

NATIONAL CHILDMINDING ASSOCIATION

ANNUAL MEMBERSHIP SURVEY REPORT

Prepared by Lake Market Research for
the National Childminding Association

This report complies with ISO:20252 standards



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A. RESEARCH CONTEXT

1.1 BACKGROUND AND OBJECTIVES

The National Childminding Association (NCMA) is the leading charity and professional association for registered childminders and nannies in England and Wales. To ensure its work reflects the day-to-day experience of working in home-based childcare, NCMA conducts an annual survey of its childminder members. The research provides a detailed breakdown of NCMA's membership and an understanding of the circumstances under which members carry out their childminding duties (e.g. business practices and profitability). With a growing nanny membership, NCMA has also conducted an additional survey of nanny members for the first time.

1.2 METHODOLOGY AND QUESTIONNAIRE

The surveys were conducted by Lake Market Research via telephone interviews between 1 and 17 February. The interviews took an average of 19 minutes for childminders to complete and 15 minutes for nannies to complete (reflecting the shorter questionnaire administered). Interviewing was conducted by fully trained ISO 20252 interviewers, all of whom received a comprehensive briefing prior to starting fieldwork.

The Membership Survey questionnaire was reviewed prior to the start of this year's research, and a number of changes were made from the previous (2010) survey. The revised questionnaire was fully piloted before fieldwork commenced. This pilot checked the flow, clarity, relevance and length of the revised questionnaire as well as the content. A copy of the final questionnaire is appended in this report.

NCMA provided a full listing of their membership base, from which Lake Market Research drew a sample to be contacted for the research. In line with last year's sampling of childminders, this sample was stratified by region to ensure it was representative of the membership as a whole. An additional 50 interviews were also conducted in Wales to bring the overall sample size of Welsh childminders to 100, and therefore provide the ability to further understand membership differences in Wales. A sample of 364 contacts was provided to recruit nanny members to complete the survey. A 45% response rate was achieved and 164 nanny interviews were completed. The sample was contacted at various times in the day, both during the week and at weekends, and each contact was called 5 times so they were given an opportunity to take part in the survey.

B. CHILDMINDER EXECUTIVE SUMMARY

DEMOGRAPHIC PROFILE

The regional distribution of the sample is in line with the geographic distribution of NCMA members, and over a third (36%) are based in Greater London and the South East. As expected, almost all NCMA childminder members are female, and over four fifths of NCMA childminder members are aged 35 or over.

Just over one in 10 NCMA childminders report being from a minority ethnic background. Childminders from Asian Indian and Asian Pakistani backgrounds are still under-represented within NCMA membership. Only 1% of members consider themselves to be disabled.

Just under half of Wales-based childminder members (48%) said they speak Welsh to any degree. Of these, the majority speak Welsh to the children they care for at least some of the time.

CHILDMINDING BUSINESS

Just over three quarters of members (78%) have been registered as a childminder for at least three years, with a third having been registered for more than 10 years. Proportions are broadly consistent with those observed last year, although a higher proportion of childminders have been registered for more than 10 years this year.

The majority of members (70%) have undergone an Ofsted / CSSIW inspection in the last two years. However, more than a quarter have not received an inspection in the last 2 years. Just under three quarters (74%) of members in England, where inspections are graded, received at least a “good” grade at their last inspection.

Virtually all members are registered to care for at least one child aged under 8, with just under half registered for six children aged under 8 at any one time.

On average, members are caring for six children. A quarter of members currently care for three children or fewer, and 16% of childminder members currently care for more than 10 children. The average number of children cared for by childminder members has increased year on year. The majority provide care for children aged 1 – 7 years old, with the greatest proportion caring for children aged 1 – 2 years old.

Just over two thirds of childminder members care for at least one child from a black or minority ethnic background. Proportions are consistent with last year’s results.

Among childminder members looking after 3- to 4-year-olds 17% are providing the free entitlement under the Early Years Education Scheme for any of these children. Among those who are not doing so, 8% believe they are accredited to provide the free entitlement. Among childminder members looking after 2-year-olds, approximately one in ten (11%) are providing the free entitlement under the Early Years Education Scheme for any of these children.

Just over half of childminder members have vacancies (in line with last year's proportions). Just over half of childminders who have vacancies expressed a desire to fill these. Encouragingly, three quarters of childminder members who have unfilled vacancies report that these had gone unfilled for no more than six months.

Almost all childminder members either provide or would offer after school care for school age children (94%), care for pre-school age children during holidays (92%), care for school age children during holidays (93%) and offer care before 8am (90%), while more than half (51%) would offer care after 7pm.

PAY & CONDITIONS

The mean number of hours worked per week is 38.6 hours, up from 37.5 in 2010. There is considerable variation across the membership base with 30% working over 50 hours a week and 10% working less than 20 hours a week.

The mean hourly fee charged is £3.90 per child, marginally higher than last year's average of £3.84. As expected, the average fees charged in Greater London (£5.02) and the South East (£4.10) are higher than the average of all childminder members. Overall, 16% of childminder members charge more than £5 per hour per child.

Just over half of childminder members earn an annual turnover of less than £10,000 from their childminding business, and 8% have a turnover of £20,000 or more. Proportions are broadly consistent with last year. Just over three quarters of childminders indicate their business is making a profit, whilst 16% are making a loss.

CHILDMINDING FOR DISABLED CHILDREN & CHILDREN WITH SPECIAL EDUCATIONAL NEEDS

One in five childminder members care for disabled children or children with special educational needs. 41% of childminder members indicated that they have undertaken training for caring for disabled children or those with special educational needs. Of those that have undertaken training, the majority of childminder members have undertaken a specialist course but with no particular child in mind. Over two thirds have undertaken such training in the last three years.

Just over two thirds (68%) of childminder members who do not currently care for any disabled children or children with special educational needs would be concerned that they would not have the appropriate equipment if asked to care for them. Other key concerns to childminders included the amount of attention required by the child (cited by 61%), lack of knowledge of child's impairment (55%) and level of support/training available locally (42%).

COMMUNITY CHILDMINDING & CHILDREN'S CENTRES

15% of childminder members currently provide or offer childcare on behalf of social services (consistent with last year). The most common types of care funded by social services are emergency childcare, respite childcare and family support social services. The proportions of childminders offering all services have increased year on year.

80% of childminder members who provide or offer childcare funded by social services are paid directly for this by social services. The mean hourly rate paid by social services for this care is £4.66 per child.

Only a small minority (6%) of childminders provide any services for children's centres (England) / integrated children's centres (Wales).

QUALIFICATIONS, CHILDCARE TRAINING & QUALITY ASSURANCE SCHEMES

51% of childminder members have achieved a childcare qualification at level 3 or above. Just under a third of childminder members stated that NVQ Level 3 was their highest childcare qualification, whilst 15% indicated that the entry level Introduction to Childminding Practice was their highest childcare qualification.

Just over three quarters of childminder members have undertaken childcare training in the last 12 months. For those who have not attended childcare training in the last 12 months, the main reasons for not doing so are that they are too busy and/or thought training was not available at convenient times. These members most frequently stated that providing training in more convenient ways and at more appropriate times would best support them to take up future opportunities. Among those that had undertaken childcare training in the last 12 months, the most commonly used training provider was their local authority. Just under three quarters indicated that the training they received was funded by their local authority, while a quarter funded the training themselves. The 2011 survey was conducted prior to the establishment of new local authority budgets, so the 2012 survey figures will offer a more accurate reflection of the impact of local government budget cuts on training and support for childminders.

The majority (87%) of childminder members have undertaken child protection training, with just over a third of these attending such training in the last year.

39% of childminder members are part of a formal quality improvement scheme or childminding network: 26% are part of a formal network run by their local authority, 15% are part of an NCMA Children Come First Network and 9% are part of the NCMA Quality First Scheme.

PERSONAL PERSPECTIVES AND OPINIONS

Members were asked what motivated them to continue working as a childminder. Just over three quarters of members (77%) said that they did so because they enjoy working with children, while 14% remain in the profession because they are still caring for their own children as well. 27% took up childminding because they wanted to work with children.

Just over two thirds of childminder members rate their local authority's support for childminding as either very good or good, while just under two thirds are either very or quite concerned about the impact of local authority cuts on childminding.

NCMA MEMBERSHIP

The majority of childminder members first heard of NCMA through their local authority (54%) or another childminder (25%). Just over three quarters of childminder members are very satisfied with their NCMA membership, with the majority also very likely to recommend NCMA to a colleague.

INTERNET USAGE

The vast majority of childminder members access the internet to some degree (89%). Four fifths (82%) of those who access the internet use it for activities relating to their childminding business. The vast majority of these use the internet to find resources to use with the children they care for. Just over a third (36%) use it to keep themselves up to date with new developments in childcare policy.

C. NANNY EXECUTIVE SUMMARY

DEMOGRAPHIC PROFILE

The majority of NCMA nanny members interviewed are based in the South: the East of England, Greater London, the South East and the South West. As expected, almost all nanny members are female, and the age profile is slightly younger than that observed for childminders. 33% of NCMA nannies reported being from a minority ethnic background. Only 1% of members consider themselves to be disabled.

NANNY BUSINESS

When asked to indicate the length of time that they had been registered as a nanny, a range of time periods were given. 34% of nannies registered in the last year and 22% registered more than three years ago. Only 30% have been inspected since registering on the voluntary part of Ofsted's Childcare Register.

Just over half of nanny members obtained their current nanny post through personal contacts/word of mouth. Nanny agencies also play a significant role in linking nannies to vacant posts. More than three quarters are happy with their current level of work.

On average, nanny members are looking after two to three children. 27% of nanny members care for children from more than one family, and 40% of those care for children from more than one family at the same time. Only 7% of nanny members live with the family or one of the families for whom they provide care. The majority provide care for children aged 1 – 7 years old. 14% currently care for at least one child from a black or minority ethnic background.

Almost all nanny members indicated that they either provide or would offer after school care for school age children, care for school age children during holidays, care after 7pm but not overnight, care for pre-school age children during the holidays and care before 8am.

PAY & CONDITIONS

The mean number of hours worked per week is 33.8 hours. Just under half of nanny members work at least 40 hours per week. There is, however, considerable variation across the membership base with 23% working over 50 hours a week and 19% working less than 20 hours a week.

39% of nanny members indicated that they earn an annual salary of less than £10,000, and 20% earn an annual salary of £20,000 or more.

CARING FOR DISABLED CHILDREN & CHILDREN WITH SPECIAL EDUCATIONAL NEEDS

6% of nanny members care for disabled children or children with special educational needs. In total, 31% of nanny members indicated that they have undertaken training in caring for disabled children or those with special educational needs. Of those who have undertaken training, the majority of nanny members have undertaken a specialist course but with no particular child in mind. 57% have undertaken training in the last three years.

QUALIFICATIONS, CHILDCARE TRAINING & QUALITY ASSURANCE SCHEMES

62% of nanny members have achieved a childcare qualification at or above level 3. A quarter of nanny members stated that NVQ level 3 was their highest childcare qualification, while 15% said that the entry level Introduction to Childminding Practice was their highest childcare qualification.

Half of nanny members indicated that they have undertaken childcare training in the last 12 months. For those who have not attended childcare training in the last 12 months, the main reasons for not doing so were that they are too busy and there was not any requirement for them to do so. The most commonly mentioned suggestions for supporting these nannies to undertake childcare training are subsidised costs, training courses at weekends and training made available online. For those who have undertaken childcare training in the last 12 months, the most commonly used training provider is their local authority. Just under two thirds of nanny members funded the training themselves, while 18% were funded by their employer.

Two thirds of nanny members have undertaken child protection training. A quarter of these nannies have attended child protection training in the last year.

PERSONAL PERSPECTIVES AND OPINIONS

Views on how the demand for nanny services has changed over the last year is split, with 30% believing it has increased and 19% believing it has declined. It is clearly an area of uncertainty, however, with 21% unable to give an answer.

NCMA MEMBERSHIP

The majority of nanny members first heard of NCMA through their local authority (25%) or another nanny (35%). Just under three quarters of nanny members are very satisfied with their NCMA membership. The vast majority of nanny members are also very likely to recommend NCMA to a colleague.

INTERNET USAGE

The vast majority of nanny members questioned (91%) access the internet to some degree. Two thirds of those use the internet for activities relating to their nanny business, with most of these using the internet to find resources for use in their work with children.

D. CHILDMINDER FINDINGS

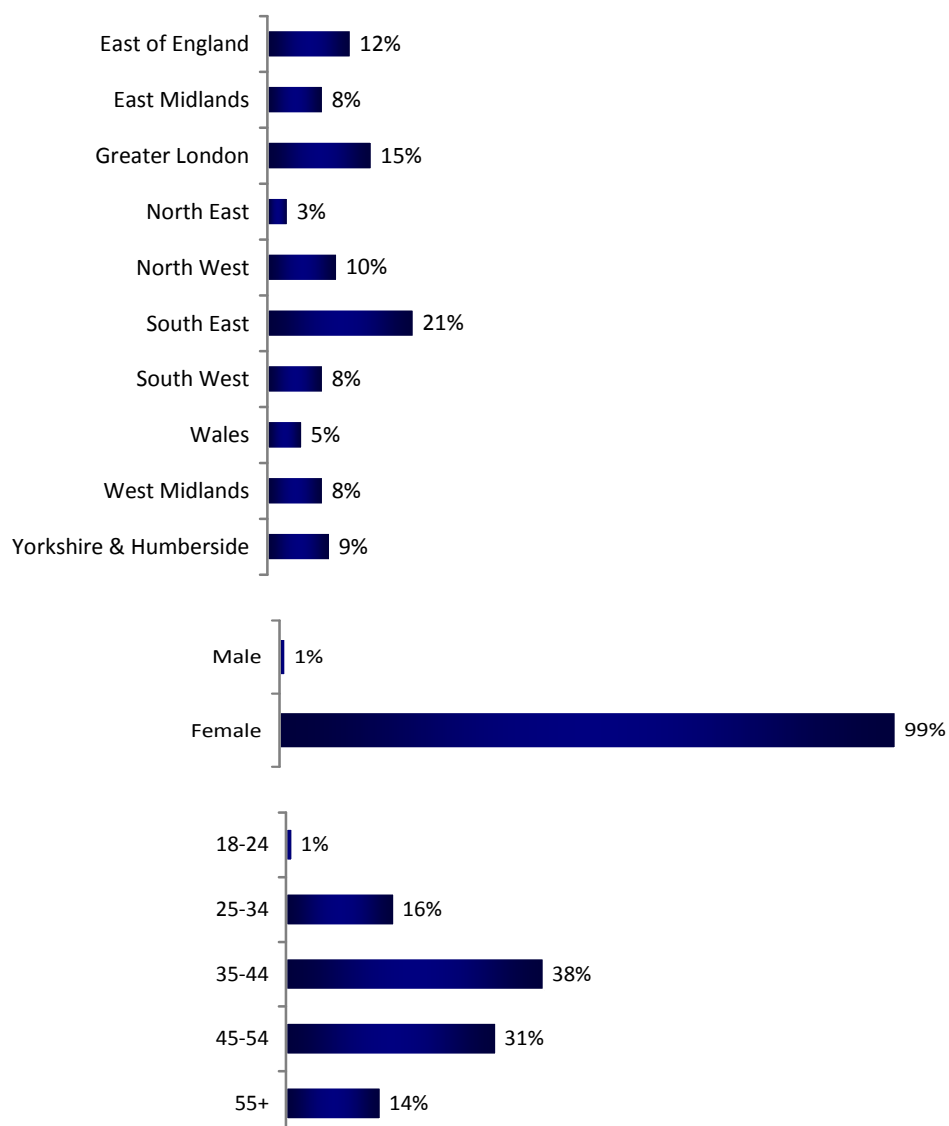
1. CHILDMINDER DEMOGRAPHIC PROFILE

1.1 REGION, GENDER & AGE

The charts below show the profile of NCMA childminder members interviewed this year. The first of these notes the geographic region in which they are based. All proportions are identical to the membership proportions provided by NCMA. As expected, almost all NCMA childminder members are female (consistent with previous surveys). Over four fifths of NCMA childminder members are aged 35 or over, with the majority of these falling in the 35-44 and 45-54 age group (also consistent with previous surveys).

Figure 1.1.1: Region, Age & Gender

Base: All 2011 childminders (1,000)



1.2 DISABILITY & ETHNICITY

NCMA childminder members were asked whether they considered themselves to be disabled and if so, what type of impairment they had. Only 1% consider themselves disabled.

Figure 1.2.1: Disability

Base: All 2011 childminders (1,000)

Yes	1%
- Physical impairment	<0.5%
- Hearing impairment	<0.5%
- Visual impairment	<0.5%
- Special Educational Needs	<0.5%
- Multiple impairments	<0.5%
- Other impairment	0%
No	99%

NCMA childminder members were also asked to give details of their ethnic background. Overall, 10% of NCMA members indicate being from a Black and Minority Ethnic group (i.e. non-white British, which is slightly less than the population of England and Wales as a whole (12.5% of whom are from a minority ethnic background at the time of the last census).

Figure 1.2.2: Ethnicity

Base: All 2011 childminders (1,000)

	2011 Membership Survey (%)	UK & Wales population (%)*
White British	89.9%	87.5%
White Irish	1.6%	1.2%
White Other Background	2.1%	2.6%
Asian Indian	1.4%	2.0%
Asian Bangladeshi	<0.1%	0.5%
Asian Pakistani	<0.1%	1.4%
Asian Chinese	<0.1%	0.4%
Asian Other Background	<0.1%	0.5%
Black African	0.8%	0.9%
Black Caribbean	1.5%	1.1%
Black Other Background	<0.1%	0.2%
Mixed Race	0.8%	1.3%
Other ethnic background	.0.1%	0.4%
Refused	<0.1%	-

* Source: 2001 Census (data published by National Statistics)

1.3 WELSH SPEAKERS

NCMA members based in Wales were asked whether they spoke Welsh, and if so, whether they spoke Welsh to the children that they care for. Just under half of Wales childminder members (48%) said they speak Welsh to any degree. Of these, the majority speak Welsh to the children they care for at least some of the time. To provide a comparison, 21% of the population in Wales said that they spoke Welsh when questioned in a survey for the Welsh Language Board in 2004, with 57% of this number (equivalent to 12% of the total population) claiming to speak Welsh fluently.¹

Figure 1.3.1: Welsh speakers

Base: All childminders living in Wales (100)

Yes – fluently	13%
Yes – but not fluently	35%
Do not speak Welsh	52%

Figure 1.3.2: Speak Welsh to children cared for

Base: All childminders living in Wales (100)

Speak Welsh	48%
- Always speak Welsh to children cared for	12%
- Sometimes speak Welsh to children cared for	33%
- Never speak Welsh to children cared for	2%
Do not speak Welsh	52%

¹ Welsh Language Board (2006). *2004 Welsh Language Use Survey*. Cardiff: Welsh Language Board.

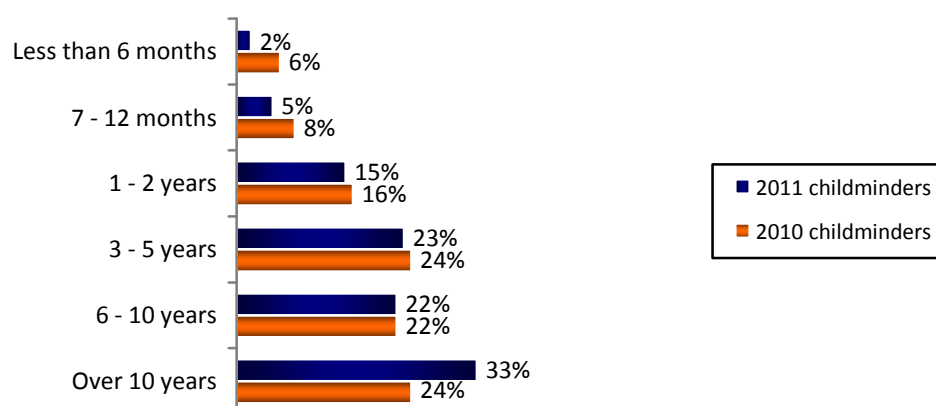
2. CHILDMINDING BUSINESS

2.1 LENGTH OF TIME AS A CHILDMINDER

NCMA childminder members were asked to indicate the length of time that they had been registered as a childminder. Just over three quarters (78%) of members indicated that they had been registered as a childminder for at least three years, with a third having been registered for more than 10 years. Proportions are broadly consistent with those observed last year, although a higher proportion of childminders in 2011 have been registered as a childminder for over 10 years.

Figure 2.1.1: Length of time as a childminder

Base: All 2011 childminders (1,000), All 2010 childminders (996)



A higher proportion of North West and East Midlands-based childminder members have been registered as a childminder for three years or less (38% and 45% respectively) compared to other regions.

Figure 2.1.2: Length of time as a childminder by region

Base: 2011 Based in East of England (120), East Midlands (82), Greater London (151), North East (30), North West (101), South East (211), South West (82), Wales (51), West Midlands (81), Yorkshire & Humberside (91)

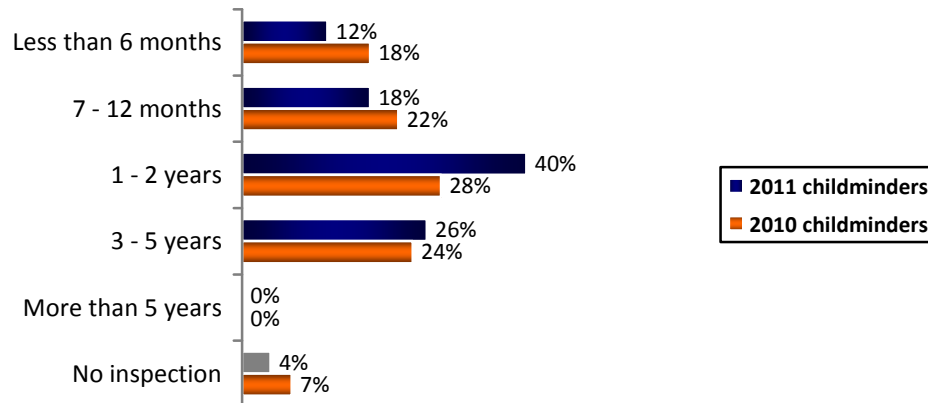
	Registered up to 3 years	Registered more than 3 years
East of England	23%	77%
East Midlands	45%	55%
Greater London	17%	83%
North East	14%	86%
North West	38%	62%
South East	27%	73%
South West	23%	77%
Wales	20%	80%
West Midlands	16%	84%
Yorkshire & Humberside	13%	87%

2.2 MOST RECENT OFSTED / CSSIW INSPECTION

NCMA childminder members were asked when their last Ofsted inspection (in England) or CSSIW inspection (in Wales) was conducted. The majority of members (70%) have undergone an Ofsted/CSSIW inspection in the last two years. A very small minority (4%) claim that they have not yet undergone an Ofsted or CSSIW inspection – these are primarily new members who have been registered as a childminder for less than one year.

Figure 2.2.1: Length of time since last Ofsted / CSSIW inspection

Base: All 2011 childminders (1,000), All 2010 childminders (996)



A higher proportion of North West and Wales-based childminder members have received an inspection in the last two years (83% and 94% respectively).

Figure 2.2.2: Length of time since last Ofsted / CSSIW inspection

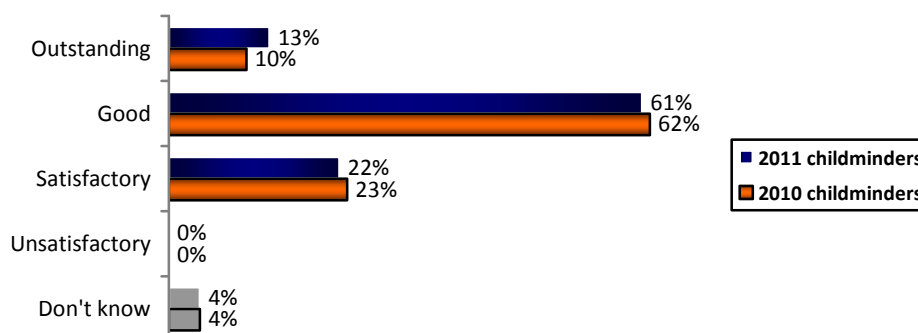
Base: 2011 Based in East of England (120), East Midlands (82), Greater London (151), North East (30), North West (101), South East (211), South West (82), Wales (51), West Midlands (81), Yorkshire & Humberside (91)

	Inspected in last two years	Inspected over two years ago
East of England	67%	30%
East Midlands	71%	23%
Greater London	63%	32%
North East	83%	17%
North West	67%	28%
South East	70%	26%
South West	69%	27%
Wales	94%	5%
West Midlands	72%	22%
Yorkshire & Humberside	73%	26%

When asked to indicate the grading awarded at their most recent Ofsted inspection, just under three quarters (74%) received a “good” or “outstanding” rating. Please note that inspections by CSSIW in Wales are not graded, so childminders based in Wales have been excluded from this analysis. Results are consistent with last year.

Figure 2.2.3: Grading awarded at most recent last Ofsted inspection

Base: Childminders in England 2011 (914), childminders in England 2010 (880)



A higher proportion of childminder members who currently care for at least 10 children received a higher grading on their last inspection (27% “outstanding”) compared to childminders who currently care for fewer children. In addition, a higher proportion of childminder members who belong to a quality improvement scheme or formal childminding network received an “outstanding” grade (19%) compared to current non- members (8%).

Figure 2.2.4: Grading awarded at most recent last Ofsted / CSSIW inspection

Base: Member of Quality Improvement Scheme / Formal Childminding Network (361), Not a Member of Quality Improvement Scheme / Formal Childminding Network (519), Currently care for 1-2 children (121), 3-5 children (358), 6-9 children (283), 10+ children (151)

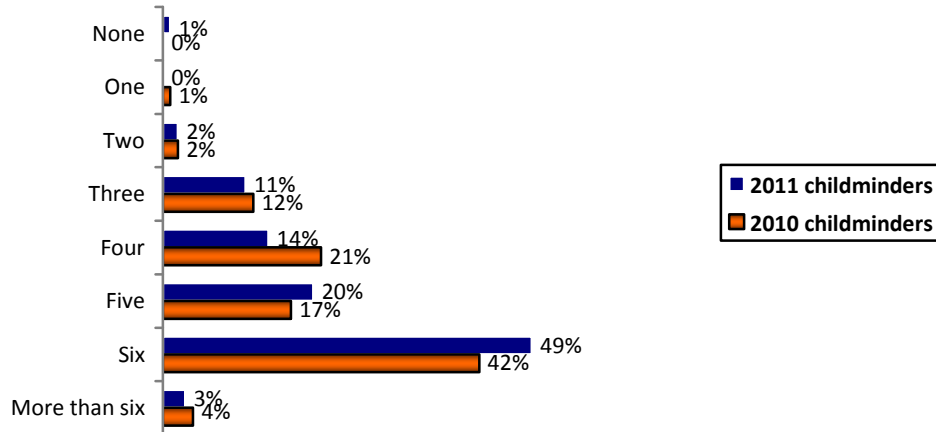
	Outstanding	Good	Satisfactory	Unsatisfactory	Don't know
Member of Quality Improvement Scheme / Formal Childminding Network	19%	63%	16%	-	2%
Not a Member of Quality Improvement Scheme / Formal Childminding Network	8%	60%	26%	1%	5%
1 – 2 children	7%	53%	28%	1%	11%
3 – 5 children	9%	64%	23%	1%	3%
6 – 9 children	12%	64%	22%	-	2%
10+ children	27%	59%	13%	-	1%

2.3 CHILDREN CARED FOR

Childminders caring for children under 8 years old are required to register with Ofsted and can register to care for a maximum of six children in this age bracket at any one time. 99% of childminder members claim they are registered to care for at least one child aged under 8, with just under half registered for six children aged under 8 at any one time (49%).

Figure 2.3.1: Number of children under 8 registered to care for

Base: All 2011 childminders (1,000), All 2010 childminders (1001)



A higher proportion of Greater London and South East-based childminder members are registered to care for fewer children compared to other regions.

Figure 2.3.2: Number of children under 8 registered to care for

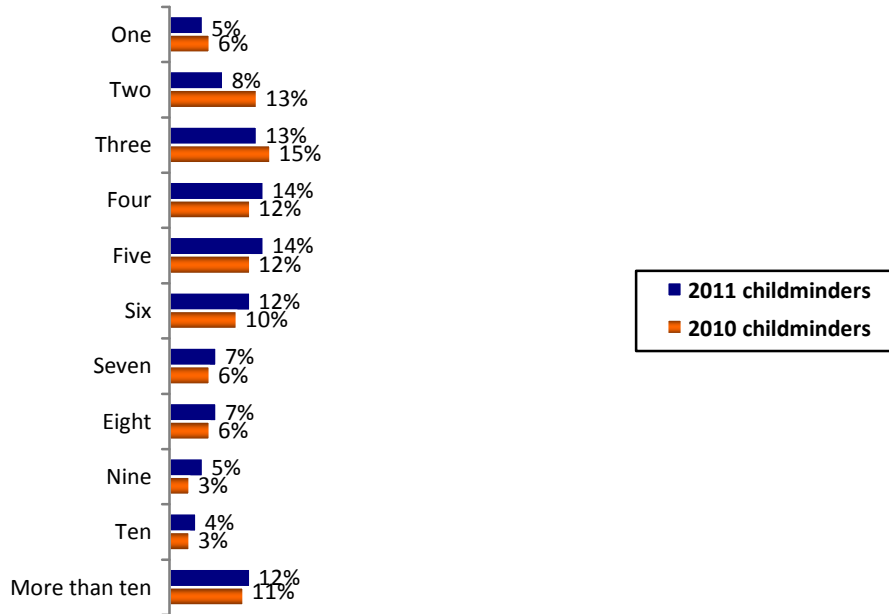
Base: Based in East of England (120), East Midlands (82), Greater London (151), North East (30), North West (101), South East (211), South West (82), Wales (51), West Midlands (81), Yorkshire & Humberside (91)

	1- 3 children	4 children	5 children	6 children
East of England	8%	13%	19%	54%
East Midlands	9%	15%	11%	59%
Greater London	31%	15%	21%	29%
North East	13%	13%	23%	50%
North West	12%	15%	25%	47%
South East	12%	18%	23%	44%
South West	9%	6%	23%	57%
Wales	8%	13%	15%	62%
West Midlands	5%	11%	22%	59%
Yorkshire & Humberside	10%	14%	13%	54%

Childminder members were then asked how many children they currently provide care for over the course of a week. On average, members are caring for six children. A quarter of members (26%) currently care for three children or fewer (with 5% only caring for a single child). Comparatively, 16% of childminder members currently care for ten or more children. The average number of children cared for by childminder members has increased year on year.

Figure 2.3.3: Number of children currently care for

Base: All 2011 childminders (1,000), All 2010 childminders (1,001)



* Mean number of children cared for: 2011 - 6.3, 2010 – 5.9

A higher proportion of East of England, East Midlands, South West and Yorkshire & Humberside-based childminder members currently care for more children with higher averages (7.8, 7.4, 7.3 and 7.2 respectively) compared to other regions.

Figure 2.3.4: Number of children currently care for

Base: Based in East of England (120), East Midlands (82), Greater London (151), North East (30), North West (101), South East (211), South West (82), Wales (51), West Midlands (81), Yorkshire & Humberside (91)

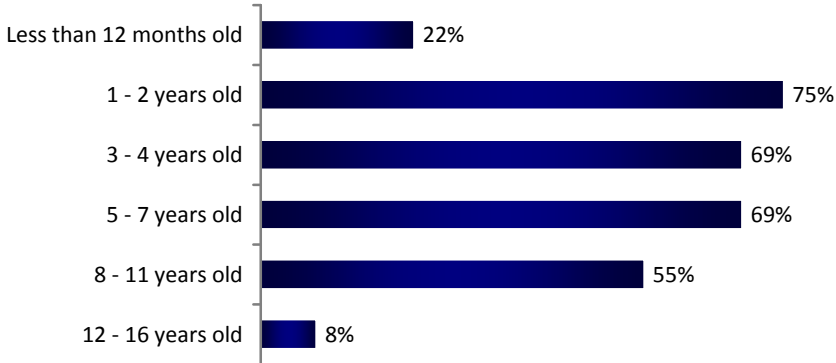
	Mean number of children cared for
East of England	7.8
East Midlands	7.4
Greater London	4.2
North East	5.7
North West	6.6
South East	5.9
South West	7.3
Wales	6.5
West Midlands	5.6
Yorkshire & Humberside	7.2

Childminders were also asked to indicate the ages of the children they currently care for (excluding their own children). The majority provide care for children aged 1–7 years old with the most common of these being 1- to 2-year-olds (75%). Under a quarter (22%) of

childminder members care for children under 12 months old and only 8% care for children between 12 and 16 years old.

Figure 2.3.5: Age of children cared for

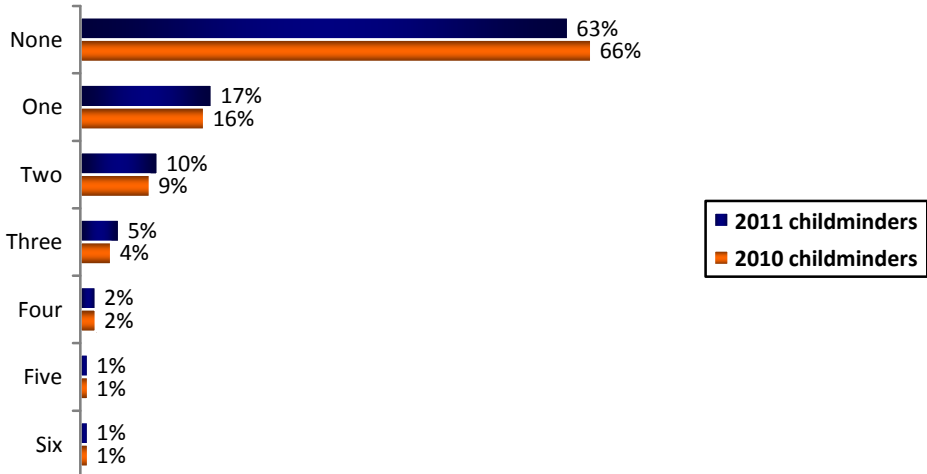
Base: All childminders (1,000)



Childminder members were also asked to indicate how many of the children they cared for are from a black or minority ethnic background. Just over a third (37%) of childminder members care for at least one child from a black or minority ethnic background. Proportions are consistent with last year.

Figure 2.3.6: Number of children cared for from a black or minority ethnic background

Base: All 2011 childminders (1,000), All 2010 childminders (969)



A significantly higher proportion of London-based childminder members (61%) currently care for at least one child from a black or minority ethnic background compared to other regions.

Figure 2.3.7: Number of children cared for from a black or minority ethnic background

Base: Based in East of England (120), East Midlands (82), Greater London (151), North East (30), North West (101), South East (211), South West (82), Wales (51), West Midlands (81), Yorkshire & Humberside (91)

	Care for no children from a black or minority ethnic background	Care for at least one child from a black or minority ethnic background
East of England	60%	40%
East Midlands	66%	34%
Greater London	39%	61%
North East	77%	23%
North West	69%	31%
South East	64%	36%
South West	76%	24%
Wales	84%	16%
West Midlands	60%	40%
Yorkshire & Humberside	69%	31%

2.4 EARLY YEARS EDUCATION PROVISION

Under the Early Years Education (EYE) scheme, the Government provides up to 15 hours of childcare each week in England (or two and a half hours of the free entitlement per day in Wales) for every 3- and 4-year-old, with childminders providing these services being reimbursed by their local authority for these hours.

Childminders currently caring for 3- to 4-year-old children were asked to indicate whether they provide the free entitlement for Early Years Education for any of these children. Only 17% of childminder members provide the free entitlement for the 3- to 4-year-olds that they care for. A higher proportion of childminders based in Greater London (25%) and the North West (25%) provide the free entitlement for the 3–4 year olds they care for.

Figure 2.4.1: Provide the free entitlement to 3 -4 year olds currently cared for

Base: Based in East of England (120), East Midlands (82), Greater London (151), North East (30), North West (101), South East (211), South West (82), West Midlands (81), Yorkshire & Humberside (91)

	Yes	No
All regions	17%	81%
East of England	8%	92%
East Midlands	12%	88%
Greater London	25%	75%
North East	10%	86%
North West	25%	74%
South East	21%	76%
South West	17%	82%
West Midlands	15%	83%
Yorkshire & Humberside	11%	89%

A higher proportion of childminder members who received an "outstanding" grade at their last Ofsted inspection and who currently care for 10 or more children provide the free entitlement for the 3 or 4 year olds that they care for.

Figure 2.4.2: Provide the free entitlement to 3 -4 year olds currently care for

Base: Outstanding Ofsted Grade (89), Good Ofsted Grade (390), Satisfactory Ofsted Grade (137), Care for 1-2 children (53), 3-5 children (236), 6-9 children (218), 10+ children (141)

	Yes	No
Outstanding Ofsted Grade	27%	73%
Good Ofsted Grade	17%	81%
Satisfactory Ofsted Grade	13%	85%
1 – 2 children	11%	87%
3 – 5 children	14%	85%
6 – 9 children	18%	80%
10+ children	23%	76%

Those who do not provide the free entitlement for any of the 3–4 year olds that they care for were asked whether they are accredited for providing the free entitlement for any of the 3–4 year olds that they care for. Only 8% of childminder members believe they have been accredited, and 5% are unsure as to whether they have been accredited. Patterns are broadly consistent across regions.

Figure 2.4.3: Accredited to provide the free entitlement to 3 -4 year olds currently care for

Base: Based in East of England (77), East Midlands (53), Greater London (66), North West (59), South East (103), South West (49), West Midlands (44), Yorkshire & Humberside (59)

	Yes	No	Don't know
All regions	8%	87%	5%
East of England	9%	83%	8%
East Midlands	2%	91%	8%
Greater London	11%	80%	9%
North West	8%	88%	3%
South East	10%	87%	3%
South West	6%	92%	2%
West Midlands	18%	77%	5%
Yorkshire & Humberside	3%	92%	5%

From September 2009, all local authorities in England can offer up to 15 hours childcare per week for the most disadvantaged 2 year olds, with childminders reimbursed by their Local Authority for providing these hours of care. Childminders currently caring for 2 year old children were asked to indicate whether they provide the free entitlement for Early Years

Education for any of these children. Wales based childminders were asked whether they provide childcare under the Flying Start Programme for the 2 or 3 year olds they care for.

Eleven per cent of members in England provide this entitlement. A higher proportion of Greater London (21%), North West (15%) and South West (17%) based childminders provide the free entitlement for the 2 year olds they care for compared to other regions. Eight per cent of Wales based childminders provide childcare under the Flying Start programme for the 2 or 3 year olds they care for.

Figure 2.4.4: Provide the free entitlement to 2 year olds currently care for (England only) / Provide childcare under the Flying Start Programme for 2 or 3 year olds currently care for (Wales only)

Base: Based in East Midlands (44), Greater London (66), North West (41), South East (79), South West (29), West Midlands (32), Yorkshire & Humberside (34)

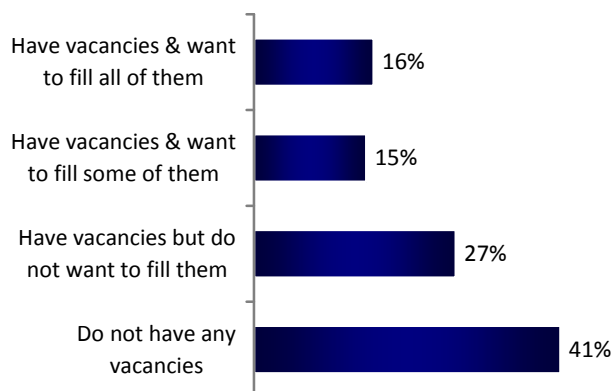
	Yes	No	Don't know
All regions	11%	87%	2%
East Midlands	5%	95%	-
Greater London	21%	76%	3%
North West	15%	85%	-
South East	9%	89%	3%
South West	17%	79%	3%
Wales	8%	90%	2%
West Midlands	3%	97%	-
Yorkshire & Humberside	3%	97%	-

2.5 VACANCIES

Childminder members were asked whether they had any childcare vacancies (i.e. were they caring for fewer children than they were registered for) and if so, whether they ideally wanted to fill these vacancies. Just over half of childminder members (58%) have vacancies (in line with last year's proportions of 59%). Just over half (53%) of childminders who have vacancies express a desire to fill them.

Figure 4.5.1: Childcare vacancies

Base: All childminders (1,000)



As expected, a higher proportion of those that are new to childminding have unwanted vacancies but also express more of a desire to fill those vacancies: 73% of childminders who have been registered for less than 1 year currently have vacancies and 63% of these want to fill these vacancies at least partly. Comparatively, 54% of childminders registered for more than 10 years have vacancies and 54% of these want to fill some or all of these vacancies.

Figure 2.5.2: Childcare vacancies by length of registration

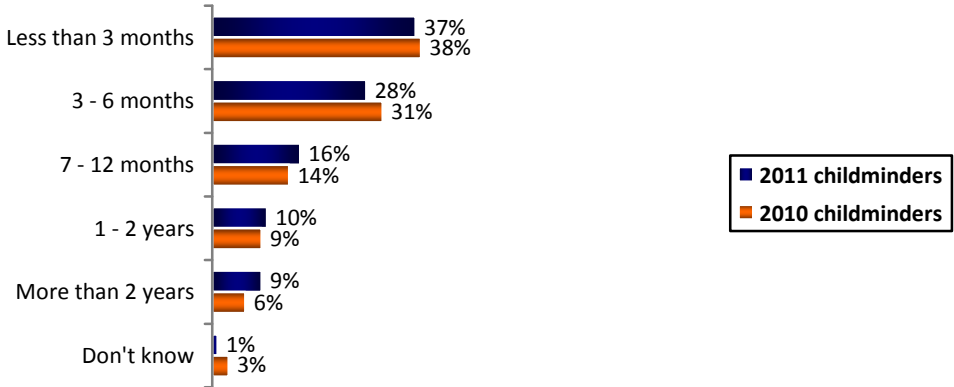
Base: Registered as a childminder less than 1 year (68), 1 – 2 years (147), 3 – 5 years (234), 6 – 10 years (218), More than 10 years (334)

	Have vacancies & want to fill all of them	Have vacancies & want to fill some of them	Have vacancies but do not want to fill them	Do not have any vacancies
Less than 1 year	27%	19%	24%	27%
1 – 2 years	20%	16%	29%	34%
3 – 5 years	13%	16%	34%	37%
6 – 10 years	16%	14%	24%	46%
More than 10 years	14%	15%	25%	46%

Encouragingly, two thirds (65%) of childminder members who have unfilled vacancies have gone unfilled for no more than six months (compared to 69% last year). However, a small proportion of these childminder members have had unwanted vacancies for more than two years (9%). Patterns are consistent by region.

Figure 2.5.3: Length of time had unwanted vacancies

Base: Childminders who have unwanted vacancies (2011 – 333, 2010 - 347)



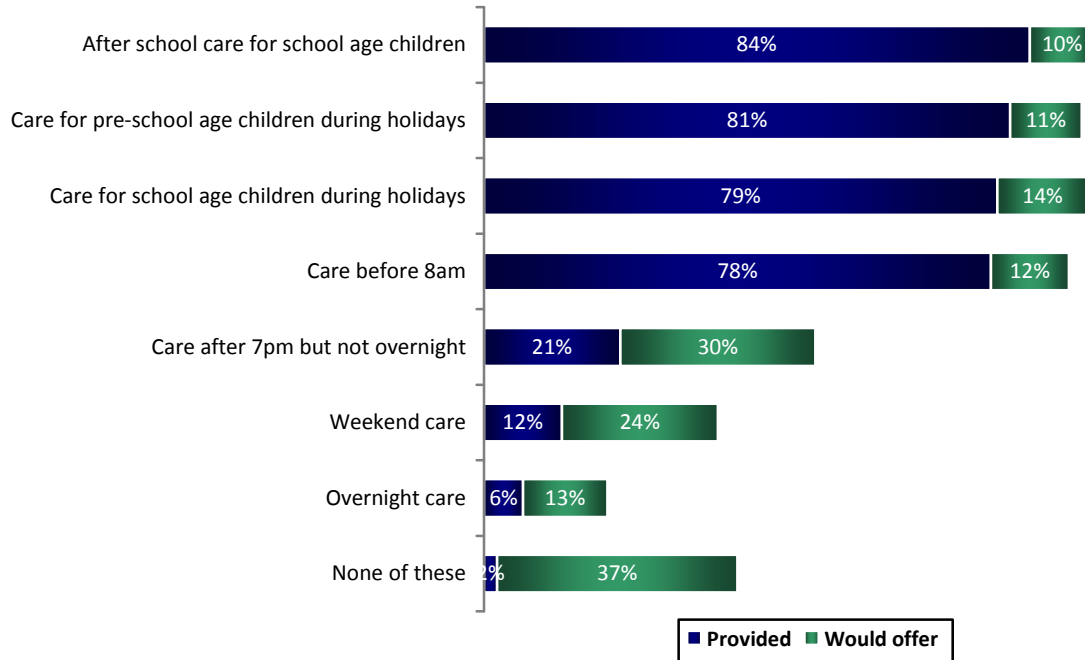
2.6 CHILDCARE PROVISION

Childminder members were asked what types of childcare they had provided in the previous year, as well as the types of childcare they would offer to parents if they requested it. Almost all childminder members either provide or would offer after school care for school age children (94%), care for pre-school age children during holidays (92%), care for school age children during holidays (93%) and care before 8am (90%). In contrast, demand for care after 7pm but not overnight, weekend care and overnight care is significantly lower with

only 21%, 12% and 6% currently providing this care. Just under a third (30%) of childminder members, however, would provide care after 7pm but not overnight if requested.

Figure 2.6.1: Types of childcare provided and would offer

Base: All childminders (1,000)



As expected, a higher proportion of childminder members who currently care for six or more children currently offer or would provide a wider variety of childcare, notably after school care for school age children and care before 8am in the morning.

Figure 2.6.2: Types of childcare offered or provided

Base: All childminders (1,000)

	After school care for school age children	Care for pre-school age children during holidays	Care for school age children during holidays	Care before 8am in the morning	Care after 7pm at night but not overnight	Weekend care	Overnight care
1 – 2 children	87%	89%	89%	76%	51%	39%	18%
3 – 5 children	93%	90%	92%	91%	48%	36%	17%
6 – 9 children	96%	93%	94%	92%	49%	32%	19%
10+ children	100%	98%	98%	97%	62%	40%	26%

3. PAY AND CONDITIONS

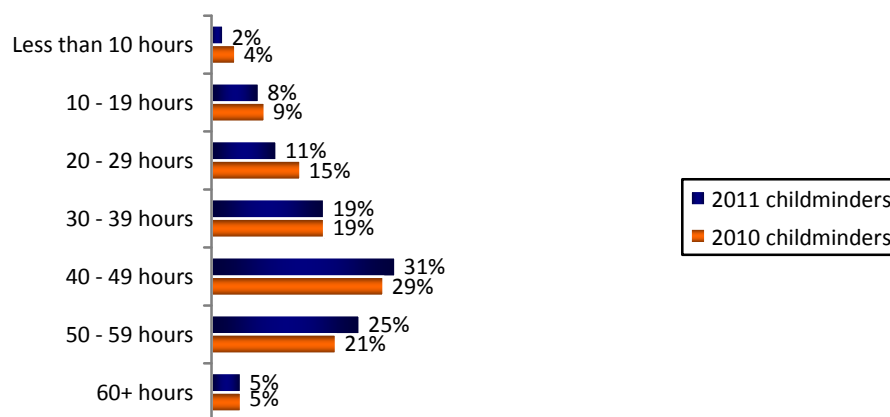
3.1 HOURS WORKED

Childminder members were asked to specify on average how many hours a week they work as a childminder. The mean number of hours worked per week is 38.6, up from 37.5 hours in 2010; just under two thirds (61%) working at least 40 hours per week, compared with 55% in 2010 and 46% in 2009. The median number of hours worked per week is 40 hours.

There is, however, considerable variation across the membership base with 30% working over 50 hours a week and 10% working less than 20 hours a week. On average, childminders are working longer hours than last year.

Figure 3.1.1: Average hours worked per week

Base: All 2011 childminders (1,000), All 2010 childminders (969)



* Mean number of hours worked: 2011 - 38.6, 2010 - 37.5

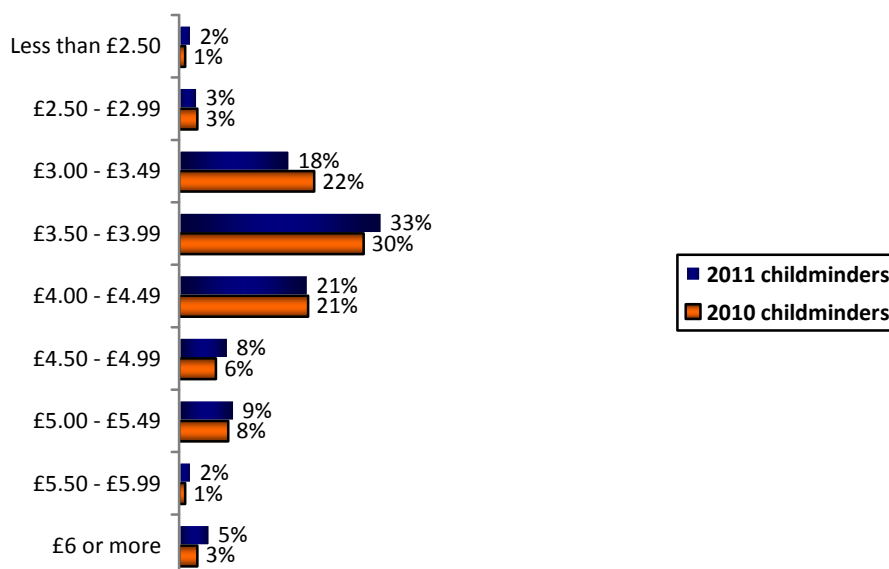
3.2 FEES CHARGED

Childminder members were asked to indicate the average fee they charge for childminding per child. Whilst the majority gave this figure as an hourly rate, 8% preferred to give a daily, weekly or monthly amount. In these cases the figure has been converted to an hourly rate to enable consistent analysis.

The mean hourly fee charged is £3.90 per child (marginally higher than last year's average of £3.84). 16% charge more than £5 per hour per child. The median hourly fee charged is £3.75.

Figure 3.2.1: Average hourly rate charged per child

Base: All childminders (1,000)



* Mean hourly rate charged: 2011 - £3.90, 2010 - £3.84

* Alternative pay rates have been converted to an hourly rate using an assumed 8 hour day, 40 hour week and 172 hour month

As expected, the average fees charged in Greater London and the South East are higher than the average of all childminder members.

Figure 3.2.2: Average hourly rate charged per child

Base: Based in East of England (119), East Midlands (82), Greater London (145), North East (29), North West (99), South East (208), South West (82), Wales (50), West Midlands (79), Yorkshire & Humberside (90)

	Mean hourly rate per child	% increase year on year
East of England	3.85	1.0%
East Midlands	3.52	3.5%
Greater London	5.02	0.0%
North East	3.51	-0.3%
North West	3.50	-0.8%
South East	4.10	3.8%
South West	3.72	5.7%
Wales	3.70	2.5%
West Midlands	3.36	-0.6%
Yorkshire & Humberside	3.43	0.9%

3.3 ANNUAL TURNOVER AND PROFIT

Childminder members were asked to indicate their approximate annual turnover of the childminding business. Please note that 7% of childminder members interviewed were either

unable or unwilling to indicate this, so results are shown based on all answering and those who indicate an amount. The recalculated values assume that those unwilling/unable to provide an answer had a similar distribution of responses as those that did provide answers. Based on recalculated data, just over half (58%) earn an annual turnover of less than £10,000 from their childminding business, and only 8% earn a turnover of £20,000 or more. Proportions are broadly consistent with last year.

Figure 3.3.1: Annual turnover of childminding business

Base: All 2011 childminders (1,000), All 2010 childminders (1,000)

PER YEAR	2011 childminders %	2011 childminders excluding don't know or refused %	2010 childminders excluding don't know or refused %
Less than £7,000	33%	35%	40%
£7,000 < £10,000	22%	23%	21%
£10,000 < £15,000	22%	24%	21%
£15,000 < £20,000	10%	10%	11%
£20,000 < £25,000	4%	4%	4%
£25,000 < £30,000	2%	2%	1%
£30,000 or more	1%	2%	3%
Don't know	5%	-	-
Refused	2%	-	-

The estimated annual turnover varies by region. A higher proportion of East of England, Greater London, North West, South East and Wales based childminder members indicate a turnover of over £10,000.

Figure 3.3.2: Annual turnover of childminding business by region (excluding don't know)

Base: Based in East of England (112), East Midlands (73), Greater London (131), North East (29), North West (96), South East (205), South West (78), Wales (49), West Midlands (75), Yorkshire & Humberside (83)

PER YEAR	Under £10,000 turnover	£10,000+ turnover
East of England	48%	48%
East Midlands	68%	30%
Greater London	58%	39%
North East	69%	31%
North West	54%	46%
South East	59%	40%
South West	58%	41%
Wales	56%	43%
West Midlands	65%	35%
Yorkshire & Humberside	63%	36%

As expected, childminder members who currently care for more children report a higher annual turnover, with 59% of those caring for one to two children reporting a turnover of

less than £7,000 compared to 41% of those caring for three to five children, 23% of those caring for 6 – 9 children and 8% caring for 10 or more children.

A higher proportion of childminder members that received an “outstanding” grade in their last Ofsted inspection or are a member of a Quality Improvement Scheme/ Formal Childminding Network report a higher annual turnover. In addition, and perhaps unsurprisingly, a higher proportion of childminders that plan to be childminding in 12 months’ time are earning a higher annual turnover.

Figure 3.3.3: Annual turnover of childminding business

Base: Outstanding Ofsted Grade (111), Good Ofsted Grade (531), Satisfactory Ofsted Grade (179), Member of Quality Improvement Scheme/Formal Childminding Network (363), Not a Member of Quality Improvement Scheme/Formal Childminding Network (533), Plan to be childminding in 12 months’ time (862), Do not plan to be childminding in 12 months’ time (39)

PER YEAR	Under £10,000 turnover	£10,000+ turnover
Outstanding Ofsted Grade	34%	62%
Good Ofsted Grade	56%	42%
Satisfactory Ofsted Grade	73%	26%
Member of Quality Improvement Scheme / Formal Childminding Network	51%	46%
Not a Member of Quality Improvement Scheme / Formal Childminding Network	63%	36%
Plan to be childminding in 12 months’ time	57%	41%
Do not plan to be childminding in 12 months’ time	79%	21%

Childminder members were also asked to indicate whether, after tax and costs, their childminding business is currently making an annual profit or loss. Please note that 6% of childminder members interviewed were either unable or unwilling to indicate this, so results have been shown based on all answering and those who indicate an amount. The recalculated values assume that those unwilling/unable to provide an answer had a similar distribution of responses as those that provided answers. Based on recalculated data, just over three quarters (77%) of childminders are making a profit, whilst 16% are making a loss.

Figure 3.3.4: Profitability of childminding business

Base: All 2011 childminders (1,000)

PER YEAR	2011 childminders %	2011 childminders excluding don’t know or refused %
Profit	73%	77%
Breaking even	15%	16%
Loss	7%	7%
Don’t know	5%	-
Refused	1%	-

There is variation in response by region. A higher proportion of childminder members based in the East of England and North East report a profit for their childminding business.

Figure 3.3.5: Profitability of childminding business

Base: Based in East of England (114), East Midlands (74), Greater London (138), North East (29), North West (96), South East (201), South West (81), Wales (49), West Midlands (77), Yorkshire & Humberside (87)

PER YEAR	Profit	Loss
East of England	84%	5%
East Midlands	70%	7%
Greater London	72%	8%
North East	83%	7%
North West	78%	5%
South East	76%	6%
South West	79%	7%
Wales	78%	7%
West Midlands	73%	14%
Yorkshire & Humberside	78%	9%

Consistent with results for annual turnover, a higher proportion of childminder members who currently care for more children report a profit for their childminding business, with 52% of those caring for one to two children reporting a profit compared to 71% of those caring for three to five children, 79% of those caring for 6 – 9 children and 83% caring for 10 or more children.

In addition, a higher proportion of childminder members that received an “outstanding” grade in their last Ofsted inspection report a profit for their childminding business. In addition, and perhaps unsurprisingly, a higher proportion of childminders that plan to be childminding in 12 months’ time are reporting a profit for their childminding business.

Figure 3.3.6: Profitability of childminding business

Base: Outstanding Ofsted Grade (113), Good Ofsted Grade (545), Satisfactory Ofsted Grade (185), Member of Quality Improvement Scheme/Formal Childminding Network (372), Not a Member of Quality Improvement Scheme/Formal Childminding Network (537), Plan to be childminding in 12 months’ time (876), Do not plan to be childminding in 12 months’ time (39)

PER YEAR	Profit	Loss
Outstanding Ofsted Grade	88%	4%
Good Ofsted Grade	79%	7%
Satisfactory Ofsted Grade	68%	9%
Member of Quality Improvement Scheme / Formal Childminding Network	78%	9%
Not a Member of Quality Improvement Scheme / Formal Childminding Network	77%	5%
Plan to be childminding in 12 months’ time	78%	7%
Do not plan to be childminding in 12 months’ time	65%	13%

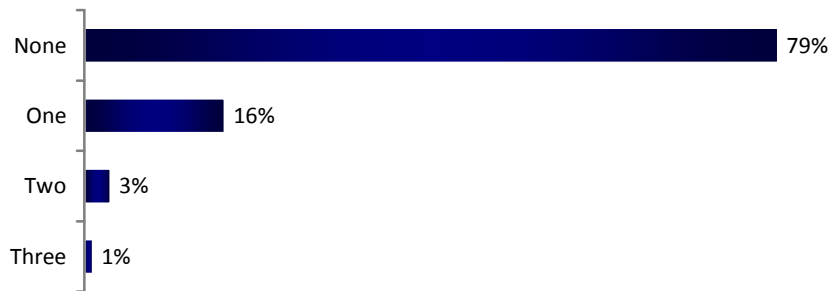
4. CHILDMINDING FOR CHILDREN WITH ADDITIONAL NEEDS

4.1 CARING FOR DISABLED CHILDREN & CHILDREN WITH SPECIAL EDUCATION NEEDS

One in five (20%) childminder members care for disabled children or children with special educational needs.

Figure 4.1.1: Number of children currently care for children who are disabled or have special educational needs

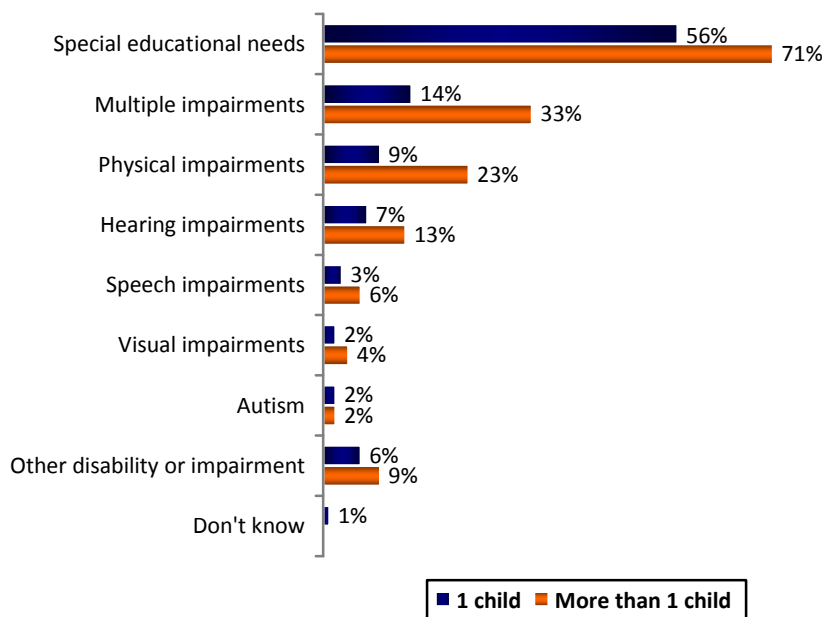
Base: All 2011 childminders (1,000)



Of the childminder members who currently care for children who are disabled or have special educational needs, the highest proportion of members look after children with special educational needs or multiple impairments.

Figure 4.1.2: Type of disability / special educational need

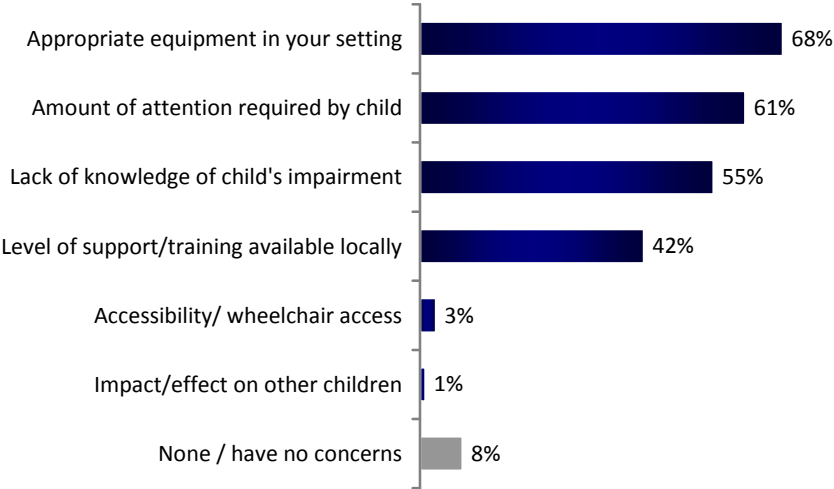
Base: Currently care for one disabled child or child with special educational needs (162), Currently care for more than one disabled child or more than one child with special educational needs (46)



Just over two thirds (68%) of childminder members who do not currently care for any disabled children or children with special educational needs indicate that they would be concerned they would not have the appropriate equipment if asked to care for them. The amount of attention required by the child, lack of knowledge of a child's impairment and level of support/training available locally are also key concerns to these childminders.

Figure 4.1.3: Concerns if asked to care for a disabled child or child with special educational needs

Base: Do not currently care for any disabled children or children with special educational needs (793)



4.2 TRAINING

All childminder members were asked whether they had undertaken any training about caring for disabled children or those with special educational needs. 41% of childminders have, and this increases to 55% among childminders who currently care for disabled children / children with special educational needs (consistent with proportions observed last year).

Figure 4.2.1: Undertaken training about caring for disabled children or those with special educational needs

Base: All 2011 childminders (1,000)

	Yes	No
All 2011 childminders	41%	59%
Currently care for disabled children / children with special educational needs	55%	45%
Do not currently care for disabled children / children with special educational needs	38%	62%

A higher proportion of childminder members who received an “outstanding” grade at their last Ofsted inspection, are members of a Quality Improvement Scheme or formal childminding network and currently care for more children have undertaken this training.

Figure 4.2.2: Undertaken training about caring for disabled children or those with special educational needs

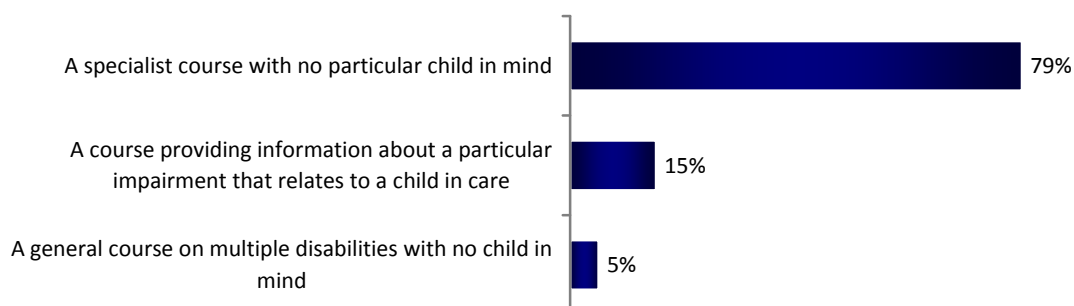
Base: Outstanding Ofsted Grade (118), Good Ofsted Grade (562), Satisfactory Ofsted Grade (197), Member of Quality Improvement Scheme/Formal Childminding Network (388), Not a Member of Quality Improvement Scheme/Formal Childminding Network (574), More than 10 years registered as a childminder (334), 6 – 10 years registered as a childminder (218), 3 – 5 years registered as a childminder (234), 1 – 2 years registered as a childminder (147), Less than 1 year registered as a childminder (68)

PER YEAR	Yes	No
Outstanding Ofsted Grade	73%	27%
Good Ofsted Grade	41%	59%
Satisfactory Ofsted Grade	25%	75%
PER YEAR	Yes	No
Member of Quality Improvement Scheme / Formal Childminding Network	57%	43%
Not a Member of Quality Improvement Scheme / Formal Childminding Network	31%	69%
More than 10 years as a registered childminder	50%	50%
6 – 10 years as a registered childminder	49%	51%
3 – 5 years as a registered childminder	35%	65%
1 – 2 years as a registered childminder	27%	73%
Less than 1 year as a registered childminder	24%	76%

Childminder members who had undertaken training for caring for disabled children or those with special educational needs were asked what type of training they had undertaken. The majority of childminder members have undertaken a specialist course but with no particular child in mind (79%).

Figure 4.2.3: Type of training undertaken for caring for disabled children / those with special educational needs

Base: Undertaken training (412)



They were also asked to indicate when this training had taken place. Over two thirds (69%) of members have undertaken training in the last three years. Of those that care for disabled children or children with special educational needs, 79% have done so in the last three years.

Figure 4.2.4: Timing of training undertaken for caring for disabled children/those with special educational needs

Base: Undertaken training (412)

	Within last 6 months	Within last year	1 -2 years ago	2 – 3 years ago	More than 3 years ago
All 2011 childminders	18%	16%	22%	13%	31%
Currently care for disabled children / children with special educational needs	28%	19%	22%	10%	21%
Do not currently care for disabled children / children with special educational needs	15%	14%	22%	14%	35%

5. COMMUNITY CHILDMINDING & CHILDREN’S CENTRES

Childminder members were asked whether they provided or offered any childcare on behalf of social services, and if so, what this involved. 15% of childminder members currently provide or offer childcare on behalf of social services (consistent with last year). A higher proportion of childminders who care for 10 or more children currently provide or offer childcare on behalf of social services.

Figure 5.1: Provide or offer any childcare for children and families funded by Social Services

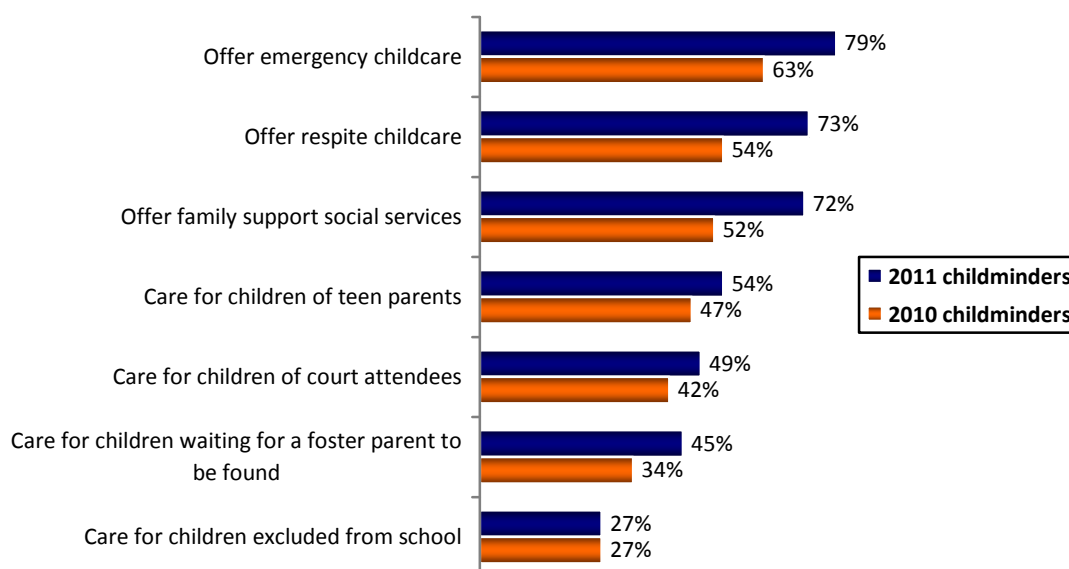
Base: All 2011 childminders (1,000)

	Yes	No
All childminders	15%	85%
Care for 1 – 2 children	11%	89%
Care for 3 – 5 children	12%	88%
Care for 6 – 9 children	18%	82%
Care for 10+ children	22%	78%

The most common types of care provided funded by Social Services are emergency childcare (79%), respite childcare (73%) and family support social services (72%). Just over a quarter (27%) provide care for children excluded from school funded by Social Services. Proportions of childminders offering all services has increased year on year.

Figure 5.2: Services offered funded by Social Services

Base: Currently offer or provide services funded by Social Services (150)

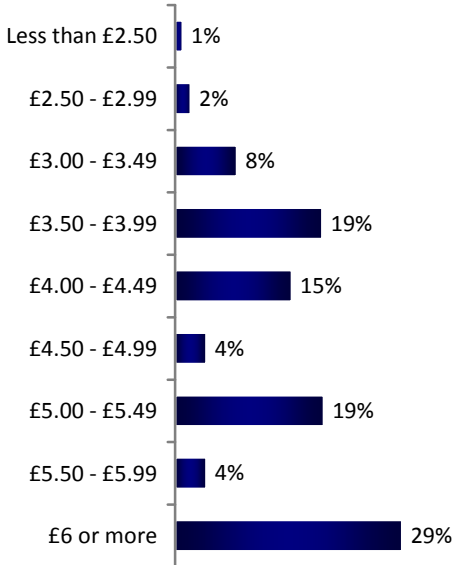


Eighty per cent of childminder members who provide or offer childcare funded by Social Services are paid directly for these services by the Social Services. These members were asked to indicate the fee that they are paid by Social Services for looking after these children. Whilst the majority gave this figure as an hourly rate, 24% preferred to give a daily, weekly or monthly amount. In these cases the figure has been converted to an hourly rate to

enable consistent analysis. The mean hourly fee charged is £4.66 per child but a range of fee ranges were given, including 16% who receive £6 or more per hour.

Figure 5.3: Average hourly rate paid for by Social Services

Base: All childminders who are funded by Social Services (101)



* Mean hourly rate charged: £3.67

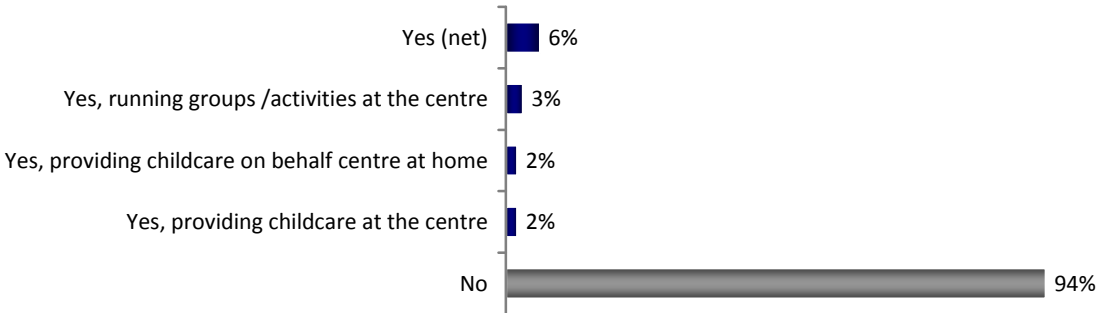
* Alternative pay rates have been converted to an hourly rate using an assumed 8 hour day, 40 hour week and 172 hour month

Five per cent of childminder members who provide or offer childcare funded by social services have been asked to keep places available so that social services could place a child with them at short notice. Seven per cent of childminder members who provide or offer childcare funded by social services are also registered with social services as a foster carer, separately from their childminding registration.

Childminder members were also asked whether they provide any services for Children’s Centres (England) / Integrated Children’s Centres (Wales only). Only a small minority (6%) provide these services.

Figure 5.4: Provide services for Children’s Centres / Integrated Children’s Centres

Base: All 2011 childminders (1,000)



6. QUALIFICATIONS, CHILDCARE TRAINING & QUALITY ASSURANCE SCHEMES

6.1 QUALIFICATIONS

Childminder members were first asked to indicate the highest childcare qualification they hold. Fifty-one per cent of childminder members have achieved a childcare qualification at level 3 or above. Just under a third of childminder members (31%) state that NVQ Level 3 is their highest childcare qualification, while 15% indicate that the entry-level Introduction to Childminding Practice is their highest childcare qualification.

Figure 6.1.1: Highest childcare qualification (2%+ mentions noted below)

Base: All 2011 childminders (1,000)

NVQ Level 3	31%
Introduction to Childminding Practice	15%
NNEB Diploma	6%
NVQ Level 2	5%
Diploma in Home based Childcare (all 5 units)	4%
Diploma in Home based Childcare (partially completed, 2-4 units)	4%
Certificate in Childminding Practice (all 3 units)	4%
Foundation degree	2%
CACHE Level 3	2%
BTEC	2%
Net: Qualification Level 3 or above	51%
Net: Qualification Below level 3	31%
Don't know / can't remember	3%

In addition to childcare qualifications, childminder members were also asked to indicate the highest non-childcare qualification they hold. The most commonly held highest non-childcare qualifications are GCSEs (38%).

Figure 6.1.2: Highest non childcare qualification (2%+ mentions noted below)

Base: All 2011 childminders (1,000)

GCSE	38%
A-Level (Including AS level)	14%
Degree	9%
City and Guilds	3%
NVQ Level 3	3%
NVQ Level 1 or 2	2%
Don't know / can't remember	1%

6.2 CHILDCARE TRAINING

All childminder members were asked whether they had undertaken any childcare training in the last 12 months (including training that did not result in a qualification). Just over three quarters (76%) have undertaken childcare training in the last 12 months (broadly in line with last year's reported proportion of 79%). A higher proportion of childminders who care for 6+ children have undertaken childcare training in the last 12 months. In addition, a higher proportion of childminder members who received an "outstanding" grade at their last Ofsted inspection and are a member of a Quality Improvement Scheme or formal childminding network have undertaken childcare training in the last 12 months.

Figure 6.2.1: Undertaken childcare training in the last 12 months

Base: All 2011 childminders (1,000)

	Yes	No
All childminders	76%	24%
Care for 1 – 2 children	66%	34%
Care for 3 – 5 children	74%	26%
Care for 6 – 9 children	80%	20%
Care for 10+ children	83%	17%
Outstanding Ofsted Grade	91%	9%
Good Ofsted Grade	77%	22%
Satisfactory Ofsted Grade	66%	34%
Member of Quality Improvement Scheme / Formal Childminding Network	84%	16%
Not a Member of Quality Improvement Scheme / Formal Childminding Network	71%	29%

Childminder members who had not attended any childcare training in the last 12 months were asked for any reasons for not attending. Just under half (45%) indicate that they are too busy, and 10% claim that training was not available at convenient times.

Figure 6.2.2: Reasons for not undertaking childcare training in last 12 months (2%+ mentions noted below)

Base: Not undertaken childcare training in last 12 months (238)

Too busy	45%
Not interested	13%
Training is not available at convenient times	10%
Training is not available locally	8%
Personal circumstances (e.g. ill health / maternity)	7%
Have completed all training available locally	5%
Don't need to do any further training	5%
Training courses are too expensive	3%
Retiring soon / won't be childminder much longer	2%

Childminder members who are not currently undertaking training state that making training available online (24%), providing training courses in the evenings (21%) and making training available at weekends (15%) would be the most helpful options in supporting them to take up childcare training in the future. Eleven per cent also stated that subsidising the cost of training would be helpful in

Figure 6.2.3: Most helpful in supporting them to take up childcare training (2%+ mentions noted below)

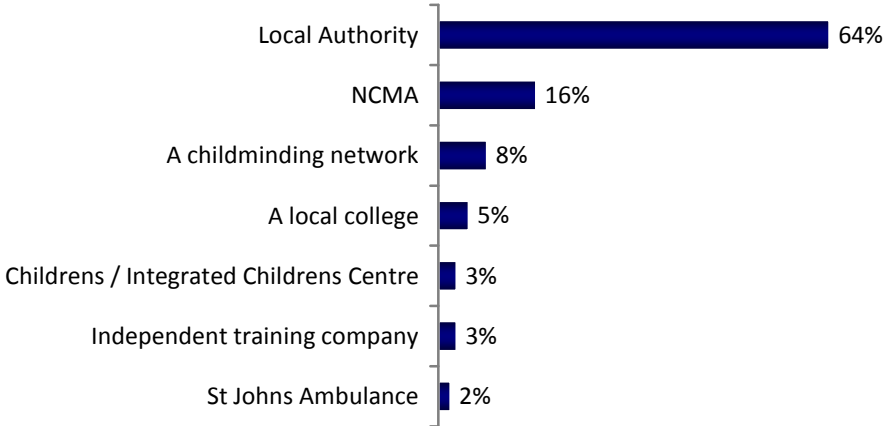
Base: Not undertaken childcare training in last 12 months (238)

Training made available online	24%
Training courses in the evenings	21%
Training courses at weekend	15%
Costs of training course being subsidised	11%
Childcare cover during daytime training courses	7%
Access to support with training, e.g. a buddy	2%
Nothing, I am not interested in undertaking childcare training	16%

For those that have undertaken childcare training in the last 12 months, childminder members were asked who provided the training. The most commonly used training provider is childminders’ local authority (64%). Sixteen per cent also indicate they have received training from NCMA.

Figure 6.2.4: Provider of childcare training (2%+ mentions noted below)

Base: Undertaken childcare training in the last 12 months (759)



A relatively higher proportion of childminder members based in East of England, South East, Wales and West Midlands received childcare training from NCMA in the last 12 months.

Figure 6.2.5: Provider of childcare training (2%+ mentions noted below)

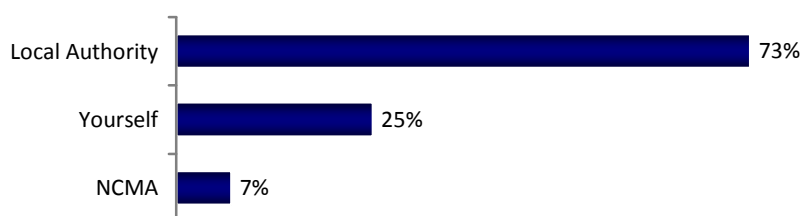
Base: Undertaken training in last 12 months East of England (87), East Midlands (56), Greater London (115), North West (81), South East (165), South West (65), Wales (34), West Midlands (70), Yorkshire & Humberside (67)

	Local Authority	NCMA
East of England	55%	28%
East Midlands	70%	11%
Greater London	77%	5%
North West	72%	6%
South East	54%	29%
South West	75%	3%
Wales	38%	46%
West Midlands	63%	16%
Yorkshire & Humberside	66%	3%

Just under three quarters (73%) of childminder members indicate that the training they received was funded by their local authority. A quarter of childminders members funded the training themselves. The 2011 survey was conducted prior to the establishment of new local authority budgets, so the 2012 survey figures will offer a more accurate reflection of the impact of local government budget cuts on training and support for childminders.

Figure 6.2.6: Funder of childcare training (2%+ mentions noted below)

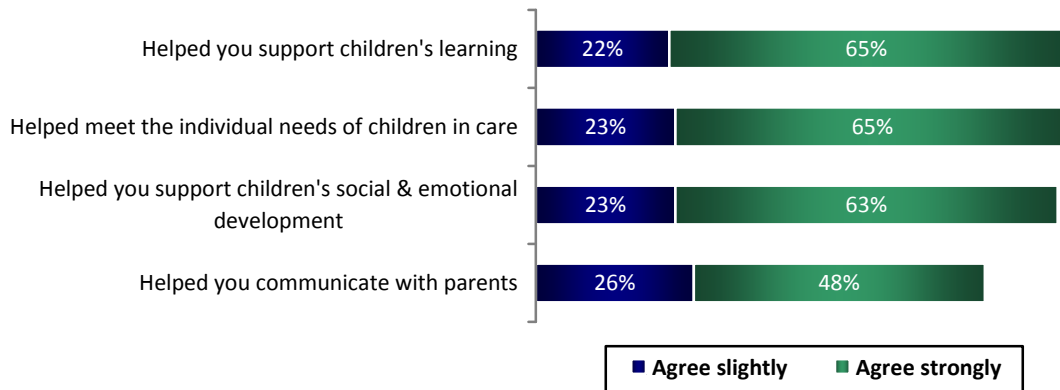
Base: Undertaken childcare training in the last 12 months (759)



All childminder members were asked to consider all of the childcare training they have received since registering and to indicate how the training helped them on a pre-defined set of indicators. The majority agree that the childcare training they had undertaken has helped them support children’s learning (87%), helped meet the individual needs of children in care (88%) and helped support children’s social & environmental development (86%). 74% also agree that it helped them to communicate with parents.

Figure 6.2.7: Perceived benefits of childcare training undertaken since registering

Base: All childminders (1,000)



All childminder members were asked whether they had undertaken any child protection training. The majority (87%) had done so, with this increasing majority amongst those that care for 6+ children and received an “outstanding” grade for their last Ofsted inspection.

Figure 6.2.8: Undertaken child protection training

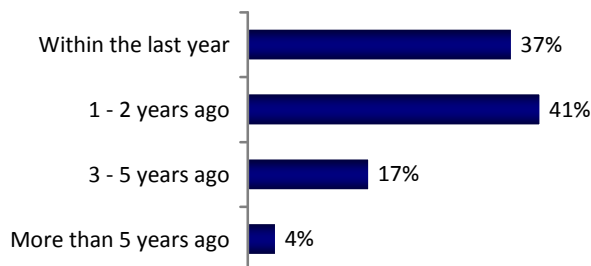
Base: All 2011 childminders (1,000)

	Yes	No
All childminders	87%	13%
Care for 1 – 2 children	79%	21%
Care for 3 – 5 children	84%	16%
Care for 6 – 9 children	90%	10%
Care for 10+ children	94%	6%
Outstanding Ofsted Grade	97%	3%
Good Ofsted Grade	89%	11%
Satisfactory Ofsted Grade	76%	24%

Just over a third (37%) of the childminder members who have attended child protection training have done so in the last year. 41% attended between 1 -2 years ago.

Figure 6.2.9: Time undertaken child protection training

Base: Undertaken child protection training (866)

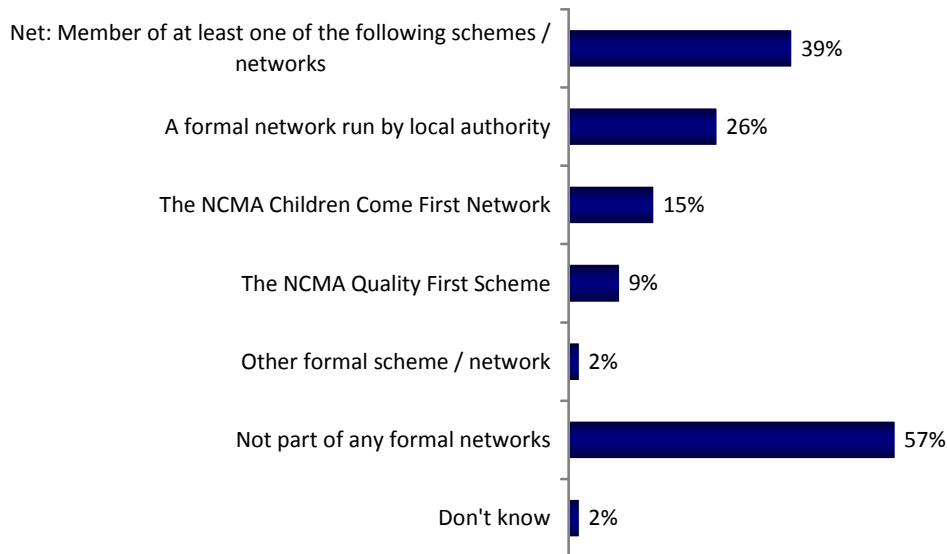


6.3 QUALITY IMPROVEMENT SCHEMES

Childminder members were asked whether they are part of any formal quality improvement schemes or childminding networks. Thirty nine per cent indicate that they are part of this type of scheme / network. Twenty six per cent are part of a formal network run by their local authority, 15% are part of the NCMA Children Come First Network and 9% are part of the NCMA Quality First Scheme.

Figure 6.3.1: Part of Quality Improvement Schemes and childminding networks

Base: All 2011 Childminders (1,000)



A higher proportion of childminder members that care for six or more children are part of a formal quality improvement scheme or childminding network.

Figure 6.3.2: Part of Quality Improvement Schemes and childminding networks

Base: Currently care for 1-2 children (137), 3-5 children (398), 6-9 children (301), 10+ children (163), Outstanding Ofsted grade (117), Good Ofsted Grade (562), Satisfactory Ofsted Grade (197)

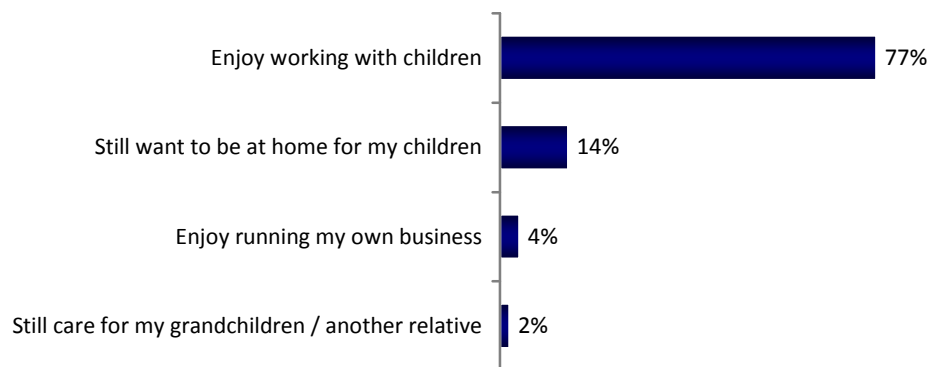
	Member of at least one scheme / network	Not part of any formal networks
Care for 1 – 2 children	30%	66%
Care for 3 – 5 children	34%	63%
Care for 6 – 9 children	44%	51%
Care for 10+ children	50%	47%
Outstanding Ofsted Grade	60%	38%
Good Ofsted Grade	40%	56%
Satisfactory Ofsted Grade	30%	68%

7. PERSONAL PERSPECTIVES AND OPINIONS

Childminders who had been registered for six years or more were asked to indicate their main reason for continuing to work as a childminder. Consistent themes emerge but in this case the primary reason is that they enjoy working with children (77%).

Figure 7.1.1: Main reason for continuing to work as a childminder

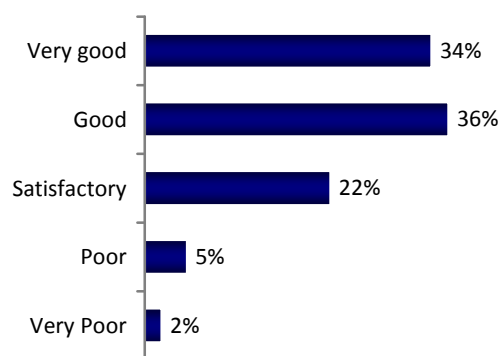
Base: All 2011 childminders (1,000)



Childminder members were also asked to rate their local authority’s support for childminding. Just over two thirds (70%) of childminder members rate their local authority’s support as either very good or good.

Figure 7.1.2: Views of local authority’s support for childminding

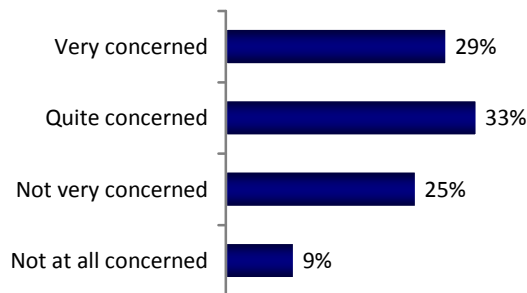
Base: All 2011 childminders (1,000)



Childminder members were also asked to indicate their concern for the impact of local authority cuts on childminding in their area. Unsurprisingly, just under two thirds of childminder members (62%) are either very or quite concerned.

Figure 7.1.3: Concern of impact of local authority cuts on childminding in area

Base: All 2011 childminders (1,000)



A higher proportion of Greater London, North East and West Midlands based childminders are concerned for the impact of local authority cuts on childminding in their area.

Figure 7.1.4: Concern of impact of local authority cuts on childminding in area

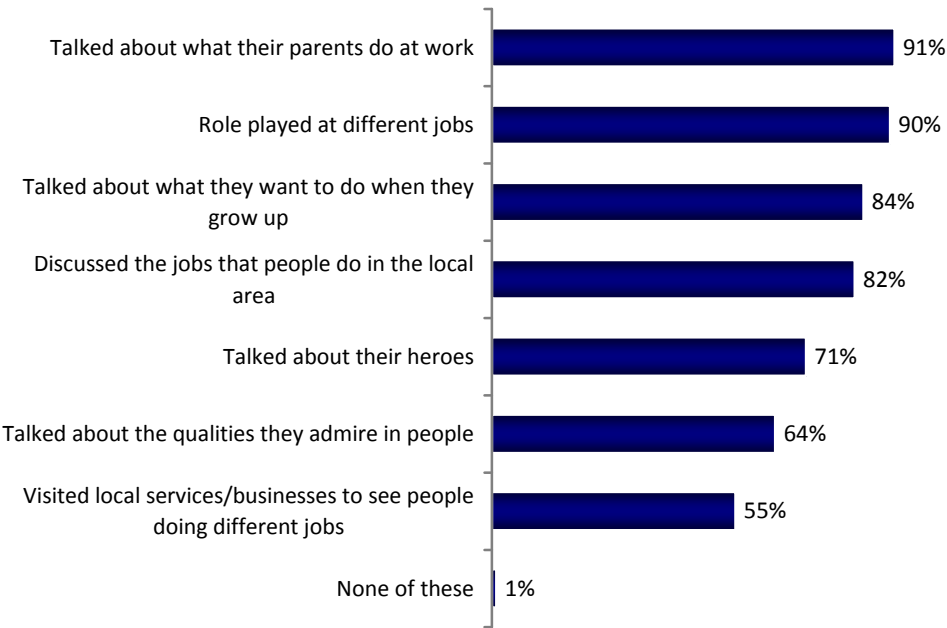
Base: East of England (120), East Midlands (82), Greater London (151), North East (30), North West (101), South East (82), South West (82), Wales (51), West Midlands (81), Yorkshire & Humberside (91)

	Concerned	Not concerned
East of England	55%	41%
East Midlands	59%	35%
Greater London	70%	27%
North East	77%	20%
North West	67%	31%
South East	56%	39%
South West	60%	38%
Wales	61%	36%
West Midlands	70%	28%
Yorkshire & Humberside	64%	34%

Childminder members were asked to indicate whether they undertake a number of pre-defined activities with the children they care for. The majority of childminder members talk about what parents do at work, have role played at different jobs, talked about what the children want to do when they grow up and discussed the jobs that people do in the local area (all above 80%). A lower proportion of childminder members who currently care for 1 – 2 children complete these activities with the children they care for.

Figure 7.1.5: Activities undertaken with children in their care

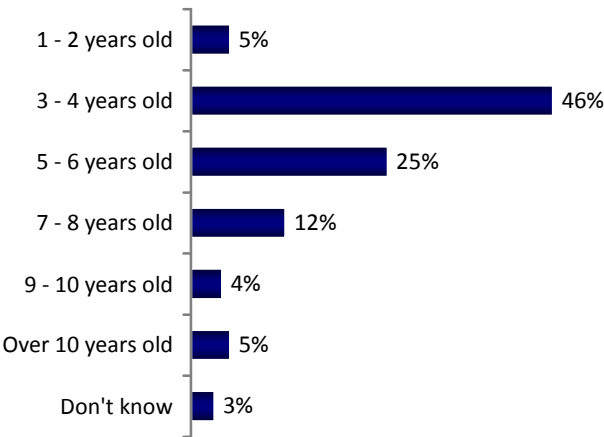
Base: All 2011 childminders (1,000)



Childminder members were also asked to indicate at what age they believe children start to show aspirations for their future. The majority (71%) believe that children start to show aspirations for their future between 3 – 6 years old.

Figure 7.1.6: Age children start showing aspirations for their future

Base: All 2011 childminders (1,000)



93% of childminder members indicate they would be childminding in 12 months' time. For the 4% who say they wouldn't be, retirement (28%), new registration and inspection requirements (16%), lack of demand for places (12%) are cited as the main reasons for giving up childminding.

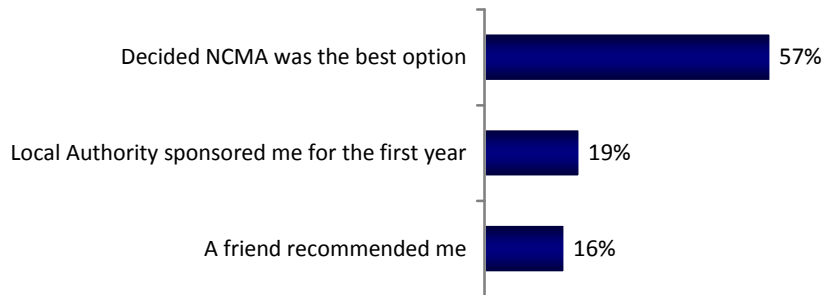
8. NCMA MEMBERSHIP

8.1 VIEWS ON MEMBERSHIP

Childminder members were first asked what the biggest factor was to them in deciding to join NCMA. Over half of childminder members (57%) indicate that they thought NCMA was the best option; whilst 19% were sponsored by their local authority for the first year and 17% were recommended to NCMA via a friend.

Figure 10.1.1: Biggest factor in deciding to join NCMA (responses over 2% shown)

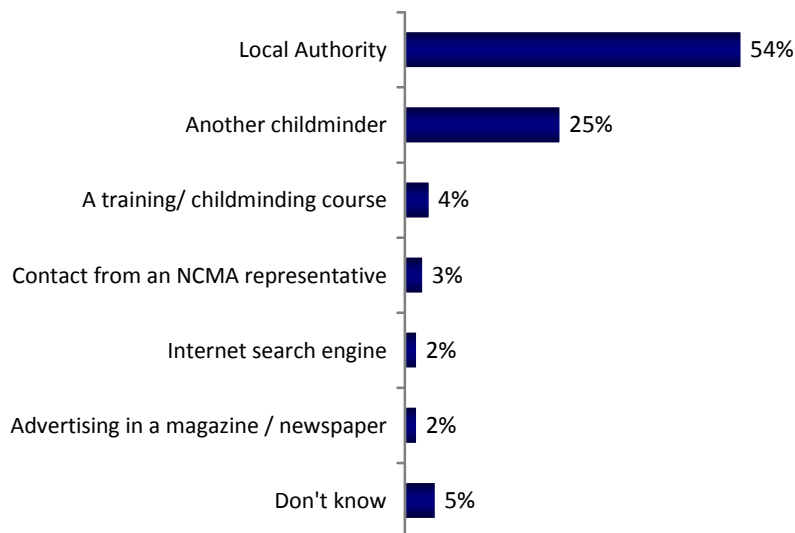
Base: All 2011 childminders (1,000)



Childminder members were also asked how they first heard of NCMA. The majority of childminder members either first heard about NCMA through their local authority (54%) or another childminder (25%).

Figure 8.1.2: First heard about NCMA through... (responses over 2% shown)

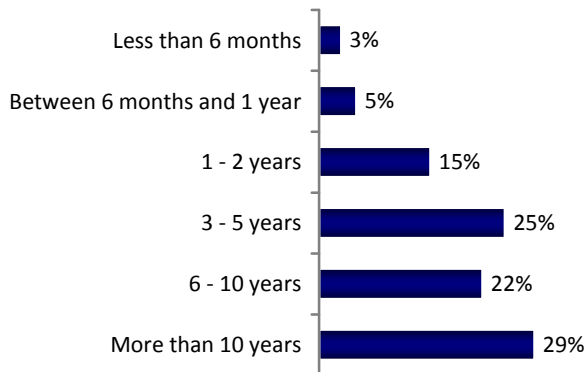
Base: All 2011 childminders (1,000)



Childminder members were also asked how long they have been a member of NCMA. The vast majority have been members for 3 years or more (76%).

Figure 8.1.3: Length of NCMA Membership

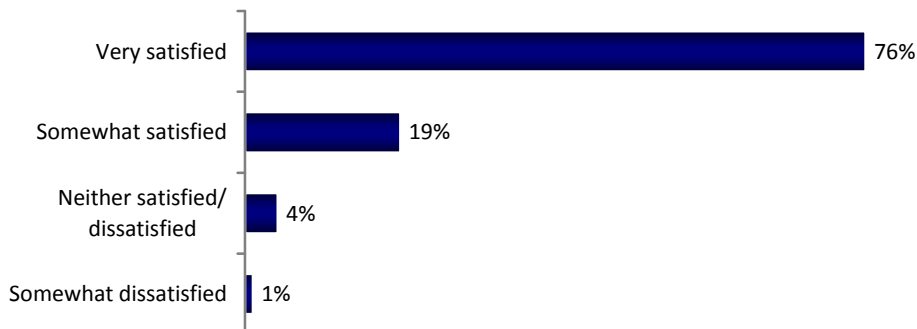
Base: All 2011 childminders (1,000)



Childminder members were also asked how satisfied they are with their NCMA membership and whether they would recommend NCMA to a colleague. Just over three quarters (76%) of childminder members are very satisfied with their NCMA membership. 19% of childminder members are somewhat satisfied with their NCMA membership.

Figure 8.1.4: Satisfaction with NCMA membership

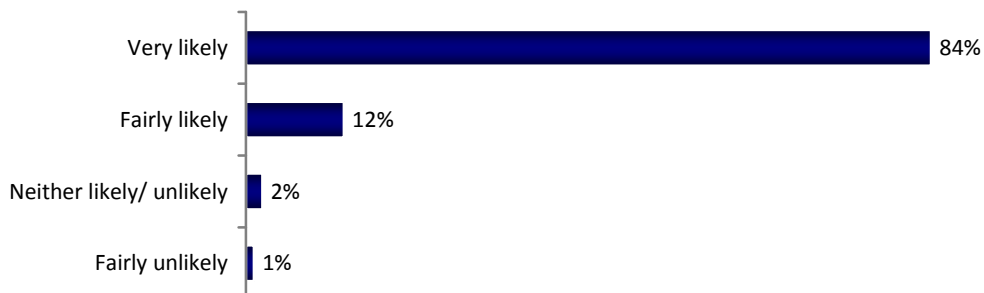
Base: All 2011 childminders (1,000)



The vast majority of childminder members (84%) are very likely to recommend NCMA to a colleague. 12% of childminder members are fairly likely to recommend NCMA to a colleague.

Figure 8.1.5: Likelihood of recommending NCMA to a colleague

Base: All 2011 childminders (1,000)

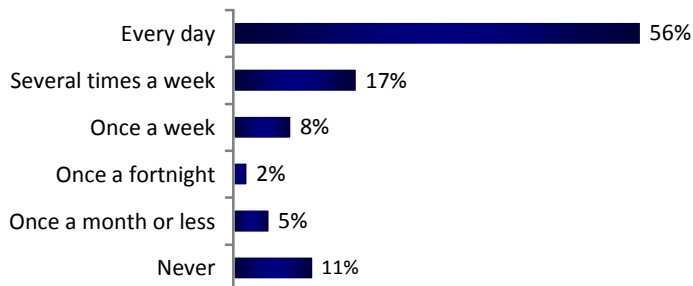


10. INTERNET USAGE

Childminders were asked to indicate how often they use the internet. The majority (89%) of childminders access the internet to some degree, and 56% access the internet every day.

Figure 10.1: Frequency of using the internet

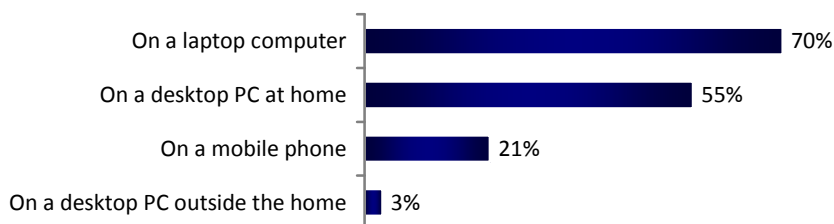
Base: All 2011 childminders (1,000)



Just over two thirds (70%) access the internet through a laptop computer, and 55% access the internet on a desktop PC at home. One in five (21%) access the internet via a mobile phone.

Figure 10.2: Access the internet through...

Base: Those that access the internet (893)



Of those that access the internet, the vast majority (94%) have an active email address.

Figure 10.3: Have an active email address...

Base: Those that access the internet (893)



Four fifths of those that access the internet use the internet for activities relating to their childminding business.

Figure 10.4: Use the internet for activities relating to childminding business...

Base: Those that access the internet (893)



A higher proportion of childminders of whom currently care for six or more children use the internet for activities relating to their childminding business.

Figure 10.5: Use the internet for activities relating to childminding business...

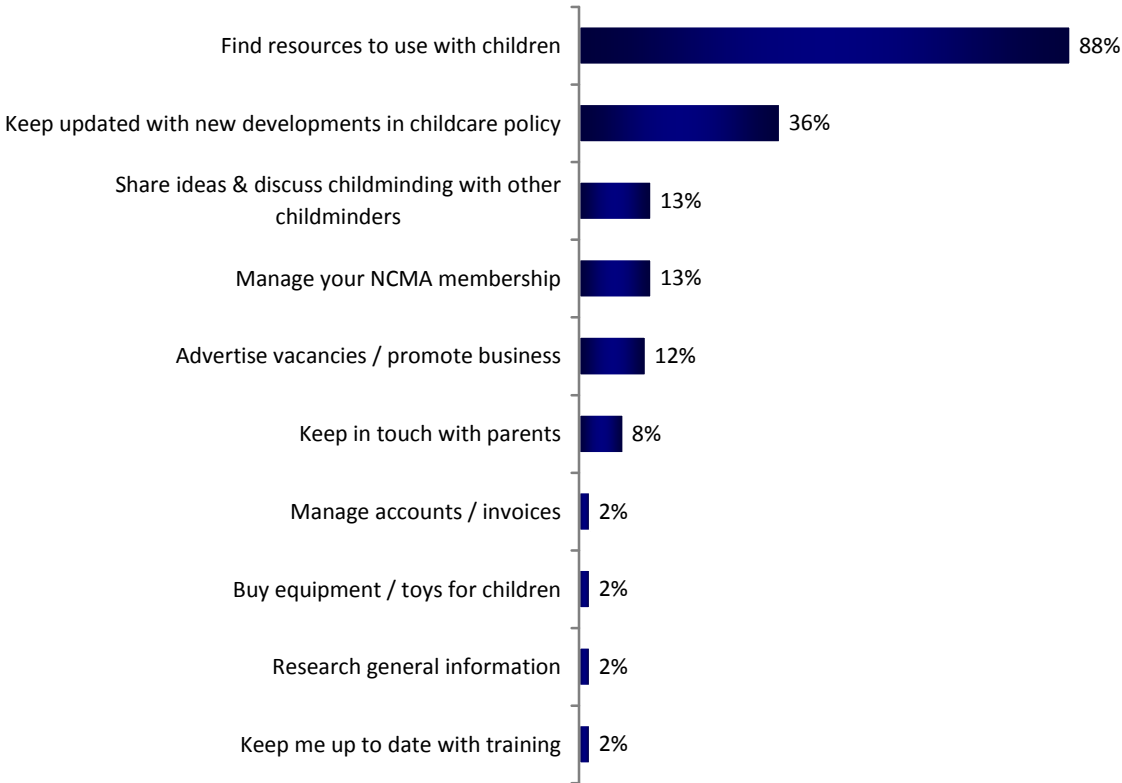
Base: Care for 1-2 children (123), 3-5 children (356), 6-9 children (267), 10+ children (146)

	Yes
1 – 2 children	70%
3 – 5 children	82%
6 – 9 children	85%
10+ children	88%

The vast majority (88%) use the internet to find resources to use with the children they care for. Just over a third (36%) use it to keep themselves updated with new developments in childcare policy.

Figure 10.6: Purpose of using the internet for childminding business...

Base: Those that access the internet for childminding business (733)



E. NANNY FINDINGS

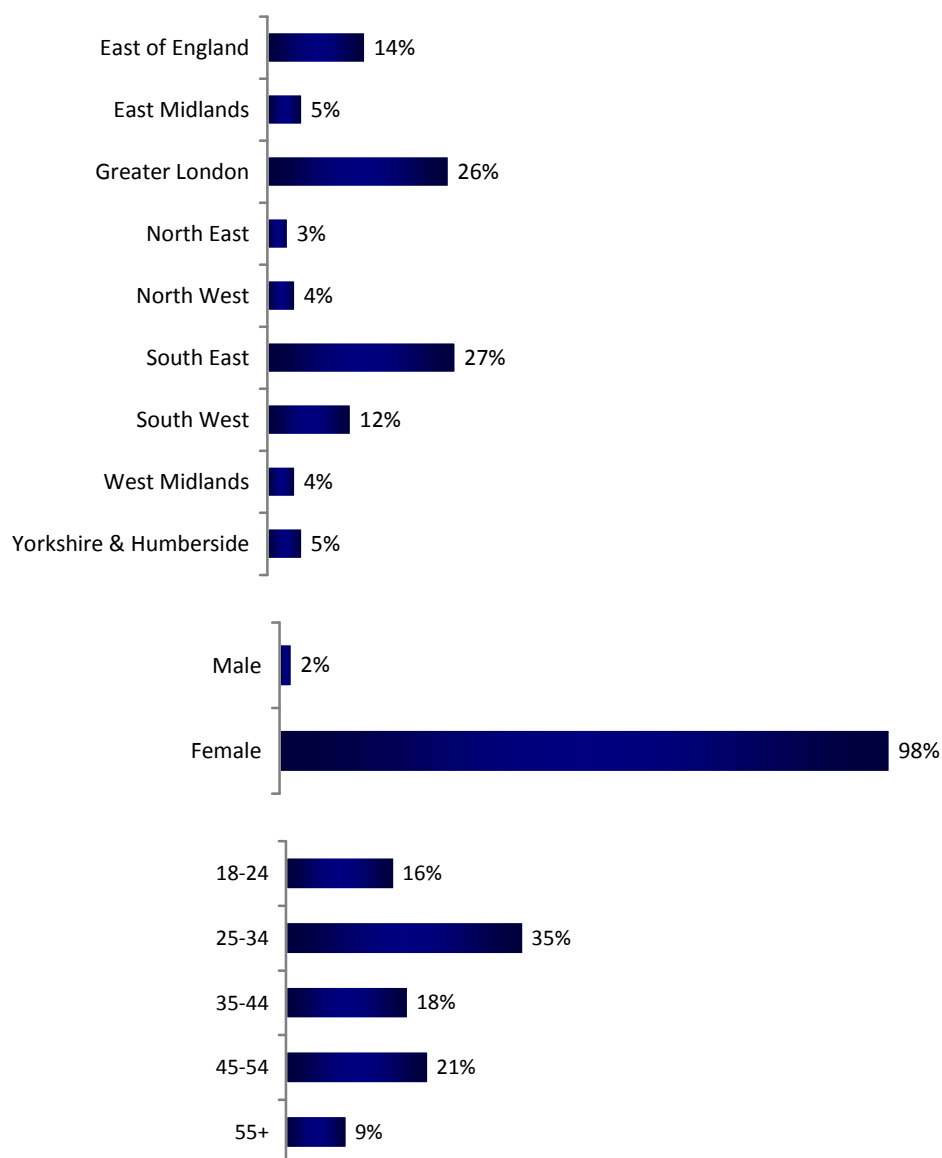
1. NANNY DEMOGRAPHIC PROFILE

1.1 REGION, GENDER & AGE

The charts below shows the profile of NCMA nanny members interviewed this year. The first of these notes the geographic region in which they are based. The majority of nanny members interviewed are based in the South: East of England, Greater London, South East and South West. As expected, almost all NCMA nanny members are female. The age profile of nanny members is slightly younger than of childminders, with the largest proportion being in the 25-34 age group.

Figure 1.1.1: Region, Age & Gender

Base: All nannies (164)



1.2 DISABILITY & ETHNICITY

NCMA nanny members were asked whether they considered themselves to be disabled and if so, what type of impairment they had. Only 1% consider themselves disabled.

Figure 1.2.1: Disability

Base: All nannies (164)

Yes	1%
- Physical impairment	-
- Hearing impairment	-
- Visual impairment	-
- Special Educational Needs	1%
- Multiple impairments	-
- Other impairment	-
No	99%

NCMA nanny members were also asked to give details of their ethnic background. Overall, 33% of NCMA members indicate being from a Black and Minority Ethnic group (i.e. non White British).

Figure 1.2.2: Ethnicity

Base: All nannies (164)

	2011 Membership Survey (%)
White British	77%
White Irish	1%
White Other Background	14%
Asian Indian	1%
Asian Bangladeshi	-
Asian Pakistani	-
Asian Chinese	-
Asian Other Background	1%
Black African	1%
Black Caribbean	1%
Black Other Background	-
Mixed Race	1%
Other ethnic background	4%
Refused	1%

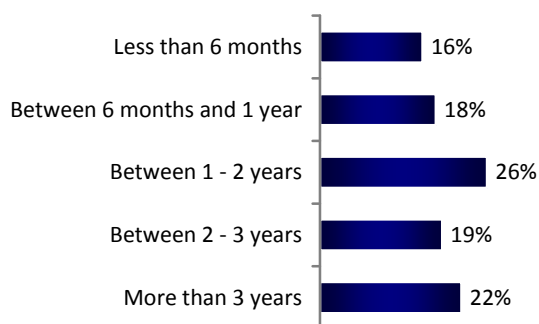
2. NANNY BUSINESS

2.1 LENGTH OF TIME AS A NANNY

NCMA nanny members were asked to indicate the length of time that they had been registered as a nanny with Ofsted (and, prior to that, the Childcare Approval Scheme) in England or the current Childcare Approval Scheme in Wales. A range of time periods are given by nanny members, with 34% registering in the last year and 22% registering more than 3 years ago.

Figure 2.1.1: Length of time registered as a nanny

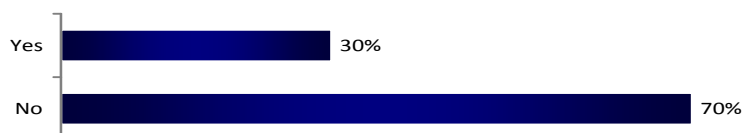
Base: All nannies (164)



Nanny members were asked if they had received an Ofsted inspection since registering, with only 30% reporting that they have.

Figure 2.1.2: Inspected since registering as a nanny

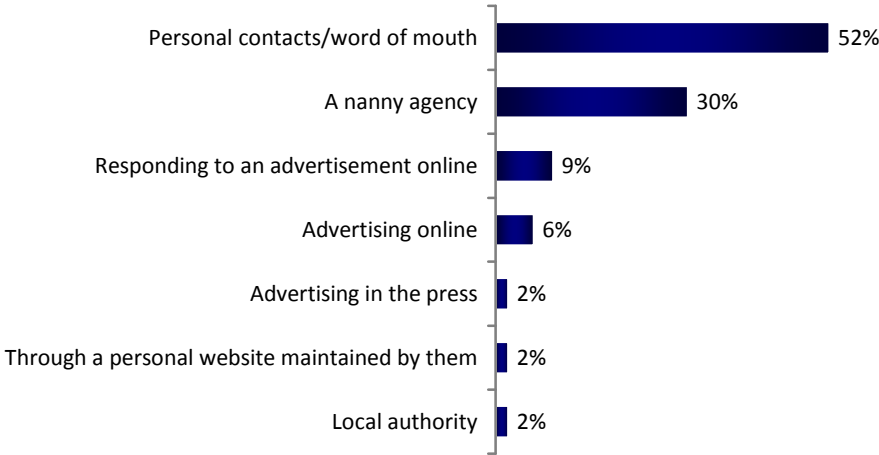
Base: All nannies (164)



Just over half (52%) of nanny members obtained their current nanny post through personal contacts / word of mouth. Nanny agencies also play a significant role, however, as 30% of nanny members' reference.

Figure 2.1.3: Method of obtaining nanny post...

Base: All nannies (164)

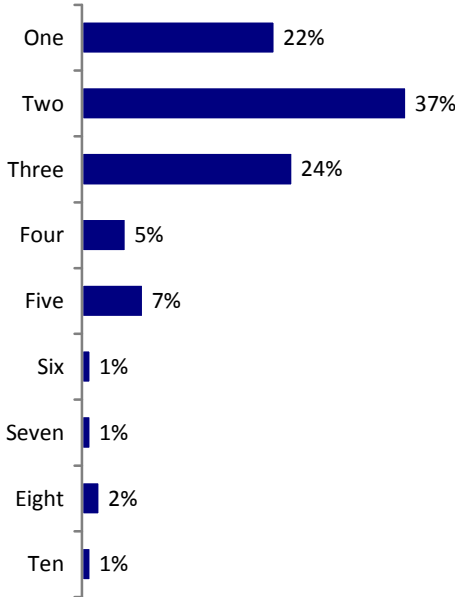


2.2 CURRENT CARE

Nanny members were asked how many children they currently provide care for. On average, nanny members are looking after 2-3 children. Just under a quarter of nanny members (22%) currently care for 1 child. Only 17% of nanny members care for 4 or more children.

Figure 4.2.1: Number of children currently care for

Base: All nannies (164)

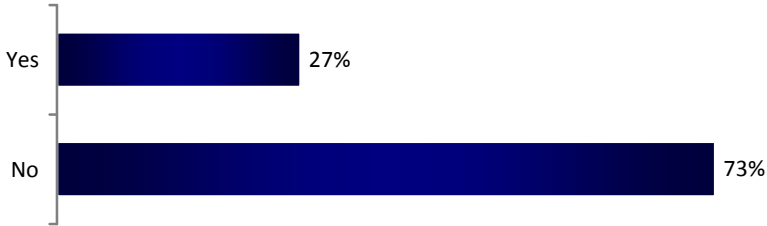


** Mean number of children cared for: 2.6*

Nanny members were also asked whether they currently care for children from more than one family and, if so, whether they currently care for children from more than one family at the same time. 27% of nanny members care for children from more than one family.

Figure 2.2.2: Care for children from more than one family

Base: All nannies (164)



Of the nanny members who care for children from more than one family, 40% care for children from more than one family at the same time.

Figure 2.2.3: Care for children from more than one family at the same time

Base: All nannies (164)



Only 7% of nanny members live with the family / one of the families they provide care for.

Figure 2.2.4: Live with the family or one of the families for whom care is provided

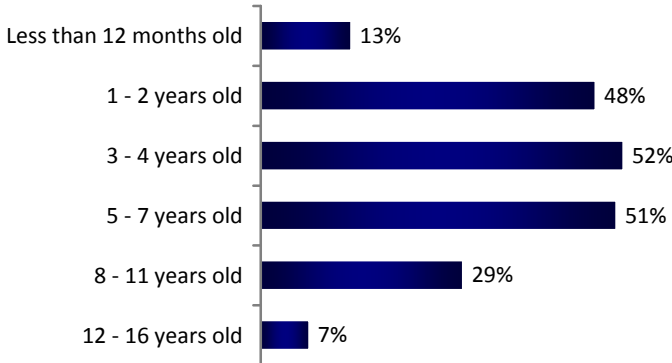
Base: All nannies (164)



Nanny members were asked to indicate the ages of the children that they currently provide care for (excluding their own). Nannies most commonly care for children under the age of 7, with approximately half of nanny members in each case caring children in the 1-2, 3-4 and 5-7 age groups.

Figure 2.2.5: Age of children cared for

Base: All nannies (164)



Nanny members were also asked how many of the children they currently care for are from a black or minority ethnic background. Fourteen per cent of nanny members care for at least one child from a black or minority ethnic background.

Figure 2.2.6: Number of children care for from a black or minority ethnic background

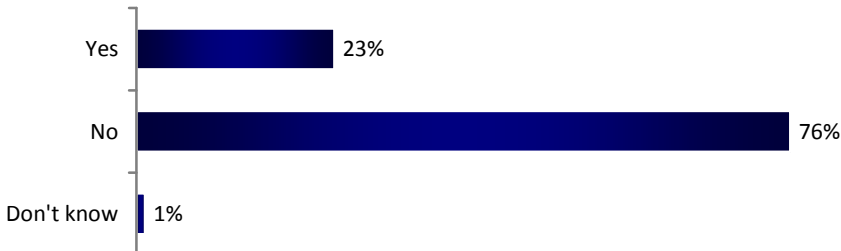
Base: All nannies (164)



Nanny members were also asked whether they would like to take on additional nanny work at present, with just over three quarters (76%) indicating that they would not.

Figure 2.2.7: Would like additional nanny work

Base: All nannies (164)

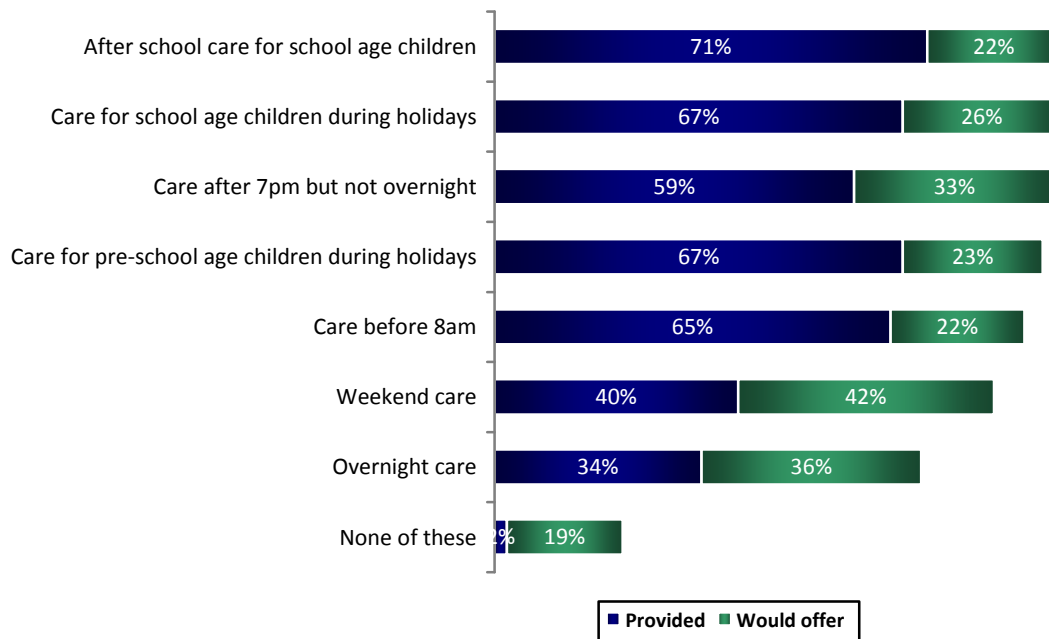


2.3 CHILDCARE PROVISION

Nanny members were asked what types of childcare they have provided in the last year, as well as the types of childcare they would offer to parents if requested. Almost all nanny members either provide or would offer after school care for school age children (93%), care for school age children during holidays (93%), care after 7pm but not overnight (92%), care for pre-school age children during holidays (90%) and care before 8am (87%). Reflecting the nature of the job, a higher proportion of nanny members would offer weekend care and overnight care if requested, compared with childminder members.

Figure 2.3: Types of childcare provided and would offer

Base: All nannies (164)

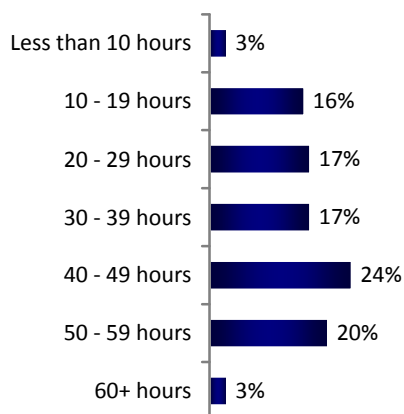


3. PAY & CONDITIONS

Nanny members were asked to specify on average how many hours a week they work as a nanny. The mean number of hours worked per week is 33.8 hours, with just under half of nanny members working at least 40 hours per week. There is, however, considerable variation across the membership base with 23% working over 50 hours a week and 19% working less than 20 hours a week. The median number of hours worked by nanny members per week is 35 hours.

Figure 3.1.: Average hours worked per week

Base: All nannies (164)

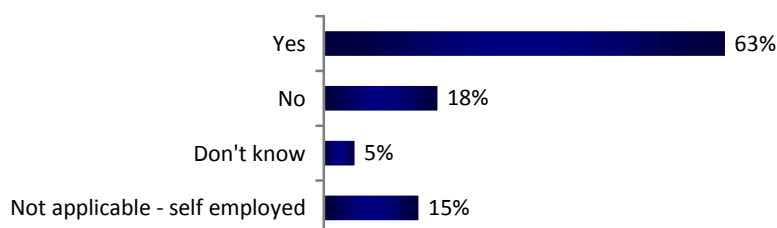


* Mean number of hours worked: 33.8

Just under two thirds (63%) indicate that their employer uses a third party payroll service to issue salary and deduct tax and national insurance. For 15% of nanny members, this is not applicable as they are self-employed.

Figure 3.2: Employer uses a third party payroll service to issue salary, deduct tax and national insurance

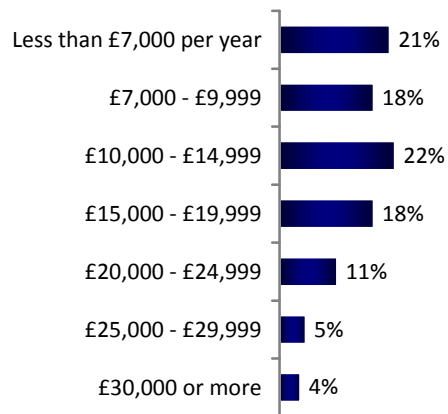
Base: All nannies (164)



Nanny members were also asked to indicate their approximate annual salary. As 5% of nanny members were either unable or unwilling to provide this information, results are given based on all those who were able to do so. The recalculated values assume that those unwilling/unable to provide an answer had a similar distribution of responses as those that did provide answers. Based on recalculated data, 39% earn an annual salary of less than £10,000, and 20% earn an annual salary of £20,000 or more.

Figure 3.3: Approximate annual salary

Base: All nannies (155)



4. CHILDREN WITH ADDITIONAL NEEDS

4.1 CARING FOR DISABLED AND CHILDREN WITH SPECIAL EDUCATION NEEDS

Six per cent of nanny members care for disabled children or children with special educational needs. Of these the most common impairments are special educational needs and multiple impairments.

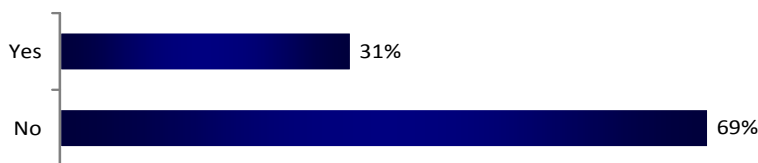
Figure 4.1: Number of nannies currently caring for children who are disabled or have special educational needs
Base: All nannies (164)



4.2 TRAINING

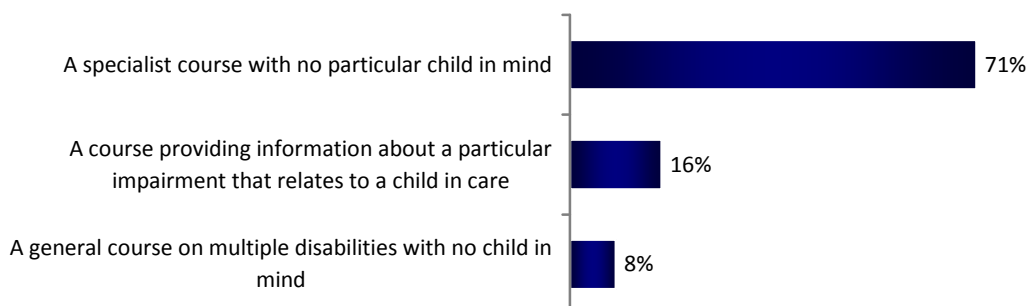
All nanny members were asked whether they had undertaken any training about caring for disabled children or those with special educational needs, with 31% reporting that they had.

Figure 4.2.1: Undertaken training about caring for disabled children or those with special educational needs
Base: All nannies (164)



For nanny members who had undertaken training for caring for disabled children or those with special educational needs, they were asked what type of training they had undertaken. The majority of nanny members have undertaken a specialist course but with no particular child in mind (71%).

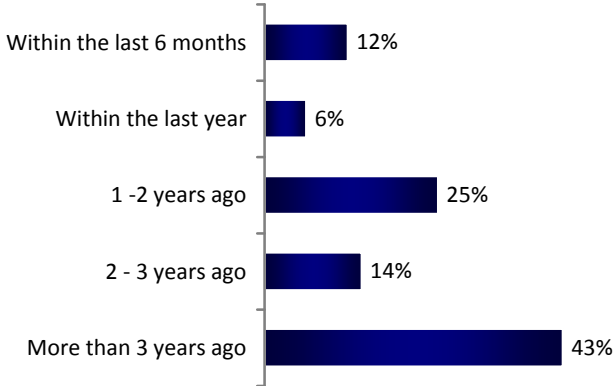
Figure 4.2.2: Type of training undertaken for caring for disabled children / those with special educational needs
Base: Nannies who had undertaken relevant training (51)



Nanny members were also asked to indicate when this training had taken place. 57% of nanny members have undertaken training in the last three years.

Figure 4.2.3: Timing of training undertaken for caring for disabled children/those with special educational needs

Base: All nannies (164)



5. QUALIFICATIONS & CHILDCARE TRAINING

5.1 QUALIFICATIONS

Nanny members were first asked to indicate the highest childcare qualification they hold. Sixty-two per cent of nanny members had achieved a childcare qualification at level 3 or above. A quarter (25%) of nanny members stated that their highest childcare qualification was NVQ Level 3, and 15% said that it was the entry-level Introduction to Childminding Practice.

Figure 5.1.1: Highest childcare qualification (2%+ mentions noted below)

Base: All nannies (164)

NVQ Level 3	25%
NNEB Diploma	16%
Introduction to Childcare Practice	15%
NVQ Level 2	8%
CACHE Level 3	5%
Foundation degree	2%
BTEC	2%
Diploma in Pre School Practice Level 3	2%
Net: Qualification Level 3 or above	62%
Net: Qualification Below level 3	23%
Don't know	2%

In addition to childcare qualifications, nanny members were also asked to indicate the highest non-childcare qualification they hold. The most commonly held highest non-childcare qualifications are GCSEs (39%). 13% of nanny members do not have any other qualifications.

Figure 5.1.2: Highest non childcare qualification (2%+ mentions noted below)

Base: All nannies (164)

GCSE	39%
A-Level (Including AS level)	20%
Degree	12%
City and Guilds	3%
NVQ Level 3	2%
Diploma	2%
NVQ Level 2	2%
Masters	2%

5.2 CHILDCARE TRAINING

All nanny members were asked whether they had undertaken any childcare training in the last 12 months (including training that did not result in a qualification). Only half (49%) of nanny members have undertaken childcare training in the last 12 months.

Figure 5.2.1: Undertaken childcare training in the last 12 months

Base: All nannies (164)



For nanny members who had not attended any childcare training in the last 12 months, they were asked for any particular reasons for not attending. Just over a third (36%) indicated that they were too busy, and 19% said that there was no requirement for them to attend any childcare training.

Figure 5.2.2: Reasons for not undertaking childcare training in last 12 months (2%+ mentions noted below)

Base: Not undertaken childcare training in last 12 months (84)

Too busy	36%
No requirement to do so	19%
Not interested	12%
Training courses are too expensive	8%
Have completed all training available locally	7%
Don't know what training is available to me	6%
Training is not available locally	5%
Training is not available at convenient times	4%
Personal circumstances (e.g. ill health / maternity)	2%

Nannies stated that reducing costs and providing childcare training at more convenient times and in more convenient ways would be most effective in supporting them to undertake such training in the future. Respondents specified subsidised training courses (24%), training courses at weekends (23%) and training made available online (18%) as particularly helpful.

Figure 5.2.3: Most helpful in supporting them to take up childcare training (2%+ mentions noted below)

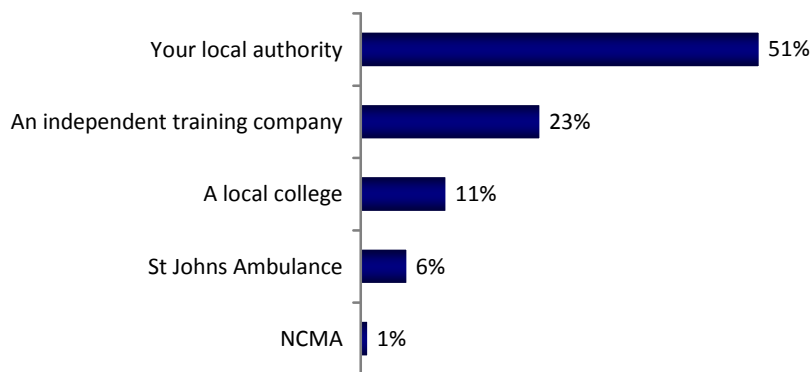
Base: Not undertaken childcare training in last 12 months (84)

Costs of training course being subsidised	24%
Training courses at weekends	23%
Training made available online	18%
Training courses in the evenings	11%
Easily accessible directory of training courses	5%
Childcare cover during daytime training courses	4%
Nothing, I am not interesting in undertaking childcare training	15%

For those who have undertaken childcare training in the last 12 months, nanny members were asked who provided the training. The most commonly used training provider is nannies' local authority (51%). An independent training company is also common at 23%.

Figure 5.2.4: Provider of childcare training (2%+ mentions noted below)

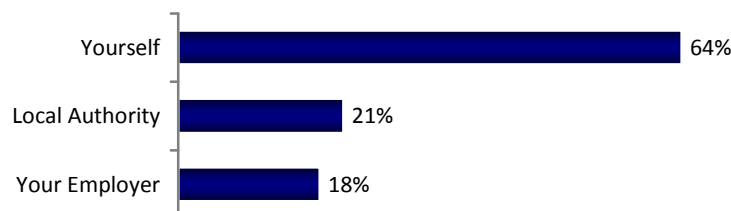
Base: Undertaken childcare training in the last 12 months (80)



Just under two thirds (64%) of nanny members indicate that the training they received was self-funded. 21% of nanny members claim that the training was funded by their local authority, and 18% from their employer.

Figure 5.2.5: Funder of childcare training (2%+ mentions noted below)

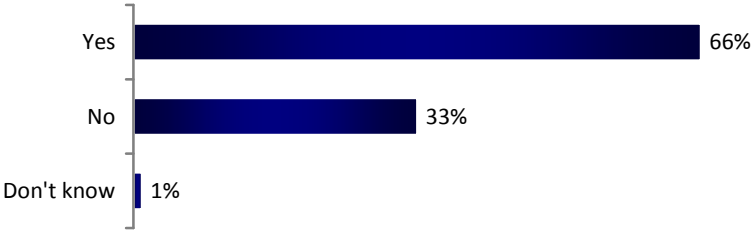
Base: Undertaken childcare training in the last 12 months (80)



All nanny members were asked whether they had undertaken any child protection training. Two thirds (66%) indicate that they have.

Figure 5.2.6: Undertaken child protection training in the last 12 months

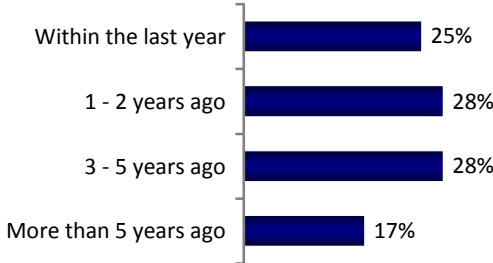
Base: All nannies (164)



Of those who had undertaken child protection training, a quarter (25%) had done so in the previous year. Seventeen per cent had attended more than five years ago.

Figure 5.2.7: Time undertaken child protection training

Base: Undertaken child protection training (109)

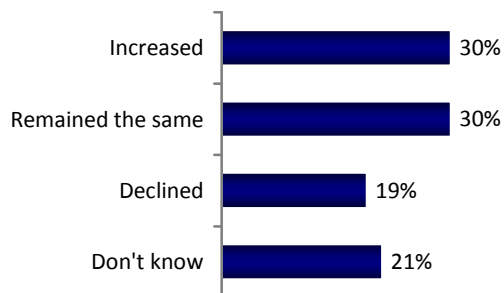


6. PERSONAL PERSPECTIVES AND OPINIONS

All nanny members were asked to consider the current demand for nanny services, and how they felt it had changed over the last year. Views are polarising, with 30% believing it has increased and 19% believing it has declined. This is clearly an area of uncertainty, however, with 21% unable to give an answer.

Figure 6.1: Demand for nanny services have ... over the last year

Base: All nannies (164)



Despite this, the vast majority (88%) of nanny members still plan to be a nanny in 12 months' time, while 5% expressed uncertainty.

Figure 6.2: Plan to be a nanny in 12 months

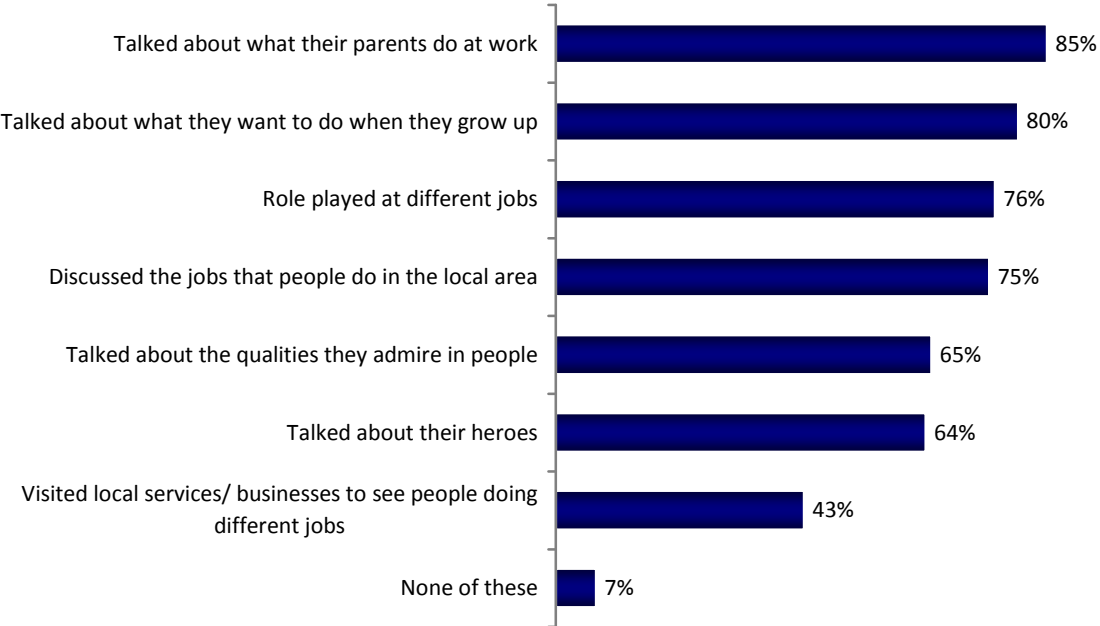
Base: All nannies (164)



Nanny members were asked to indicate whether they undertake a number of pre-defined activities with the children that they care for. The majority of nanny members talk about what parents do at work, talk about what the children want to do when they grow up, have role played at different jobs and discussed the jobs that people do in the local area (all above 70%).

Figure 6.3: Activities undertaken with children in their care

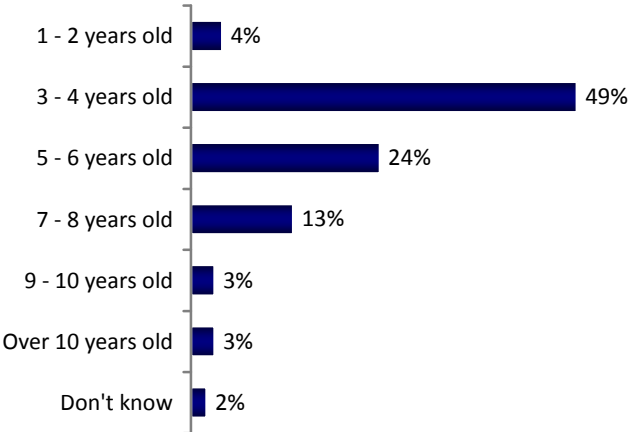
Base: All nannies (164)



Nanny members were also asked to indicate at what age they believe children start to show aspirations for the future. The majority (73%) believe that children start to show aspirations for their future between 3 – 6 years old, notably 3 – 4 years old (49%).

Figure 6.4: Age children start showing aspirations for their future

Base: All nannies (164)



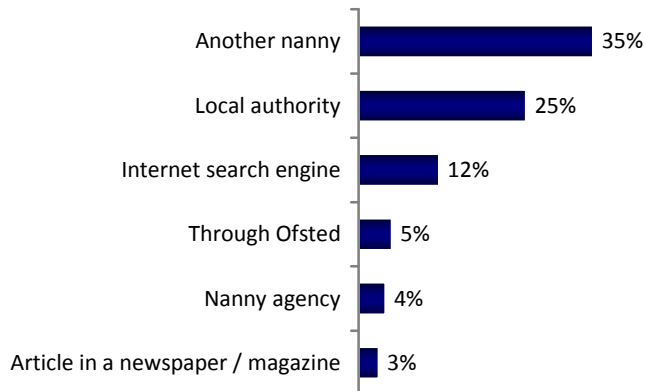
7. NCMA MEMBERSHIP

7.1 VIEWS ON MEMBERSHIP SERVICES

Nanny members were asked how they first heard of NCMA. A range of responses were given, but word of mouth (35%) and their local authority (25%) were the most common.

Figure 7.1: First heard about NCMA through...

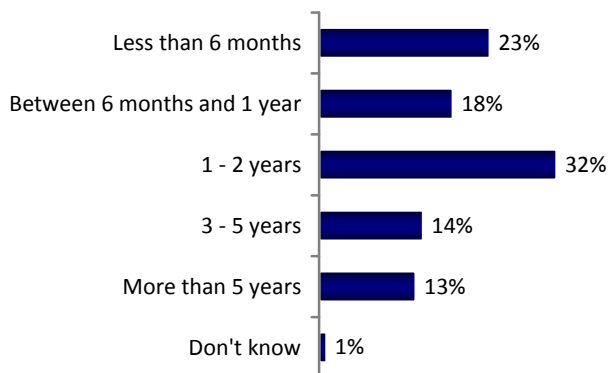
Base: All nannies (164)



Nanny members were also asked how long they have been a member of NCMA. In the context of the relatively recent introduction of nannies to the NCMA Membership (first offered in 2005), it is unsurprising that the vast majority have been members for 2 years or less (73%).

Figure 7.2: Length of NCMA Membership

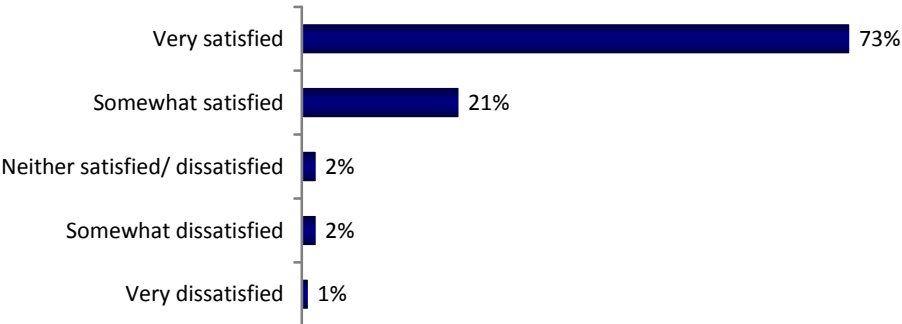
Base: All nannies (164)



Nanny members were also asked how satisfied they are with their NCMA membership and whether they would recommend NCMA to a colleague. Just under three quarters (73%) of nanny members are very satisfied with their NCMA membership. 21% of nanny members are somewhat satisfied with their NCMA membership.

Figure 7.3: Satisfaction with NCMA membership

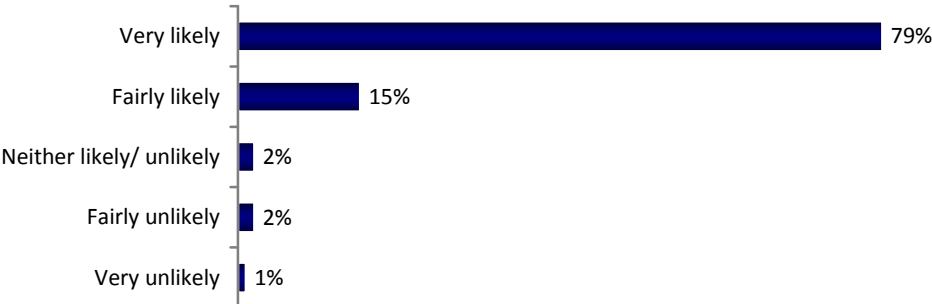
Base: All nannies (164)



The vast majority of nanny members (79%) are very likely to recommend NCMA to a colleague. Fifteen per cent of nanny members are fairly likely to recommend NCMA to a colleague.

Figure 7.4: Likelihood of recommending NCMA to a colleague

Base: All nannies (164)

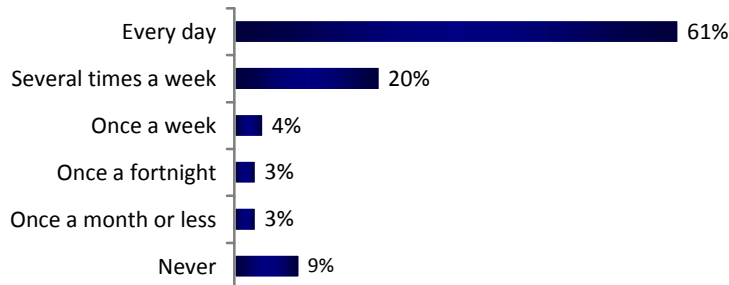


8. INTERNET USAGE

Nannies were asked to indicate how often they use the internet. The majority (91%) of nannies access the internet to some degree, and 61% access the internet every day.

Figure 8.1: Frequency of using the internet

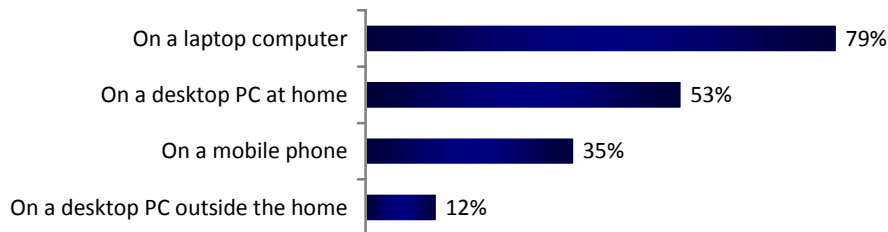
Base: All nannies (164)



Nearly four fifths (79%) access the internet through a laptop computer, and 53% access the internet on a desktop PC at home. Just over a third (35%) access the internet via a mobile phone.

Figure 8.2: Access the internet through...

Base: Those that access the internet (150)



Of those that access the internet, the vast majority (93%) have an active email address.

Figure 8.3: Have an active email address...

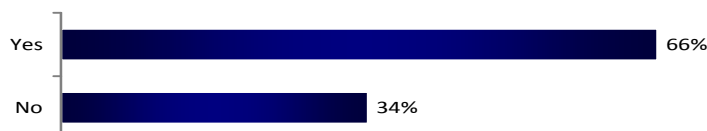
Base: Those that access the internet (150)



Two thirds of those that access the internet use the internet for activities relating to their nanny business.

Figure 8.4: Use the internet for activities relating to nanny business...

Base: Those that access the internet (150)



The vast majority (84%) use the internet to find resources to use with the children they care for. Just under a quarter (24%) use it to keep themselves updated with new developments in childcare policy.

Figure 8.5: Purpose of using the internet for nanny business...

Base: Those that access the internet for nanny business (99)

