

2005 Childcare and Early Years Providers Survey Childminders

Sam Clemens and Robert Kinnaird
BMRB Social Research

Research Report

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Providers Survey
Childminders*

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1 Summary and conclusions

1.1 Introduction

The Department for Education and Skills (DfES) commissioned BMRB to undertake four surveys to collect information about childcare providers and the childcare workforce. This report outlines the findings for childminders and is based on interviews with 1,132 childminders sampled from the Ofsted database.

Findings from the 2005 survey have been compared with those from similar surveys conducted in 2003 and where appropriate 2001. Data have been weighted and grossed to provide national estimates.

1.2 Characteristics of provision

Since 2003 there has been a slight decline in the number of registered childminders: from 72,900 to 70,200 (a four per cent decrease).

A substantial minority (18 per cent) of registered childminders contacted for the 2005 survey said that they were no longer working as a childminder, and so did not take part in the interview. Taking this into account, there are 57,650 active childminders offering childcare places in England.

It is difficult to compare the number of active childminders in 2005 with the number in 2003, as the 2003 sample was drawn from a different source and so we do not know what proportion of Ofsted registered childminders were no longer working as childminders at that time. This means that it is not possible to gross up the 2003 figures on the same basis as has been done in 2005, and so any comparisons of overall numbers are invalid. Other comparisons (involving proportions and averages) are possible, as both samples involved interviews with active childminders.

Childminders are not evenly distributed across England – the South East accounts for nearly a fifth (19 per cent), while the East Midlands accounts for just eight per cent.

Just under half (45 per cent) of childminders have been operating for five years or more; the equivalent proportion in 2003 was 58 per cent.

The vast majority (91 per cent) of childminders operate in both term time and during the school holidays and 76 per cent operate for five days a week. Seven per cent accept children at weekends. The average number of hours that childminders accepted children for in term time is 43 hours a week, a slight increase since 2003 when the equivalent figure was 39 hours.

Most childminders do not have a business plan, although the proportion with a business plan has risen from 17 per cent in 2003 to 29 per cent in 2005.

1.3 Places and children

In 2005 there were an estimated 275,600 childminding places. There were 242,400 children enrolled.

Childminders provide places to children of varying ages – a fifth of children enrolled were aged under two years old, a third were pre-school children (2-4 year olds), a quarter were aged 5-7 years old and 22 per cent were aged 8 or over.

Children of black or minority ethnic origin make up 12 per cent of all children attending.

At the time of the survey, there were 80,700 vacant places with childminders – an average of 1.4 places per childminder. However, childminders do not always want to work at their full capacity, and if demand was there, they would only fill 67 per cent of these places (53,800 places).

Three-fifths of childminders look after their own children at the same time as the children they are paid to look after.

1.4 Characteristics of childminders

Forty-five per cent childminders were aged 20-39, 37 per cent were aged 40-49 and 18 per cent were 50 or over, a similar breakdown to 2003. As in 2003, nearly all (98 per cent) childminders were female.

On average childminders had been working in childcare for eight years and four months, a decrease from nine years and five months in 2003.

Just two per cent of childminders employ a paid assistant.

1.5 Training

Four in five childminders had attended a preparatory training course when they first registered as a childminder and two thirds of childminders had received some training in the last 12 months. A fifth of childminders who had received training in the last 12 months felt that they had not received enough training.

1.6 Qualifications

Three-fifths (65 per cent) of childminders held some kind of childcare related qualification. There appeared to be a substantial increase in the proportion of childminders holding at least a Level 3 relevant qualification (from 16 per cent in 2003 to 43 per cent in 2005). However, this may be due to childminders in 2005 counting each module that makes up the Childminding Certificate as a Level 3 qualification in its own right.

Just under a fifth (17 per cent) of active childminders were working towards a relevant qualification.

1.7 Income and expenditure

Average annual expenditure by childminders on costs such as insurance, toys, food and consumables etc. (but excluding any housing costs) was £2,300.

On average childminders charged £2.75 an hour, ranging from an average of £3.30 an hour in London to an average of £2.19 an hour in the West Midlands.

On average, childminders took £7,600 a year in fees – which is around £150 a week. Taking into account their expenditure, this means that the average net income from childminding in the last 12 months was £5,500. A fifth (21 per cent) of childminders said that they had supplemented their income from childminding from other sources.

1.8 Conclusions

Since 2003, there has been a slight decline in the number of registered childminders. A substantial minority (18 per cent) of the registered childminders contacted for the survey said that they were no longer working as a childminder, which means that the number of active childminders (57,650) is substantially less than the number registered.

Just under a quarter of a million children (242,400) are looked after by childminders, for, on average, 17 hours a week in term time and 25 hours a week in the school holidays. There is a substantial amount of spare capacity in this sector of the childcare market: in total 53,800 vacant places which childminders would fill if demand was there. This accounts for 20 per cent of all registered places available.

2 Introduction

2.1 The Ten Year Strategy for childcare

The Government's Ten Year Strategy for early years and childcare, published in December 2004, outlined a number of key principles and objectives:

- *Choice and Flexibility* - greater choice for parents in how they balance their work commitments and family life;
- *Availability* – flexible, affordable, high quality childcare for all families with children aged up to 14 who need it;
- *Quality* - high quality provision delivered by a skilled early years and childcare workforce; and
- *Affordability* – families to be able to afford flexible, high quality childcare that is appropriate for their needs.

The Government's vision is to ensure that every child gets the best start in life, and to give parents more choice about how to balance work and family life. By 2010, all 3 and 4 year olds will be entitled to 15 hours a week of free high quality care, for 38 weeks a year and there will be an out of school childcare place available for all children aged 3-14 from the hours of 8am-6pm every weekday. This will be accompanied by a package of measures to help address the issue of affordability of childcare, including increases in the childcare costs that can be claimed through Working Tax Credit and measures to help parents balance work and family life, including the extension of paid maternity leave.

To support this, and to help improve the quality of childcare, there is to be a radical reform of the workforce. This will include measures to strengthen professional leadership in all full day care settings, improve the qualifications and status of early years' and childcare workers and provide training opportunities for childminders and other home-based carers.

A Transformation Fund of £250m over the period April 2006 to August 2008 will support investment to raise the quality of the early years' workforce without undermining efforts to improve affordability.

2.2 Objectives of the research

The Department for Education and Skills needs robust information on the key characteristics of childcare provision in the early years and childcare sector, as well as information on its workforce and the costs of childcare that is available.

The DfES carried out surveys amongst childcare and early years' providers in 1998, 2001 and 2003. The 2005 Childcare and Early Years' Providers' Survey is a modified version of the 2003 Childcare and Early Years' Workforce Survey, expanded in places to provide more information on recruitment and retention issues and the costs of childcare.

The 2005 survey consists of four separate sample surveys aimed at collecting information from the following Ofsted – registered settings:

- Full-day childcare: facilities that provide day care for children under 8 for a continuous period of four hours or more in any day in non-domestic premises (for example, day nurseries and children's centres).
- Sessional childcare: facilities that provide day care for children under 8 for a session which is less than a continuous period of 4 hours in any day in non-domestic premises, for example, playgroups. (There must be a break between sessions with no children in the care of the provider).
- Out-of-school childcare: after school clubs, breakfast clubs and holiday clubs.
- Childminders: those looking after one or more children aged under 8 for a total of more than two hours a day, for reward. (People who look after children wholly or mainly in the child's own home do not need to be registered with Ofsted).

2.3 The Survey

The survey examines the key characteristics of childcare provision and its workforce:

- Provider characteristics (business performance, member of childminder networks or professional associations, length of operation).
- Number of places and children attending (number of places, ages, ethnicity, hours worked).
- Staff (whether have paid assistants).
- Training (current level of training, training plans).
- Qualifications (qualifications held and being worked towards by childminders).
- Income and expenditure (costs, fees, funding).

2.4 Survey Design

This report is based on 1,132 interviews conducted with childminders.

Other surveys were conducted with 1,171 senior managers of full day care providers, 1,007 senior managers of sessional providers and 1,039 senior managers of out of school provision.

The sample for each provider type was stratified by Ofsted region¹ to ensure a representative sample was interviewed in each region. This sample was then randomly divided into two equal groups and assigned to module A or B. In order to reduce the time it took to complete the interview, it was decided that the questionnaires would be divided into two sections. The first section included core questions to be asked of all respondents and the second section consisted of one of two modules (module A or B). Module A asked questions on costs and income and module B asked questions on training and recruitment. A copy of the questionnaire is included in the appendices to the overview report. The same questionnaire was used for all of the group settings, but a slightly different questionnaire was used for the childminder survey.

Data are weighted by Ofsted region (as of March 2005) to ensure the figures are representative of childminders throughout England.

Interviews were conducted by telephone using CATI (Computer Assisted Telephone Interviewing) by The Operation Centre's² fully trained telephone interviewers in Hull. Interviews were carried out between 28th June 2005 and 2nd September 2005.

Full details of the methodology and analysis are included in the Technical Appendix to this report.

¹ Ofsted divides England into eight regions: East of England, East Midlands, London, North East, Yorkshire & Humberside, North West England, South East England, South West England, West Midlands.

² BMRB is part of the Kantar Group, the information and consultancy arm of WPP, BMRB's parent company. In addition to BMRB, other market research agencies in the Kantar Group include Research International and Millward Brown, as well as a number of smaller, specialist organisations. In April 2004 the support services of the Kantar companies were grouped to form a shared resource called The Operations Centre. The majority of BMRB's existing operational services, including field management, sampling and data processing continue to be based at BMRB's Head Office in Ealing but, while still wholly owned by WPP, the new operations centre is now a separate legal entity from BMRB. The Operations Centre continue to work to existing quality standards and BMRB continue to take responsibility for the quality of the work undertaken by their support services.

2.5 Structure of the report

This report is one of five produced from the results of the 2005 Childcare and Early Years' Providers' Survey – the latest in a series of surveys going back to 1998. The other four reports cover:

- Full day care providers
- Sessional providers
- Out of school providers
- Overview report – drawing together the findings from all four settings

The remainder of this report is structured as follows:

Chapter 3	Characteristics of provision
Chapter 4	Number of places available and number and types of children enrolled
Chapter 5	Characteristics of childminders
Chapter 6	Training
Chapter 7	Qualifications
Chapter 8	Income and expenditure

2.6 Notes on reading the report

In the tables, grossed up figures are provided along with percentages. These grossed up figures are based on the total number of childminders registered with Ofsted in March 2005, excluding the proportion found by the survey to be no longer eligible for the survey (e.g. no longer working as childminders).

These grossed up figures are not exact, and like the percentages reported are subject to confidence intervals. Grossed figures in this report have been rounded to the nearest 100.

Where appropriate, comparisons are made between these findings and those of the previous childcare workforce surveys (mainly the 2003 survey conducted by MORI, but in some cases with the 2001 survey conducted by SQW and NOP). However, comparisons need to be treated with caution as both the previous surveys used different sample sources, and used different methods of weighting and grossing. In

2001, data from the Children's Day Care Facilities Survey (March 2001) were used for weighting and grossing purposes, and so the samples are not strictly comparable.

The sample for the childcare audiences in 2003 came from the Childcarelink database held by Opportunity Links, whereas the 2005 sample came from Ofsted. The 2003 sample did not have full details of all providers in all parts of the country and some work was done to obtain the necessary contact details on certain areas.

The 2003 childminder survey then used Ofsted data for weighting and grossing. The weighted data is therefore comparable (with some caveats) with the 2005 data. However, as the sample was not drawn from Ofsted, it was not possible to know how many childminders on the Ofsted database in 2003 were ineligible for the survey because they were not active childminders. It was assumed, when grossing the figures up to provide national estimates, that all childminders on the Ofsted database were active childminders.

In 2005 we found that this was not the case and identified 18 per cent of our sample as being registered but inactive. This was taken into account when grossing figures up to provide national estimates.

Therefore, it is not possible to compare national estimates from 2005 with 2003, as the 2003 figures may over-estimate provision. However, both surveys are surveys of active childminders, so the proportions and means are comparable.

In the 2003 report, some analysis was carried out to look at childminders in the 20 per cent most deprived wards. By 2005, there had been a change in the areas used to define the level of deprivation from wards to Super Output Areas (SOA). Therefore, this report looks at the 30 per cent most deprived areas. For comparative purposes, the 30% most deprived SOAs can be considered as roughly equivalent to the 20 per cent most deprived areas.

There is also some analysis by the population density of an area. This is defined in the same way as in 2003: low density - less than 10 people per hectare; medium density - between 11-24 people per hectare and high density - more than 25 people per hectare.

The percentages in the tables do not always add to 100 per cent due to rounding, and, where percentages in the text differ to the sum of percentages in the tables, this too will be due to rounding.

A * in a table signifies a value between 0 and 0.49, while a – signifies a zero.

Unless otherwise stated, figures referred to are weighted.

3 Characteristics of Provision

3.1 Introduction

This chapter looks at the number and geographical spread of childminders, length of time working as a childminder, details of the childcare provision and whether the childminder was a member of a network or association.

3.2 Numbers and Geographical Spread of Childminders

Since 2003 there has been a slight decline in the number of registered childminders: from 72,900 to 70,200 (a four per cent decrease).

A substantial minority (18 per cent) of registered childminders contacted for the survey said that they were no longer working as a childminder, and so did not take part in the interview. Taking this into account, there are 57,650 active childminders offering childcare places in England.

It is difficult to compare the number of active childminders in 2005 with the number in 2003, as the 2003 sample was drawn from a different source and so we do not know what proportion of Ofsted registered childminders were no longer working as childminders at that time. This means that it is not possible to gross up the 2003 figures on the same basis as has been done in 2005, and so any comparisons of overall numbers are invalid. Other comparisons (involving proportions and averages) are fine, as both samples involved interviews with active childminders.

Childminders are not evenly distributed across the regions. The South East alone accounts for nearly a fifth of all providers (19 per cent) while the East Midlands had the smallest proportion with just eight per cent. The regional distribution is almost exactly the same as in previous years.

	Total 2005		Total 2003	Change from 2005 to 2003	Total 2001
	%	No.	%	%	%
East Midlands	8%	4,800	8%	0	9%
East of England	12%	6,900	12%	0	12%
London	16%	9,400	15%	+1	16%
NE & Yorkshire & Humberside	14%	8,300	14%	0	13%
North West	12%	6,700	12%	0	12%
South East	19%	11,000	19%	0	20%
South West	9%	5,300	10%	-1	10%
West Midlands	9%	5,300	10%	-1	9%

Base 2005: All childminders (unweighted 1,132; weighted and grossed 57,662)
Base 2003: All childminders (unweighted 850; weighted and grossed 72,949)
Base 2001: All childminders (unweighted 850; weighted and grossed 72,300)

Childminders were predominantly based in the more densely populated areas. Eight out of ten childminders (79 per cent) were based in high density areas, 13 per cent were in areas of medium density and the rest were in areas of low density (eight per cent).

Just under a fifth (18 per cent) of childminders were based in the 30 per cent most deprived areas, this figure is the same as 2003³.

3.3 Length of operation

There was a decrease in the proportion of childminders that had been operating for over five years compared with 2003 – 45 per cent and 58 per cent respectively.

As with the 2003 survey, childminders located in the 30 per cent most deprived areas were more likely to have been operating for less than five years (64 per cent) than those in the 70 per cent least deprived areas (53 per cent).

³ Comparisons with the 2003 survey must be treated with caution as the deprivation data was based on a different measurement to the 2005 survey, but the 20 per cent most deprived wards in 2003 are roughly equivalent to the 30 per cent most deprived areas in the 2005 survey

3.4 Business plans

The number of childminders who had a written business plan has increased from 17 per cent in 2003 to 29 per cent in 2005.

Of those who had a plan (15,500 childminders), 80 per cent had updated the plan in the past two years, a decrease since 2003 when the proportion was 85 per cent. Overall this translates into 22 per cent childminders with a written business plan that has been updated in the last two years.

3.5 Network and Association Membership

About a third (35 per cent) of childminders were members of a formal childminding network, this is a decrease since 2003 when the figure was 46 per cent.

Childminders with a greater number of children enrolled were more likely to be a member of a formal childminding network than those with fewer children enrolled – 28 per cent of childminders with 1-2 children enrolled said they were, compared with 49 per cent of childminders with 7 or more children enrolled.

There had been a slight decrease in the proportion of childminders who were members of an informal childminding network, 33 per cent in 2003 to 27 per cent in 2005.

As in 2003, four in five childminders (79 per cent) were members of a professional association. The most popular organisation was the National Childminder Association (NMCA) with 78 per cent of all childminders. Other organisations mentioned were the Pre-School Learning Alliance (four per cent), Playgroup Network (three per cent) and a local childminding association (three per cent).

Table 3.2 Professional association membership				
	Total 2005		Total 2003	Change from 2003 to 2005
	%	No.	%	%
National Childminder Association (NCMA)	78	45,000	74	+4
Pre-school Learning Alliance	4	2,300	4	+0
Playgroup Network	3	2,000	4	-1
Local Childminding Association	3	1,600	-	(+3)
Sure Start	1	700	-	(+1)
Kids Club Network	1	600	2	-1
Other Answer	3	1,800	3	+0
Not a member of a professional association	21	11,900	22	-1
<i>Base 2005: All childminders (Module A) (unweighted, 525; weighted and grossed 26677)</i>				
<i>Base 2003: All childminders (unweighted 850; weighted and grossed 72,949)</i>				

3.6 Childminder Provision

3.6.1 Opening times

The majority (91 per cent) of childminders accepted children in both term time and school holidays, similar to 2003 when the figure was 90 per cent.

Just eight per cent offered term time care only and less than one per cent offered school holiday care only.

Childminders based in London were more likely to offer term time care exclusively than the overall proportion – 17 per cent compared with eight per cent respectively.

3.6.1.1 Opening times term-time

Three quarters of childminders (76 per cent) were open for five days, presumably Monday to Friday. Seven per cent accepted children at weekends in term time.

3.6.1.2 Opening times in school holidays

Three quarters of childminders (73 per cent) were open for five days, again presumably Monday to Friday. Six per cent accepted children at weekends during the school holidays. Childminders in the 30 per cent most deprived areas were more likely to accept children at weekends than those in the 70 per cent least deprived areas – 11 per cent and five per cent respectively.

3.6.2 Working hours

3.6.2.1 Term time

The average number of hours childminders accept children for in term time was 43 hours a week, an increase since 2003 when the equivalent figure was 39 hours.

Nearly half (47 per cent) of childminders accepted children for 50 hours or more, a substantial increase from 33 per cent in 2003.

Childminders with a greater number of enrolments were more likely to accept children for longer hours than those with fewer children enrolled. On average childminders with seven or more children enrolled accepted children for 49 hours a week while those with 1-2 enrolments accepted children for 38 hours a week.

3.6.2.2 School holidays

The average number of hours childminders accept children for during the school holidays was 45 hours a week, an increase since 2003 when the equivalent figure was 40 hours a week.

Half (50 per cent) of childminders accepted children for 50 hours or more a week and three quarters (74 per cent) accepted children for 40 hours or more. In 2003 the equivalent figures were 36 per cent and 71 per cent respectively.

Childminders with a greater number of enrolments were more likely to accept children for longer hours than those with fewer children enrolled. On average childminders with seven or more children enrolled, accepted children for 49 hours a week while those with 1-2 enrolments accepted children for 42 hours a week.

Childminders based in the North West (50 hours) tended to accept children for longer hours than average (45 hours) during the school holidays.

3.7 Whether look after own children

Childminders were asked whether they look after any of their own children at the same time as children they are paid to look after. Three fifths (61 per cent) of childminders

said that they did look after their own children at the same time as looking after children that they are paid to look after.

Childminders with a greater number of children enrolled were less likely to look after their own children at the same time as the children they are paid to look after. Only half (51 per cent) of childminders with seven or more children enrolled looked after their own children compared with 68 per cent of childminders with 1-2 enrolments.

Table 3.3 Proportion of childminders that look after own children at the same time as children they're paid to look after by number of enrolments with childminder

	Overall	1-2 enrolments	3-4 enrolments	5-6 enrolments	7 or more enrolments
	%	%	%	%	%
Yes	61%	68%	61	57	51
No	39%	32%	39	43	49

Base 2005: All childminders (unweighted 1,132; weighted and grossed 57,662)

The childminders' own children tended to be older than the ones they are paid to look after. Only one in ten had a child aged under two years old while a third had a child aged eight or over.

4 Places and children

4.1 Introduction

This chapter presents data on the number of Ofsted registered places, the number of children enrolled with childminders, the demographic breakdown of the children enrolled, the number of hours of care, number of vacancies and expansion.

4.2 Number of places

In total there were 275,600 Ofsted registered places with active childminders in 2005⁴. The average number of places per childminder was 4.8 which is a slight increase since 2003 when there were, on average, 4.5 places per childminder.

Over half of the childminders were registered to provide more than four places (56 per cent) and very few (6 per cent) offered just one or two places.

Childminders in London were more likely (69 per cent) to have 1-4 registered places than childminders overall (44 per cent), and hence had, on average, the least number of places per childminder. This was also the case in 2003.

Table 4.1 shows places by region. The distribution of places by region is consistent with the distribution of households with dependent children. The South East is most well provided for, with a fifth (20 per cent) of all places and 17 per cent of the households with dependent children. This was also the situation in 2003.

⁴ This is the number of places as estimated by the survey, not the total number on the Ofsted database.

Table 4.1 Number of Ofsted registered places				
Region	Number of places			Distribution of households with children*
	No.	%	Mean	
East Midlands	24100	9%	5.1	9.1
East of England	33700	12%	4.9	11.7
London	37500	14%	4.0	12.2
North East, Yorkshire & Humberside	42800	16%	5.2	15.5
North West	31700	11%	4.7	13.1
South East	53900	20%	4.95	17.0
South West	26200	10%	4.9	10.1
West Midlands	25600	9%	4.9	10.5
TOTAL	275,600		4.8	

Base 2005: All childminders (unweighted 1,132; weighted and grossed 57,662)
** From 2001 Census*

4.3 Enrolments in term time

The total number of children enrolled in term time was 242,400. The average number of children enrolled per childminder was 4.2, which is an increase since 2003 when the figure was 3.9. The number of children enrolled is less than the number of places available, suggesting that there is a significant amount of spare capacity (as not all children will take a full place).

The average number of enrolments per childminder was lowest in London (3.1) and highest in the South West (5).

Childminders in areas of higher density were more likely to have fewer number of children enrolled than the less dense areas – high density (4.05), medium density (4.38) low density (5.70).

As table 4.2 shows the distribution of enrolments matches the distribution of places quite closely.

Table 4.2 Children enrolled by region in term time				
Region	Children enrolled			Distribution of places
	No.	%	Mean	
East Midlands	23,300	10%	4.9	9%
East of England	31,200	13%	4.6	12%
London	29,000	12%	3.1	14%
North East, Yorkshire & Humberside	38,300	16%	4.6	16%
North West	27,200	11%	4.1	11%
South East	42,100	17%	3.8	20%
South West	26,400	11%	5.0	10%
West Midlands	24,900	10%	4.7	9%
TOTAL	242,400		4.2	

Base 2005: All childminders (unweighted 1,132; weighted and grossed 57,662)

4.4 Enrolments during school holidays

The total number of children enrolled during the last school holiday was 145,000. The average number of children per childminder was 2.8. (The last school holiday would have been Easter for most of the childminders interviewed).

Again childminders in London had fewer children enrolled in the holidays (2.1) compared with the overall average (2.8).

Table 4.3 Children enrolled by region during school holidays

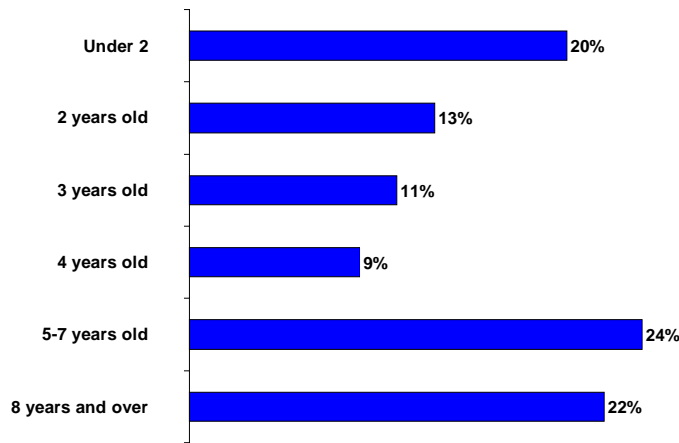
Region	Children enrolled		
	No.	%	Mean
East Midlands	12,200	8%	2.8
East of England	19,600	14%	3.1
London	16,000	11%	2.1
North East, Yorkshire & Humberside	24,300	17%	3.1
North West	17,300	12%	2.8
South East	28,200	19%	2.8
South West	14,100	10%	2.8
West Midlands	13,300	9%	2.9
TOTAL	145,000		2.8

Base: All childminders who look after children during holidays (1,041; weighted and grossed 52,844)

4.5 Ages

Childminders provided places to children of varying ages. A fifth (20 per cent) of the children enrolled were aged less than 2 years; while a third (34 per cent) were pre-school children aged 2-4 years old. A quarter (24 per cent) were aged 5-7 years old and a fifth (22 per cent) were 8 or over.

Chart 4.1 Proportions of enrolled children by age group



Base: All children (unweighted 4,832 in 1132 childminders; weighted 243,933 in 57662 childminders)

Childminders looking after larger numbers of children tended to have a greater number of older children. Childminders with 1-2 enrolments had 0.2 children aged 8 or over while those with 7 or more enrolments had 2.7.

4.6 Black or Minority Ethnic groups (BME)

There were 23,600 children of black or minority ethnic origin, which accounts for 12 per cent of all children enrolled with childminders⁵.

Data from the 2001 Census shows that although people of black or minority ethnic origin make up around nine per cent of England's population, among those aged 0-7 the proportion rises to 15 per cent. This suggests that there are slightly fewer children of BME origin using childminders than would be expected from their proportion in the population.

⁵ This average excludes people who answer don't know at either the question on number of children enrolled, or at the number of children of BME origin (i.e. to be included, both questions have to be answered). Therefore, this proportion is slightly higher than that calculated by dividing the number of BME origin children by the total number of children enrolled.

Three quarters (74 per cent) of childminders looked after no children of black or minority ethnic origin. This fell to a third (34 per cent) in London and rose to 85 per cent in the South West.

Table 4.4 Proportion of children of black or minority ethnic origin						
	Total 2005		30% most deprived areas		70% least deprived areas	
Unweighted base	1,132		194		938	
	%	No.	%	No.	%	No.
None	74%	42,550	68%	6,900	75%	35,650
1- 10%	1%	400	1%	100	1%	300
11% or more	25%	14,650	31%	3,200	24%	11,450
Don't know	*	50	-	-	*	50
Mean (inc. zeros)	12%		18%		11%	

Base: All childminders (unweighted 1,132, weighted and grossed 57,662),

Compared with the average (0.4 children of BME origin per childminder), providers based in the 30 per cent most deprived areas (0.5), those in areas of high density (0.5) and those situated in London (1.1) have higher numbers of children of black or minority ethnic origin. These figures are as expected because of the greater concentration of people of black or minority ethnic origin in London and in turn, London is a high density area and contains a large number of the 30 per cent most deprived areas.

4.7 Special Educational Needs (SEN)

There were 9,400 children with a special educational need (SEN) enrolled with childminders, this represents four per cent of all the children enrolled with childminders.

Eighty-seven per cent of childminders had no children with a special educational need, one in ten (11 per cent) were looking after one child with special education needs; and very few (2 per cent) were looking after two or more.

In 2004, 17 per cent of children at maintained primary schools were assessed as having special educational needs (around two per cent with statements). This is much higher than the proportion with childminders. Childminders will be relying on their own judgement, as pre-school children may not have been formally assessed, and for children that have been assessed, childminders may not have access to this information. This may mean that they are under-estimating the proportion. Alternatively, it may be that children with special educational needs are less likely to be looked after by childminders, either because their parents feel they need a different sort of childcare, or because childminders are unwilling to take them on.

4.8 Number of hours of care

4.8.1 Term time

On average, childminders said that they would accept children for 9.2 hours a day (for a typical day in term time). Most (59 per cent) accepted children for 9-10 hours a day (which covers the “standard” 8am – 6 pm day), and 14 per cent accepted children for 11 or more hours a day. Most childminders (76 per cent) accepted children for 5 days a week. The average number of hours per week that childminders said that they would accept children for was 43 hours.

However, the hours that childminders actually looked after children for tended to be less than this.

The average number of hours a childminder looked after a child was 17 hours a week in term time. A third (33 per cent) of children were looked after for 1-9 hours, a third (30 per cent) were looked after for 10-19 hours, 15 per cent for 20-29 hours, eight per cent 30-39 hours and ten per cent were looked after for 40 hours or more.

Children in London were looked after for, on average, the greatest number of hours (21 hours a week), while those in the South West were looked after for, on average, the least number of hours (15.1 per week).

4.8.2 School holidays

On average, childminders said that they would accept children for 9.7 hours a day (for a typical day in the holidays). Most (57 per cent) accepted children for 9-10 hours a day (which covers the “standard” 8am – 6 pm day), and 14 per cent accepted children for 11 or more hours a day. Most childminders (73 per cent) accepted children for 5 days a week. The average number of hours per week that childminders said that they would accept children for was 44 hours, which is similar to the term time hours that they are prepared to work.

The average number of hours a childminder looked after a child during the school holidays was 25 hours a week, which is more than in term time.

As with term time care, childminders in London tended to look after children for, on average, the greatest number of hours per week (28 hours), while in the South West, children spent, on average, the least number of hours with childminders (21 hours per week).

Table 4.5 Number of hours per week children are cared for

Number of hours	Term time	School holidays
	%	%
1-9	33	15
10-19	30	23
20-29	15	22
30-39	8	14
40-49	7	15
50 or more	3	5
Don't know	4	6
Mean	17	25

Base: All children term time (unwtd 4,481; weighted and grossed 242365), School holiday (unwtd 2,802; weighted and grossed 144,984)

4.9 Vacancies

Childminders were asked how many vacant places they had in a typical week. Many (38 per cent) said that they had no vacancies. This was more common for childminders in the 70 per cent least deprived areas (40 per cent had no vacancies, compared with 30 per cent of childminders in the most deprived areas).

A fifth of childminders (19 per cent) had one vacant place, a further fifth (20 per cent) had two, while one in ten (10 per cent) said that they had 4 or more vacant places. In total, there were 80,700 vacancies, on average 1.42 per childminder (including those with no vacancies). This number of vacant places accounts for 29 per cent of all childminder places available.

Childminders with fewer children enrolled had, on average, more vacant places. Childminders with 1-2 enrolments had 2.2 places vacant while those with seven or more enrolled had 0.6.

Childminders who had vacancies were asked how many of their vacant places they would actually fill if the demand was there. A fifth (17 per cent) of childminders with vacancies said they would not fill any. The average number of vacant places among childminders with vacancies was 2.3, but the average number childminders said that they would fill was 1.6. In total, childminders with vacancies said that they would fill 53,800 of the vacant places if demand was there – which is 67 per cent of all the vacant places; and which accounts for 20 per cent of all registered places available.

4.10 Expansion

About one in ten (13 per cent) childminders had expanded in terms of the number of registered places in the last 12 months. Of those who hadn't expanded, 16 per cent said they planned to in the next 12 months.

Childminders who said they didn't plan to expand were asked why not. By far the most common reason given (43 per cent) was that they were *already at the maximum capacity*. After this other reasons were that they *were happy with number of present children* (15 per cent) and *would need larger premises* (11 per cent).

	%
Already at maximum capacity	43
Happy with the number of children at present	15
Would need larger premises	11
Stopping childminding	7
Because of own children/grandchildren	7
No sufficient demand for extra places	5
Couldn't cope with more children	4
Quality of childcare would suffer	4
Would have to take on staff and don't want to	3
Don't need to take on more children	1
Too much competition from other providers	1
Too costly to expand	1
Other answer	8
No answer	1
Don't know	1

Base: Childminders with no plans to expand in next 12 months (unwtd 378; weighted and grossed 19,081)

5 Characteristics of childminders

5.1 Introduction

This chapter looks at the demographic profile of childminders, their experience and the scale of the employment of paid assistants.

5.2 Age

Most childminders (90 per cent) were aged 30 or over. A third (35 per cent) were 30-39, a further third (37 per cent) were 40-49 and a fifth (18 per cent) were aged 50 or over. Eight per cent were aged 25-29, and only a very small number of childminders were younger than this (one per cent – around 900 individuals). These figures are similar to 2003.

5.3 Sex

As in 2003, the vast majority (98 per cent) of childminders were female. Men represented just two per cent of childminders, approximately 1,000 individuals.

5.4 Ethnicity

Seven per cent of childminders said they were of black or minority ethnic origin, a decrease from 2003 when the proportion was 13 per cent. This proportion is slightly lower than the average for the UK working population of nine per cent⁶.

5.5 Disability

Just one per cent of childminders (approximately 800 individuals) said they had a disability, a similar figure to 2003 (one per cent)

According to the 2005 Labour Force Survey (LFS), about ten per cent of the working population (and 11 per cent of the female working population) have a disability.

⁶ Labour Force Survey 2005

Table 5.1 Demographics of childminders				
	Total 2005		2003	Change from 2003 to 2005
	%	No.	%	
20-39	45	5,300	48	-3
40-49	37	21,300	34	+3
50+ years	18	10,400	18	+0
Gender				
Female	98	56,700	99	-1
Male	2	1,000	1	+1
Ethnicity				
From a black or minority ethnic group	7	4,000	13	-6
Not from a black or minority ethnic group	92	53,200	86	+6
Disability				
With a disability	1	800	2	+1
Without a disability	99	56,800	98	-1
<i>Base 2005: All childminders (unweighted 1,132; weighted and grossed 57,662)</i>				
<i>Base 2003: All childminders (unweighted 850; weighted and grossed 72,949)</i>				

5.6 Experience

On average childminders had been working as a childminder for six years and eight months. Childminders with a greater number of children enrolled, tended on average to have been working as a childminder for longer. Those with 1-2 enrolments, had worked for four years and eleven months compared with those with seven or more enrolments where the average number of years was eight years and five months.

Childminders were also asked how long they had been working in the childcare sector. On average they had been working in childcare for eight years and four months, a decrease since 2003 when the equivalent figure was nine years and five months. Again those with a greater number of enrolments had worked in the childcare sector for longer (1-2 enrolments, six years and seven months, 7 or more enrolments, ten years and three months).

5.7 Paid assistants

Just two per cent of childminders employed a paid assistant.⁷

⁷ The base size is too small (22) to allow any further analysis of paid assistants.

6 Training

6.1 Introduction

This chapter looks at the training that childminders have received.

6.2 Preparatory course

Around four in five (84 per cent) childminders had attended a preparatory training course when they first registered as a childminder, a slight increase since 2003 when the proportion was 77 per cent and continuing an upward trend since 2001. This figure drops in the East Midlands where only two thirds (67 per cent) of childminders had attended a course. In all other regions the figure is over 82 per cent.

Of those people who had attended a preparatory course most said it had lasted for longer than one day (81 per cent for at least 8 hours, an increase since 2003 when the figure was 73 per cent). One in twenty (five per cent) said that the course was less than four hours.

Table 6.1 Whether received preparatory course

	Total 2005		Total 2003	Change from 2003 to 2005	2001
	%	No.	%		%
Attended course	84%	48,300	77%	+7	67%
Did not attend course	16%	9,300	23%	-7	33%
Don't know	*	100	-	-	-

Base 2005: All childminders (unweighted 1132; weighted and grossed 57,662).

Base 2003: All childminders (unweighted 850; weighted and grossed 72,949)

Base 2001: All childminders (unweighted 850; weighted and grossed 72,300)

6.3 Whether received training in last 12 months

There was a slight increase in the number of childminders who have received some training in the last 12 months, from 61 per cent in 2003 to 66 per cent in 2005. However, the proportion receiving 16 or more days of training in the last 12 months had decreased from 18 per cent in 2003 to 13 per cent in 2005.

On average, childminders had received nine days of training in the last 12 months. Some childminders had received a lot of training (a small number said that they had spent over 200 days training, which may be because they had been doing some course or qualification), which brings this average up. The median amount of training received was two days in the last 12 months.

Table 6.2 Amount of training in last 12 months				
	Total 2005		Total 2003	Change from 2003 to 2005
	%	No.	%	
Any days spent training	66%	40,100	61%	+5
Number of days:				
None	34%	20,400	39%	-5
1-5 days	36%	21,700	22%	+14
6-10 days	12%	7,300	11%	+1
11-15 days	6%	3,500	11%	-5
16 or more days	13%	7,600	18%	-5
MEAN AMOUNT	9 days			
MEDIAN AMOUNT	2 days			
<i>Base 2005: All childminders (Module B) (607)</i>				
<i>Base 2003: All childminders (850)</i>				

A fifth of those childminders who had received training in the last 12 months said they thought this was not enough, 77 per cent said they thought this was about right⁸.

⁸ In 2003 the survey asked childminders for more detail about the training they received; satisfaction with training, money spent on training, funding for training, training plans and business skills, these questions were removed for the 2005 survey.

7 Qualifications

7.1 Introduction

This chapter looks at the qualifications that childminders currently hold and the qualifications they are working towards.

7.2 Definitions of Qualifications Levels

The qualifications are grouped together in the levels that they have been accredited with by the Qualifications and Curriculum Authority.

- Level 1 (foundation level) – GCSE grade D-G, Foundation level GNVQ, Level 1 NVQ
- Level 2 (intermediate level) – GCSE A*-C, Intermediate GNVQ, Level 2 NVQ
- Level 3 (Advanced level) – A level, Vocational A level (Advanced GNVQ), Level 3 NVQ
- Level 4 – Higher level qualifications, BTEC Higher Nationals, Level 4 NVQ (e.g. Level 4 Certificate in Early Years Practice)
- Level 5 – Higher level qualifications, BTEC Higher Nationals, Level 5 NVQ (e.g. Early Years Foundation Degree)
- Level 6 – Honours degree (e.g. Qualified Teacher Status)
- Level 7 – Masters degree
- Level 8 – Doctorate

Respondents were asked for the highest qualification relating to childcare that they hold⁹.

There have been changes to the way that the levels are defined since the previous survey in 2003. Current Levels 4, 5 and 6 (as defined above) were previously all part of Level 4. Current Levels 7 and 8 were previously part of Level 5. Further information can be found in the Technical appendices to this report.

⁹ In the previous surveys, respondents were asked for the actual name and level of the qualification. In the 2005 survey respondents were only asked for the level of their highest qualification to reduce the burden on the respondent and to avoid the difficulties of coding the numerous childcare qualifications.

7.3 Current qualifications

A third (35 per cent) of childminders at the time of the survey held no qualifications relevant to childcare. This figure increased for those based in areas of low density (44 per cent) and those in the North West (43 per cent). Six in ten (65 per cent) childminders held some kind of relevant qualification.

Two fifths (40 per cent) said they held a Level 3 qualification and 43 per cent said they had at least a Level 3 qualification. This is a large increase on 2003 and 2001, when just 15 per cent and 14 per cent respectively said they had a Level 3 qualification. (This increase may be due to confusion among childminders as what counts as a Level 3 qualification. There is a suggestion that some childminders may have counted one unit towards the Level 3 qualification as a Level 3 qualification; therefore this increase should be treated with caution).

	Total 2005		2003	Change from 2003 to 2005
	%	No.	%	
Level 1	16%	8,800	7%	+9
Level 2	6%	3,100	7%	-1
Level 3	40%	21,500	15%	+25
Level 4 & 5	1%	700	1%	+2
Level 6	2%	1,000		
Level 7 & 8	*	200		
Overseas qualification	*	100	-	(-)
Any relevant qualification	65%	35,200	64%	+1
No relevant qualification	35%	18,900	36%	-1
At least a Level 2 qualification	49%	26,500	23%	+26
At least a Level 3 qualification	43%	23,400	16%	+27

Base 2005: All childminders giving useable qualification details (unwtd, 1,063; weighted and grossed 54,180)

Base 2003: All childminders (unweighted 850; weighted and grossed 72,949)

7.4 Qualification being worked towards

Just under a fifth (17 per cent) of childminders said they were working towards a relevant qualification, a similar proportion to 2003 (19 per cent). In total, 15 per cent of childminders were working towards a Level 3 qualification or above.

Childminders located in the low density areas were more likely to say they weren't studying towards a qualification (91 per cent)

Table 7.2 Qualifications being worked towards				
	Total 2005		2003	Change from 2003 to 2005
	%	No.	%	
Level 1	1	600	2	-1
Level 2	1	600	2	-1
Level 3	12	6,900	12	+0
Level 4 & 5	2	1,200	*	+3
Level 6	1	600		
Any relevant qualification	17	9,800	19	-3
No relevant qualification	81	46,700	81	+0
At least a Level 2 qualification	16	9,200	14	+2
At least a Level 3 qualification	15	8,600	12	+3
<i>Base 2005: All childminders (Module B) (unwtd 607; weighted and grossed 30,985)</i>				
<i>Base 2003: All childminders (unweighted 850; weighted and grossed 72,949)</i>				

8 Income and Expenditure

8.1 Introduction

This chapter looks at the expenditure incurred by childminders. A summary table (Table 8.1) brings together all of these categories and shows total expenditure. The chapter also covers the fees charged for looking after children, and the income received from childminding.

8.2 Expenditure and outgoings

8.2.1 Costs of housing

Childminders tend to look after children in their own homes, so we asked about the costs of their own rent or mortgage. Of course, this cost is not entirely expenditure related to childminding, as it is also where the childminder lives. However, a proportion of it could be seen as related to childminding.

Most (72 per cent) childminders own their own home with a mortgage, and 13 per cent own their home outright. Just 12 per cent rent their home. Compared to population figures for England, childminders are more likely to own their home (86 per cent compared to 68 per cent), but less likely to own their home outright (13 per cent compared to 29 per cent). As childminding is a business run from home, and the home has to be inspected to ensure that it is suitable, it may be more difficult for those who rent their properties to take up childminding (for example, many rental agreements do not allow businesses to be run from rented properties).

Seventeen per cent of childminders said that they did not pay any housing costs. This is higher than the proportion owning their home outright, and could possibly be due to respondents' partners being the householders.

A significant minority (19 per cent) of childminders did not provide details of how much they paid for their housing costs (either because they did not know or they did not want to say). The average annual cost of housing among those paying for it who could give a figure was £5,800. This varied by region and was highest in London and the South East (£7,000) and lowest in the North West (£4,300)

8.2.2 Insurance costs

Nearly all childminders had some insurance related to being a childminder – only four per cent said that they did not pay for insurance.

Nine per cent could not say how much their insurance cost them, but among those providing a figure (and who paid for insurance), the average cost per year was £70.

8.2.3 Cost of toys, books and other items for children

Again, very few childminders (four per cent) did not spend any money on toys, books or other items for the children they looked after. Eighteen per cent were not able to provide a figure (it may be difficult for some to separate out the costs of toys etc. related to their childminding from the costs of toys that are bought for their own children).

Among those who said that they paid something for toys and books etc. the average cost per year was £380. Not surprisingly, this increased as the number of enrolments increased (average spend among those with 1-2 children enrolled was £300 a year, and among those with 7+ children enrolled it was £600 a year).

8.2.4 Cost of food

One in ten (11 per cent) childminders did not spend any money on food for the children they looked after. This was most common among childminders with only one or two enrolments (20 per cent did not pay for any food). A further eight per cent were not able to say how much they spent on food.

Of those providing a figure, and who did pay something for food the average cost per year was around £1,000 (around £20 a week). Again, this tended to increase with the number of enrolments (ranging from £600 for those with 1-2 children up to £1,600 for those with 7+ children).

8.2.5 Cost of other consumables

Providers were asked how much they spent on other consumables (such as nappies, stationery, paint etc). Seventeen per cent said that they did not pay for any other consumables (again, this was most common for childminders looking after just one or two children – 26 per cent did not pay for any other consumables). A further 12 per cent were unable to say how much they actually spent on consumables.

Of those who gave a figure, and were paying for other consumables, the average cost per year was around £300 (or around £7 a week).

8.2.6 Cost of professional fees

Most childminders (85 per cent) did not pay any professional fees (e.g. to accountants or lawyers). Four per cent could not tell us how much they paid. Of those paying, who gave a figure, the average spent on professional fees was £190 a year.

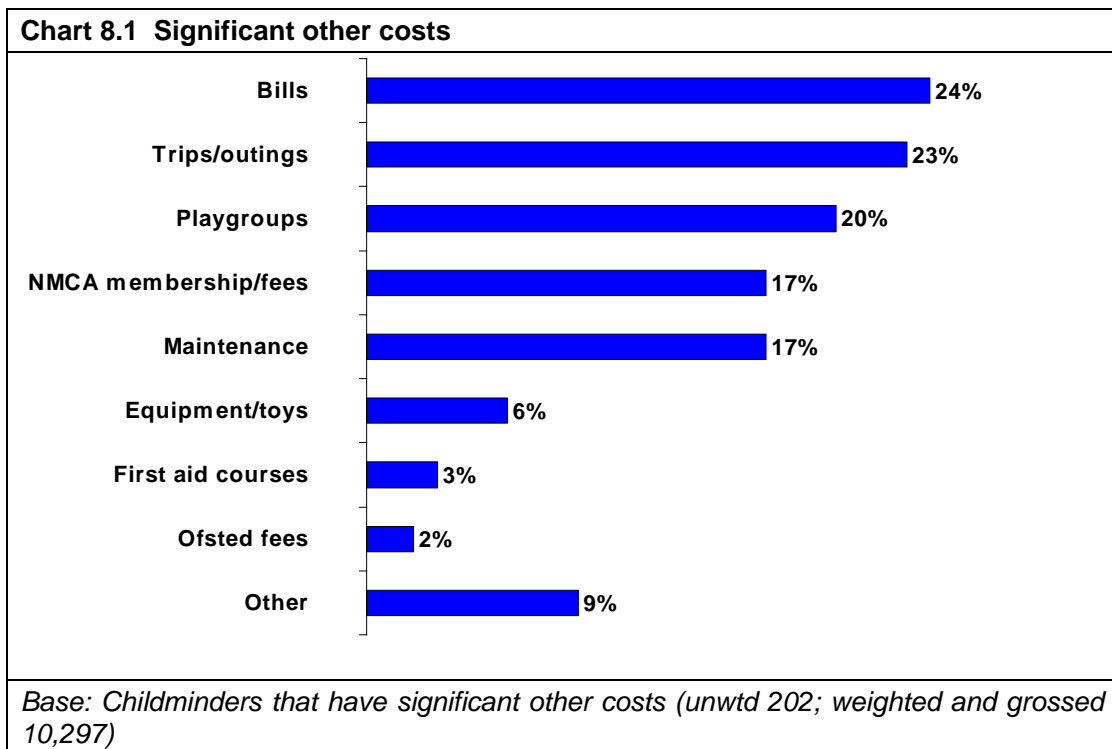
8.2.7 Cost of transport

Nearly a third (30 per cent) of childminders said that they did not spend anything on transport. Nine per cent could not say how much they spent. Of those who did spend money on transport, and who could give a figure, the average amount spent was £660 a year.

8.2.8 Other costs

61 per cent of childminders said that could not think of any other significant costs that they had to pay.

The costs that childminders who could think of other significant costs mentioned included items such as bills (e.g. heating, lighting, electricity etc); trips and outings and the cost of toddler groups, playgroups etc. Chart 8.1 below shows the proportions mentioning each.



Five per cent were unable to say how much these other costs were, but among those providing a figure, the average amount spent on other costs was £600 a year.

8.2.9 All expenditure

Table 8.1 Annual expenditure for childminders (excluding housing costs)				
	Base	% paying nothing	Av. Amount (exc. zeros)	Median Amount (exc. zeros)
Insurance	475	4%	£70	£50
Toys, books etc	430	4%	£380	£240
Food	430	11%	£1,000	£780
Other consumables	461	17%	£300	£240
Professional fees	505	85%	£190	£150
Transport	478	30%	£660	£520
Other costs	497	61%	£600	£260
TOTAL AVERAGE (inc. zeros)	£2,300			
<i>Base: All childminders (Module A) (unwtd 525; weighted and grossed 26,677)</i>				

8.2.10 Staff costs

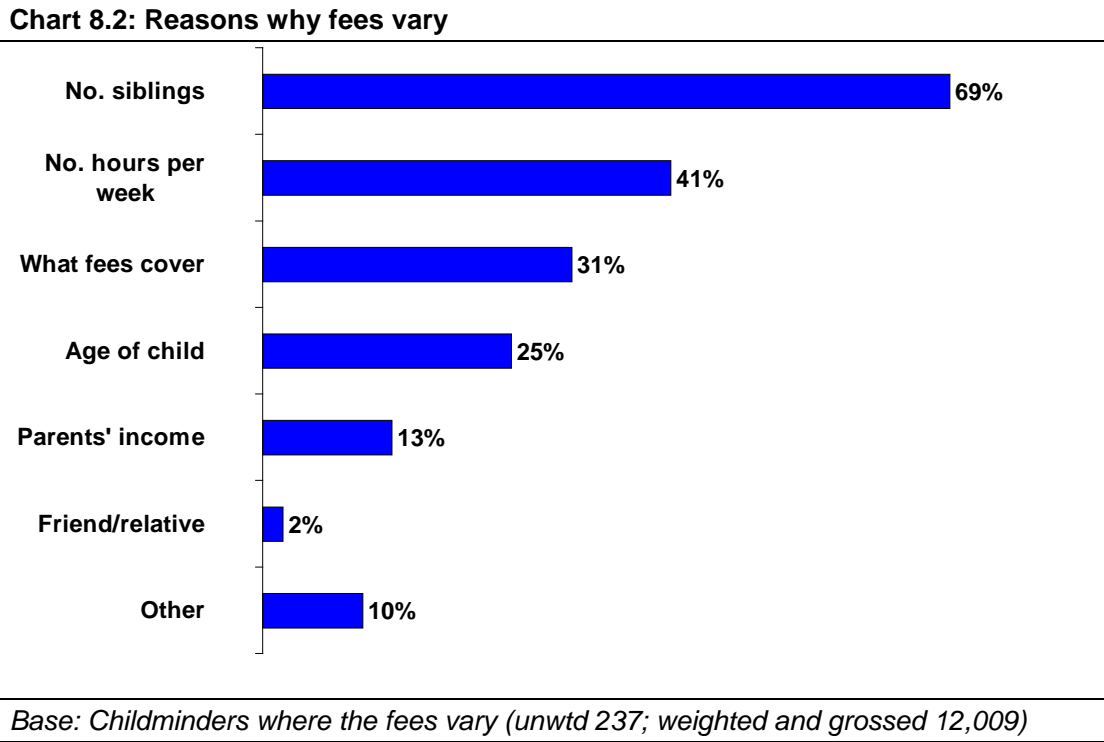
Details were not collected on the salaries paid by childminders to their paid assistants. As only two per cent of childminders employ any paid assistants, this is unlikely to have any significant impact on the overall expenditure figures.

8.3 Income

8.3.1 Fees charged

Most childminders (81 per cent) charged per hour. One in ten (nine per cent) charged per day and seven per cent per week.

Just under half (44 per cent) of the childminders varied the fees from child to child, while 56 per cent charged the same for all children. Where the fees do vary, the most common reasons for variation are the number of siblings enrolled, and number of hours per week the child does and what the fees cover.



Most of the childminders (86 per cent) who were open both during the school holidays and during term time did not vary their fees on this basis.

Childminders were asked what fees they charged for a typical child. A fifth (22 per cent) of the childminders could not (or would not) say. For those providing a figure, most (78 per cent) charged between £2.50 and £5.00 per hour, and only one per cent charged more than £5 an hour. Two per cent said that they charged nothing. (This may be because they were looking after children for a friend or relative).

On average, childminders charged £2.75 per child per hour. Childminders in London charged the highest amount (£3.30 an hour) and those in the West Midlands charged the least (£2.19 per hour). There was no difference in hourly rates between the most and least deprived areas.

Childminders were also asked what their total income from fees was. Fifteen per cent could not say, but among those giving a figure, a quarter (28 per cent) had a fee income of over £10,000 a year. A further third (37 per cent) had a fee income of between £5,000 and £10,000. A substantial minority (18 per cent) had a fee income of less than £2,500 a year. On average, childminders took £7,600 a year in fees – which is around £150 a week.

Not surprisingly, fee income increased with the number of children enrolled – ranging from, on average, £4,700 for childminders with one to two children up to £11,100 for those with seven or more children.

Half (50 per cent) had raised their fees in the last two years, 13 per cent had raised their fees more than two years ago, one per cent had reduced their fees and a third (36 per cent) had never raised their fees. Childminders in the 30 per cent most deprived areas were more likely to have never changed their fees than those in less deprived areas (49 per cent had never changed their fees compared with 34 per cent of those in less deprived areas). Childminders with fewer children enrolled were also less likely to have ever changed their fees (54 per cent of those with just one or two children enrolled had never changed their fees, compared to 21 per cent of those with 7 or more children enrolled).

8.3.2 Income from Local Authority

It was fairly rare for childminders to receive any income from the Local Authority – and 92 per cent said that they got no income from this source, and three per cent did not know. This did not vary by the level of deprivation of an area, or by the number of children enrolled. Of the few who did receive Local Authority money, the average amount was £3,200 per year.

8.3.3 Income from other sources

Childminders were asked what, apart from fees and money from Local Authorities, were their other main sources of income. Most (89 per cent) said that they had no other sources of income. However, a few childminders mentioned other sources – but not all of these were “childcare related sources” – three per cent mentioned other jobs and one per cent said their partner’s income. Therefore, not all the other income mentioned is directly relevant to childminding. The only “relevant” answer given was Sure Start which was mentioned by two per cent of childminders.

8.3.4 Total income from childminding

To assess how much income childminding brought in for childminders, we asked roughly, in the last 12 months, how much their income from childminding had been. From this we calculated annual net income.

Over a quarter (28 per cent) of childminders either could not (22 per cent) or would not (six per cent) answer. Of those providing a figure, two per cent earned nothing in the previous year. A quarter (27 per cent) had taken home £2,500 or less, and a further 31 per cent had taken home between £2,501 and £5,000. One in ten (13 per cent) had taken home over £10,000.

The average net income from childminding in the last 12 months was £5,500. This did not vary by the level of deprivation of the area. Childminders in the South East had a significantly higher income than those in the North East, Yorkshire and Humberside (on average £6,300 compared to £4,600).

Childminders were asked how many places they needed to fill to earn the minimum income that they are prepared to accept. Eleven per cent didn't know. Of those giving an answer, a tenth (11 per cent) said no places (and so presumably did not rely on their childminding income). At the other extreme, 28 per cent said they needed between 76% and 100% of their places filled. On average, childminders felt they needed 56% of their available places filled if they were to earn the minimum income they required.

A fifth (21 per cent) of childminders said that they supplemented their income from childminding from other sources. This was more common on the 70 per cent least deprived areas (where 22 per cent of childminders supplemented their income compared to 14 per cent in more deprived areas). It was more common in the East Midlands and the South East where around 30 per cent supplemented their income, compared to the East of England where only seven per cent did. Childminders with fewer children were more likely to supplement their income than those looking after a higher number of children (27 per cent of childminders with 1-2 children enrolled supplemented their income compared to 17 per cent of those with 7+ enrolled).

8.4 Tax credits and childcare vouchers

8.4.1 Awareness of tax credit issues

In April 2005, there was an increase in the amount of childcare that could be claimed as part of the childcare element of the Working Tax Credit to £175 per week for one child. Three in ten (29 per cent) childminders were aware of this increase. Awareness did not seem to vary greatly by area or number of children enrolled. Those that were aware of the change were asked if the change had led them to make any changes to the fees. Three per cent said that it had affected their fees (one per cent of all childminders), and all of these increased their fees.

Providers were asked whether they were aware of a further change, due to take place in April 2006, whereby the amount that can be claimed will rise from 70% to 80% of the limit. One in ten childminders (nine per cent) said that they were aware of this, but most (92 per cent) were unaware of this change.

8.4.2 Fees paid by parent's employers

A fifth (17 per cent) of childminders received fees for children from the parent's employer (for example, via childcare vouchers or direct payment). This was more

common for childminders in the 70 per cent least deprived areas (18 per cent compared to 11 per cent in the most deprived areas). It was also, not surprisingly, more common among childminders with larger number of children enrolled (28 per cent of childminders with 7 or more children enrolled received some of their fees from the parent's employer).

On average, in childminders with children paid for by parental employers, just one child was paid for in this way. The average fee income received in the last week from parents' employers was £80 (among childminders who received income from this source). The number of childminders in the sample receiving income in this way (88) is too small to allow for more detailed analysis.

9 Technical appendix

9.1 Design

The research was divided into two surveys, with a group provider questionnaire (i.e. sessional care, full day care and out of school care providers) and an individual setting questionnaire (i.e. childminders). While they were a similar format with similar questions, because childminders largely operate individually it was felt they required a separate questionnaire that was more tailored to their setting.

The questionnaires were developed by the research team at BMRB Social Research in consultation with representatives from the Department for Education and Skills (DfES). The surveys were largely based on previous surveys, with new questions relating to costs, and some extra questions on recruitment and retention added in. As part of the questionnaire development stage BMRB researchers carried out cognitive interviews with representatives from the four provider types, to test the new costs questions. The findings from these interviews helped shape the questionnaire format and question wording.

In order to reduce the time it took to complete the interview, it was decided the questionnaires would be divided into two sections. The first section would include core questions to be asked of all respondents and the second section would consist of one of two modules (module A or B). Module A asked questions on costs and income and module B asked questions on training and recruitment. Respondents were randomly split into two equal groups and assigned to module A or B, prior to the interview taking place. (The sample was stratified by region before this allocation took place to ensure that within each region equal numbers were asked module A or B).

Draft questionnaires were produced and tested in a pilot exercise.

9.1.1 Pilot

The group provider setting questionnaire was piloted on 14th June 2005. The childminder questionnaire was piloted on 5th and 6th July 2005. Computer assisted telephone interviews (CATI) were carried out by The Operations Centre¹⁰ (TOC) telephone interviewers in Ealing.

¹⁰ BMRB is part of the Kantar Group, the information and consultancy arm of WPP, BMRB's parent company. In addition to BMRB, other market research agencies in the Kantar Group include Research International and Millward Brown, as well as a number of smaller, specialist organisations. In April 2004 the support services of the Kantar companies were grouped to form a shared resource called The Operations Centre. The majority of BMRB's existing operational services, including field management, sampling and data processing continue to be based at BMRB's Head Office in Ealing but, while still wholly owned by WPP, the new operations centre is now a separate legal entity from BMRB. The Operations

Following the pilot exercises a number of relatively minor changes were made, in order to shorten and simplify both questionnaires.

9.2 Sample design

The sample for the survey was obtained from Ofsted, who hold a register of all early years and childcare providers. Target sample sizes of 1,125 were set for all four setting types, and the issued sample size was based on ineligibility rates and response rates from the 2003 survey. Some reserve sample was also drawn for contingency.

Ofsted provided a stratified random sample for the four provider types who were active as at 13th June 2005 – sessional care, full day care, out of school care and childminders, using a sample specification produced by BMRB. The sample was stratified by Ofsted region, then 1 in n providers were selected to give: 2235 sessional providers, 2192 full day care providers, 2909 out of school providers and 2491 childminders.

9.2.1 Sessional

The sample provided by Ofsted was stratified by region and 1 in n providers were selected, with a random starting point, to draw a sample of 1925 sessional care providers. This sample was then randomly divided into two equal groups and assigned to module A or B.

9.2.2 Full day care

The sample provided by Ofsted was stratified by region and 1 in n providers were selected, with a random starting point, to draw a sample of 1925 full day care providers. This sample was then randomly divided into two equal groups and assigned to module A or B.

9.2.3 Out of school care

The sample provided by Ofsted was stratified by region and 1 in n providers were selected, with a random starting point, to draw a sample of 2550 out of school providers. This sample was then randomly divided into two equal groups and assigned to module A or B. There was no information available in advance as to whether these providers offered before or after school care or holiday care, or all of these. For the 2005 survey, providers were asked about their after school care, if they offered this. If they did not offer after school care, but did offer holiday care, then they were asked

Centre continue to work to existing quality standards and BMRB continue to take responsibility for the quality of the work undertaken by their support services.

about holiday care. (Three providers did not offer after school care or holiday care and so were asked about before school care; a further three provided none of these, and so were asked about weekend care). This approach means that the after school sample is representative of all after school providers, but the holiday club sample is not representative of all holiday clubs.

Due to higher than expected non-contact and illegibility rates, another 271 providers were added to the sample.

A small number of duplicates were found across the different sample types (as providers can offer more than one type of childcare). As the numbers were small, duplicate providers were randomly allocated to one of the relevant sample types (and asked specifically about this type of care) and removed from the other samples.

9.2.4 Childminders

The sample provided by Ofsted was stratified by region and 1 in n providers were selected, with a random starting point, to draw a sample of 2040 childminders. Home childcarers were excluded from the sample. This sample was then randomly divided into two equal groups and assigned to module A or B.

Due to a higher than expected proportion of ineligible respondents, another 295 childminders was added to the sample.

9.3 Main survey

The survey was conducted using BMRB's Computer Assisted Telephone Interviewing (CATI), between 28th June 2005 and 2nd September 2005 for the group providers questionnaire and 18th July 2005 and 30th August 2005 for the individual setting questionnaire. Originally the group providers survey was due to finish earlier, however because of problems in contacting a number of providers, fieldwork was extended in order to boost the number of interviews achieved. The extension was successful and helped increase the response rate to a more acceptable level. Interviews were carried out by The Operation Centre's (TOC) fully trained telephone interviewers.

The senior manager¹¹ of each childcare provision and every childminder included in the issued sample were sent an advance letter informing them that BMRB would be contacting them and explaining what the research would cover. In addition to the letter, they were sent a datasheet¹² and a qualification list, which they were asked to complete

¹¹ Letters were addressed to the 'Senior manager' as their name was not included in the sample provided by Ofsted.

¹² The datasheet included a number of detailed questions from the questionnaire that the respondent would need to look up in advance.

prior to the interview. Different datasheets were sent depending on which module (costs or training) the provider had been randomly allocated to. If when the interviewer spoke to the respondent they said they had not received the advance documents, contact details were taken and duplicate documents were issued by post, fax or email. The interviewer then agreed a convenient time to call the respondent back.

In total 4349 interviews were carried out with childcare and early years providers in England – 1007 with sessional providers, 1171 with full day care providers, 1042¹³ with out of school providers and 1132 with childminders. The average interview length was just under 20 minutes for the group provider interviews and just under 12 minutes for the childminder interviews.

9.4 Response rates

	Sessional care	Full day care	Out of school	Childminder	Overall
Issued sample	1925	1924	2801	2335	8985
Ineligible*	63	89	422	425	999
Eligible sample	1862	1835	2379	1910	7986
Bad number	186	87	266	185	724
Contactable sample	1676	1748	2113	1725	7262
Refusals	142	219	252	229	842
Non contact	527	358	819	364	2068
Achieved	1007	1171	1042	1132	4352
Response rate (on eligible sample)	54%	64%	44%	59%	54%
Response rate (on contactable sample)	60%	67%	49%	66%	60%

* Ineligible includes providers which have closed down; providers who said that they don't provide the relevant type of childcare and duplicates that were removed prior to issue.

¹³ Although 1042 out of school providers were interviewed, due to an error on the questionnaire three of these followed erroneous routing and so have been excluded from the tables and reporting.

9.5 Weighting and grossing

The only information held for the population of all providers was the regional breakdown. The regional breakdown for the achieved sample was, in all cases, fairly close to the population breakdown, but we decided that it would still be worth applying weights to ensure that the sample matched the population.

The table below shows the achieved and population breakdowns (March 2005) by region. Weights were applied to ensure that the sample matched the population.

Region	Sessional		Full day care		Out of school	
	Survey %	Popn %	Survey %	Popn %	Survey %	Popn %
East Midlands	10.13	9.62	7.17	7.50	6.83	7.37
East of England	15.99	15.38	9.05	9.17	10.11	9.47
London	10.03	10.58	13.07	15.00	12.90	14.74
NE & Yorkshire & Humberside	10.53	10.58	14.35	13.33	13.76	12.63
North West	10.53	10.58	13.49	13.33	19.25	17.89
South East	21.45	21.15	17.59	17.50	13.57	14.74
South West	13.21	13.46	12.72	11.67	11.07	10.53
West Midlands	8.14	8.65	12.55	12.50	12.51	12.63

Region	Childminders	
	Survey %	Popn %
East Midlands	9.45	11.97
East of England	13.69	8.26
London	13.87	16.24
NE & Yorkshire & Humberside	14.31	14.39
North West	10.95	11.68
South East	18.37	19.09
South West	10.07	9.26
West Midlands	9.28	9.12

For the tables and reports, the weighted data was grossed up to the total number of active providers in England. The estimate of the number of active providers was achieved by taking the total number of providers of each type on the Ofsted database

(as at March 2005), and taking away the proportion that the survey had found to be ineligible (no longer in business, no longer providing that type of childcare). The proportion that were ineligible varied between the different provider types.

The table below shows how the grossing was carried out.

	On Ofsted database (March 2005)	Ineligible (%)	Total active providers
Sessional	10200	2.29	9966
Full day care	12100	2.39	11811
Out of school	9700	11.25	8609
Childminders	70200	17.86	57662

	Survey	Total	Multiplier
Sessional	1007	9966	9.8971
Full day care	1171	11811	10.0861
Out of school	1039	8609	8.2856
Childminders	1132	57662	50.9384

9.6 Actual and effective sample sizes

The weighting process has an impact on the effective sample sizes of the four providers. As the weights applied were small, the impact of weighting is limited. The actual and effective sample sizes are shown in the table below.

	Achieved sample	Effective sample
Sessional	1,007	1,006
Full day care	1,171	1,166
Out of school	1,039	1,032
Childminders	1,132	1,121

9.7 Data analysis

Calculating annual costs and fees

In order to make it as easy as possible to collect cost and income data, providers were able to provide a cost for the following time periods:

A week

a month

a four week period

a quarter

a year

In order to produce annual estimates, some assumptions had to be made.

For the following costs and income, we assumed that they would be paid across the whole year, and thus multiplied up to a full 52 week year:

- Rent
- Insurance (most provided an annual cost)
- Toys, books and other items for children
- Business rates
- Professional fees
- Transport
- Other costs
- Income from local authority/central government

However, for consumables (food and other consumables) and fees, the costs or income would only be relevant when the provider was open. There was no question asking how many weeks a year the provider was open (which will be added to the 2006 survey), but providers were asked if they were open during term time, the school holidays or both. For full day and sessional providers those open during both, we multiplied costs/fees up to a full 52 week year. For those only open in term time, we multiplied up to a 39 week year, and for those open just in the holidays, we multiplied up to a 12 week year.

As out of school providers are very varied as to how many weeks a year they open, we instead calculated weekly costs/fees based on 13 week years for holiday clubs and 39 week years for out of school clubs.

9.7.1 Pay data

When asking about hourly pay, if a respondent refused, they were asked to give a banded answer. The data in the reports combines the banded data with the non-banded data (by using the midpoint of bands). The level of refusal was low, so this made very little difference to overall estimates.

9.8 Edits

When collecting information on costs and income, and asking respondents to provide numbers that are keyed in by the interviewer, it is possible for miskeying to occur. On inspection, a small number of answers seemed either much too large or much too small. Therefore, we decided to implement rules whereby certain outliers would be removed from the data. Only very small numbers of answers were removed.

9.9 Survey materials

The questionnaire and advance letter are included in the overview report.

9.10 Changes to the National Qualification Framework since 2003

The three regulatory authorities (QCA, ACCAC and CCEA) revised the NQF as part of a review of regulatory arrangements. The revised criteria and NQF came into effect on 1 September 2004.

The main change is that the NQF now comprises nine levels (Entry Level to Level 8) rather than six. While Entry Level and Levels 1 to 3 have not changed, Levels 4 and 5 have been divided into more precise levels - Levels 4 to 8.

The recent changes to the NQF do not alter the number of qualifications available, but rather increases the number of levels against which qualifications are accredited.

The table below illustrates these changes.

Previous levels (Examples)	Current levels (Examples)
Level 5 Level 5 NVQ in Construction Level 5 Diploma in Translation	Level 8 Specialist awards
	Level 7 Level 7 Diploma in Translation
Level 4 Level 4 National Diploma in Professional Production Skills Level 4 BTEC Higher National Diploma in 3D Design Level 4 Certificate in Early Years Practice	Level 6 Qualified Teacher Status
	Level 5 Level 5 Early Years Foundation Degree
	Level 4 Level 4 Certificate in Early Years Practice
Level 3 Level 3 Certificate in Small Animal Care; Level 3 NVQ in Aeronautical Engineering A levels	
Level 2 Level 2 Diploma for Beauty Specialists; Level 2 NVQ in Agricultural Crop Production GCSEs Grades A* -C	
Level 1 Level 1 Certificate in Motor Vehicle Studies; Level 1 NVQ in Bakery GCSEs Grades D-G	
Entry Level Entry Level Certificate in Adult Literacy	

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