

# **Evaluation of the Early Implementation of the Childcare Offer for Wales**

**Findings from the parent survey**

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# Executive summary

In September 2017, the Welsh Government began a pilot initiative to test the provision of 30 hours a week of government-funded early education and childcare for working parents of 3 and 4 year olds. The Childcare Offer for Wales was provided to children of eligible parents in seven selected local authorities for up to 48 weeks a year (including 9 weeks outside of term time). An evaluation of the pilot was commissioned by the Welsh Government, part of which consisted of a web-based survey of parents who have taken up the childcare offer to investigate how parents have responded to the policy. This executive summary presents the main findings from the parent survey, based on 555 responses

## Key findings

### Who is taking up the offer?

The profile of survey respondents suggests that the policy is mostly being accessed by relatively highly educated parents. Nearly two-thirds of respondents (63%), most of whom were women (90%), had a degree or higher degree.

The survey responses demonstrated that the policy is being accessed by families with wide-ranging income levels. Fifty-nine per cent reported a household income of £41,600 or above. Approximately one quarter of the sample (24%) reported a household income between £26,000 and £41,599, leaving 16 per cent with household income below £26,000. By comparison, the median household income for a household with two working individuals in Wales was ££45,760 in 2016/2017.

### What is the impact on childcare use?

Most parents (90%) were able to keep their children with the same childcare provider as before the policy was introduced, but the evidence suggests that many parents (49%) needed to use another provider to cover the additional hours of childcare, suggesting a patchwork of care. Two-thirds of parents (66%) used more than one childcare provider in a typical term time week. This figure does not distinguish between parents taking up Foundation Phase and the childcare offer.

The introduction of 30 hours also appears to have encouraged a shift from informal to formal childcare. Although the majority of parents (57%) were using the same number of hours of formal childcare as before taking up the offer, 40 per cent of respondents had increased their hours of formal childcare and 16 per cent were using fewer hours of *informal* childcare. Considering all childcare use (not just the 30 hours), the most commonly used types of childcare were nursery classes attached to a primary or infant school (used by 52% of parents) and day nurseries (used by 42%).

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## What is the impact on employment?

There was a high level of continuity in the number of hours that parents worked before and after the policy was introduced – 86 per cent of parents worked the same hours. Hours were more likely to have increased for women (12%) than men (3%) and for lower income households<sup>1</sup> (18%) rather than high income households<sup>2</sup> (6%).

Parents perceived a change in extent of flexibility and opportunity provided by the offer. Overall, three in five parents (60%) thought they had more opportunities for training, learning and development. Parents in the low household income group (69%) were more likely to report having greater learning and development opportunities compared to those in the middle income group<sup>3</sup> (59%) and in the higher income group (51%). The offer provided more flexibility in making work-related decisions for women and parents in low income households. More than two-thirds of female respondents (68%) reported having more flexibility than before compared to 56 per cent of male respondents. Nearly three-quarters (73%) of the parents in the lowest household income group also reported having more flexibility after taking up the childcare offer in contrast to 60 per cent of those from the highest household income group.

## What is the impact on income and wealth?

The policy appeared to have a considerable impact on disposable income. Sixty per cent said that they had slightly more money while 28 per cent thought that they had much more money since taking up the offer. The remaining 12 per cent reported that the childcare offer had made no real difference to the money they had to spend, and this was not because they were only using informal childcare prior to the offer. The childcare offer also was perceived by parents to provide the potential for parents to earn more. Two-thirds (67%) of parents thought the offer had provided them with more opportunities to increase their earnings.

Provider fees charged to parents varied according to the type of provider. An overwhelming majority that uses nursery schools and nursery classes did not pay for any of the hours they used (92% and 93%, respectively). Conversely, 25 per cent of parents using out of school childcare and 20 per cent who used childminders paid for all the childcare hours they use, perhaps because they provided wraparound care and were in addition to the 30 hours of funded care.

## How easy was it to apply?

Those who had successfully signed up for the 30 hours had mostly found the process straightforward. Across local authorities, 92 per cent thought that it was easy to apply for the offer. Of the small proportion who had encountered difficulties, the most

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<sup>1</sup> Household income of £41,599 or less

<sup>2</sup> Household income of £52,000 or more

<sup>3</sup> Household income £41,600-£51,999

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common reason for the application process being challenging was that the accompanying documentation for the application was difficult to provide.

## Summary

The parent survey provided early insights about responses to the policy change in terms of childcare use and parental employment. There was evidence of a shift towards formal childcare as a result of the policy and most parents used more than one childcare provider to cover the Foundation Phase and childcare elements of the provision. Within the first half year of the policy, most parents were working the same number of hours as previously but were better off with more disposable income and reported greater opportunities for training and development as well as increased earnings. The evidence from the parents' survey suggests that more targeting will be needed to engage parents from lower socio-economic backgrounds to take advantage of the childcare and enter or increase employment.

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# 1 Introduction

## 1.1 Policy background

In September 2017, the Welsh Government began a pilot initiative to test the provision of 30 hours a week of government-funded early education and childcare for working parents of 3 and 4 year olds. In the pilot phase, the Childcare Offer for Wales is provided to children of eligible parents in seven selected local authorities for up to 48 weeks a year. This included 9 weeks of childcare outside of term time.

In this phase, all 22 local authorities (LA) were asked to express their interest in becoming an early implementer of the Childcare Offer for Wales. Selection of early implementer LAs was based on how well the expressions of interest aligned with the purpose of the offer, how innovative they were in addressing challenges to delivery and their understanding of the childcare sector in the area<sup>4</sup>. Geographical spread and maintaining a balance between urban and rural LAs was also taken into account as a part of the selection criteria<sup>5</sup>. Of the sixteen that applied, seven LAs were selected to deliver the offer in September 2017: Blaenau Gwent, Caerphilly, Flintshire, Rhondda Cynon Taf, Swansea, Anglesey and Gwynedd (with Anglesey and Gwynedd working together). The offer was made available to working parents across the whole of these local authorities, except for Swansea and Rhondda Cynon Taf where the offer was only available within selected areas<sup>6</sup>. A further seven local authorities will begin delivering the offer from September 2018.

Prior to the introduction of the Childcare Offer for Wales, families received government-funded childcare through two key schemes, both of which remained in effect. The first of these is delivered through Flying Start, an early years' programme which offers 12.5 hours a week of free childcare to 2 year old children until they turn 3 living in disadvantaged areas of Wales<sup>7</sup>. This scheme is available to all parents of eligible children living in a Flying Start area. The second is the Foundation Phase, a universal scheme which offers all children in Wales a minimum of 10 hours a week of government-funded early year's education from the term following their third birthday, for up to 38 weeks a year. Through the Foundation Phase, eligible children are offered part-time education in a LA approved setting such as a nursery, funded playgroup, childminder, or in a school<sup>8</sup>.

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<sup>4</sup> <https://www.pacey.org.uk/news-and-views/pacey-blog/2016/november-2016/the-truth-about-30-hours/>

<sup>5</sup> <https://www.pacey.org.uk/news-and-views/pacey-blog/2016/november-2016/the-truth-about-30-hours/>

<sup>6</sup> <https://gov.wales/topics/people-and-communities/people/children-and-young-people/childcare/talk-childcare/pilot-areas/?lang=en>

<sup>7</sup> <https://gov.wales/topics/people-and-communities/people/children-and-young-people/parenting-support-guidance/help/flyingstart/?lang=en>

<sup>8</sup> <https://gov.wales/docs/dcells/publications/180328-foundation-phase-nursery-guide-for-parents-and-carers-en.pdf>



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Under the Childcare Offer, the Foundation Phase provision is topped up with additional hours of childcare which are specifically geared towards the children of working parents<sup>9</sup>.

The primary policy aims of the Childcare Offer for Wales are:

- To enable more parents (particularly mothers) to return to work.
- To increase the disposable income of those in work and help counteract poverty for those in low-paid jobs.
- To encourage child development and school readiness.

All parents, guardians, step-parents and long-term live-in partners within a household are eligible for the offer if they have a child within the age range, meet the definition of a working parent, and live within one of the seven early implementer local authorities<sup>10</sup>. The offer defines working parents as those who are employed, self-employed or on a zero hours contract and work a minimum of 16 hours a week<sup>11</sup>. Both parents in a two-parent family and the sole parent in a single-parent family must be working in order to qualify for the offer. However, there are some exceptions, for example, where one parent is working and the other has caring responsibilities (other than for their own children) or when one parent is working and the other is disabled or incapacitated, the working parent is eligible for the offer. Furthermore, families that fall out of eligibility (most commonly when one or both parents lose their job), can continue to access offer for up to 8 weeks.

The offer also aims to take into account the barriers faced by parents of children with special educational needs (SEN). To support children with SEN to access the offer, the Welsh Government provides additional support to local authorities to offer training, equipment, toys, and other material and human resources<sup>12</sup>.

Take-up of the 30 hours childcare offer was slow when the offer was launched and although it has increased since inception, it continues to be lower than anticipated<sup>13</sup>. A lack of capacity and availability of settings is a key issue in the childcare sector in Wales<sup>14</sup> and this could explain the low take-up of the offer. However, feedback to local councils also suggests that a lack of awareness or understanding of the offer, and unwillingness to move children from current care arrangements have affected take-up<sup>15</sup>.

More recently, the offer has also come under scrutiny for potentially exacerbating inequalities through its eligibility criteria<sup>16</sup>. As the offer only allows parents working a minimum of 16 hours per week to apply for eligibility, critics argue that it overlooks economically vulnerable groups such as parents out of work but looking to get back into work, and parents working fewer than 16 hours a week.

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<sup>9</sup> <http://www.senedd.assembly.wales/mglIssueHistoryHome.aspx?lId=21394&Opt=0>

<sup>10</sup> Childcare Offer: Guidance for Early Implementer Local Authorities, Welsh government, September 2018

<sup>11</sup> Childcare Offer: Guidance for Early Implementer Local Authorities, Welsh government, September 2018

<sup>12</sup> Childcare Offer: Guidance for Early Implementer Local Authorities, Welsh government, September 2018

<sup>13</sup> <https://www.bbc.co.uk/news/uk-wales-politics-44292076/> report find

<sup>14</sup> <https://gov.wales/docs/caecd/research/2017/171031-childcare-capacity-en.pdf>

<sup>15</sup> <https://www.bbc.co.uk/news/uk-wales-politics-44292076>

<sup>16</sup> <https://www.bbc.co.uk/news/uk-wales-politics-44865029>

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While child development and school readiness are important aims of the Childcare Offer in Wales, the policy also has a strong focus on economic outcomes related to employment and income particularly for mothers and parents in low-paid jobs. Given the policy emphasis on employment and income, and the recent criticism around widening inequalities, examining the pilot phase, particularly in relation to parents' experience of the offer and its impact on their employment and income, provides useful insight into the effectiveness of the policy. This is an essential step in enabling success factors and addressing barriers prior to national roll out of the policy.

## 1.2 Evaluation methodology

The National Centre for Social Research and Arad Research were commissioned by the Welsh Government to conduct an evaluation of the early implementation of the childcare offer for Wales.

The overall aims of the evaluation were:

- To generate learning for national and local government, providers, parents and other stakeholders to help refine implementation plans for the national launch of 30 hours government funded childcare in September 2018.
- To provide early insights on delivery and responses to the policy change in terms of childcare use and parental employment.

This project was a mixed-method evaluation involving several research strands:

- Qualitative interviews with participating and non-participating parents
- Qualitative interviews with local and national stakeholders
- Qualitative interviews with participating childcare providers
- Analysis of Local Authority administration data
- Web-based survey of parents participating in the early implementation phase of the policy

This report focuses on the survey of parents which covered the following areas:

- Background information about child and family
- Current early education and childcare use
- Changes in childcare use since taking up the childcare offer
- Perceived impact on employment, disposable income and the family.

## 1.3 Sample

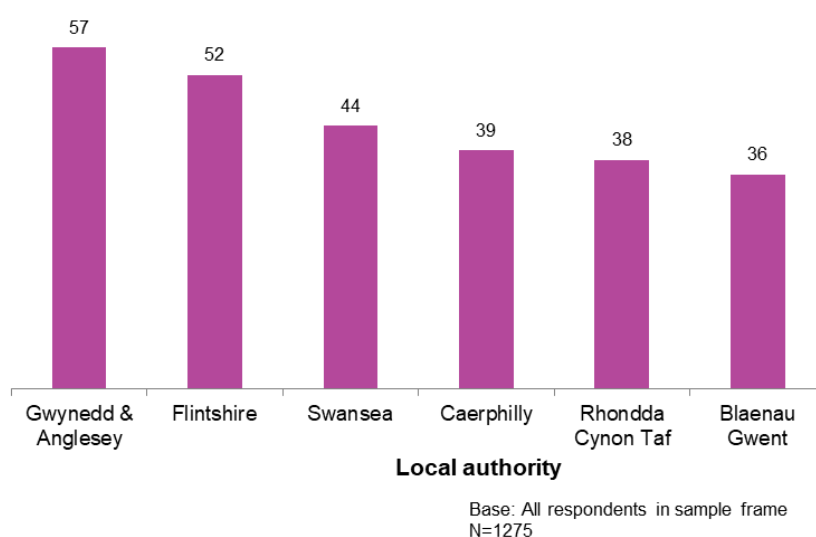
Using a census approach, all parents taking up the childcare offer from the seven participating local authorities were invited to take part in the survey. A total of 1,275 parents from the seven participating local authorities were contacted via email.

The sample frame (1,275 parents) consisted of people who had taken up the childcare offer either in the Autumn term of 2017 or in the Spring term of 2018 (that is, from September 2017 when the pilot was launched, until February 2018). The eligibility criteria for the survey was two-fold: 1) respondents were currently using the 30 free hours of early education and childcare for their 3 or 4 year old children and 2) they had main or shared responsibility for arranging their child's early education and childcare.

The survey was completed by 555 parents with a response rate of 43 per cent. The responding sample covered all participating LAs in the early implementation phase of the policy. The data was weighted to account for non-response bias using the index of multiple deprivation (IMD) at area level so that we can be confident that the responding sample is representative of parents taking up the offer<sup>17</sup>.

Given that Gwynedd and Anglesey are jointly working in delivering the childcare offer, responses from these two local authorities have been merged under a single category. Any area level analysis is therefore, based on six areas. Figure 1 shows the breakdown of survey responses as a proportion of the sampling frame by local authority. The proportion of responses by local authority varied. More than half of the parents who were taking up the offer in Gwynedd and Anglesey, and Flintshire participated in the survey relative to about one in three (36%) in Blaenau Gwent.

**Figure 1: Response rate within each local authority %**



<sup>17</sup> A technical note is presented in the appendix for more information on the weights.

It should be noted that sample sizes for the local authorities range from 75-129 (Table 1). The findings for individual LAs from this survey should be treated with caution when the sample number is low. For this reason, this report focuses on national trends with broad descriptions of the variation across LAs.

**Table 1: Number of responses by LA**

Local authority	No. of responses
Blaenau Gwent	75
Caerphilly	109
Flintshire	129
Gwynedd Anglesey	82
Rhondda Cynon Taf	82
Swansea	78
Total	555

## 1.4 Fieldwork

A pilot phase of the survey took place from 12th February to 1st March 2018 with a sample of 100 cases from Manylion Rhieni Gwynedd a Mon i'r Llywodraeth. An invitation letter and email was sent to all 100 cases in the sample and reminder emails and letters were sent at different stages of the pilot fieldwork period to those who had not yet taken part. The main purpose of the pilot was to test the survey instrument.

A number of minor changes were made as a result of the pilot to improve the survey for the mainstage. The mainstage fieldwork took place from 8th May to 15th June 2018. A total of 1,275 parents were invited to take part in the mainstage. All parents were sent an invitation letter and email, and non-responders were sent emails and text messages reminding them to complete the web-based survey. Four reminder emails and text messages were sent out to non-respondents during the fieldwork period. The reminders, particularly the first two, were effective in increasing response rates with increases from 9 per cent to 24 per cent following the first batch of reminders and up to 32 per cent following the second batch. Separate reminders were also sent out to respondents who had partially completed the survey and which resulted in 15 partially completed surveys being converted into fully completed surveys. The final response rate at the end of the fieldwork period was 43 per cent.

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## 1.5 Reporting conventions for survey data

The survey findings presented in this report use data that have been weighted to take account of non-response bias<sup>18</sup>. All percentages reported are weighted.

There are two types of tables and charts included in this report. For single coded questions, percentages will generally sum to 100 per cent. In some instances, some single coded questions may not sum to exactly 100 per cent due to rounding. Where the survey question allowed multiple responses (i.e. the 'select all that apply' questions), the percentages may add up to more than 100 per cent.

It is important to note that some parents did not answer all questions as it was possible to select options such as 'do not know' and 'prefer not to answer'. The findings in this report are based on valid responses with both the weighted and unweighted base sizes presented in each table.

## 1.6 Limitations

Although weighting reduces bias in the estimates, it is important to recognise that some groups of parents may be more inclined to agree to participate than others. This could include parents with higher education qualifications and those who are more tech-savvy given that the survey was web-based. As a result, it is possible that the results are not fully representative of all parents taking up the 30 hours.

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<sup>18</sup> A technical note on the weights is presented in the appendix.

## 2 Profile of parents taking up the offer

This chapter presents the demographic and socioeconomic characteristics of the respondents.

The sample consisted of parents who had taken up the childcare offer by February 2018. One in three parents (33%) took up the offer in September 2017 while 67 per cent began using it between October 2017 and February 2018 during which the childcare offer was expanded.

The majority of the parents (71%) had one child aged 3 or 4, 28 per cent had two children aged 4 years or under while 1 per cent had three or more children aged 4 years or under. The majority of respondents (88%) lived together with their partner or spouse while 12 per cent did not. The survey did not examine the nature of respondents' relationship with the child. We therefore, do not know if the respondent was a parent or a carer.

In most cases, the respondent to the survey was a woman (90%) rather than a man (10%). Most respondents (63%) had a degree or higher degree, demonstrating that majority of parents responding to the survey were relatively well educated. Table 2 presents the education backgrounds of the sample.

**Table 2: Breakdown of highest education qualification**

Highest education qualification	%
No formal qualifications	1
Other qualifications (including vocational and foreign qualifications below degree level)	1
GCSE grades D-G	1
GCSE grades A-C	10
A levels	13
Higher educational qualification below degree level	11
Degree or higher degree or equivalent	63
Weighted base	553
Unweighted base	554

The breakdown of income also demonstrates the higher than average socio-economic status of the parents participating in the survey as about one-third (34%) had a household income of more than £52,000 (Table 3). As well as reflecting qualification

levels, respondent incomes also result from the majority (88%) being in two-parent dual-working households.

Table 3 only includes the income breakdown of respondents who disclosed their income. There were 9 respondents who selected 'prefer not to answer' and 1 respondent who selected 'don't know'.

The range of average (median) household income in this survey was from £41,600 to £51,999. Based on the frequency distribution of income, three categories were created for subgroup analysis: group 1 (up to £41,599), group 2 (from £41,600 to £51,999) and group 3 (£52,000 or higher) (Figure 2).

For comparison, the median household income in Wales for a household in which two individuals are working is £45,760 in 2016/2017<sup>19</sup>, suggesting that the parents accessing the Childcare Offer were fairly similar in their incomes compared to the general population<sup>20</sup>.

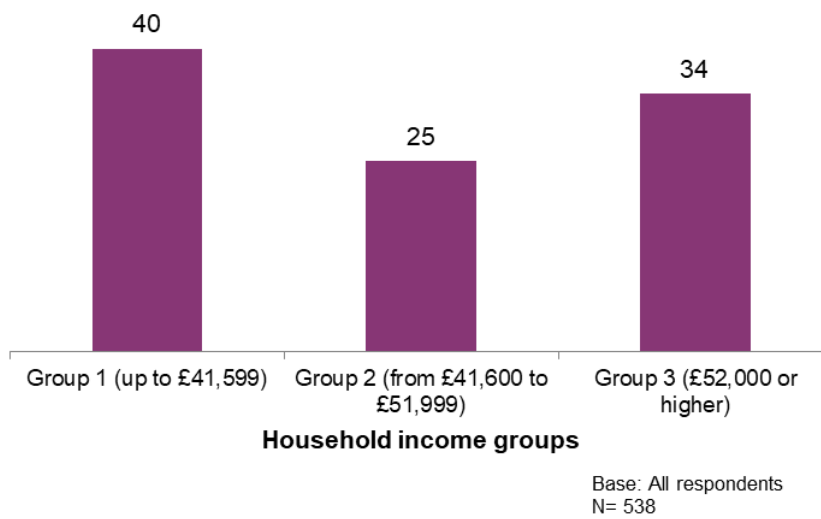
**Table 3: Breakdown of total household income per year %**

Total household income per year	%
Up to £10,399	1
£10,400 to £15,599	4
£15,600 to £20,799	4
£20,800 to £25,999	7
£26,000 to £31,199	10
£31,200 to £41,599	14
£41,600 to £51,999	25
£52,000 to £99,999	33
£100,000 or more	1
Weighted base	540
Unweighted base	538

<sup>19</sup> <http://researchbriefings.files.parliament.uk/documents/CBP-8191/CBP-8191.pdf>

<sup>20</sup> The median household income in Wales represented the median household income per person. In the absence of data on median household income of couple households, we multiplied the figure of median household income per person by two.

**Figure 2: Breakdown of household income per year %**



There was some variation in the median household income range across local authorities. Blaenau Gwent and Caerphilly had a median household income range of £31,200 to £41,599. By contrast, Flintshire, Gwynedd and Anglesey, Rhondda Cynon Taf and Swansea had a higher median household range of £41,600 to £51,999.



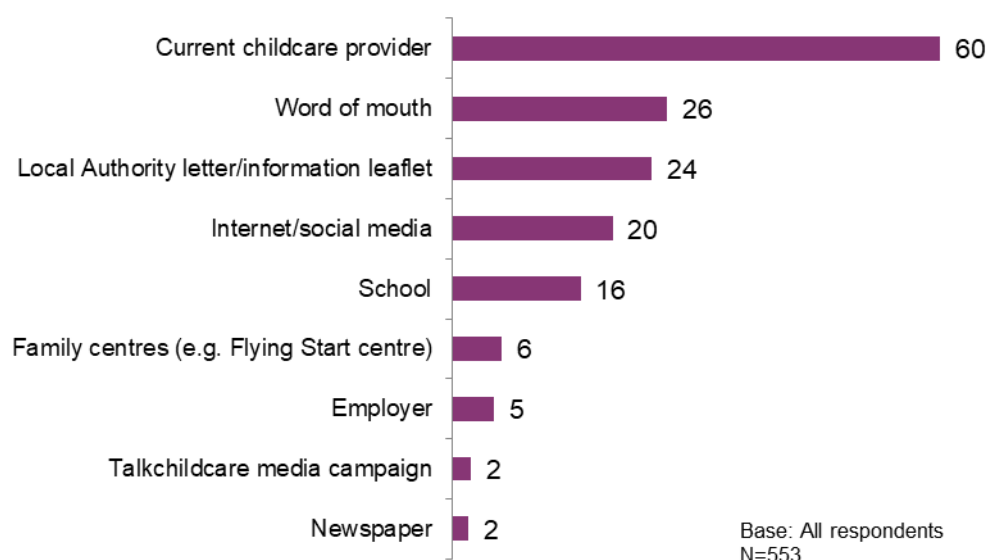
### 3 Accessing the childcare offer

This chapter examines the delivery of the childcare offer, particularly with respect to its flexibility, accessibility and use outside of term time.

#### 3.1 How did parents hear about the offer?

Parents were most likely to hear about the childcare offer from their current childcare provider followed by word of mouth and a leaflet or letter from their local authority (Figure 3).

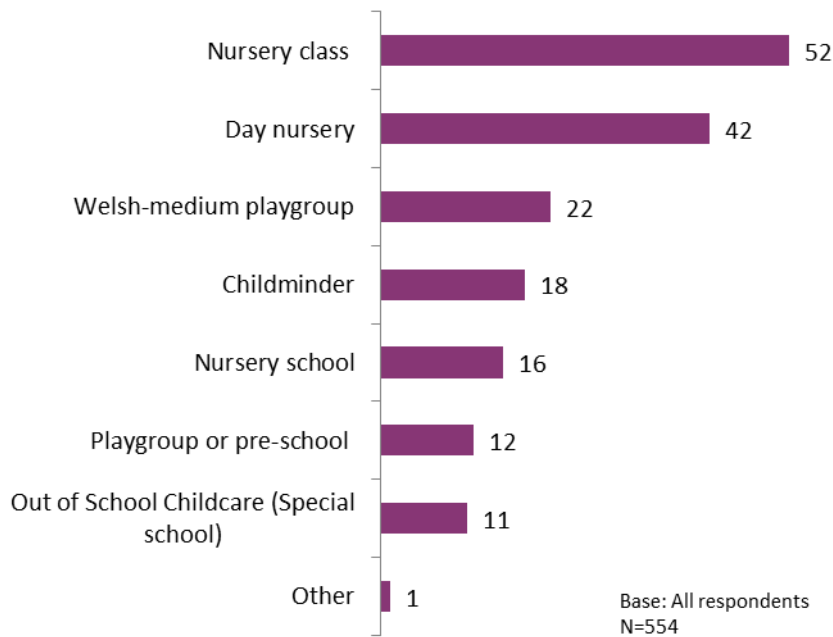
**Figure 3: How parents heard about the childcare offer %**



#### 3.2 How are parents using the childcare offer?

Figure 4 presents the proportion of parents using each type of childcare provider for the Childcare Offer. The most commonly cited providers were nursery class (used by 52% of parents) and day nurseries (used by 42%). Parents also used Welsh-medium playgroups, childminders, nursery schools, playgroup/preschool and out of school childcare. However, it is not known whether parents were using all 30 hours (or more than 30 hours) or how this was distributed across the different providers.

**Figure 4: Type of childcare providers used**



Most parents (66%) used more than one type of childcare provider in a typical term-time week with 59 per cent using two providers, and 7 per cent using three or more providers. Only one in three (34%) respondents used one type of childcare provider.

Although the survey did not differentiate between Foundation Phase and the childcare offer, it is reasonable to assume that parents who use nursery classes or nursery schools are receiving the Foundation Phase early education hours at these settings. When excluding nursery classes and nursery schools from the analysis, only 32 per cent of parents had to use more than one childcare provider in a typical term-time week. The majority of these parents (68%) were using one provider.

The finding suggests that most parents are able to use a single childcare provider if they are only taking up the childcare offer. For the 32 per cent of parents who are not using nursery classes and nursery schools but are using more than one childcare provider, it is not immediately clear if using more than one provider is by choice or necessity. It raises questions on the readiness and capacity of providers to meet the needs of parents.

The next section explores the differences in how childcare providers are used in terms of hours and timings.

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## Day nursery

Two hundred and thirty one parents used day nurseries. Almost half of the respondents (49%) used day nurseries for 11-20 hours. A greater proportion of respondents (13%) used day nurseries for more than thirty hours a week relative to nursery school or class (1% and 2% respectively).

While most respondents (71%) used day nurseries at 3pm to 6pm, parents were also likely to use it throughout the day (60% before 9am, 59 per cent from 9am to 1pm and 55% from 1pm to 3pm). This suggests that day nurseries are generally used by parents working long hours and for whom the school day type provision from 9am-3pm does not suffice.

## Childminder

Ninety-three parents used childminders. Similar to day nurseries, 49 per cent of respondents using childminders used them for 11-20 hours weekly, followed by 24 per cent who used it for 21 to 30 hours and 16 per cent who used it for up to ten hours. A further 11 per cent used childminders for more than 30 hours.

The use of childminders was almost equally split throughout the day. More than three-quarters of those using childminders (77%) used them between 3pm to 6pm while 73 per cent used them in the morning before 9am. A further 67 per cent used them between 1pm to 3pm and 65 per cent used them between 9am and 1pm. A small proportion of people (3%) also used childminders after 6pm. These patterns imply that some childminders may be caring for children early in the morning and dropping them off in nursery school or class before picking them up at the end of the session.

## Nursery school or class

There were 87 respondents who used nursery schools and 285 respondents who used nursery classes. Most respondents (71%) who used nursery schools or nursery classes used them for 11-20 hours (Nursery schools: 71%, nursery classes: 68%) followed by up to 10 hours (23% for nursery class and 19% for nursery school). The most popular times for using nursery schools or classes were 9am to 1 pm (77% for nursery schools and 71% for nursery classes). It is typical for nursery schools and classes to offer Foundation Phase in the mornings in conjunction with other wraparound childcare arrangements.

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## Out of school childcare

Sixty parents used out of school childcare. Half of these parents (52%) used it for 11-20 hours. Unlike nursery schools and classes, most respondents who use out of school childcare used it later in the day from 3pm to 6pm (69%), followed by 46 per cent using it from 1pm to 3pm. These findings suggest that out of school childcare may be used as wraparound provision around the Foundation Phase.

## Playgroup

There were 122 respondents who used Welsh-medium playgroups and 65 respondents used other playgroups. While childcare was mostly used for 11-20 hours for the aforementioned providers, there was more variation when it came to playgroups. Almost half (49%) of respondents who used Welsh medium playgroups used it for 11-20 hours while 39 per cent used it for up to ten hours. A further 13 per cent used it for 21-30 hours.

Similarly, most respondents who used other playgroups (48%) used them for 11-20 hours a week, followed by 42 per cent reported using them for up to 10 hours. The most popular timing for respondents to use playgroups was 9am to 1pm (Welsh medium playgroups: 76%, other playgroups: 69%). This finding suggests that playgroups are chosen by parents who need fewer hours of childcare, although it is possible that parents are using multiple childcare providers in combination but are using playgroups for fewer hours than other provider types. Moreover, given that some Welsh-medium playgroups are only open for a few hours a day, this is likely to explain the high proportion of take-up in the morning.

## Summary

Parents choosing nursery schools or nursery classes were most likely to use the provision for 11-20 hours and week and in the morning between 9am and 1pm, reflecting when the Foundation Phase places are offered.

Day nurseries and childminders tended to be used for longer hours which would be consistent with their offer of childcare places rather than Foundation Phase.

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## 3.3 Is childcare provision being offered in a flexible way?

A key aspect of flexibility is being able to choose the number of hours and times of day at a preferred provider. The different types of providers varied in their ability to offer flexibility.

### Out of school childcare

There were 61 respondents using out of school childcare. Approximately three-quarters (73%) of parents using out of school childcare were able to freely choose the days and times when their child attends the provider. A further 23 per cent could choose when their child attends their childcare but within some restrictions specified by the provider while 4 per cent did not have a choice.

### Day nursery

There were 231 respondents using day nurseries. Akin to out of school childcare, almost three in four (71%) of parents using day nurseries were able to freely choose the days and times when their child attends their provider, highlighting the high flexibility of day nurseries. One-quarter (25%) of parents could choose when their child attends their childcare but within some restrictions specified by the provider while a mere 3 per cent did not have a choice.

### Childminder

There were 102 parents using childminders. Two in three (66%) were able to freely choose their preferred days and times while 33 per cent could choose within some restrictions. A small percentage (1%) had to take the days and times specified by the provider.

### Playgroups

There were 65 parents using Welsh-medium playgroups and 122 using other playgroups. Just over half of parents were able to freely choose the days and times when their child attends playgroup (Other playgroups: 58%, Welsh-medium playgroups: 54%). Additionally, 33 per cent of parents using Welsh-medium playgroups and 28 per cent using other playgroups were able to choose when their child attends the childcare but with some restrictions. A further 14 per cent of those using other playgroups and 13 per cent using Welsh-medium playgroups had to take the days and times specified by the provider.

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## Nursery school and nursery class

There were 287 respondents using nursery class and 88 respondents using nursery school. Perceived flexibility varied considerably across the two provider types as 47 per cent of parents using nursery schools could freely choose when their child attends in contrast to 30 per cent of parents using nursery class.

In stark contrast to the flexibility of out of school childcare and day nursery, more than half of the parents using nursery classes (55%) had to take the days and times specified by their provider in comparison to 37 per cent of parents using nursery schools. These findings suggest that there may be greater flexibility in nursery schools than nursery classes.

## 3.4 How have childcare arrangements changed since the offer?

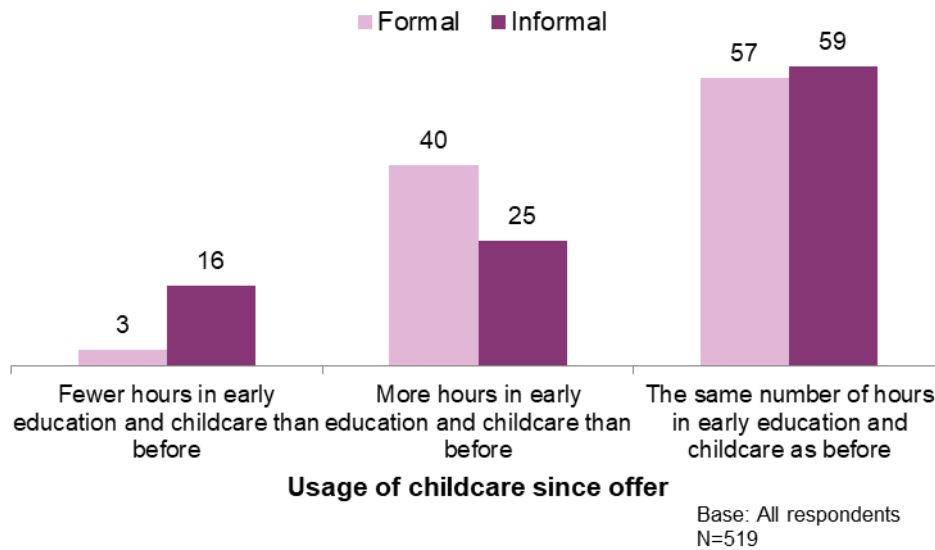
This section examines the extent to which the use of childcare has changed since taking up the offer.

The survey indicated a shift towards greater use of formal early education and childcare. Two in five (40%) respondents reported using more hours of formal provision since taking up the offer and 2 per cent reported using less (Figure 5). Additionally, 16 per cent of parents were using fewer hours of informal childcare after taking up the offer.

The majority of parents (60%) said that they were using informal childcare alongside formal provision, suggesting that using a combination of formal and informal childcare is a popular option for many parents.

Only a small proportion of respondents (6%) did not use any formal early education or childcare prior to the childcare offer. The children of these parents included a mix of those who were previously below the age threshold for the Foundation Phase and had just turned three years old as well as those who were eligible but not taking up the place.

**Figure 5: Usage of formal and informal childcare since the offer %**



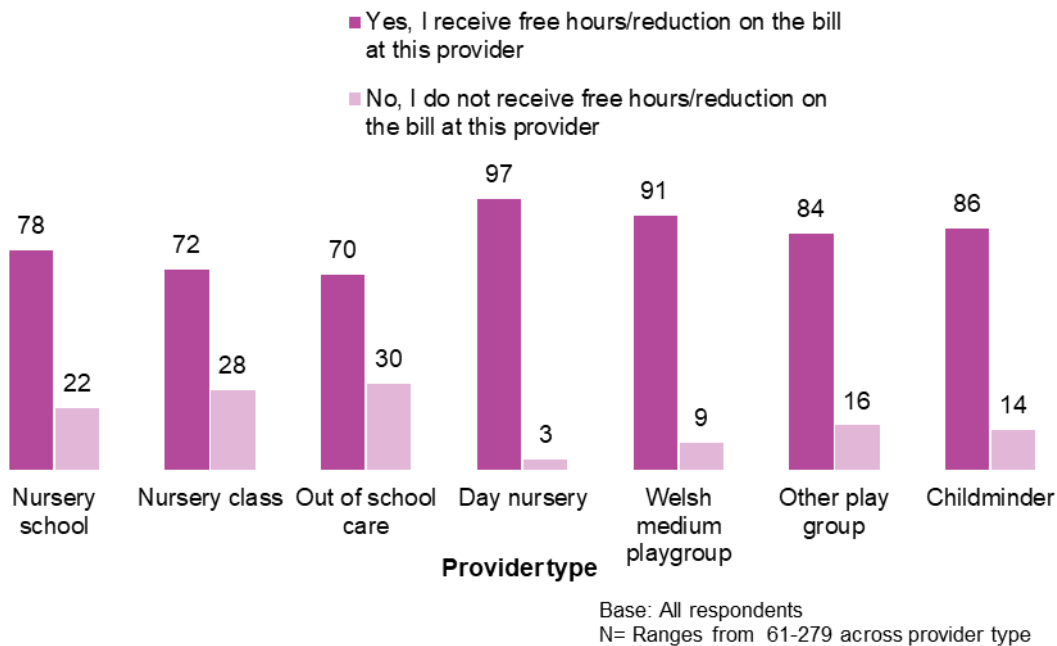
A small proportion of parents (10%) reported having to change their childcare provider since taking up the offer. Those parents who took up the offer immediately upon its launch in September 2017 were more likely to change providers (15%) than those who took up the offer later in the academic year (8%).

Around half of respondents (49%) needed to find additional providers to make use of the 30 hours. This is especially likely for parents taking up the Foundation Phase in a childcare provider that does not offer the childcare element of the offer such as nursery schools and nursery classes. Although most parents did not have to completely change their childcare providers, some have needed to make additional arrangements since the offer. This suggests that childcare arrangements may have become increasingly complex as a result.

### Free hours or reduction on bills

For each type of childcare provider used, parents were asked whether they received the government funded hours (or a reduction on the bill) (Figure 6). Out of school childcare was the provider type least likely to be used with the government funded hours (30%), followed by nursery class (28%) and nursery school (22%). One possible explanation is that parents are using childcare hours at these providers that are in addition to the 30 funded hours, or that the systems are not yet in place for them to receive the funded hours at this provider.

**Figure 6: Whether free hours/reduction is included in childcare bill at provider**



### 3.5 Does the offer accommodate parental demand outside of term time?

As part of the offer, parents can receive 30 hours per week of childcare for nine weeks outside of term time during the year. This section examines how the offer accommodates parental demand outside of term time across the different types of childcare providers.

Variation across the different childcare providers is expected as day nurseries and childminders are better set up to provide out of term hours in comparison to other types of childcare such as nursery classes which are more closely linked to school terms.

#### Day nursery

Almost nine in ten (87%) of the parents who used day nurseries had used this provider during school holidays. A further 7 per cent had not used it outside of term time but were planning to do so. Of the parents who had used or were planning to use this provider outside term time, 90 per cent had used government funded hours.



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## Childminder

Most parents using childminders (86%) had used this provider in the school holidays and a further 2 per cent had not used this provider outside of term time but were planning to do it. Similarly, 97 per cent of these parents using childminders had used government funded hours at this provider during the school holidays.

## Nursery school and class

A smaller proportion of parents had used nursery schools (21%) or nursery classes (10%) outside of term time and less than one in ten were planning to do so (nursery school: 9%, nursery class: 3%).

Of the small number of parents using or intending to use nursery schools or nursery classes in outside of term time, the majority were using funded hours (nursery class: 72% of 29 parents, nursery school: 58% of 19 parents).

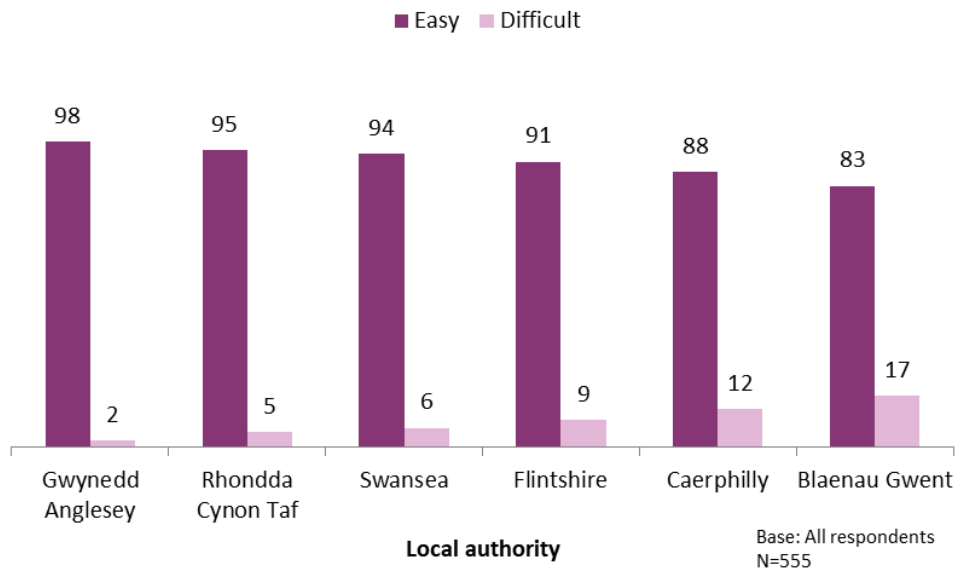
## Summary

The proportion of parents who were using childcare outside of term time varied considerably across providers with the highest proportion being day nurseries (87%) and childminders (86%). Most parents (59%) were using childcare in the school holidays and were able to access it. A small proportion of parents (less than 10% across provider types) had not used it but was planning to do so. The findings imply that there is indeed demand for childcare outside of term time and that these parents can take advantage of the fact that the offer extends to nine weeks of childcare in the school holidays.

## 3.6 How accessible is the offer?

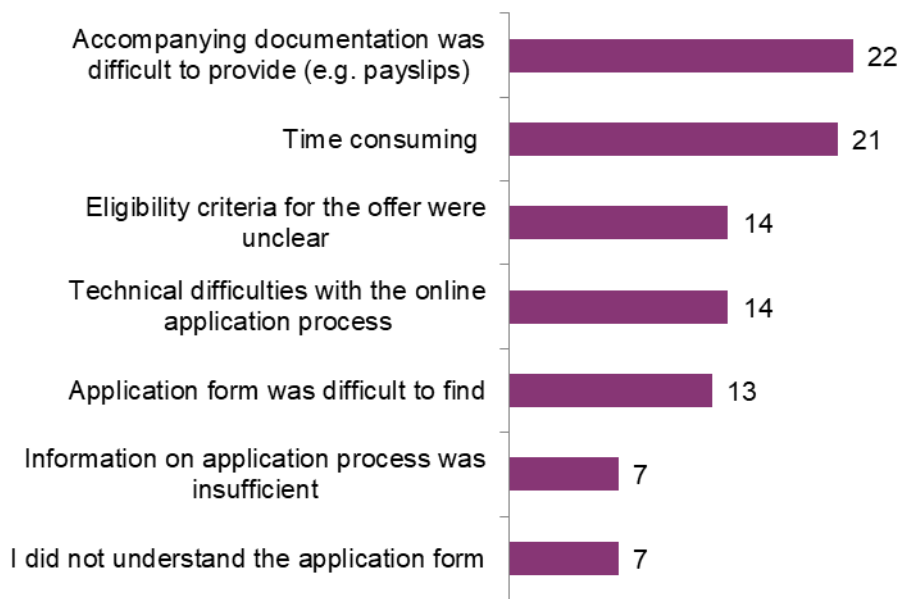
Most of the parents (92%) who had successfully signed up for 30 hours thought that it was very easy or fairly easy to apply for the offer while 8 per cent thought that it was fairly difficult or very difficult (Figure 7). However, some variation was observed across local authorities. Nine out of ten respondents (98%) in Gwynedd and Anglesey thought that the application process was easy in contrast to 83 per cent of respondents in Blaenau Gwent.

**Figure 7: Proportion of respondents who found the application easy or difficult by local authority**



For those who found it challenging, the most commonly cited reasons were that it was difficult to provide accompanying documentation and that the process was time consuming (Figure 8). (Note that Figure 8 presents the number of respondents, not the percentage, to reflect the low numbers.)

**Figure 8: Reasons why application process was difficult (N)**



Base: Respondents who found application process difficult (N=48)

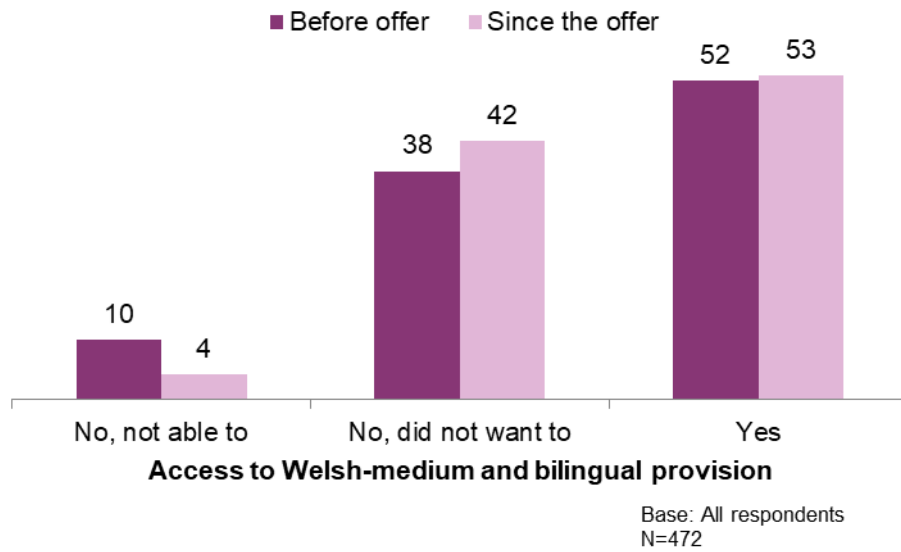
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There was no statistically significant difference in education or income in how easy respondents found the application process. While it is encouraging that the majority of respondents found it easy to apply for the offer, it should be noted that the parents in this survey were those who successfully signed up for the offer. The survey did not encompass parents who tried to apply for the offer but did not succeed.

## Does the current Welsh-medium and bilingual provision meet parental demand?

The proportion of parents and carers who were able to access Welsh medium and bilingual provision before and since the offer remained broadly stable (Figure 9). Notably, there was a drop in the proportion of respondents who wanted but were unable to access Welsh-medium and bilingual provision since the offer.

**Figure 9: Changes in access to Welsh-medium and bilingual provision since the offer %**



## SEN support

Although one of the aims of the offer was to address the barriers faced by parents of children with special educational needs (SEN), only 2 per cent of people who participated in the survey had children with SEN. As a result, analysis on SEN was not possible given the small sample size. The low proportion is comparable to the equivalent study in England. Only 2 per cent of parents in the study of the early implementation of the extended hours in England had children with SEN<sup>21</sup>. The experiences of this group in relation to taking up the childcare offer warrants further research.

<sup>21</sup> <https://www.gov.uk/government/publications/30-hours-free-childcare-early-implementation-evaluation>

## 4 Employment

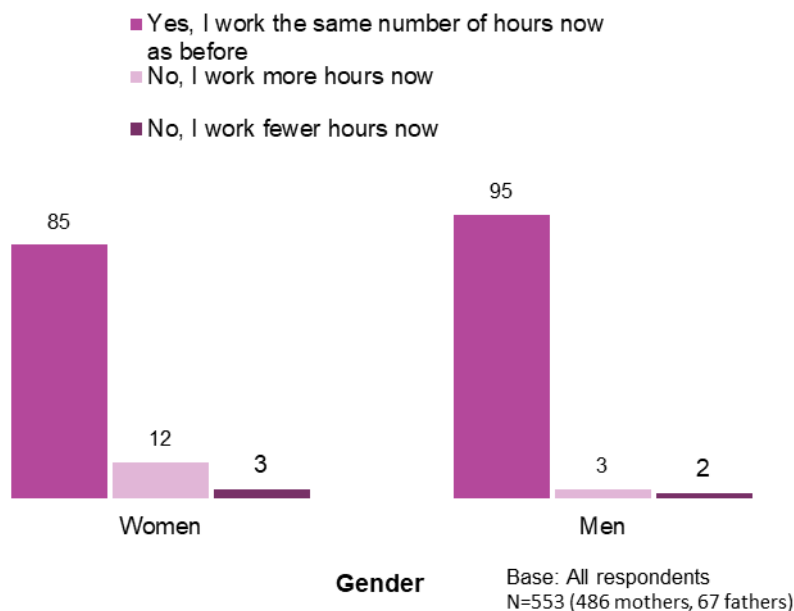
The childcare offer aims to improve employment related outcomes such as increasing opportunities for parents, particularly mothers, to return to work. This chapter examines the impact of the offer on parents' employment and employment-related decision making.

### 4.1 Has the offer changed parents' work hours?

There was a high level of continuity between parents' work hours before and after taking up the childcare offer. Nearly 9 in 10 respondents stated that they still work the same number of hours as before (86%) and over 9 in 10 reported their partners still work the same hours (93%).

However, women and men responded differently to the offer (Figure 10). While only 3 per cent of the 67 men who responded to the survey work more hours since taking up the childcare offer, 12 per cent of the 486 women that responded to the survey work more hours now than they did before suggesting that the childcare offer has marginally affected women's ability to work more hours.

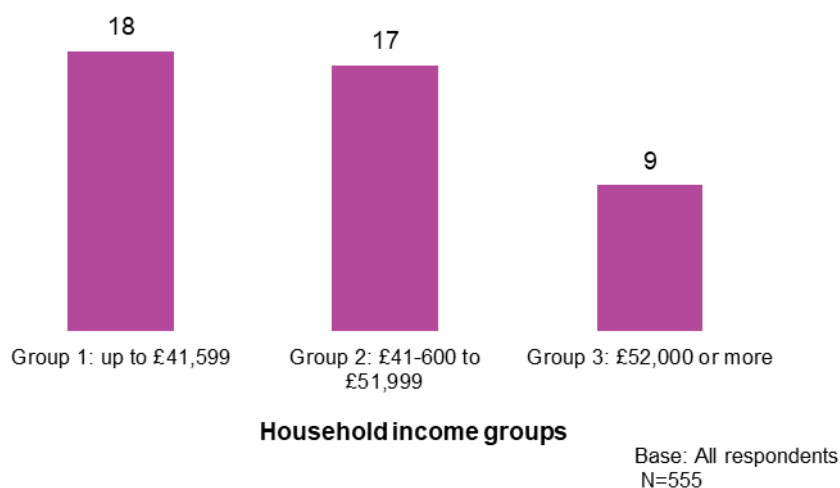
**Figure 10: Whether offer had changed respondents' work hours by gender %**



Similarly, the childcare offer seems to have affected the work hours of a greater proportion of parents in income group 1 than income group 3 (Figure 11). Nearly 1 in 5 (18%) of either parent in income group 1 (up to £41,499) worked more hours than they

did before. Conversely, only 1 in 10 (9%) parents in income group 3 (earning £52,000 or more) have increased their work hours since taking up the offer.

**Figure 11: Percentage of parents (either respondent or partner) that work more hours since taking up the offer by income group %**



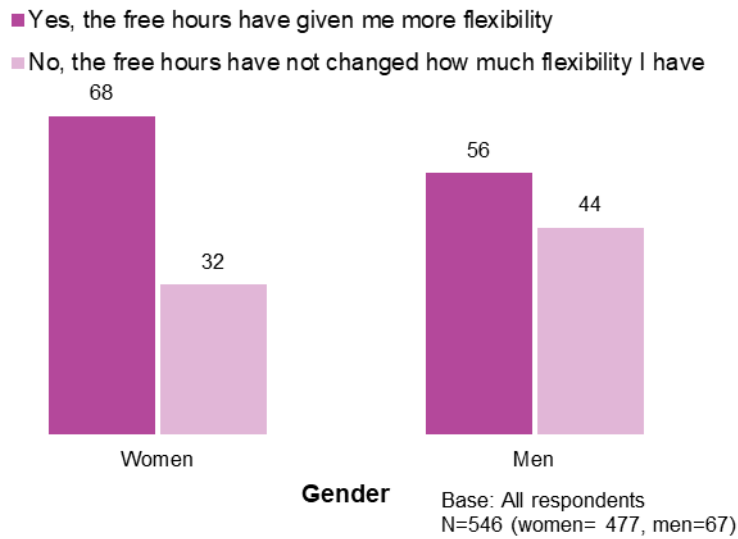
These findings suggest that some parents earning less than £41,600 have been able to increase their work hours. However, it is also important to note that for more than four in five parents in this income group (82%), the childcare offer has not had any impact on their work hours.

## 4.2 Has the offer provided flexibility in work decisions?

The childcare offer appears to have had a more noticeable impact on parents' flexibility in making work related decisions. More than two thirds of parents (67%) reported having more flexibility in the types of jobs they do and the hours they work since taking up the offer (Figure 12).

Women and parents in the first income group were most likely to report having more flexibility. While more than half of the men that responded to the survey felt they had more flexibility (56%), more than two thirds of women (68%) felt the same. Similarly, nearly three quarters (73%) in the first income group (up to £41,599) reported having more flexibility after taking up the childcare offer in contrast to only 60 per cent in the third income group (£52,000 or more).

**Figure 12: Flexibility in work decisions by respondents' gender %**

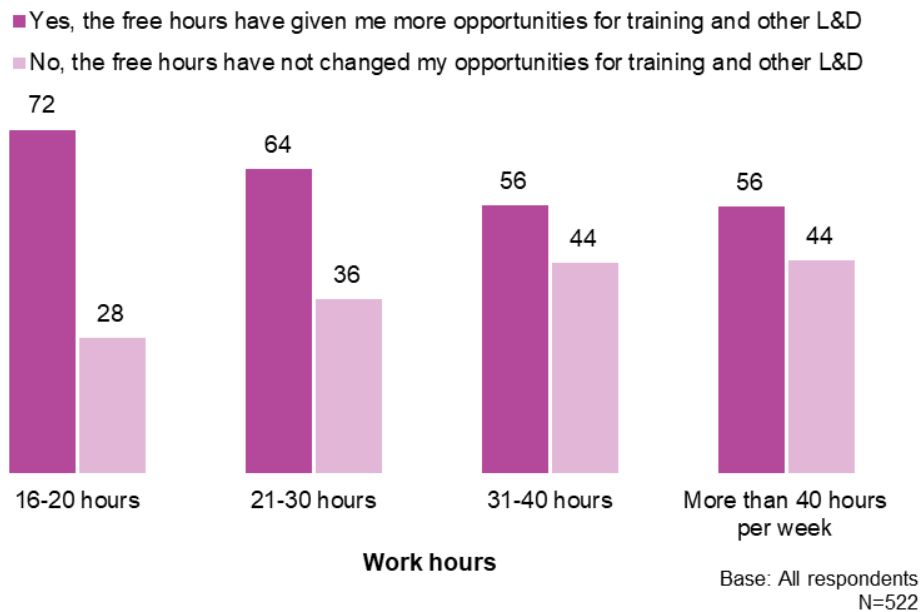


Furthermore, parents who took up the offer in September 2017 were less likely to say the offer has given them more flexibility with two fifths (41%) saying the childcare offer has not changed how much flexibility they have.

### 4.3 Has the offer increased learning and development opportunities?

Overall, for three in five respondents (60%), taking up the childcare offer had provided more opportunities for training and learning and development (L&D). Parents working part-time were most likely to say the childcare offer provided them with increased learning and development opportunities (Figure 13).

**Figure 13: Whether respondent parents have more time for L&D by work hours %**



Parents in income group 1 (£41,599 or less) were also more likely to report having more L&D opportunities but this could also be due to a higher proportion of parents working part-time in this group.

## 4.4 Summary

Findings from the parent survey indicate that some women and to a lesser extent, men reported increasing their work hours but overall, most parents continue to work the same hours as they did before taking up the offer. Although the offer has not substantially changed parents' work hours per week, it has given them more flexibility to make work related decisions and positively impacted their ability to engage in training and L&D opportunities. It is possible that an increase in opportunities for L&D and flexibility in making employment related decisions could support parents in working more hours in the medium to long term.



## 5 Income and wealth

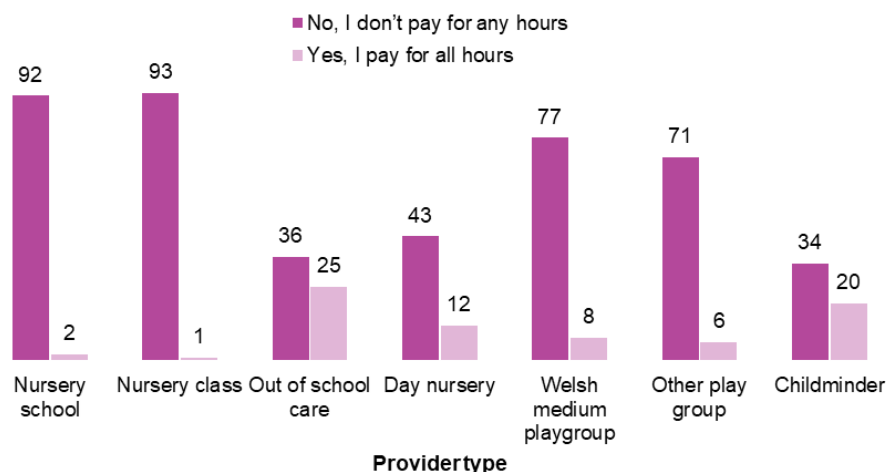
The childcare offer also aims to improve income and wealth of working families, specifically those in low-paid jobs. This chapter examines changes to provider costs borne by parents, and their perceptions of the opportunities to increase their family income since taking up the offer.

### 5.1 What are the fees and additional charges?

Provider fees paid by parents varied based on the types of providers used. An overwhelming majority that used nursery schools and nursery classes did not pay for any of the hours they used (92% and 93%, respectively). Given that most parents use nursery schools and classes for Foundation Phase, this might explain the high proportion of parents who did not pay for any of the hours used. Similarly, three-quarters of parents that used playgroups such as the Welsh medium playgroup (77%) did not pay for their hours.

Conversely, a fifth or more of parents that use childminders (20%) and out of school care (25%) paid for all the childcare hours they use. This may have been due to the difficulties in accessing the free hours in some LAs<sup>22</sup>, particularly in the early stages of the pilot, or because parents needed more than the 30 hours each week. The fact that nearly one in five parents that paid for out of school childcare and three in five parents that paid for a childminder use two or more providers (17% and 60%, respectively), also suggests that these providers may not be their primary form of childcare.

**Figure 14: Whether parents pay for their childcare %**



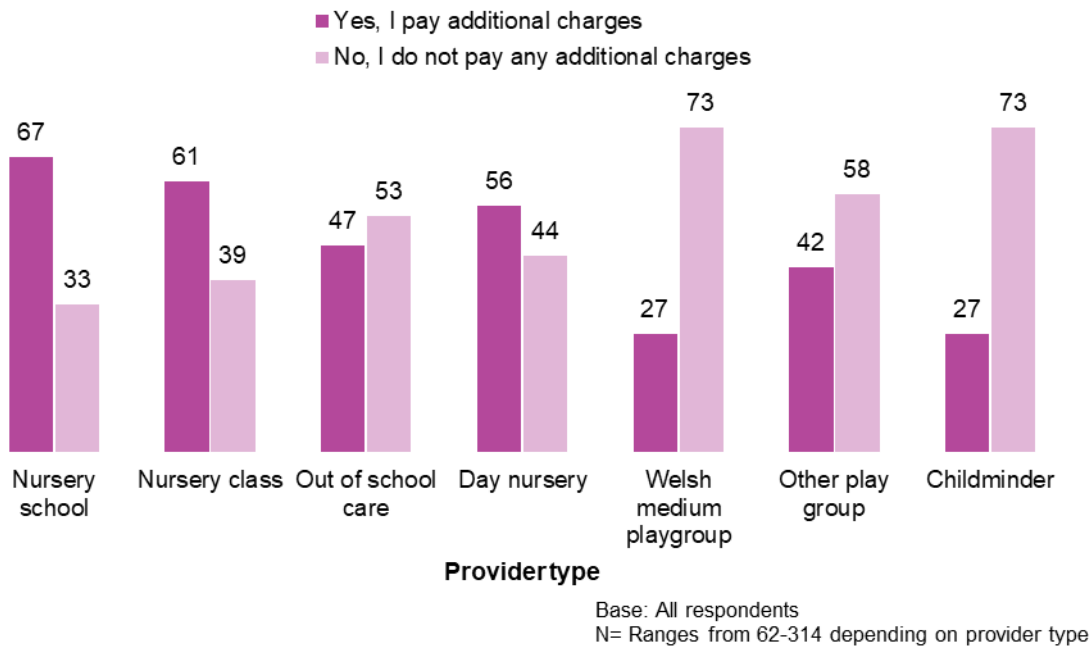
Base: All respondents  
N= Ranges from 65-319 depending on provider type

<sup>22</sup> Base size too small for subgroup analysis.

While the majority of parents using nursery schools or nursery classes did not pay for fees, a high proportion of them were required to pay additional charges for lunches, snacks, or special activities which are not included in the fees.

Additional charges were also incurred by smaller but nevertheless substantial proportions of parents whose children attended day nurseries, out of school care, and playgroups. Parents using Welsh playgroups and childminders were least likely to incur additional charges.

**Figure 15: Whether parents pay additional charges %**



Findings from the parent survey suggest that most parents continue to incur childcare costs, despite not paying for any childcare hours, as they still incur additional charges from their providers. Childcare may continue to be a burden on overall income and wealth for some families, however, further research is needed to determine the extent of the expenses incurred by parents and its impact on their wealth.

## 5.2 Has the offer provided opportunities to increase income?

The majority of respondents (67%) thought the offer had provided them with more opportunities to increase their earnings. Nearly three in four respondents (73%) who took up the offer from October to February (i.e. after September 2017) thought the offer had given them more earning opportunities (Figure 16). Furthermore, respondents in the first and second income groups were more likely to report more earning opportunities (70% and 74%, respectively) than the highest earners (62%). However,

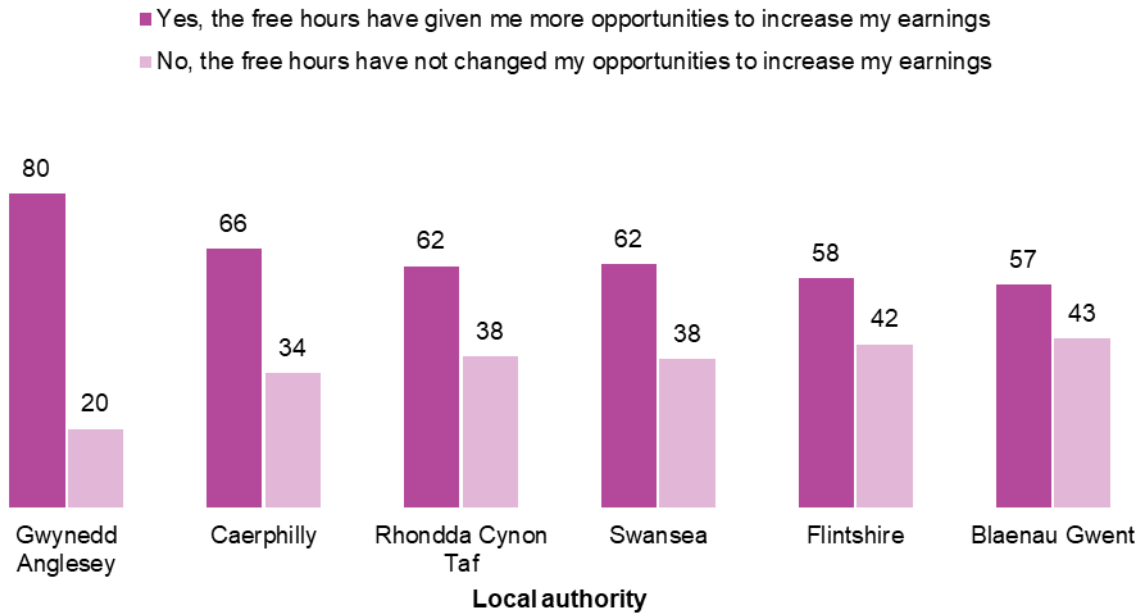
half of the highest earners also worked more than 40 hours per week and therefore, are unlikely to have capacity to increase their work hours.

**Figure 16: Whether parents have more opportunities to increase income by when they took up the childcare offer %**



While proportions across local authorities were fairly consistent on perceived employment related benefits, the proportions on perceived benefits on parents' income somewhat varied across local authorities. For example, four in five respondents (80%) in Gwynedd and Anglesey felt the offer had provided them with more earning opportunities in contrast to just over half in Flintshire (58%) and Blaenau Gwent (57%) who felt the same.

**Figure 17: Whether parents have more opportunities to increase income by local authority %**



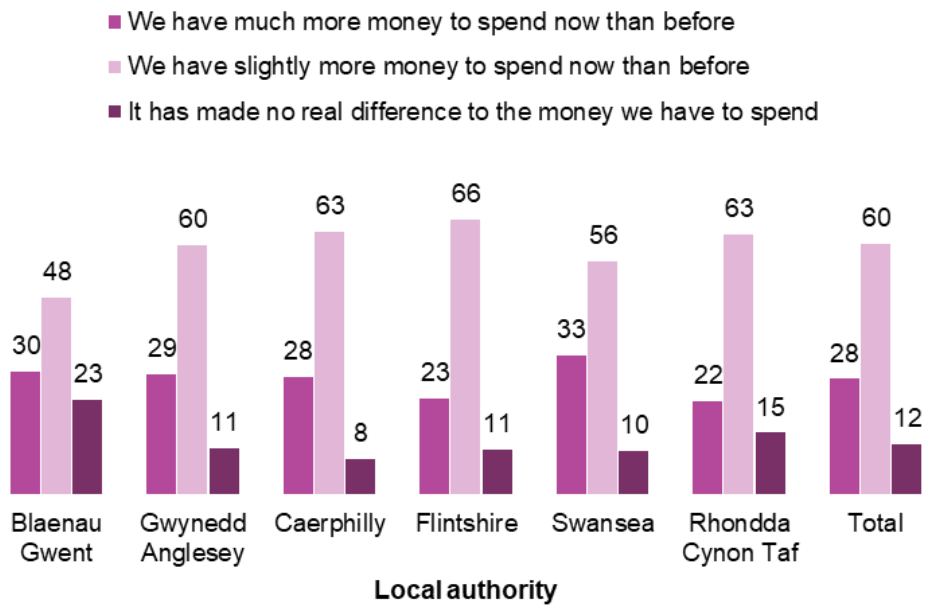
Base: All respondents  
N=540

### 5.3 What is the impact on family income?

Nearly 9 in 10 respondents (88%) thought they had much more or slightly more money to spend now than before taking up the offer. Less than a third of respondents (28%) reported having much more money to spend now than before taking up the offer and three in five respondents (60%) stated that they have slightly more money now than before taking up the offer.

Across local authorities, figures varied slightly with 23 per cent of respondents in Blaenau Gwent reporting that the childcare offer has made no real difference to money they have to spend in contrast to 8 per cent of those in Caerphilly (Figure 18).

**Figure 18: Impact of offer on family income by local authority %**



Base: All respondents  
N=553

It is encouraging to note that a large majority have more money to spend now than before taking up the offer. However, this increase in disposable income is largely due to the savings accrued from a reduction in their childcare costs rather than by an increase in work hours.

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## 5.4 Summary

The survey findings suggest that most parents are likely to have more opportunities to increase their income and report an increase in disposable family income after taking up the offer. However, it is also evident that the increase in income is mostly due to a reduction in their childcare costs rather than changes to their employment or work hours.

The impact of the offer on disposable income may also occur through different mechanisms for families with lower incomes and those with higher earnings. For middle and higher income groups, an increase in disposable income may have been a result of saving on childcare costs rather than increasing work hours. For families on low incomes, the policy aimed to mitigate poverty by providing them with more flexibility and opportunity to return to work or work for longer hours. However, the evidence found no clear movement from poverty to employment especially as most parents were working the same number of hours as before. This suggests that more targeting will be needed to engage parents from lower socio-economic backgrounds to take advantage of the childcare and increase employment.

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## 6 Conclusions

The aim of the survey was to evaluate the pilot of the childcare offer and provide early insights on delivery and responses to the policy change in terms of childcare use and parental employment.

The respondents were those who had successfully signed up for the childcare offer and had mostly found the application process straightforward (92%). The group of parents who had found the process difficult found it hard to provide accompanying documents and thought the application was time-consuming. It is not known what proportion of eligible parents had not succeeded in navigating the system.

The evidence suggests that the offer is only counteracting poverty to a small extent. For instance, there is a high level of continuity in the number of hours worked before and after the policy was introduced. This suggests that overall, the policy has not yet had a large impact on employment. Hours had increased, however, for a small proportion of women and to a lesser extent, men as well as among parents from the first income group (up to £41,599).

There was some positive impact on flexibility in work related decisions and earning opportunities. Approximately two in three parents (67%) said that they had greater flexibility in employment related decisions while 60 per cent thought that they had more opportunities for training, learning and development.

Moreover, two-thirds thought (67%) they had more earning opportunities since the offer. The majority thought they had slightly or much more money than before. Therefore, the fact that most parents reported incurring additional charges for their childcare arrangements did not undermine the value of the policy.

The policy does, however, seem to have led to greater reliance on formal childcare which has been associated with benefits for early child development. About two in five (40%) reported using more hours of formal childcare and 16 per cent were using fewer hours of informal childcare. For most parents, taking up the offer did not require them to change provider (90%), but the evidence suggests that for many, their current provider was not able to deliver all the hours. Around half of parents (49%) needed to find an additional provider, suggesting a patchwork of care to enable them to work.

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## 7 Technical appendix

There were two stages to computing the weights: (1) calculating the probability of non-response, given an individual's known characteristics, and (2) adjusting for the difference between the respondents and all parents who consented to being contacted for the survey.

Non-response weighting takes into account differences between the respondents and identify any characteristics which have a systematic effect on the likelihood that an individual will respond to a survey.

In this survey, the non-response weights were calculated on the basis of the respondent's postcode. From this, we were able to match the characteristics of the geographic area including the Multiple Index of Deprivation (IMD) statistics to each respondent. By then identifying which of these characteristics had a systematic effect on the probability of response, we were able to produce the non-response weight. In this case, we used the quintiles for IMD-Health, IMD-Housing and postcode sector density to calculate this. A range of statistical measures were used to verify that this specification of the non-response model was optimal.

Once the non-response weights were calibrated, we needed to adjust for any differences between the respondents and population of parents who consented to being contacted for the survey. The final (weighted) sample of respondents is representative of the population (i.e. all people who signed up for the offer) in terms of local authority. Therefore, the weighted proportion of respondents in each LA is the same as in the population. This is in addition to any differences which were also accounted for in the non-response weight such as the differences between the IMD and sector density variables for the respondents.



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