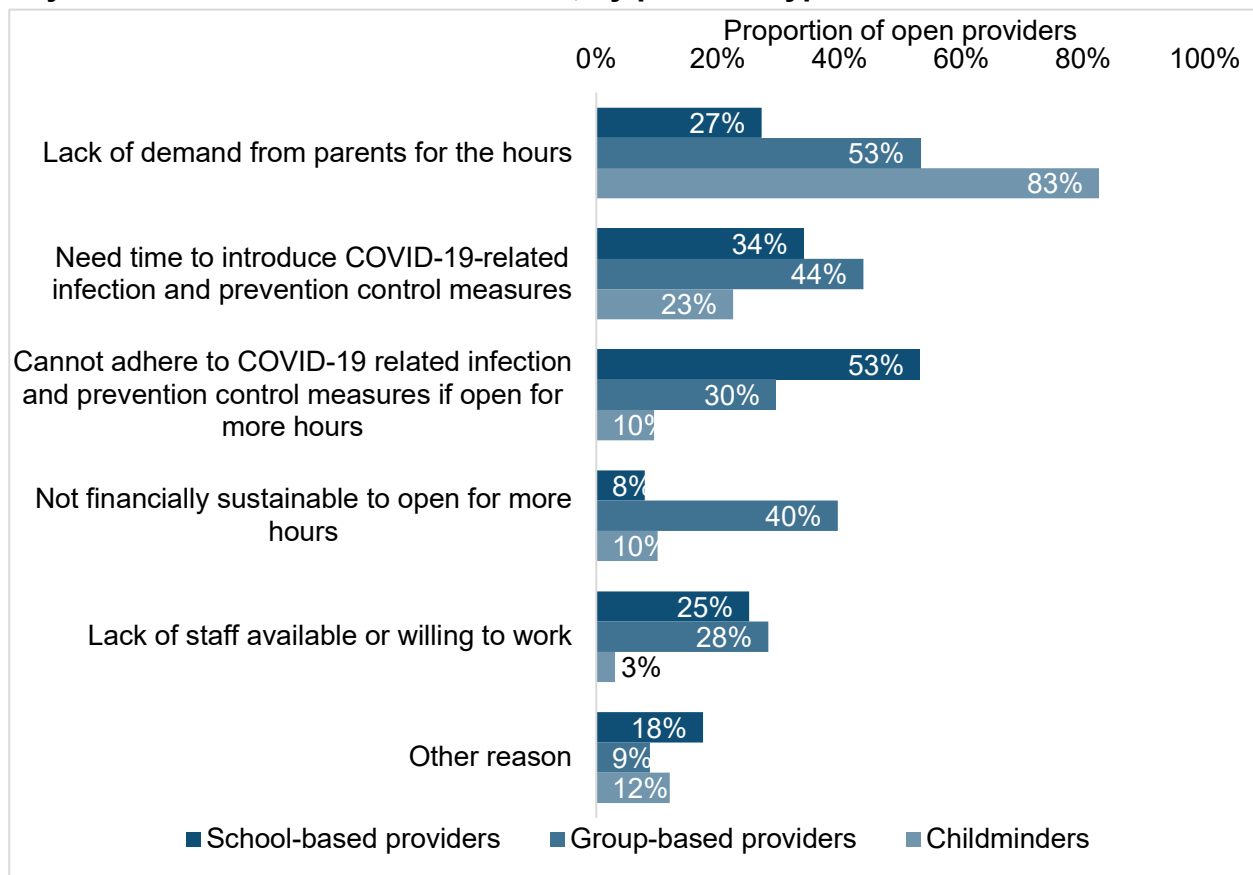
between 8.01 to 10 hours before COVID-19, compared to 44% at the time of the survey. Six per cent of open GBPs were open for between 6.01 to 8 hours before COVID-19, compared to 27% at the time of the survey.

**Figure 6: Distribution of open childminders' opening hours per day, before COVID-19 and at the time of the survey**



Open providers with a reduction in their opening days or hours were asked to select the reasons behind the reduction. Open GBPs and CMs most commonly reported that a lack of demand from parents for the hours was the reason behind reduced opening days or hours (53% and 83%, respectively) (Figure 7; Accompanying Table 7). Open SBPs most commonly reported that they were operating at reduced hours because they cannot adhere to COVID-19 related infection and prevention control measures if open for more hours (53%). Forty-four per cent of open GBPs selected that they needed time to introduce COVID-19 related infection and prevention control measures if open for more hours and 40% of open GBPs reported that it was not financially sustainable to open for more hours.

**Figure 7: Proportion of open providers who reported a reduction in opening days/hours due to the below reasons, by provider type**



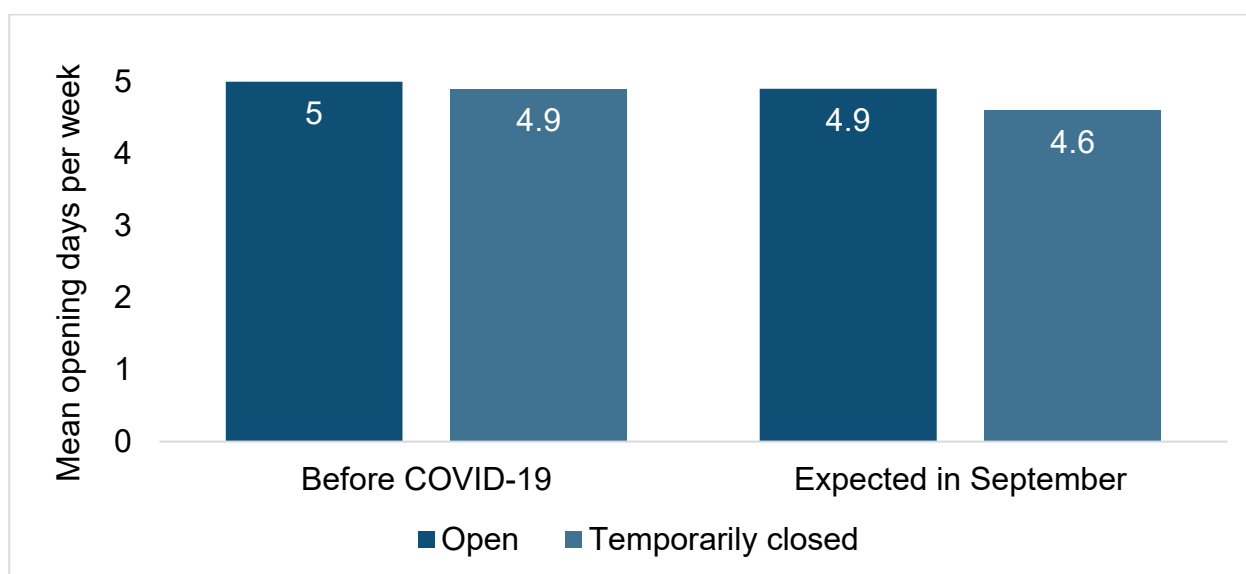
## Expectations for September

### Opening days

Providers were asked about the number of days they were open in a typical week before COVID-19 and, for those providers who were open or temporarily closed at the time of the survey, how many days per week they expected to be open in September 2020.

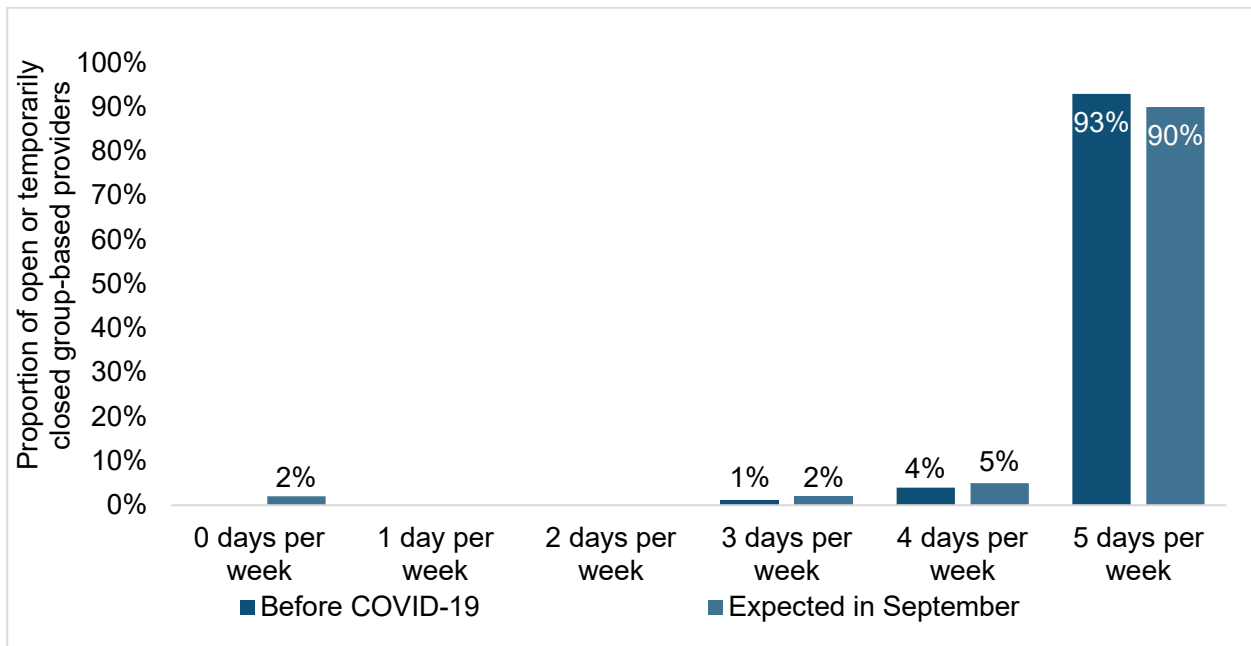
Open and temporarily closed group-based providers (GBPs) expect a minimal reduction in their opening days per week in September compared to before COVID-19 (Figure 8; Accompanying Tables 3 and 9). GBPs who were open at the time of the survey were, on average, open for 5 days a week before COVID-19 and expect to be open for 4.9 days a week in September. GBPs who were temporarily closed at the time of the survey were, on average, open for 4.9 days a week before COVID-19 and expect to be open for 4.6 days a week in September.

**Figure 8: Mean opening days per week for open or temporarily closed group-based providers, before COVID-19 and expected in September**



When looking at the distribution of opening days before COVID-19 and expectations for September, 90% of open or temporarily closed GBPs expect to be open for 5 days a week in September; 93% of open or temporarily closed GBPs were open 5 days a week before COVID-19 (Figure 9; Accompanying Tables 3 and 9). Five per cent of open or temporarily closed GBPs expect to be open for 4 days per week in September, compared to 4% before COVID-19. Two per cent of open or temporarily closed GBPs expect to be open 0 days a week in September.

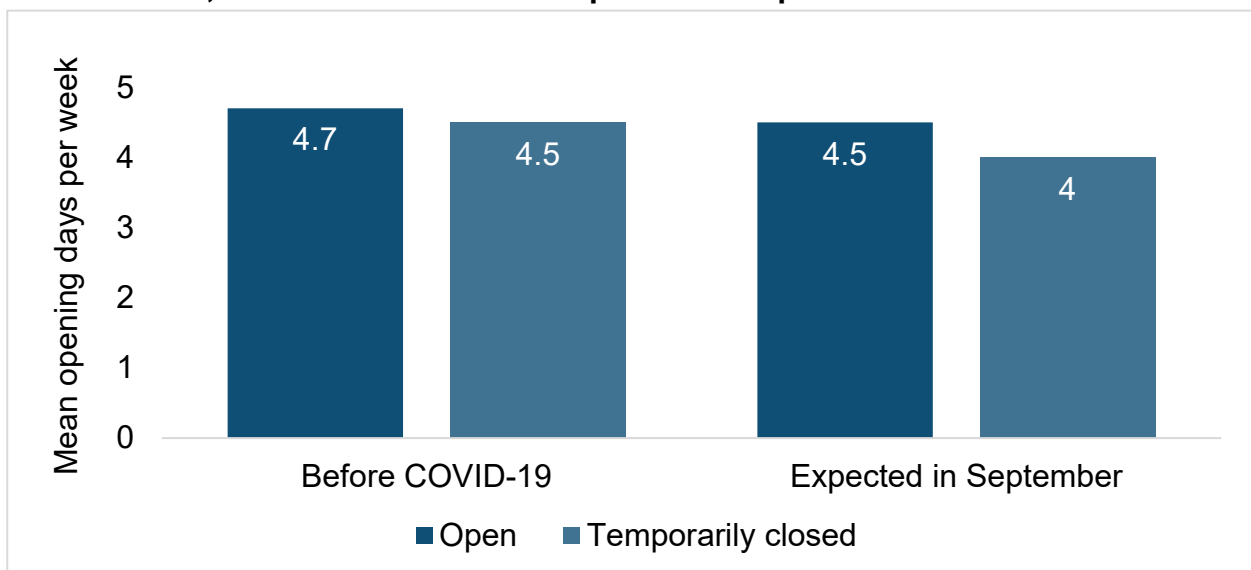
**Figure 9: Distribution of open or temporarily closed group-based providers' opening days per week, before COVID-19 and expected in September**



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

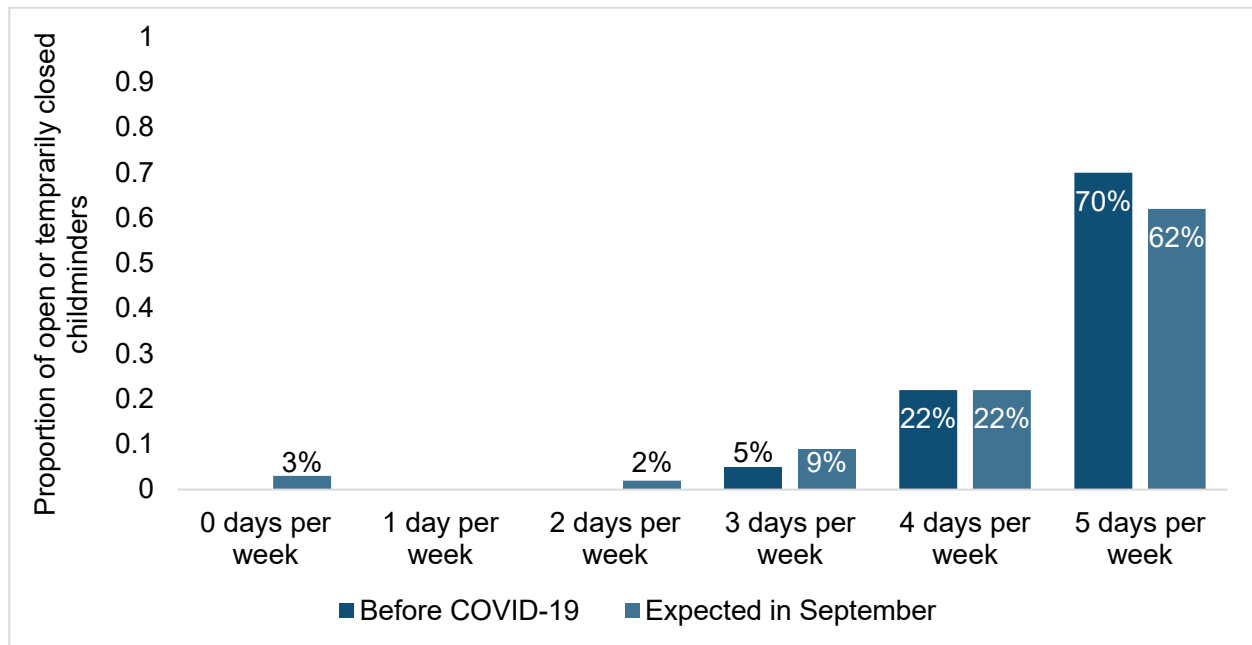
Open and temporarily closed childminders (CMs) also expect a minimal reduction in their opening days per week in September compared to before COVID-19 (Figure 10; Accompanying Tables 3 and 9). CMs who were open at the time of the survey were, on average, open for 4.7 days a week before COVID-19 and expect to be open for 4.5 days a week in September. CMs who were temporarily closed at the time of the survey were, on average, open for 4.5 days a week before COVID-19 and expect to be open for 4 days a week in September.

**Figure 10: Mean opening days per week for open or temporarily closed childminders, before COVID-19 and expected in September**



When looking at the distribution of opening days before COVID-19 and expectations for September, 62% of open or temporarily closed CMs expect to be open 5 days a week in September, compared to 70% before COVID-19 (Figure 11; Accompanying Tables 3 and 9 ). Twenty-two per cent of open or temporarily closed CMs expect to be open for 4 days per week in September, the same proportion as before COVID-19. Three per cent of open or temporarily closed CMs expect to be open 0 days a week in September.

**Figure 11: Distribution of open or temporarily closed childminders’ opening days per week, before COVID-19 and expected in September**



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

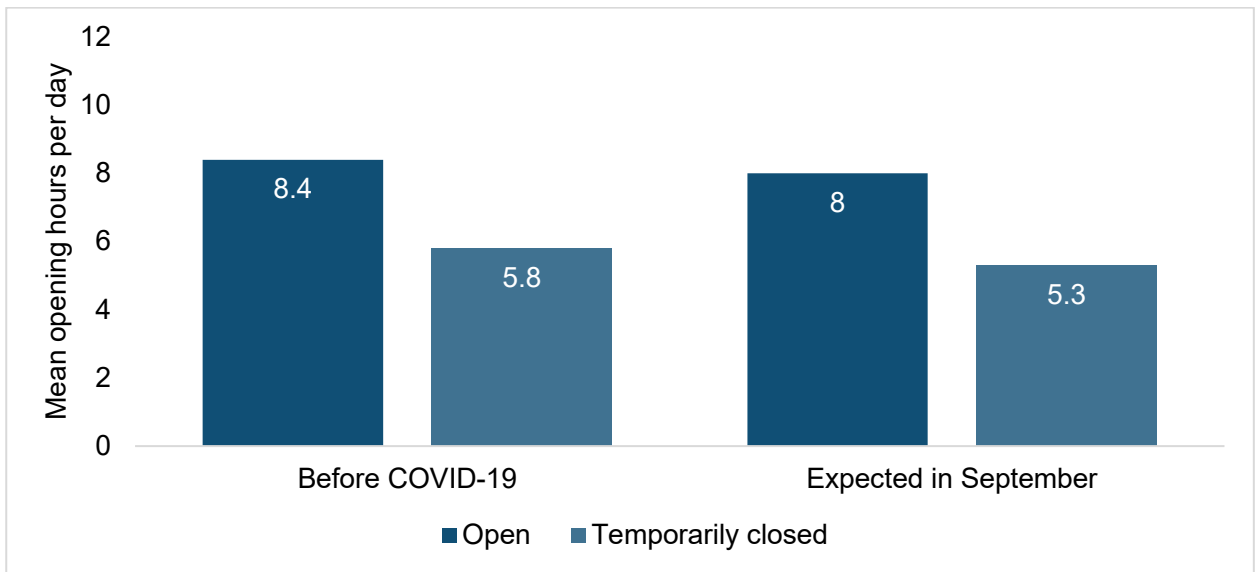
### Opening hours

Providers were asked about their opening hours per day on a typical day before COVID-19 and, for those providers who were open or temporarily closed at the time of the survey, how many hours they expected to be open per day in September 2020.

In September, open and temporarily closed GBPs expect, on average, to be open for fewer hours a day than before COVID-19 (Figure 12; Accompanying Tables 5 and 10). GBPs who were open at the time of the survey were, on average, open for 8.4 hours a day before COVID-19 and expect to be open for 8 hours a day in September. GBPs who were temporarily closed at the time of the survey were, on average, open for 5.8 hours per day before COVID-19 and expect to be open for 5.3 hours per day in September.

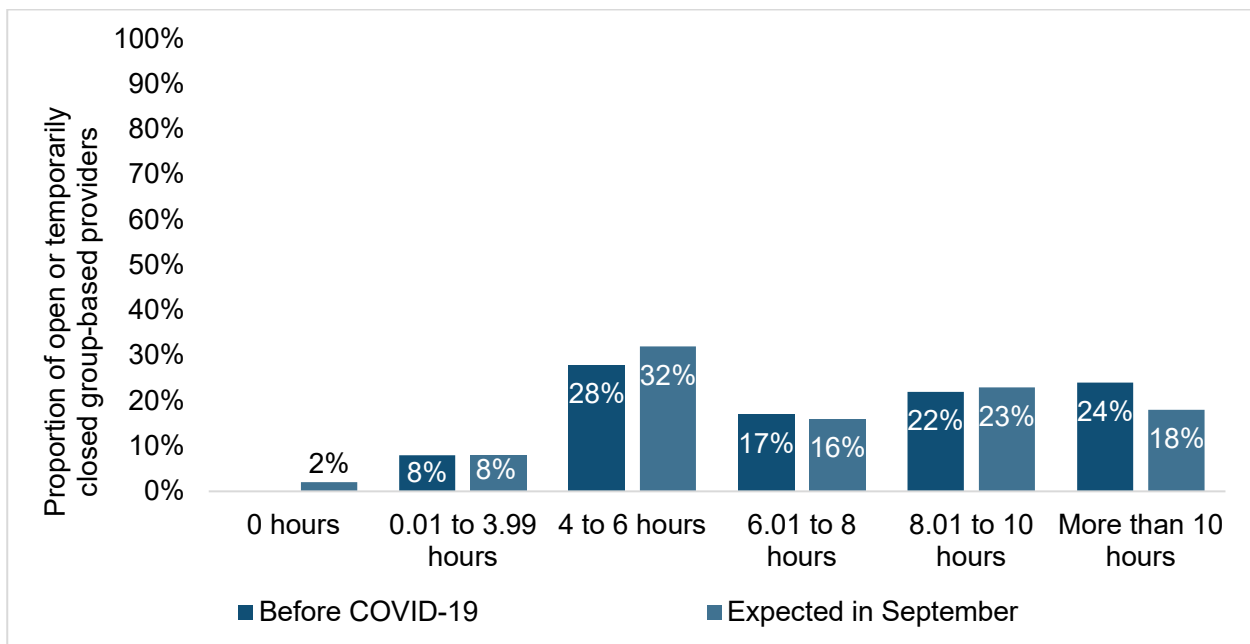


**Figure 12: Mean opening hours per day for open or temporarily closed group-based providers, before COVID-19 and expected in September**



When looking at the distribution of opening hours before COVID-19 and expected in September, 18% of open and temporarily closed GBPs expect to be open for more than 10 hours a day, compared to 24% before COVID-19 (Figure 13; Accompanying Tables 5 and 10). In September, 2% of open or temporarily closed GBPs expect to be open 0 hours per day.

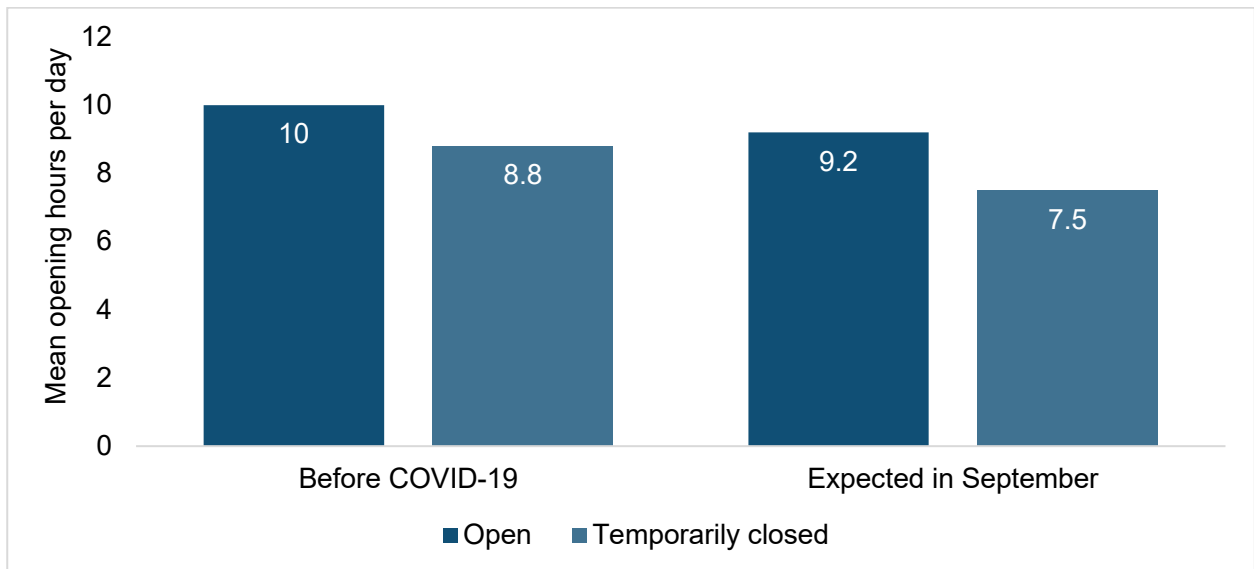
**Figure 13: Distribution of open or temporarily closed group-based providers' opening hours per day, before COVID-19 and expected in September**



Notes: 0 hours was not included as an option for the 'before COVID-19' questions.

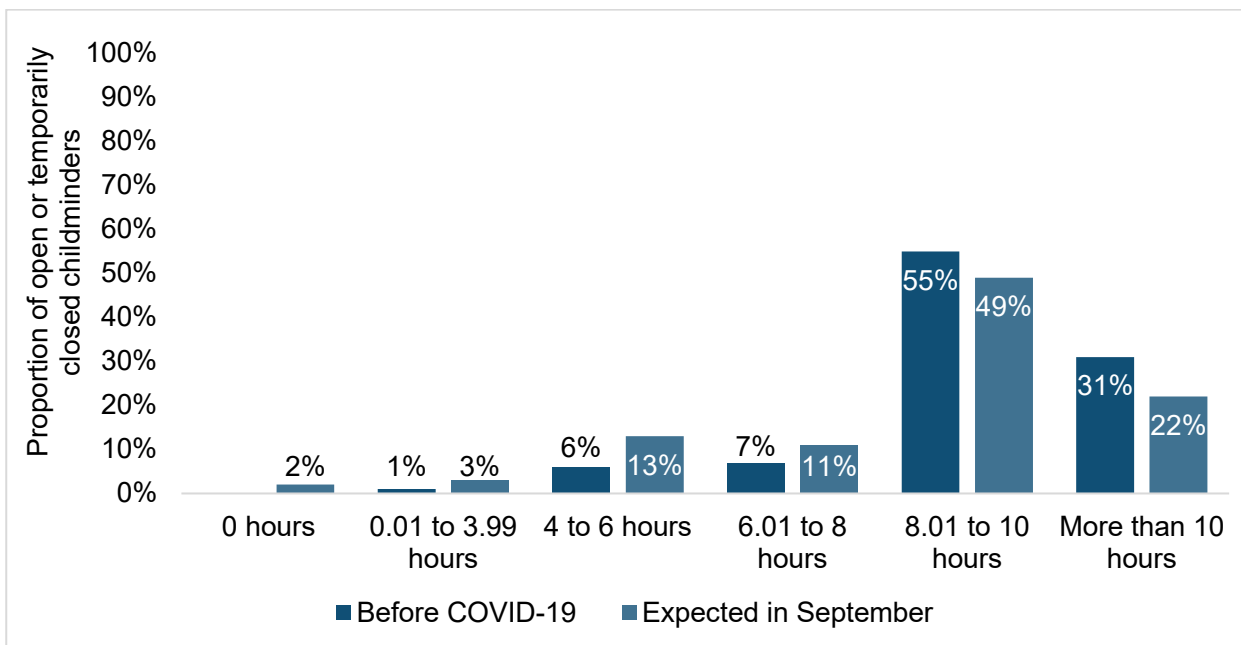
In September, open and temporarily closed CMs expect, on average, to be open for less hours per day than before COVID-19 (Figure 14; Accompanying Tables 5 and 10). CMs who were open at the time of the survey were, on average, open for 10 hours a day before COVID-19 and expect to be open for 9.2 hours a day in September. CMs who were temporarily closed at the time of the survey were, on average, open for 8.8 hours per day before COVID-19 and expect to be open for 7.5 hours per day in September.

**Figure 14: Mean opening hours per day for open or temporarily childminders, before COVID-19 and expected in September**



When looking at the distribution of opening hours before COVID-19 and expected in September, 22% of open or temporarily closed CMs expect to be open for more than 10 hours a day in September; 31% of open or temporarily closed CMs were open for more than 10 hours per day before COVID-19 (Figure 15; Accompanying Tables 5 and 10). Forty-nine per cent of open or temporarily closed CMs expect to be open for between 8.01 to 10 hours in September, compared to 55% before COVID-19. In September, 2% of open or temporarily closed CMs expect to be open 0 hours per day.

**Figure 15: Distribution of open or temporarily closed childminders' opening hours per day, before COVID-19 and expected in September**



*Notes: 0 hours was not included as an option for the 'before COVID-19' questions*

## Attendance

Providers were asked about the number of children they expected to attend their setting in a typical week during the 2020 summer term<sup>14</sup>. For providers who were open at the time of the survey, they were asked how many children did attend. To allow for a comparison between these two time-points, only providers who reported being open at the time of the survey are compared.

On average, open school-based providers (SBPs), expected 4 two-year old children to attend during a typical week in the 2020 summer term and at the time of the survey, 1 two-year old child attended their setting (Table 3; expected figures, author calculations; attended figures, Accompanying Table 16). Open SBPs expected, on average, 38 three and four-year old pre-school children to attend and at the time of the survey, 12 children attended their setting (Table 3; expected figures, author calculations; attended figures, Accompanying Table 17).

On average, open group-based providers (GBPs), expected 15 two-year old children and at the time of the survey 6 two-year old children attended their setting (Table 3; Accompanying Tables 12 and 16). On average, they expected 30 three and four-year old pre-school children and 16 of these attended (Table 3; Accompanying Tables 13 and 17).

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

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<sup>14</sup> Providers were asked about the expected number of children in the summer 2020 term, rather than number attending before COVID-19 because of the differences in attendance rates in the summer term compared to the spring term.

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

<b>Age category:</b>	<b>Open SBPs: Expected</b>	<b>Open SBPs: Attended</b>	<b>Open GBPs: Expected</b>	<b>Open GBPs: Attended</b>	<b>Open CMs: Expected</b>	<b>Open CMs: Attended</b>
Under age two	0	0	7	4	1	1
Age two	4	1	15	6	2	1
Three and four-year-old pre-school children	38	12	30	16	2	1
School aged children aged 4 or over <sup>15</sup>	-	-	9	2	4	1
<i>Unweighted base: Open providers</i>	<i>Between 369-372</i>	<i>Between 371-372</i>	<i>Between 1086-1108</i>	<i>Between 1102-1108</i>	<i>Between 1752-1768</i>	<i>Between 1768-1778</i>

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

<sup>15</sup> Figures for school age children not shown for SBPs. SBPs covers nursery provision only, not reception classes.

## Workforce

Group-based providers (GBPs) and school-based providers (SBPs) were asked how many paid staff were involved in the delivery of their provision, including how many were working full-time and how many were working part-time<sup>16</sup>. This question was asked for both before COVID-19 and for open providers, at the time of the survey. To allow for a comparison between these two time-points, only providers who reported being open at the time of the survey are compared.

Open SBPs had, on average, 16 paid staff before COVID-19 (Table 4; author calculations). Before COVID-19 an average of 10 paid staff were working full-time and an average of 5 paid staff were working part-time (author calculations). At the time of the survey, open SBPs had an average of 9 paid staff working full-time and 6 paid staff working part-time (Accompanying Tables 27 and 28).

Open GBPs had, on average, 11 paid staff before COVID-19 (Table 4; Accompanying Table 24). An average of 6 paid staff were working full-time and an average of 5 paid staff were working part-time before COVID-19 (Accompanying Tables 25 and 26). At the time of the survey, open GBPs had an average of 4 paid staff working full-time and 4 paid staff working part-time (Accompanying Tables 27 and 28).

**Table 4: Group-based provider and school-based provider mean number of paid staff before COVID-19 and at the time of the survey**

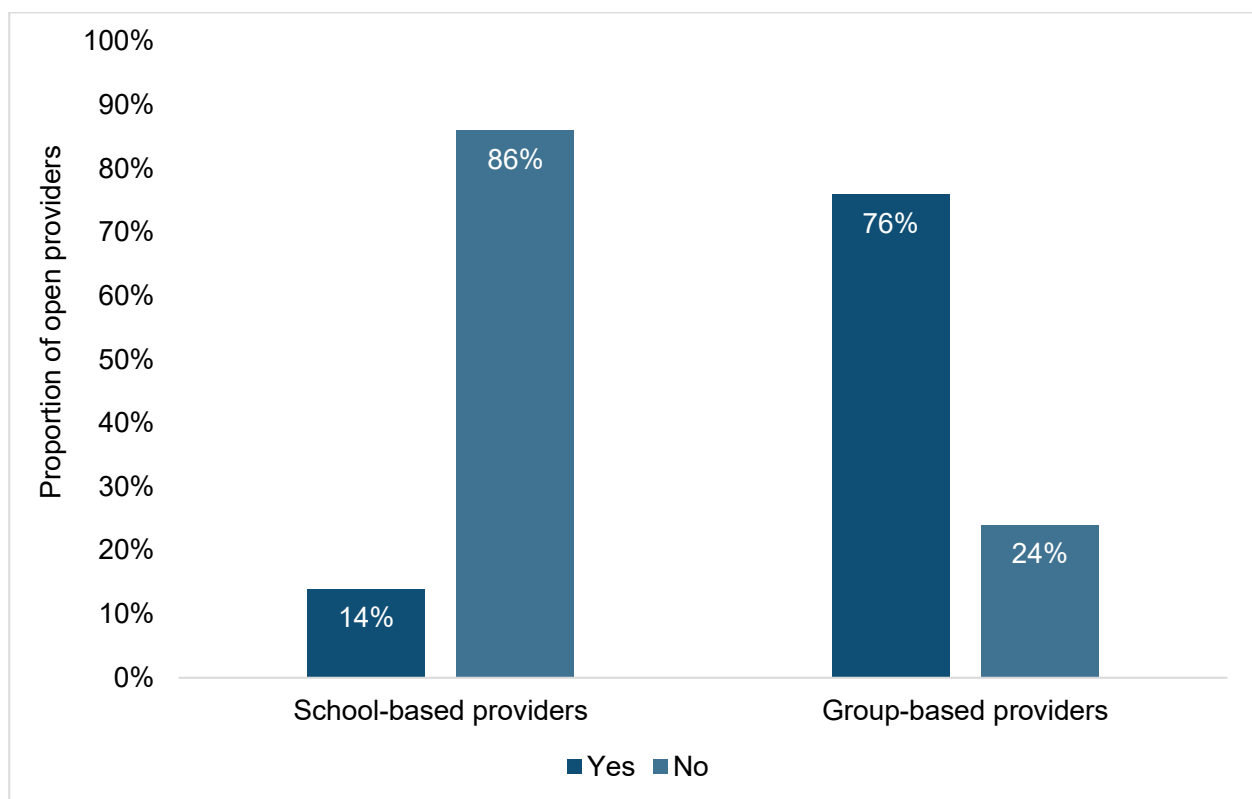
Staff category:	Open SBPs: Mean number of staff before COVID-19	Open SBPs: Mean number of staff at the time of the survey	Open GBPs: Mean number of staff before COVID-19	Open GBPs: Mean number of staff at the time of the survey
<b>Total</b>	16	Not asked	11	Not asked
<b>Full-time (30 hours+)</b>	10	9	6	4
<b>Part-time (&lt;30hours)</b>	5	6	5	4
<b>Furloughed</b>	N/A	1	N/A	3
<b>Unweighted base</b>	370	Full-time: 363 Other questions: 364	1,106	Full-time: 1,093 Part-time: 1,097 Furlough: 1,088

*Notes: The staff numbers for SBPs are higher than in the main SCEYP, therefore, caution should be taken when making comparisons to the main SCEYP and when making conclusions about the whole SBP workforce. Numbers have been rounded to whole numbers. Unweighted bases range due to different number of providers answering each question.*

<sup>16</sup> CMs were not asked this question, due to the low number of CMs employing staff.

Open providers were also asked about the number of staff that were currently on furlough as part of the Coronavirus Job Retention Scheme. At the time of the survey, open SBPs had an average of 1 staff furloughed and open GBPs had an average of 3 staff furloughed (Table 4; Accompanying Table 29). Seventy-six per cent of open GBPs have made use of the scheme at any point, compared to 14% of open SBPs (Figure 16; Accompanying Table 30). It is important to note that the furlough scheme could only be used by settings where parents paid for some hours and so the setting was not entirely funded by the free entitlement or other Government sources. SBPs receive a majority of their funding from the free entitlements<sup>17</sup>, which may account for their reduced use of the scheme.

**Figure 16: Proportion of open school-based and group-based providers that have made use of the Coronavirus Job Retention Scheme at any point**



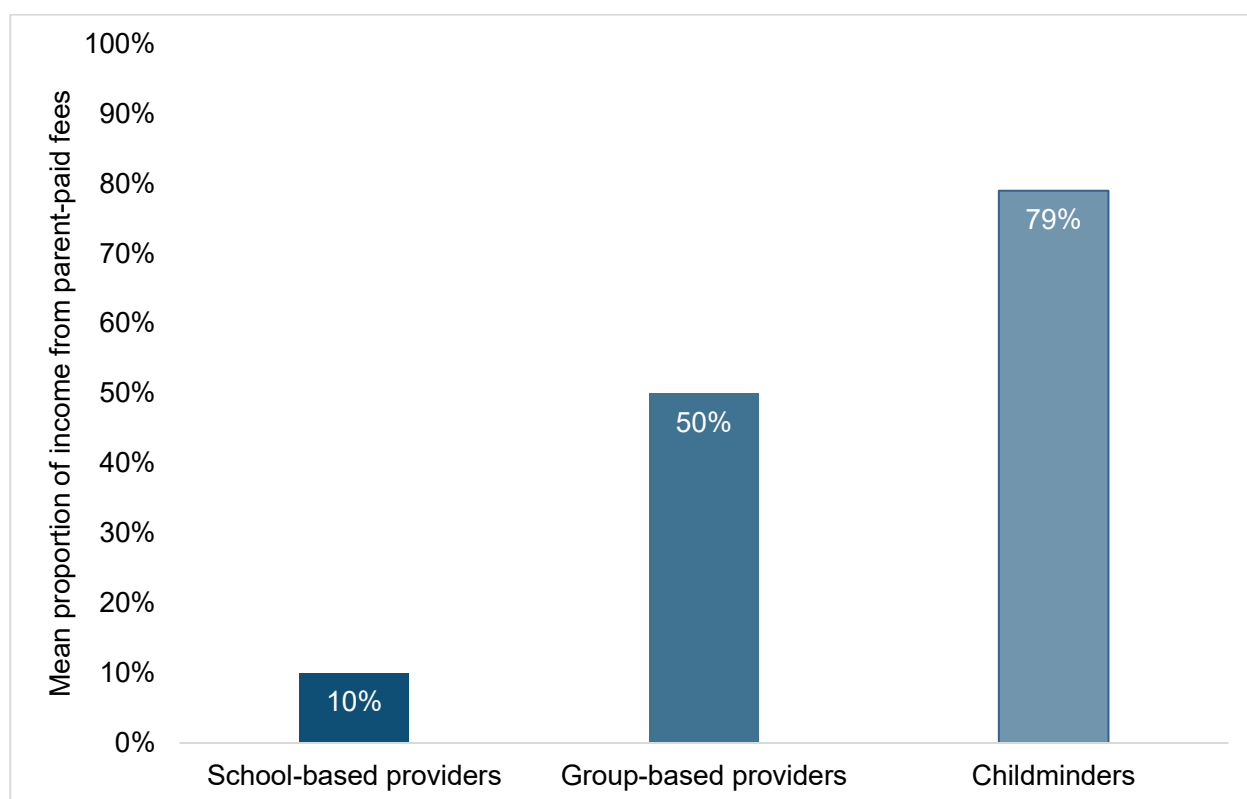
<sup>17</sup> [2019 finance report – link to add](#)

## Finances

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

To understand the impact of the loss of these fees, all providers were asked approximately what proportion of their total income typically came from parent-paid fees. As can be seen in Figure 17 (Accompanying Table 19), the mean proportion of income was highest for childminders (CMs; 79%), then group-based providers (GBPs; 50%) and was lowest for school-based providers (SBPs; 10%).

**Figure 17: Mean proportion of income from parent-paid fees before COVID-19, by provider type**



Providers were asked how much income they would have been expecting to receive from parent-paid fees for a typical week during the 2020 summer term.<sup>18</sup> Again, to allow for a

<sup>18</sup> Providers were asked about the expected income from parent-paid fees in the summer 2020 term, rather than this income before COVID-19 because of the differences in attendance rates, and therefore income, in the summer term compared to the spring term.



comparison between before COVID-19 and at the time of the survey, only open providers are compared.

Open SBPs, GBPs and CMs received less weekly income, on average, than expected due to COVID-19 restrictions. On average, SBPs expected to receive £784 per week from parent-paid fees but received, on average £198 at the time of the survey (Table 5; expected figures, author calculations; received figures, Accompanying Table 21). On average, GBPs expected to receive £3,644 per week from parent-paid fees but received, on average £1,265 at the time of the survey (Table 5; Accompanying Tables 20 and 21). On average, CMs expected to receive £553 per week from parent-paid fees but received, on average £267 at the time of the survey (Table 5; Accompanying Tables 20 and 21).

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

<b>Expected weekly income</b>	<b>Open SBPs</b>	<b>Open GBPs</b>	<b>Open CMs</b>
Mean	£784	£3644	£553
Median	£0	£1000	£417
<i>Unweighted base: Open providers</i>	311	958	1500
<b>Received weekly income at time of survey</b>	<b>Open SBPs</b>	<b>Open GBPs</b>	<b>Open CMs</b>
Mean	£198	£1265	£267
Median	£0	£150	£200
<i>Unweighted base: Open providers</i>	318	986	1555

## Financial sustainability

Open group-based providers (GBPs) and childminders (CMs) were asked, based on what they knew about the current situation and upcoming developments (for example, changes to the Coronavirus Job Retention Scheme from August onwards), for how long they were reasonably confident that it would be financially sustainable to continue to run their childcare provision for<sup>19</sup>. It is important to note that this survey was conducted before the Government's announcement on 20 July that LAs would continue to be funded

for the Autumn term at broadly the levels they would have expected to see in the 2020 autumn term had there been no coronavirus (COVID-19) outbreak, which may or may not have influenced how open GBPs or open CMs may have responded. Additionally, providers' responses related to experiences and expectations in July, but child attendance has since increased since then; an estimated 761,000 children attended early years settings on 15 October<sup>20</sup>.

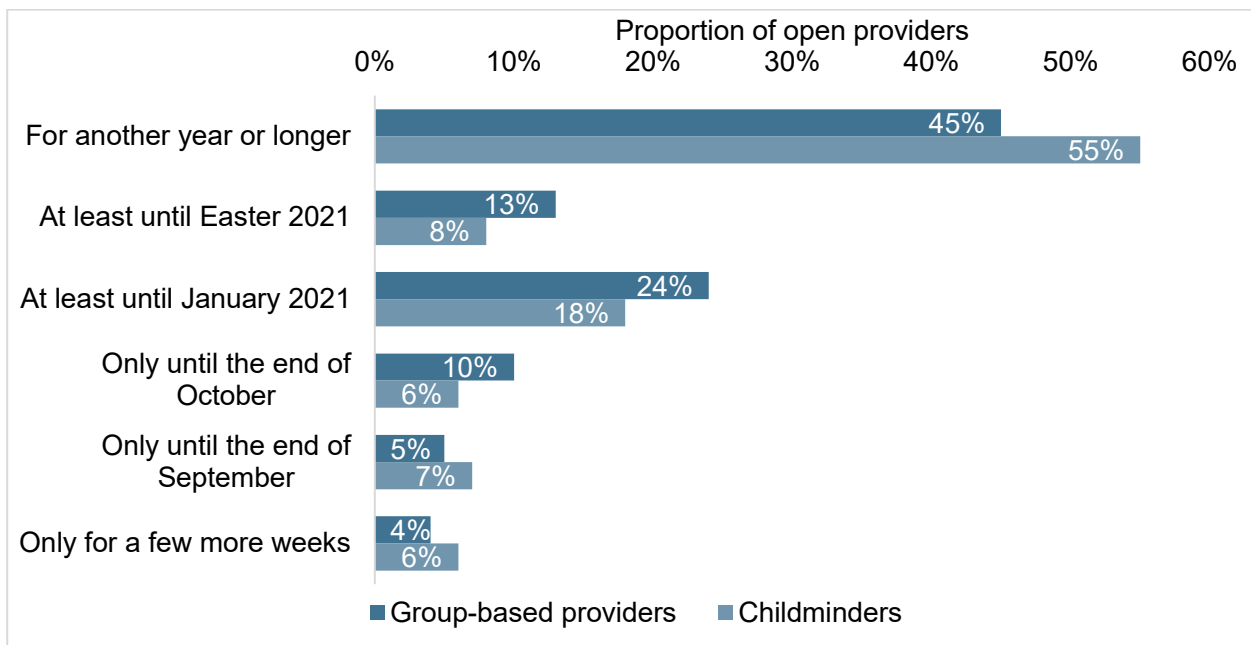
45% of open GBPs and 55% of open CMs reported that they believe it will be financially sustainable to continue for another year or longer (Figure 18; Accompanying Table 22). 10% of open GBPs and 6% of open CMs reported that it will be financially sustainable to continue only until the end of October and 4% of open GBPs and 6% of open CMs reported that it will be financially sustainable to continue only for a few more weeks.

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<sup>19</sup> SBPs were not asked this question as the decision to run provision is part of wider decisions concerning the larger school strategy

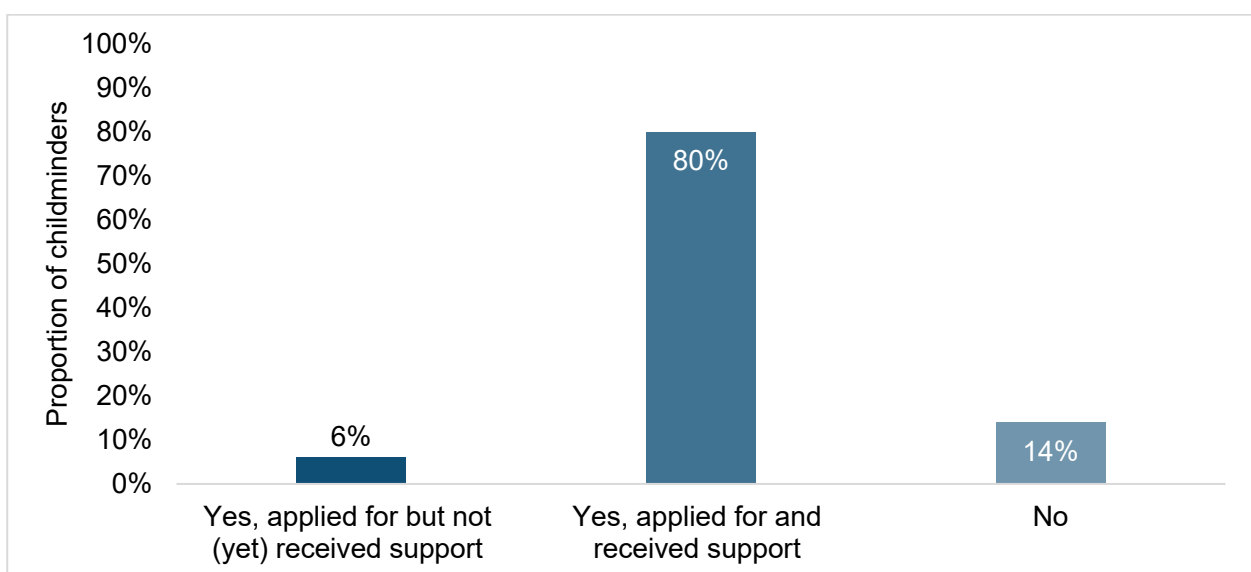
<sup>20</sup> [Attendance in education and early years settings during the coronavirus \(COVID-19\) outbreak](#). Due to many children attending EY settings on a part-time basis, and some children not being present due to normal sickness or holiday absence, we would not expect all children to be in attendance on the day of the data collection.

**Figure 18: Proportion of open providers reporting how long they believe it would be financially sustainable to continue to run their childcare provision**



All CMs were asked whether they had applied for any financial support from the government due to loss of income, for example via the Self-Employment Income Support Scheme or the Small Business Grant Scheme. As can be seen in Figure 19 (Accompanying Table 23), the majority of all CMs (86%) have applied for financial support from the Government. Of these 80% have received support and 6% have applied for but not (yet) received support. 14% of CMs had not applied for financial support.

**Figure 19: Proportion of all childminders that have made use of Government financial support**





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