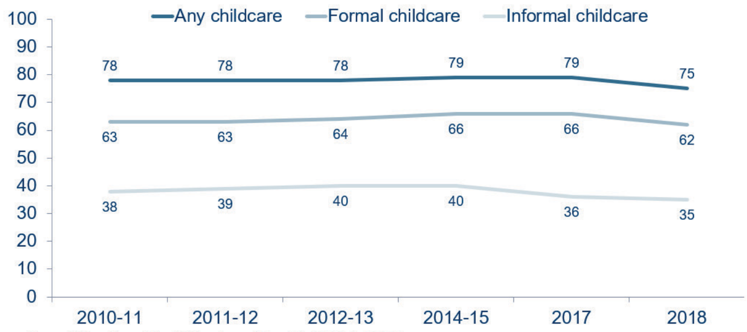
Department for Education

Childcare and Early Years Survey of Parents in England, 2018

Official Statistics. 20 December 2018. Fieldwork: January – August 2018

A fall in receipt of formal childcare since 2017, reflecting a fall in use of after-school clubs

Percentage of families with child(ren) aged 0 to 14 using childcare providers in most recent term-time week



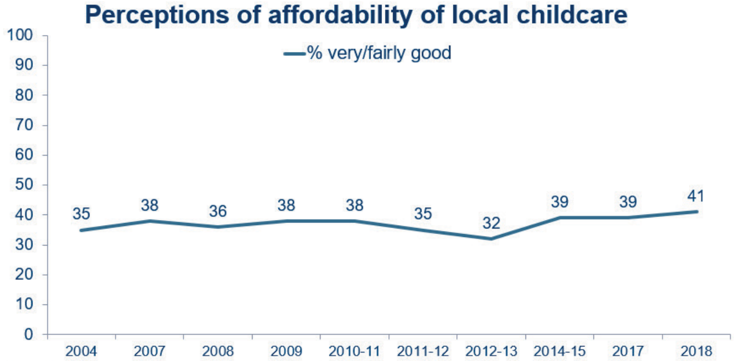
Base: All families with child(ren) aged 0 to 14 (5,922 in 2018)

Overall, in 2018, 75% of families in England with children aged 0 to 14 had used some form of childcare during their most recent term-time week. This equated to 4.2 million families or 6.0 million children.

Formal childcare was used by 62% of families, down from 66% in 2017 primarily due to a fall in the use of after-school clubs and activities among school-age children (which fell from 41% in 2017 to 35% in 2018).

Perceptions of the affordability of local childcare broadly stable over time

Perceptions of affordability of local childcare



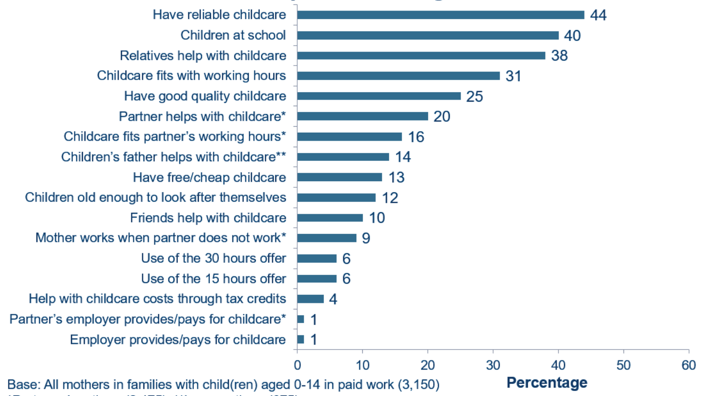
Base: All families with child(ren) aged 0 to 14 (5,922 in 2018)

Two in five (41%) parents rated the affordability of local childcare as very or fairly good, in line with the 2017 survey (39%).

Just over half (52%) of parents who paid for childcare said it was easy or very easy to meet their childcare costs, while 19% found it difficult or very difficult. These proportions are also in line with the 2017 survey (52% and 21% respectively).

Reliable childcare is reported by mothers to help them make work choices

Factors that helped mothers go out to work



Base: All mothers in families with child(ren) aged 0-14 in paid work (3,150)
*Partnered mothers (2,475); **Lone mothers (675)

70% of mothers with children aged 0-14 were in work in 2018, a rise from 68% in 2017. Over two in five (44%) working mothers said that having reliable childcare helped them to go out to work.

Among mothers who had entered the workforce in the previous two years, the most common reason for this move, reported by 21%, was finding a job that enabled them to combine work and childcare.

Contents

About this release

This Official Statistics release provides the main findings of the 2018 wave in the Childcare and Early Years Survey of Parents series. This includes: overall usage of childcare providers; receipt of the funded 15 hours of childcare or early education a week for disadvantaged 2-year-olds and for all 3- to 4-year-olds, and of the funded 30 hours of childcare or early education a week for all 3- to 4-year-olds with working parents; parents' perceptions of the quality and availability of childcare provision; children's use of digital electronic devices in the home learning environment; the cost of childcare and perceptions of affordability; and factors influencing maternal employment decisions.

The 2018 survey reports the findings of face-to-face interviews, conducted between January and August 2018, with a nationally representative sample of 5,922 parents with children aged 0 to 14 in England. The sample of children aged 2 to 4 were boosted by a factor of three relative to their incidence in the population, in order to increase the sample size and opportunities for analysis within this group. The prior survey wave was carried out in 2017. The survey follows an annual cycle, with the next wave due to be in field between January and August 2019. For ease of interpretation, data from the 2018 survey wave is compared to the 2017 wave, but longer term trends are shown for some key time series questions. Where differences between survey waves, or between population sub-groups, are reported upon these differences are statistically significant, unless figures are explicitly reported as being 'in line with' or 'unchanged from' previous figures, in which case the differences are not statistically significant.

The survey was funded by the Department for Education (DfE), and managed by Ipsos MORI. It aims to provide information to help monitor the progress of policies and public attitudes in the area of childcare and early years education. The study has two key objectives. The first is to provide salient, up-to-date information on parents' use of childcare and early years provision, and their views and experiences. The second is to continue the time series – which has now been running for 14 years – on issues covered throughout the survey series.

This report summarises key findings from the survey. More detailed findings can be found in the accompanying Main and Additional Tables documents, and in the Technical Report, which is published on the DfE website.

A follow-up survey will be conducted in 2019 with parents who consented to take part in future research and findings will be published in the Autumn of 2019. An equivalent follow-up survey was conducted for the 2017 wave, and results were published in September 2018.

Defining childcare

The study uses a very inclusive definition of childcare and early years provision. Parents were asked to include any time that the child was not with a resident parent or a resident parent's current partner.

Formal providers: include nursery schools, nursery classes, reception classes, special day schools, day nurseries, playgroups, childminders, nannies or au-pairs, baby-sitters, breakfast clubs, after-school clubs and holiday clubs.

Informal providers: include grandparents, ex-husband/wife/partners, older brother/sisters, other relatives, friends or neighbours.

In this publication

As detailed in section 8. Accompanying Tables, the following tables are published alongside this report:

• Main Tables (OpenDocument .ods)

• Additional Tables (OpenDocument .ods)

The accompanying Technical Report provides information on the data sources, their coverage and quality, and explains the methodology used in producing the survey data.

Feedback

We welcome feedback on any aspect of this document at EY.ANALYSISANDRESEARCH@education.gov.uk

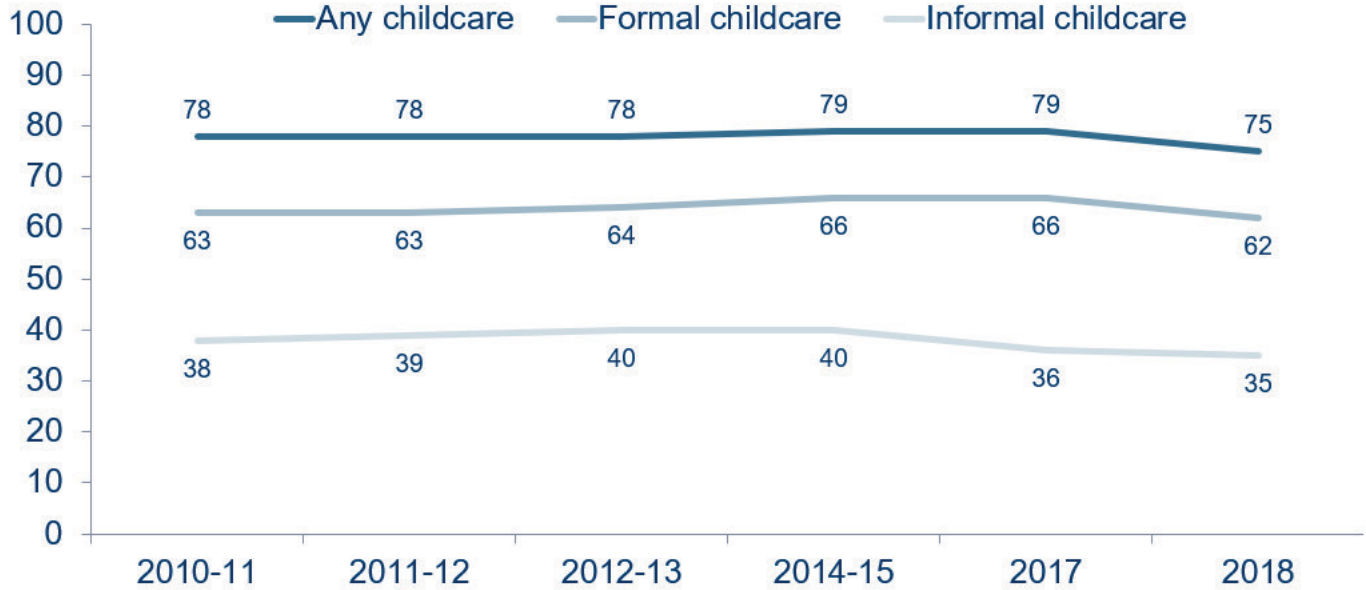
We undertook a user consultation during 2018 on the Childcare and Early Years Survey of Parents. A summary of the consultation responses and plans for the survey from 2019 onwards can be found on the following web page https://www.gov.uk/government/consultations/surveys-on-childcare-and-early-years-in-england . The 2019 survey will be focussed on parents of children aged 0 to 4, inclusive of children in Reception year, while the 2020 survey will cover the 0 to 14 age range as per the 2018 and earlier surveys, continuing the survey series.

1. Use of childcare and early years provision

Overall use of childcare

Overall, in 2018, 75% of families in England with children aged 0 to 14 had used some form of childcare during their most recent term-time week (Table 1.1)[1]. This equated to 4,197,000 families, or 5,985,000 children (Table 1.2)[2]. Just over three in five families (62%) had used formal childcare and early years provision, and 35% had used informal childcare (provided by friends and family) (Table 1.1).

Figure A: Percentage of families using childcare providers
England, most recent term-time week, 2010-11 to 2018



Base: All families with child(ren) aged 0 to 14 (5,922 in 2018)

Use of formal childcare among families

The proportion of families using formal childcare fell from 66% in 2017 to 62% in 2018, bringing it in line with the proportion of families using formal childcare in earlier waves of the survey (63% in both 2010-11 and 2011-12, and 64% in 2012-13). This fall was largely attributable to a lower take-up of after-school clubs (a fall from 38% in 2017 to 32% in 2018), day nurseries (a fall from 10% to 9%), and playgroups (a fall from 5% to 3%).

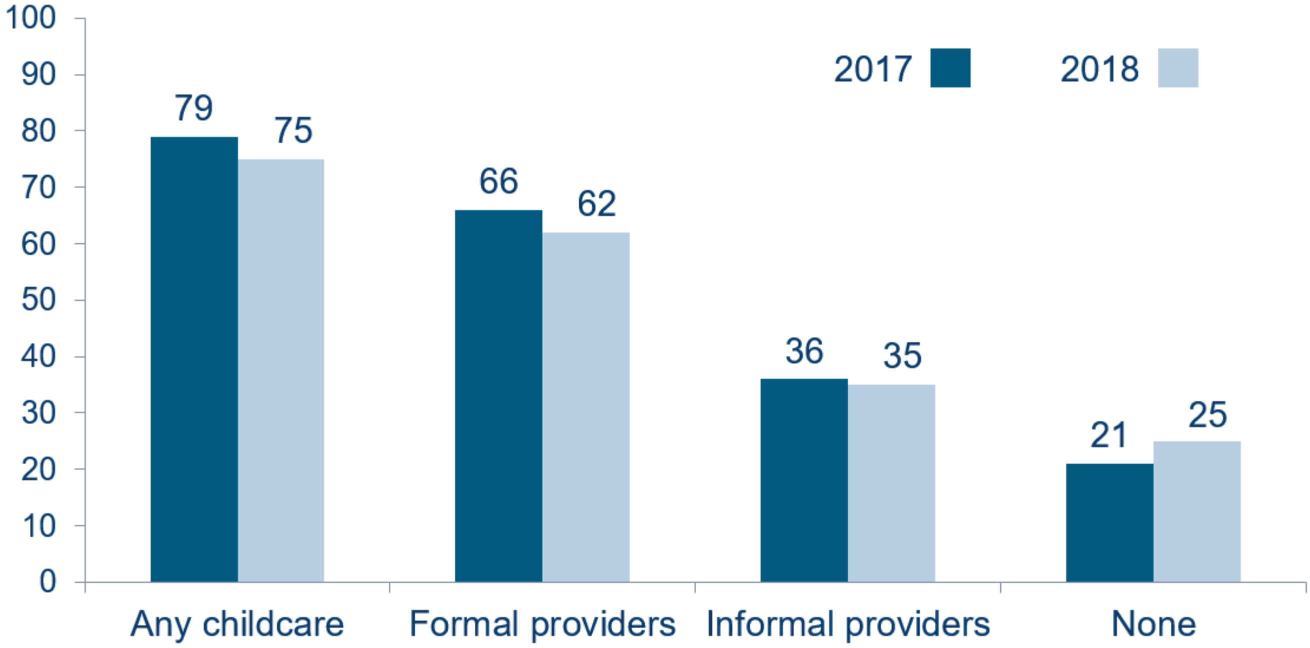
The use of formal childcare among families with only pre-school children remained stable between 2017 and 2018 (71% in both years), but fell among families with both pre-school and school-age children (from 84% to 79%), and among families with school-age children only (from 59% to 53%). Reflecting this pattern at the child-level (rather than the family-level), the proportion of children aged 0 to 2 receiving formal childcare remained broadly stable between 2017 and 2018 (43% and 40% respectively), as did the proportions for children aged 3 to 4 (89% and 88% respectively) and aged 5 to 7 (64% in both years) (Table 1.3). Receipt of formal childcare fell, however, among children aged 8 to 11 (from 52% to 48%), and among children aged 12 to 14 (from 36% to 28%).

In families with a school-age child (or children), the use of formal childcare fell among both couple families (from 67% in 2017 to 63% in 2018) and lone parent families (from 61% to 52%). By family work status, this fall was sharpest among working lone parent families (from 62% to 53%) and non-working lone parent families (from 58% to 50%).There was no change in the proportion of families using informal childcare

[1] Parents were asked in detail about their use of childcare during the most recent term-time week before the interview took place.
[2] Figures are grossed to a national level using national estimates (number of families in England and number of children aged 0-14 in England) calculated from the Child Benefit Register as of January 2018.

(36% in 2017 and 35% in 2018). Almost a quarter (23%) of families used both formal and informal childcare, in line with the proportion recorded in 2017 (24%).

Figure B: Percentage of families using childcare providers
England, most recent term-time week, January to August 2018



Base: All families with child(ren) aged 0 to 14 in 2017 (5,693) and in 2018 (5,922)

Use of formal childcare among children

The proportion of all children (rather than families, as reported above) receiving formal childcare was 52%, down from 55% in 2017 (Table 1.3). Pre-school children (aged 0 to 4) were most likely to receive formal childcare from day nurseries (used by 19% of all pre-school children), nursery schools (17%), and nursery classes (9%).

School-age children (aged 5 to 14) were most likely to receive formal childcare from after-school clubs (used by 35% of all school-age children, down from 41% in 2017), followed by breakfast-clubs (8%, unchanged from 2017). The use of breakfast-clubs by school-age children has doubled since 2010-11, when the proportion stood at 4%.

The fall in the use of after-school clubs since 2017 applied across the entire age range of school-age children (from 42% to 37% for children aged 5 to 7, from 45% to 41% for children aged 8 to 11, and from 34% to 26% for children aged 12 to 14). Among school-age children in lone parent families, the use of after-school clubs fell from 37% in 2017 to 26% in 2018. While the use of after-school clubs also fell among school-age children in couple families, this fall was not statistically significant (44% in 2017 and 40% in 2018). By the deprivation level of the local area, use of after-school clubs fell among school-age children living in the most deprived areas of the country (from 29% in 2017 to 21% in 2018). The use of after-school clubs also fell for school-age children living in relatively less deprived areas of the country, although these falls were not statistically significant.

Pre-school children receiving formal childcare spent on average 18.0 hours a week in formal childcare (in line with 2017, 17.0 hours), while school-age children receiving formal childcare spent on average 4.0 hours a week in formal childcare (up from 3.3 hours in 2017) (Table 1.5)[3].

Characteristics associated with children's receipt of formal childcare included:

[3] Median (rather than mean) numbers of hours are reported because they are less affected by extreme values.

- The child's age: children aged 3 to 4 were most likely to receive formal childcare (88%) while children aged 12 to 14 were least likely to (28%) (Table 1.3);
- The deprivation level of the local area: 62% of children living in the least deprived areas received formal childcare, compared to 44% of children living in the most deprived areas (Table 1.4);
- The family's annual income: 63% of children in families earning £45,000 or more received formal childcare, compared to 47% of those earning under £10,000 (Table 1.4);
- The family structure and work status: children in dual-working couple families (60%), and in working lone-parent families (49%), were most likely to receive formal childcare. Children in couple families with neither parent in work (37%), and in non-working lone-parent families (42%) were least likely to receive formal childcare (Table 1.4).

Just under two in five (38%) families with school-age children used childcare during school holidays (Table 7.1), a fall from the proportion recorded in 2017 (44%). This fall is primarily attributable to a lower take-up of informal childcare during school holidays (32% in 2017 compared to 27% in 2018), which in turn is chiefly due to a fall in the proportion of families using grandparents in holiday periods (24% in 2017 compared to 20% in 2018). One in five (21%) families used formal childcare during school holidays (in line with the 22% recorded in 2017).

Parents were asked what changes to local childcare provision, if any, would be most helpful for making it better suited to their needs. Parents were most likely to say more affordable childcare (26%, a fall from 32% in 2017), more childcare available during the school holidays (19%, the same as in 2017), and longer opening hours (15%, also the same as in 2017) (Table 5.16). Parents who wanted to see improvements made to local childcare provision were asked at which times of year improvements should be made in order to meet their needs. Parents were most likely to say in the Summer holidays (65%), followed by in the half-term holidays (36%), during the week in term time (36%), and in the Easter holidays (34%), all of which show no significant change since 2017 (Table 5.15).

Reasons for using childcare

Two-thirds (66%) of pre-school children received childcare (formal or informal) for economic reasons (e.g. to enable their parents to work, look for work, or to study), with child-related reasons being almost as common (58%) (e.g. for the child's educational or social development, or because the child likes attending). Reasons relating to parental time were less common (22%) (e.g. allowing their parents to conduct domestic activities, socialise, or look after other children) (Table 9.10). These proportions are in line with those recorded in 2017 (64%, 58%, and 22% respectively).

Parents considered a number of factors when choosing a formal childcare provider. For pre-school children, the most common factors were the provider's convenience (mentioned by 60% of parents), and reputation (57%). Other frequently mentioned factors included the quality of the care given (50%), and the opportunity for the child to mix with other children (also 50%). A quarter of parents (25%) mentioned financial considerations (an increase from 18% in 2017) (Table 6.1).

Reasons for choosing a formal childcare provider for school-age children followed a similar pattern, with the most common factors also being the provider's convenience (mentioned by 46% of parents), and reputation (38%), followed by the quality of the care given (33%), and the opportunity for the child to mix with other children (30%, down from 35% in 2017). Eighteen per cent of parents mentioned financial considerations (Table 6.1).

Parents who had not used any childcare in the past year (neither formal nor informal) tended not to use childcare out of choice, rather than due to constraints. Specifically, over three in five (63%) parents not using childcare said they would rather look after their children themselves, while the affordability of childcare was less likely to be mentioned (9%) (Table 5.2).

2. Receipt of the entitlement to government funded childcare or early education

Policy background on childcare or early education in England[4]

All 3- to 4-year-olds in England can receive 15 hours of government funded early education a week and, from September 2017, those with working parents are entitled to 30 hours a week. Furthermore, some 2-year-olds are also eligible for 15 hours a week of early education, for example if their parent or guardian gets certain benefits[5], or if the 2-year-old is looked after by a local council, has a statement of special education needs or an education, health and care plan, gets Disability Living Allowance, or has left care. The funded early education must be with an approved childcare provider, and stops when a child starts in reception class (or reaches compulsory school-age, if later).

15 hours of early education

For families who meet the eligibility criteria, 2-year-old children are entitled to 570 hours a year. It is usually taken as 15 hours a week for 38 weeks of the year, but parents can choose to take fewer hours over more weeks, for example just under 12 hours a week for 48 weeks of the year.

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30 hours of early education for 3- and 4-year-olds with working parents

3- to 4-year-olds in England with eligible working parents can get 1,140 hours per year. This is usually taken as 30 hours a week for 38 weeks of the year, but parents can choose to take fewer hours over more weeks, for example 23 hours a week for 48 weeks of the year. Parents can get 30 hours of childcare for their child(ren) if they (and their partner, if they have one) are in work, including self-employment, (or getting parental leave or sick leave), and are earning at least the National Minimum Wage or Living Wage equivalent to 16 hours a week. They must also each earn less than £100,000 per year. From September 2018, foster parents who work outside their fostering role have been eligible to receive the 30 hours of childcare offer for children aged 3 to 4 in their care so long as it is consistent with the child's care plan (this policy change was made after the end of the 2018 survey fieldwork).

Awareness and use of 15 hours of childcare or early education

Nine in ten (90%) parents with a child aged 0 to 4 were aware of the 15 hours offer (Table 2.2). Parents in families with higher annual incomes were more likely to be aware of the offer (91% of those earning £45,000 or more per year, compared to 86% of those earning under £10,000).

Among parents with a 2-year-old, just over four in five (83%) were aware that certain 2-year-olds are eligible for some free hours of childcare each week (Table 2.4).

Official statistics from the DfE's Early Years Census and Schools Census[6] show that in January 2018, 95% of 4-year-olds, 92% of 3-year-olds, and 72% of eligible 2-year-olds benefitted from funded childcare or early education.

In 2018, over nine in ten (92%) parents using the 15 hours offer were satisfied with the way they could use the hours for their child (Table 2.5). Almost all parents using the 2-year-old offer were satisfied with the way they were able to use the hours for their child (96%).

[4] https://www.gov.uk/help-with-childcare-costs
[5] https://www.gov.uk/help-with-childcare-costs/free-childcare-2-year-olds-benefits
[6] https://www.gov.uk/government/statistics/education-provision-children-under-5-years-of-age-january-2018 (Tables 1, 2, 4 and 6). The Department for Education's Early Years Census and Schools Census are the official take up figures for funded childcare and early education, so are presented here.

3. 30 hours of childcare or early education for working parents of 3- to 4-year-olds

Awareness and understanding of the 30 hours

In September 2017 (prior to the start of fieldwork in January 2018), the Government entitlement was extended to 30 hours a week, for 38 weeks of the year, for 3- and 4-year-olds with working parents (hereafter referred to as 'the 30 hours')[7].

Among parents with a child aged 0 to 4, almost four in five (78%) were aware of the 30 hours (Table 3.1). Awareness was higher among parents in couple families (80%, compared to 72% among lone parents), and among those with higher family annual incomes (89% of those earning £45,000 or more per year, compared to 68% of those earning under £10,000). Awareness also varied by the age of the child(ren) in the household. Among families with a child aged 0 to 2 (but no children aged 3 to 4) 73% were aware, while among families with a child aged 3 to 4 (but no children 0 to 2) 84% were aware (Table 3.7).

Parents were most like to have heard about the 30 hours by word of mouth (for instance, from friends or relatives) (35%), or from their current childcare provider (18%) (Table 3.8).

Parents who were aware of the 30 hours were asked a series of questions to gauge their understanding of the scheme. The majority of parents were aware that providers can charge for certain extra services, such as meals, consumables, and special lessons or activities (78%), that children can receive their hours from Ofsted registered childminders (76%), that children can receive their hours from two or more childcare providers (57%), that some providers allow funded hours to be taken at any time of the year, not just in term time (56%), and that providers cannot charge parents any top-up fees for the funded hours children receive (52%) (Table 3.2). Among parents who were aware that providers can charge for certain extra services, most (72%) were aware that parents can choose not to receive, or pay, for these services.

Take-up of the 30 hours

Official statistics from the DfE's Early Years Census and Schools Census show that in January 2018[8], 296,920 children aged 3 to 4 benefitted from the extended 30 hours entitlement. DfE's estimates suggest around 390,000 children were eligible for the extended hours nationally, suggesting around 3 out of 4 eligible children have taken up some extended hours.

Responses to the Childcare and Early Years Survey of Parents show that in 2018, parents who applied for the 30 hours were most likely to have done so to help with their childcare costs (60%), so they could maintain (31%) or increase (22%) their working hours, or to help prepare their child for school (25%).

Almost all (94%) parents using the 30 hours were satisfied with the way they were able to use the hours for their child, including over three quarters (77%) who said they were very satisfied (Table 2.5).

Among working parents with a 3- or 4-year-old who had not applied for the 30 hours, the most common reasons for not applying were that their child had started school (17%), that they would rather look after their child themselves (15%), and that they did not need any more hours of childcare (15%) (Table 3.15).

Over a third (36%) of non-working parents with a child aged 0 to 4 felt it was likely they would try to find paid work to become eligible for the 30 hours (Table 3.3). Among parents whose partner was not in work, a similar proportion (35%) felt it likely their partner would try and find paid work to become eligible for the 30 hours.

The great majority (94%) of children receiving government funded hours received their hours from a single childcare provider, with the remaining 6% receiving their hours from two or more providers. Children using

[7] The eligibility criteria for 30 hours are set out at: https://www.gov.uk/government/publications/30-hours-free-childcare-eligibility
[8] https://www.gov.uk/government/statistics/education-provision-children-under-5-years-of-age-january-2018 (Tables 3LA, 5LA & 7LA). The Department for Education's Early Years Census and Schools Census are the official take up figures for funded childcare and early education, so are presented here.

the 30 hours were most likely to receive their hours from more than one provider (13%, compared to 4% for children using the 15 hours offer, and 2% for children using the 2-year-old offer).

Among children receiving government funded hours from more than one formal provider (whether under the 2-year-old offer, the 15 hours offer, or the 30 hours offer), the most common reasons for using more than one provider were so the parent could cover all the days for which they needed childcare (45%), so the parent could cover the times of day for which they needed childcare (35%), and because the providers met different needs for the child (29%) (Table 3.19).

Perceived impacts of the 30 hours

Parents using the 30 hours were asked a series of questions to gauge the perceived impact on their work, finances, family life, and their child's preparedness for school.

Just over half (55%) of parents said that if the 30 hours were not available to them, they would still be working the same number of hours. A third (34%), however, thought that in the absence of the 30 hours they would be working fewer hours, with this belief more common among parents in lower- and middle-income families (37% among those earning under £20,000 per year, 52% among those earning between £20,000 and £30,000, and 41% among those earning between £30,000 and £45,000), than among those in higher-income families (27% among those earning £45,000 or more). Only 5% of parents thought they would be working more hours were the 30 hours not available to them (Table 3.5).

The majority of parents (66%) felt the 30 hours had given them more flexibility in terms of the number of hours they could work, and half (50%) felt the 30 hours had given them more flexibility in terms of which jobs they could do (Table 3.5). These impacts were more likely to be reported by parents in lower- and middle-earning families than those in higher-earning families (for example, 82% of parents in families earning under £20,000 felt the 30 hours had given them more flexibility in terms of the number of hours they could work, compared to 53% in families earning £45,000 or more).

Most parents felt the 30 hours had improved both their family finances and their family life. Three quarters (74%) said they had more money to spend, and four in five (80%) said the overall quality of their family life was better, compared with before they took up the 30 hours (Table 3.6). By family annual income, parents in higher-income families were more likely to say they had more money to spend since taking up the 30 hours (85% among those earning £45,000 or more per year, compared to 49% among those earning under £20,000 per year).

For the great majority of children receiving the 30 hours (84%), parents felt the offer was making the child better prepared for school (Table 3.4). As a result of the 30 hours, these children were felt to be getting on better with other children (83%), and to have improved communication skills (62%), improved numeracy (53%), and improved literacy (49%) (Table 3.20).

4. Paying for childcare

Just under three in five (57%) families who used a childcare provider in the reference week reported paying for this childcare, a fall from the proportion recorded in 2017 (60%) (Table 4.1). Of families using formal provision, 64% reported paying for this childcare (in line with 2017, 65%), and of families using informal provision, 5% reported paying for this childcare (in line with 2017, 7%).

Families containing only a school-age child (or children) and using formal provision were most likely to pay for formal childcare (68%, in line with the 67% recorded in 2017). This compared to 57% among families containing both school-age and pre-school children (a fall from 62% in 2017), and 63% among families containing a pre-school child (or children) only (in line with the 64% recorded in 2017).

Weekly cost of childcare

The overall median weekly amount paid by families to childcare providers (including both formal and informal providers) was £25, a fall from the 2017 survey (Table 4.5)[9]. The amount paid varied depending on the number of hours of childcare used across all children in the household, and the types of providers used. Costs statistics are subject to a number of caveats, as described in the Technical Report.

Turning to child-level (rather than family-level) payments, the overall median weekly amount paid to formal childcare providers was £16, a fall from the £20 recorded in the 2017 survey (Table 4.6). For pre-school children, the median payment was £44 (a fall from the £60 recorded in 2017); for children aged 3 to 4 the median payment was £20 (compared to £35 in 2017, although this difference was not significant); for children aged 2 it was £66 (compared to £75 in 2017, although this difference was also not significant); and for children aged 0 to 1 it was £86 (a fall from £121 in 2017).

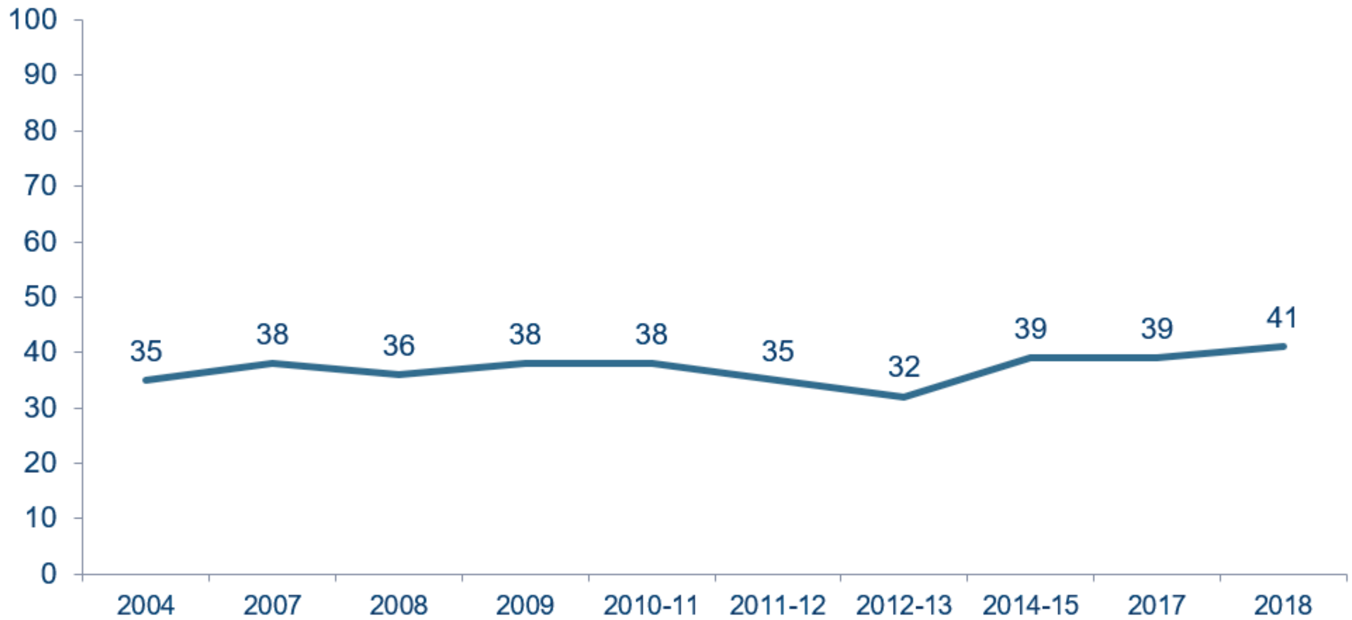
Child-level payments are influenced by the total number of hours children spend in formal childcare, as well as the types of providers used. As such, changes in payments since 2017 do not necessarily reflect changes in the fees and charges levied by childcare providers.

For school-age children, the median weekly amount paid to formal childcare providers was £13 (unchanged since 2017, also £13).

Perceptions around the cost of childcare

Two in five (41%) parents rated the affordability of local childcare as very or fairly good, while 30% rated it as very or fairly poor (Table 5.1). These proportions are in line with those from the 2017 survey (39% and 33% respectively).

Figure C: Percentage of parents rating the affordability of local childcare as very or fairly good
England, 2004 to 2018



Base: All families with child(ren) aged 0 to 14 (5,922 in 2018)

Just over half (52%) of parents who paid for childcare said it was easy or very easy to meet their childcare costs, unchanged from 2017 (also 52%). One in five (19%) parents found it difficult or very difficult to meet their childcare costs, in line with 2017 (21%), but a fall from 2012-13 (27%).

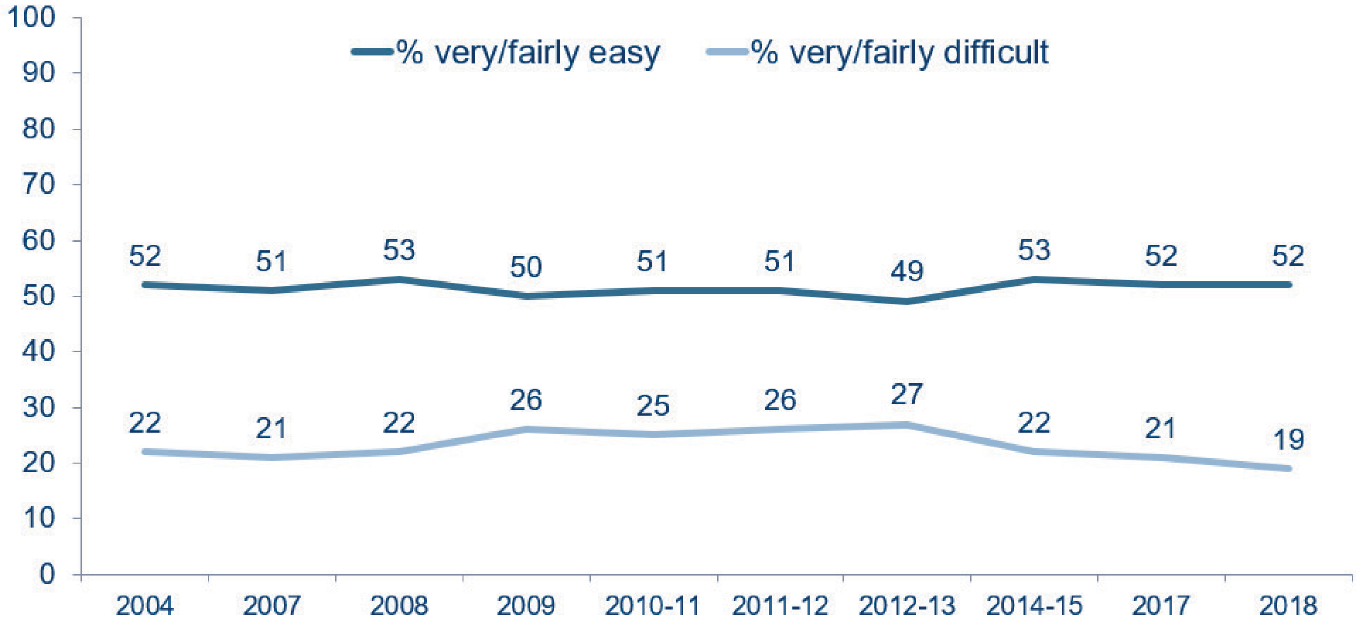
[9] The median amount in the 2017 survey was also £25, but this represents a fall because significance testing on continuous data is carried out on mean values. Median (rather than mean) values are reported because they are less affected by extreme values. Details about significance testing on continuous data can be found in section 2.4 of the Technical Report.

By family work status, couple households in which neither parent was in work, along with working and non-working lone parent households, were the most likely to experience difficulties in meeting their childcare costs (with 38%, 41%, and 37% respectively of these households finding it difficult to meet their childcare costs). By contrast, only 13% of dual-working couple households, and 18% of couple households where one parent was in work, experienced difficulties.

Reflecting these patterns, difficulty in meeting childcare costs also varied by family annual income. While only one in ten (10%) families earning £45,000 or more experienced difficulty in meeting their childcare costs, this rose to around a third (32%) of families earning under £10,000, earning between £10,000 and £20,000 (35%), and earning between £20,000 and £30,000 (32%).

Figure D: The ease of meeting the cost of childcare

England, 2004 to 2018



Base: All families with child(ren) aged 0 to 14 who paid for childcare in the reference week (5,583 in 2018)

Financial help with childcare costs

Parents were asked whether they received any financial help towards childcare costs for any children in the household. This covered a variety of sources, including an employer (via childcare vouchers, direct payments to providers, or provision at the parent's place of work); the entitlement to government funded early education; and an ex-partner.

Among families who used formal childcare in the reference week, 21% reported that they received financial assistance from at least one external source (Table 4.9), in line with the proportion in 2017 (23%). Parents were most likely to receive support from their employer (13%, in line with the proportion of 14% in 2017).

Impact of government-funded and employer-provided support

Parents in work and receiving one or more form of government-funded or employer-provided support were asked what impact, if any, this support had had on their (and on their partner's) job[10].

[10] The forms of support were: Government funded hours of childcare under the 15 or 30 hours offers; Tax-Free Childcare; Working Tax Credit and/or Child Tax Credit; employer-provided childcare vouchers; direct payments to a childcare provider made by an employer; and a childcare provider located at the parent or partner's place of work.

Parents were most likely to say that the support they received had enabled them to stay in work (23%), or maintain their working hours (20%) (Table 4.14). One in seven (14%) parents said the support had enabled them to increase their working hours, and 6% said it had enabled them to decrease their working hours.

For partners, the support was most likely to have enabled them to maintain their working hours (17%), stay in work (10%), or increase their working hours (8%) (Table 4.15). Two per cent of partners had decreased their working hours because of the support they had received.

Tax-Free Childcare

Policy background on Tax-Free Childcare

On 21 April 2017, a new government initiative called Tax-Free Childcare was launched to parents. The initiative was opened gradually by the age of the youngest child, with all eligible parents able to apply from 14 February 2018. Over time, Tax-Free Childcare will replace the Childcare Voucher Scheme. Under the new scheme, working parents can apply for an online childcare account, and for every £8 they pay in, the government pays in an additional £2, up to a maximum of £2,000 per child per year, for children aged 0-11 (or £4,000 for disabled children up to the age of 17). Parents are then able to use the funds to pay for registered childcare.

Just over a quarter (27%) of parents with a child aged under 12 were aware of the Tax-Free Childcare scheme (Table 5.3), a rise in awareness since the 2017 survey (21%). By family work status, dual-working couple families were most likely to be aware of the scheme (33%), followed by working lone parent families (24%). Non-working lone parents were least likely to be aware (17%).

Among working families (dual-working couple families, and working lone parent families) with a child aged under 12, 5% had opened a Tax-Free Childcare account, and a further 1% had applied for, but had not opened an account.

Just over a quarter (26%) of parents with a child aged under 12 who had not applied for Tax-Free Childcare said they would ‘definitely’ or ‘probably’ apply for it in the future (Table 5.18).

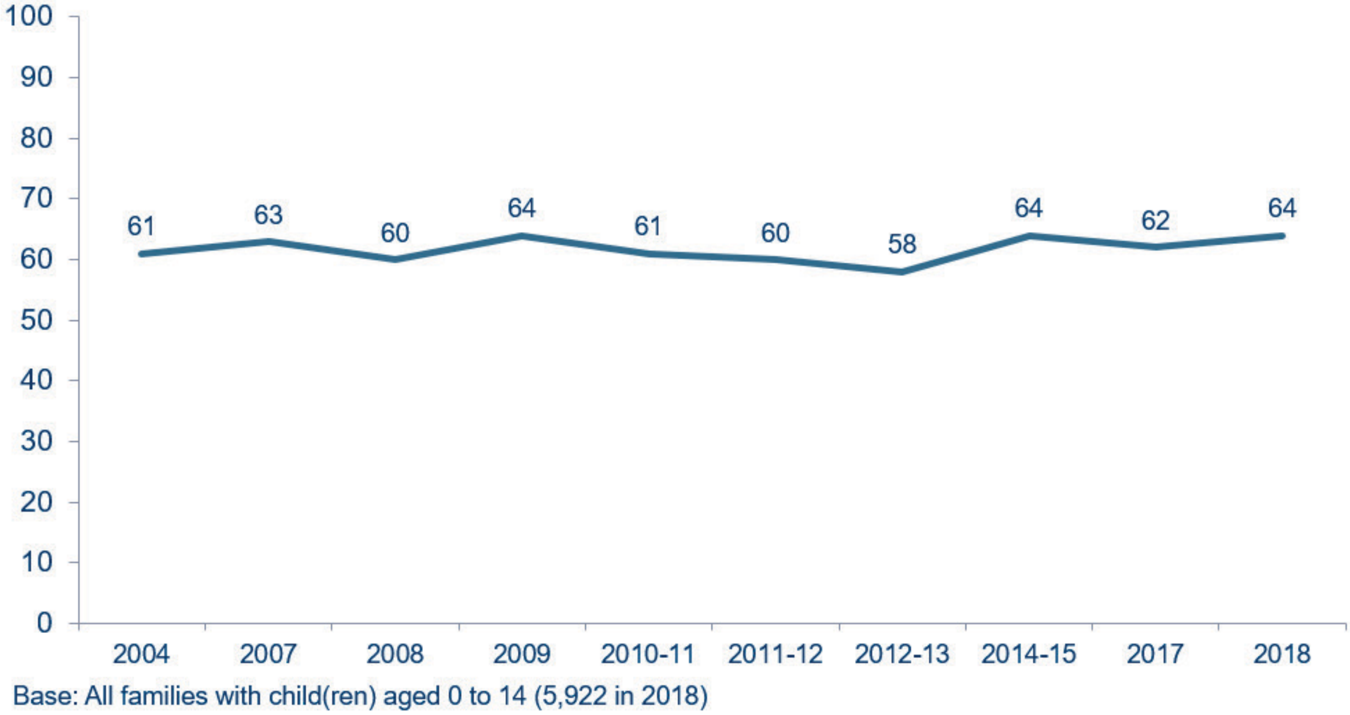
Among those who did not intend to apply for Tax-Free Childcare in the future, the main reasons were because they did not use formal childcare (25%), because they claimed Tax Credits (22%), or because they (or their partner) were not working (16%) (Table 5.19).

5. Perceptions of childcare and early years provision

Perceptions of quality

The majority of parents (64%) rated the overall quality of local childcare provision as very or fairly good, with just 9% rating it as very or fairly poor (Table 5.1). These proportions are in line with the 2017 survey (62% and 9% respectively).

Figure E: Percentage of parents rating the quality of local childcare as very or fairly good
England, 2004 to 2018



Perceptions of availability and flexibility

Forty-five per cent of parents felt the number of local childcare places was 'about right' (in line with the 42% recorded in 2017), while 29% said there were not enough places (in line with the 28% recorded in 2017) (Table 5.1).

One in five (22%) parents reported problems with finding childcare flexible enough to meet their needs, while 39% indicated they did not have problems (Table 5.14), in line with 2017 proportions (21% and 37% respectively).

Figure F: Parents' perceptions of the availability of local childcare places
England, 2004 to 2018

Information about childcare

Around half (49%) of parents said the information available to them about childcare in their local area was ‘about right’, while 31% thought there was too little information[11]. A further 18% of parents were unsure, while 2% felt there was too much information (Table 5.1). These proportions are in line with the 2017 survey.

By family work status, lone parents were most likely to feel there was too little information about local childcare available (37% of working lone parents, and 35% of non-working lone parents). This compares to 29% of dual-working couple families, and 30% of couple families where one parent was in work. Parents living in more deprived areas of the country were also more likely to feel there was too little information (34% of those living in the most deprived areas, compared to 27% of those living in the least deprived areas).

Parents were most likely to receive information about childcare via word of mouth, for example from friends or relatives (42% having done so in the last year), or from school (33%) (Table 5.4); both of these proportions are unchanged from those recorded in 2017.

6. The home learning environment and digital technology

Children’s use of digital electronic devices

The 2017 survey asked a series of questions to understand the home learning environment for children aged 0 to 5. The Home Learning Environment (HLE) is interactions in and around the home which support a child’s learning, such as reading, learning numbers and to count, playing with words and letters or singing nursery rhymes, songs or poems. In the 2018 survey, for the first time in the survey series, questions focused specifically on children’s use of digital technology in the home learning environment.

Around three quarters (76%) of children aged 0 to 5 used a digital electronic device at home, either alone, or together with someone else[12]. Children were most likely to use a tablet computer (64%) or a smartphone (40%), followed by a PC or laptop computer (16%), and a video games console (15%) (Table 6.6). The proportions of children that used a digital electronic device at home showed no statistically significant variation by family annual income, or by the deprivation level of the local area.

Among children that used digital electronic device at home, the most common reasons were to support learning (74%), to encourage play and creativity (45%), or to keep them occupied or quiet (44%) (Table 6.8). There were no statistically significant differences by family annual income, or by the deprivation level of the local area, in the proportions of children that used a digital electronic device at home to support their learning, or to encourage play and creativity

Parents used digital electronic devices as a tool for learning in a variety of ways. Among children who used a digital electronic device at home, two-thirds (65%) were helped by someone at home to learn the alphabet, spell, or recognise words using the device(s). The same proportion (65%) were helped to learn songs, poems, nursery rhymes, or tell stories, while 62% were helped to learn numbers or to count (Table 6.7). The proportions of children using digital electronic devices as a tool for learning showed no statistically significant variation by family annual income in terms of types of learning activities, with the exception of learning songs, poems, nursery rhymes, or telling stories (68% of children in households earning under £10,000 per year, compared to 62% of children in families earning £45,000 or more per year).

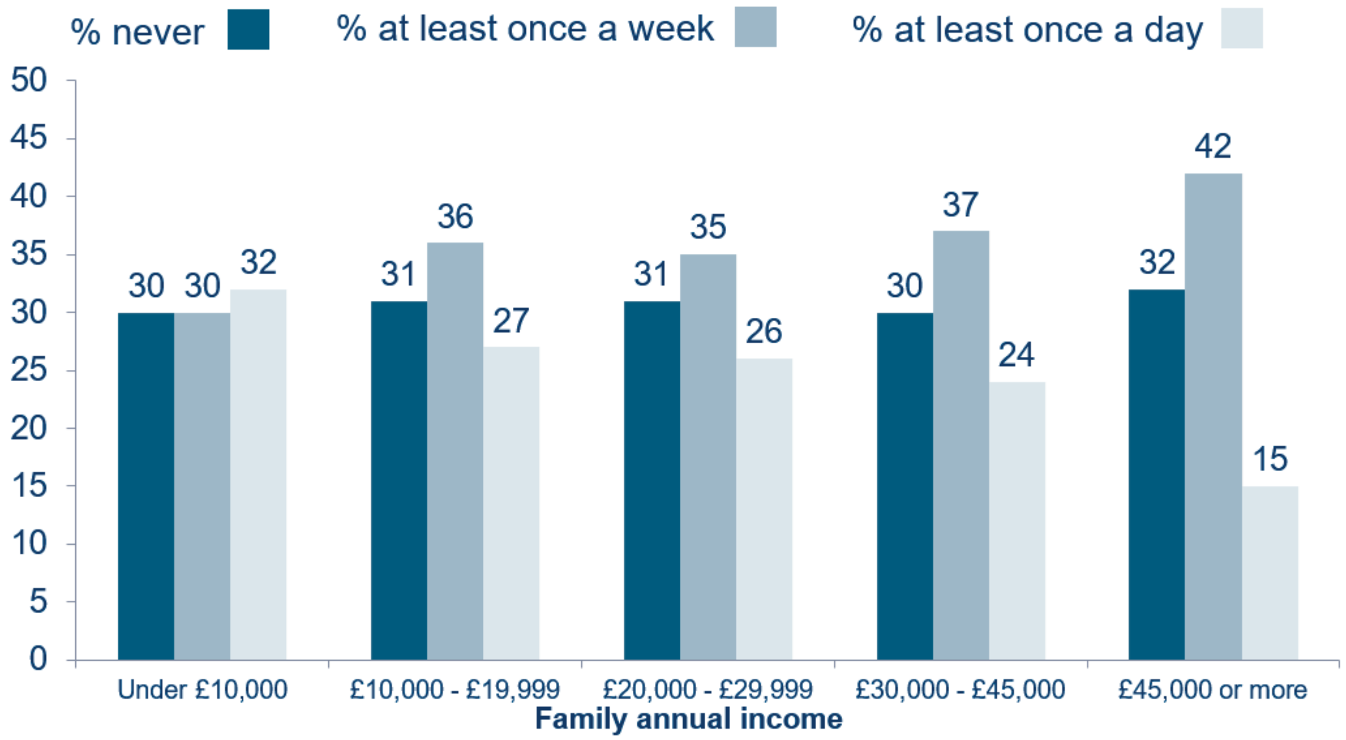
Among all children aged 0 to 5, around a quarter (23%) used a digital electronic device with someone at home as a learning tool on a daily basis, and a further two in five (37%) used one less often than daily, but

[11] Under s12 of the Childcare Act 2006, Local Authorities are required to publish information electronically on their website, and update this information at a minimum every term. Local Authorities are also required to provide information on which childcare providers provide the 30 hours offer.

[12] Digital electronic devices included: tablet computers; smartphones; video game consoles; PCs or laptop computers; E-Readers; and Apps or games on a Smart TV or Connected TV. Watching TV did not constitute using a digital electronic device for the purposes of the survey.

at least once a week (Table 6.2). There was variation by family annual income, with children in lower income households more likely to use a device with someone at home as a learning tool on a daily basis (32% of children in households earning under £10,000, compared to 15% of children in households earning £45,000 or more).

Figure G: Frequency with which children were helped to learn via a digital electronic device by someone at home
England, January to August 2018



Base: All children aged 0 to 5 (3,374)

Information about home learning and play activities

Parents of children aged 0 to 5 were asked from where they would like to get information and ideas about learning and play activities they could do with their child. Informal networks including friends or relatives (36%), other parents (24%), and parenting classes or groups (16%) were frequently mentioned, with formal channels including the child's school (27%) or childcare provider (20%) also popular (Table 6.9). Parents also had an appetite for online sources, with around one in five parents citing internet sites (22%) and social medial channels (19%), and 11% mentioning parenting or child development apps.

7. Mothers, work and childcare

Levels of work among mothers

Seven in ten (70%) mothers reported that they were in work, a rise from the 68% recorded in 2017 (Table 8.5). Just over half (52%) of non-working mothers said that if they could arrange good quality childcare which was convenient, reliable and affordable, they would prefer to go out to work, in line with the 2017 survey (50%) (Table 8.12).

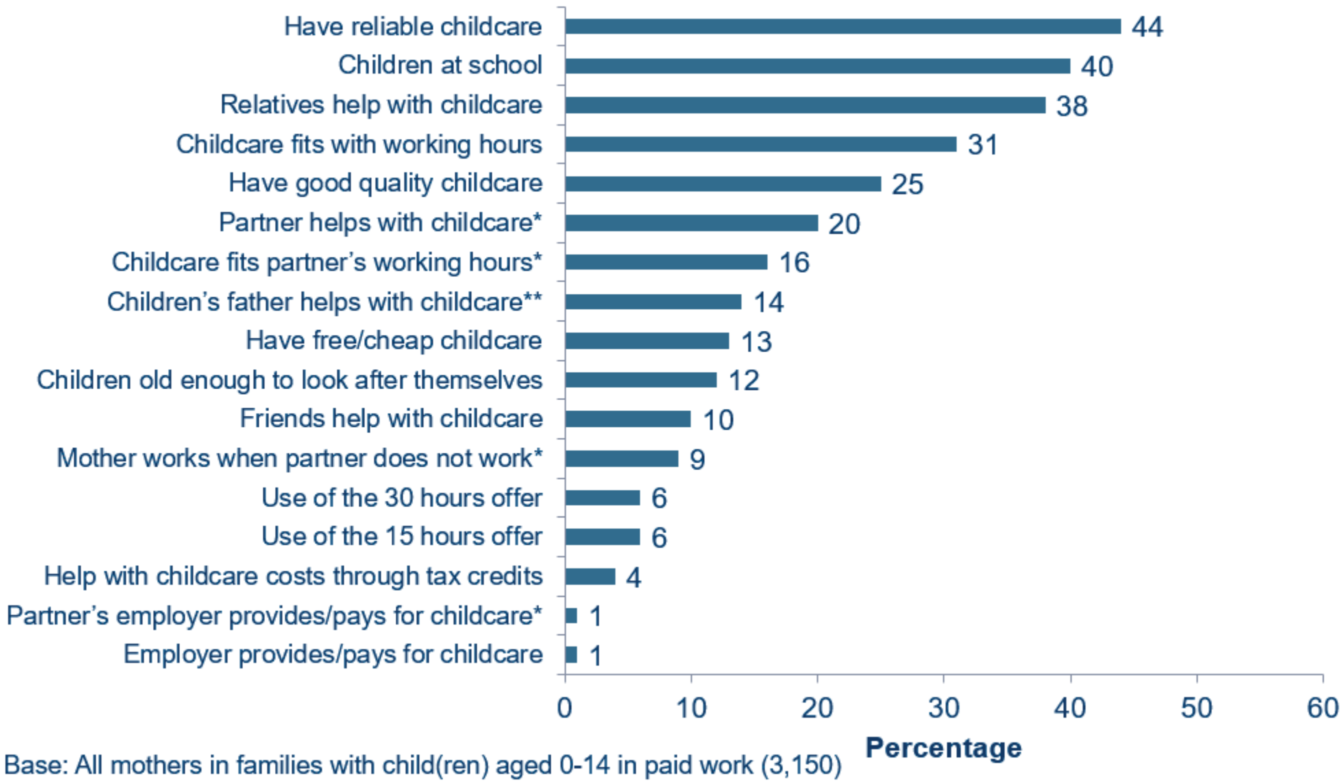
Factors influencing going out to work

Among mothers who had entered the workforce in the previous two years, the most common reason for this move, reported by 21%, was finding a job that enabled them to combine work and childcare (Table 8.8). Three per cent of mothers said they started working to become eligible for the 30 hours. Among mothers with a child aged 2 to 5, this proportion rose to 5%.

Mothers who had transitioned from part-time to full-time work in the previous two years most commonly reported that a job opportunity/promotion (38%) or their financial situation (24%) had influenced this change (Table 8.9). Six per cent of parents said they made this change to become eligible for the 30 hours. Among mothers with a child aged 2 to 5, this proportion rose to 14%.

Over two in five (44%) working mothers said that having reliable childcare helped them to go out to work. Having children at school (40%), and having relatives available to help with childcare (38%) were other facilitating factors (Table 8.3). These proportions are in line with those recorded in 2017 (46%, 40%, and 41% respectively). Six per cent of working mothers said the 15 hours offer helped them to work, and the same proportion said the 30 hours helped them to work. Among mothers with a child aged 2 to 5, these proportions rose to 18% and 16% respectively.

Figure H: Factors that helped mothers go out to work
England, January to August 2018



Base: All mothers in families with child(ren) aged 0-14 in paid work (3,150)
*Partnered mothers (2,475); **Lone mothers (675)

Among mothers working part-time, almost a third (30%) said they would increase their hours if there were no barriers to doing so; however, over half (55%) said they would not change their working hours (Table 8.1). These proportions are in line with those recorded in 2017 (33% and 54% respectively). Mothers in households with lower family annual incomes were more likely to want to increase their working hours than those in higher income households: over a third of mothers in households earning under £10,000 (36%), between £10,000 and £20,000 (35%), and between £20,000 and £30,000 (35%) expressed a desire to increase their hours, compared to around a quarter of mothers in households earning between £30,000 and £45,000 (27%), or £45,000 or more (25%).

8. Accompanying tables

The tables from which the charts in this report are drawn are available in Excel format on the department's statistics website, Statistics: childcare and early years, alongside a fuller set of tables.

Main tables

Use of childcare and early years provision

Table 1.1	Use of childcare providers, 2017 and 2018 surveys
Table 1.2	National estimates of use of childcare
Table 1.3	Use of childcare providers, by age of child
Table 1.4	Use of childcare, by family and area characteristics
Table 1.5	Hours of childcare used per week, by age of child

Receipt of the entitlement to Government funded childcare or early education

Table 2.1	Receipt of Government funded childcare or early education, by age of child
Table 2.2	Awareness of the 15 hours offer, by family characteristics

30 hours of childcare or early education for working parents of 3- to 4-year-olds

Table 3.1	Awareness of the 30 hours of childcare offer, by family characteristics
Table 3.2	Understanding of the 30 hours offer
Table 3.3	Likelihood that respondent and partner will try and find paid work (now or in the future) to become eligible for the 30 hours offer
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Paying for childcare

Table 4.1	Families paying for use of childcare providers, by provider type
Table 4.2	Weekly and hourly payment for childcare, by provider type
Table 4.3	Difficulty paying for childcare, by family characteristics

Factors affecting decisions about childcare

Table 5.1	Perceptions of local childcare provision, 2004 to 2018
Table 5.2	Reasons for not using childcare in the last year, by age of children
Table 5.3	Awareness of and application for Tax-Free Childcare, by family characteristics

Parents' views of their childcare and early years provision

Table 6.1	Reasons for choosing main formal provider, by age of child
Table 6.2	Frequency with which children use an electronic device with someone at home to help them learn, by family characteristics

Use of childcare during school holidays

Table 7.1	Use of childcare during school holidays, 2008 to 2018

Mothers, work and childcare

Table 8.1	Changes to mothers' working hours if there were no barriers, by family type, mother's working status, and family annual income
Table 8.2	Factors that would help mothers change their working hours
Table 8.3	Childcare arrangements that helped mothers to go out to work, by family type

Additional tables

Use of childcare and early years provision

Receipt of the entitlement to Government funded childcare or early education

30 hours of childcare or early education for working parents of 3- to 4-year-olds

Paying for childcare

Technical Report tables

9. Technical information

The Technical Report which accompanies this report provides further methodological information on the survey design, sample, fieldwork, data analysis, interpretation, weighting and definitions used.

When reviewing these tables and the report please note that:

The survey uses a broad definition of 'childcare'	Parents were asked to include any time that the child was not with a resident parent or a resident parent's current partner, or at school. In order to remind parents to include all possible people or organisations that may have looked after their children, they were shown a list of childcare providers: nursery schools, nursery classes, reception classes, special day schools, day nurseries, playgroups, childminders, nannies or au-pairs, baby-sitters, breakfast clubs, after-school clubs and holiday clubs, grandparents, ex-husband/wife/partners, older brother/sisters, other relatives, friends or neighbours.
Detailed information about childcare was collected for one 'reference child' in each household	Because of the constraint of interview length, detailed information on the use and needs of all children in the family could not be collected (unless the child was an only child). Rather, in families where there were two or more children, we obtained a broad picture about the childcare arrangements of all children, before asking more detailed questions about one randomly selected child (referred to as the selected child in relevant sections of the report
Detailed information was collected for childcare use during term-time periods	As childcare arrangements may vary between school term-time and school holidays, most of the questions focused on a reference term-time week (which was the most recent term-time week). A separate set of questions was asked about the use of childcare during the school holidays by parents of school-age children (these questions had been added in 2008).
Parents' classifications of the 'type' of childcare provider have been checked.	Deciding on the correct classification of the 'type' of provider can be complicated for parents. We therefore checked the classifications given by parents with some providers themselves in a separate telephone survey.
Cost estimates are based on self-reported data and are subject to some caveats	Estimates of childcare costs are based on the amounts families reported paying for the childcare they used for all children, during the reference week. They therefore represent an overall average, and take no account of the number of children in the household or the number of hours used. Respondents were asked about what they paid for 'out of their own pocket'. It is not possible to tell what parents have excluded or included in their calculations (e.g. childcare vouchers, government funded hours, tax credits). The analysis also takes no account of the fees policies of the relevant providers (because we did not collect this information).

10. Further information is available

For a detailed technical note	Please see the accompanying Technical Report
Reports for previous years of the survey are available	Full reports for each year the survey has been conducted can be found on the DfE website.
For some related publications	Childcare and early years provider survey, published here Provision for children under 5 years of age in England, published here

11. Official Statistics

These are Official Statistics and have been produced in line with the Code of Practice for Official Statistics. This can be broadly interpreted to mean that the statistics:

- meet identified user needs;
- are well explained and readily accessible;
- are produced according to sound methods, and
- are managed impartially and objectively in the public interest.

The Department has a set of statistical policies in line with the Code of Practice for Official Statistics.

12. Get in touch

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Reference: Childcare and Early Years Survey of Parents 2018