

City of London Corporation
Childcare Sufficiency Assessment 2011

Final version

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1. Executive summary

1.1 Introduction

This document is The City of London Corporation's second full Childcare Sufficiency Assessment (CSA). The first CSA was completed and published in March 2008.

The aim of the CSA is to provide a complete picture of the current childcare market in The City of London. It is a report based on a wide range of data that has been collection and analysed specifically for this purpose. This includes data collected through a survey of City resident parents, information about the supply of childcare provision in The City, and the many factors that affect demand for it.

The purpose of the CSA is to measure the effectiveness of The City's childcare market in meeting the needs of resident families, to identify any gaps, and to make recommendations as to how The City of London Corporation should plan to address them.

Under the Childcare Act 2006 it is a statutory requirement of all English local authorities to produce a CSA. A full CSA report must be published every three years, and in the intervening period the data contained in the report should be reviewed and updated and the CSA action plan monitored and implemented.

1.11 Methodology

Coda Consultants Ltd were commissioned to manage the production of The City of London Corporation CSA 2011. This was undertaken in partnership with Morgans Research Ltd.

There were five stages to the work:

- **Desk research and collation of demographic data.** Coda Consultants undertook desk research into the various demographic factors that could potentially have an impact on the childcare market.
- **Consultation with City resident parents.** During January and February of 2011 Morgans Research consulted **210** parents living in The City of London. This consultation was conducted through two methods: telephone interviews and face to face surveying at locations around The City.
- **Consultation with childcare providers and other stakeholders in The City.** Morgans conducted a series of interviews with managers of the five nursery settings located in The City, and with The City's two childminders.

Coda also undertook a telephone interview with a representative of Jobcentre Plus.

- **Consultation with children.** Two consultation groups were facilitated with children aged between seven and 10 years old. The groups were held at two after school clubs, and a total of 15 children participated.
- **Analysing gaps.** Data collected from the parents survey was analysed by Morgans and passed to Coda Consultants. This was brought together with all other data collected for the CSA so that an analysis of childcare sufficiency gaps could be carried out. Coda then proposed a series of recommendations to address the issues that had been identified through the gaps analysis.

1.3 Summary of issues and findings

This section lists the issues that were identified through the CSA 2011. They are grouped into five areas, and for each there is a summary of the recommendations made in the gaps analysis (Section 8) for how the City might address some of the issues.

1.31 Availability of childcare

Five City nursery providers consulted for the CSA 2011 all predicted that demand for their provision will be higher in three years' time.

The majority (62%) of parents surveyed were currently using a form of childcare; either formal, informal or both.

40% of parents surveyed who were using childcare were accessing some or all of their provision outside of the City.

Nursery providers in the City of London reported that, on average 56% of the parents who use their setting live in The City.

Some parents report that they access childcare in other local authority areas because there is no childcare of that type available in The City.

The most frequent reason given for not using childcare during term time was because at least one parent in the family stays at home (43%).

The average hours per week being accessed from formal childcare providers in term time by surveyed parents indicate that full time daycare is not generally being accessed.

75% of parents currently using childcare reported that their current arrangements meet their needs.

56% of surveyed parents currently using childcare stated that they would prefer different childcare arrangements. For most of these this meant a different type of provision to the one they were currently accessing.

The most hours most frequently described as the preferred childcare arrangements of parents not currently using childcare were 13 hours per week in a maintained school nursery (20 parents out of 65, 31%).

30 parents not currently using childcare expressed an unmet need for an average 24 hours a week of day nursery provision across term time and school holidays.

The survey found evidence of a long hours culture amongst working families.. 23% of parents with a child under two stated that they or their partner worked from 8am-6pm every day plus overtime.

70% of parents surveyed who were not currently using childcare stated that they would prefer to be using childcare if suitable affordable provision was available to them (65 parents). For 40% of these parents the reason they would prefer to be using childcare would be in order to work.

Some nursery settings may not make their full quota of registered places available due to a perceived lack of demand. Evidence from the parents survey however suggests that there is unmet demand for nursery provision.

Recommendations

The City should plan how to met unmet need for early years childcare. One way of doing this would be to increase the number of childminders, but any recruitment of childminders would need to be supported by a publicity campaign publicising the benefits of this type of provision.

The City should investigate whether nurseries are purposely understaffed so as not to offer their full quota of registered paces. Evidence suggest there is unmet demand for nursery provision.

Better data on occupancy and the true availability places is needed. Further research should be conducted into why so few places in early years settings are taken up by parents claiming free entitlement.

If necessary stricter procedures should be implemented to encourage compliance from providers in publicising the entitlement and making their full quota of places available.

1.22 Affordability of childcare

Available data for early years childcare provision in The City indicate that it costs nearly three times as much as the Greater London average.

Use of formal childcare only – without any informal childcare - was most frequently found in families with annual incomes over £100,000 and least frequently found in families with incomes of £40,000-£65,000. This could be an indication that middle-income families find formal childcare harder to afford.

Early years childcare was most frequently being accessed by parents with household incomes of less than £10,000 a year.

Parents surveyed for the CSA 2011 were generally satisfied with their current childcare arrangements. However, parents were less satisfied with the cost of their childcare than its quality.

None of the 130 parents using childcare who were surveyed for the CSA 2011 were claiming the childcare element of Working Tax Credit. 48% of these could not give a clear reason why they were not claiming, indicating a considerable lack of awareness.

Take up of the free entitlement was low among surveyed parents, with 41% of eligible parents (16 parents) not accessing any of their entitlement. Seven of these however were accessing a reception class and did not realise that this counts as a free entitlement place.

Six parents with a three or four year old stated that they were not accessing any of their free entitlement due to a lack of available places.

There is statistically high relative supply of early years childcare in The City but only a tiny proportion of the available places are being taken up through the free entitlement.

Recommendations

The City should prioritise increasing access to financial assistance methods that could enable more low income families to access childcare.

A marketing campaign should be undertaken to raise awareness of the Childcare Element of WTC. This should focus on dispelling bad associations and reassuring parents that the benefit is worth claiming. FYI should consider providing basic 'better off calculations to parents to encourage take up of WTC.

1.23 Special needs and disabilities

Two parents stated that their child's need for regular medication was a problem when accessing childcare or activities. Although 70% of parents (five out of seven) who had children with additional needs said that they would not require any further assistance to access provision for their children.

Nursery providers expressed a need for training from The City of London Corporation and would welcome more opportunities to network with other providers.

Recommendations

The City should consider running training for childcare providers in meeting the needs of disabled children, if possible including medical support to severely disabled children.

FYI should ensure that details of provision on its database properly reflects provider's ability to include disabled children.

1.24 Childcare during school holidays

Half of the respondents to the survey stated that the school holidays present difficulties for them as parents. Most of these parents felt that there is not enough childcare or activities for children during the holidays.

Childcare use during the school holidays is more likely to be in order to enable a parent to work than childcare used during term time. 60% of parents gave work or study as their reason for using childcare during the holidays, compared to 46% in term time.

Current childcare users most frequently specified holiday play provision as the type of childcare they would prefer to be using.

While The City of London has a high level of relative supply of early years childcare, the level of supply of childcare for school-aged children is much lower.

Recommendations

The City should encourage more childcare provision to operate in the school holidays.

Term time out of school providers should be encouraged to run holiday playschemes or to open up their premises to another organisation who could run the provision

1.25 Information for families

Awareness of the Family and Young People's Information Service was low among surveyed parents. Less than half were aware of the service: 42% (88 parents).

There is some evidence that the *What's On* guide is not reaching parents of Asian ethnicities. Parents from these communities were significantly less likely to be aware of the publication and most likely to have not read it if they were aware.

Recommendations

FYI should explore ways of marketing its service to City residents, including more outreach to deprived neighbourhoods.

FYI should consider ways to make *What's On* more inclusive of Asian families. This could include translated sections, or the inclusion of culturally specific features or sections.

2. Introduction

This document is The City of London Corporation's second full Childcare Sufficiency Assessment (CSA). The first CSA was completed and published in March 2008.

The aim of the CSA is to provide a complete picture of the current childcare market in The City of London. It is a report based on a wide range of data that has been collection and analysed specifically for this purpose. This includes data collected through a survey of City-resident parents, information about the supply of childcare provision in The City, and the many factors that affect demand for it.

The purpose of the CSA is to measure the effectiveness of The City's childcare market in meeting the needs of resident families, to identify any gaps, and to make recommendations as to how The City of London Corporation should plan to address them.

2.2 The statutory background

It is a statutory requirement of all English local authorities to produce a CSA. A full CSA report must be published every three years, and in the intervening period the data contained in the report should be reviewed and updated and the CSA action plan monitored and implemented.

These requirements are set out in the Childcare Act 2006, which placed new duties on local authorities to manage local childcare markets in order to 'secure' sufficient childcare for local parents – particularly those in work or intending to take up employment. In order to be able to do this, local authorities need to measure the current sufficiency of childcare so that gaps can be addressed. This is achieved through the CSA.

In 2009 the government produced updated statutory guidance to assist local authorities in producing their second CSA and implementing its findings. The guidance describes the main types of sufficiency gap that the CSA should aim to investigate.

- **Type gaps:** not enough childcare of a particular type
- **Income gaps:** shortage of childcare that is affordable to parents living nearby
- **Time gaps:** shortage of childcare that is available at the times parents say they need it
- **Age gaps:** shortage of childcare for children of certain ages, for example 5-14

- **Specific needs gaps:** insufficient childcare for families with disabilities or cultural needs
- **Geographical gaps:** a lack of childcare in certain areas and localities.

As well as identifying these gaps, the guidance also requires local authorities to demonstrate that:

- There is sufficient range of provision, with an appropriate balance between sessional and full daycare.
- There is sufficient knowledge and information about childcare among parents.
- Local childcare provision is sufficiently sustainable.

2.3 What do we mean by childcare?

The word ‘childcare’ can cause confusion, and its full meaning is often misinterpreted. Section 18 of the Childcare Act 2006 provided the first legislative definition of ‘childcare’ as: *‘any form of care for a child’* excluding parental care and statutory education. The following table shows what is and is not included under this official definition.

Table 1. The legislative definition of the term ‘childcare’

‘Childcare’ includes	‘Childcare’ does not include
Provision for children aged 0-5 registered by Ofsted on the Early Years Register, eg: <ul style="list-style-type: none"> • Nurseries and pre-schools • Childminders Early years education provided in maintained and independent schools, eg: Nursery and reception classes. Provision for children aged 5-8 required to register with Ofsted on the statutory part of its Childcare Register, eg: <ul style="list-style-type: none"> • After school clubs • Breakfast clubs • Holiday playschemes Provision for children and young people aged 8-19 eligible to register on the voluntary part of Ofsted’s Childcare Register, eg: <ul style="list-style-type: none"> • Nannies and home-based childcarers • Short-term care, such as creches Activities such as sports coaching and tuition Out of school activities provided by schools on school premises (‘extended services’)	Education or activities provided by a school during school hours from key stage 1 upwards. Care provided by a parent, step-parent or person with parental responsibility, including any relative or foster parent. Care provided by a children’s home, a care home, a hospital or a residential family centre or any secure establishment (eg. young offenders institution).

The legislative definition of childcare does not include informal childcare for children under eight. This can include childcare provided by babysitters, friends or other people who are not registered with Ofsted. For many families these types of childcare are just as important as formal ones, they may also be preferable to some people for cultural reasons.

The City of London Corporation CSA 2011 set out to measure the level of use of informal childcare through the parents survey (described in the Methodology, Section 3).

The parents survey also asked parents about their use of activities for older children (8-14), which are also exempt from registering with Ofsted and therefore classed as informal childcare.

For the purposes of The City of London CSA 2011 therefore, the term 'childcare' can refer to any care or activity where a child or young person attends without the parents present.

2.4 Measuring changes since 2008

The City of London Corporation published its first CSA in March 2008. An action plan was subsequently developed in order to take forward the recommendations from the CSA and has been kept under regular review ever since.

The CSA 2008 identified a number of key issues, which the Corporation has been working on addressing through its CSA action plan. This second CSA shows the extent to which these issues have changed in the intervening years; showing whether the issues still persists, and if the situation has improved or worsened for parents since 2008.

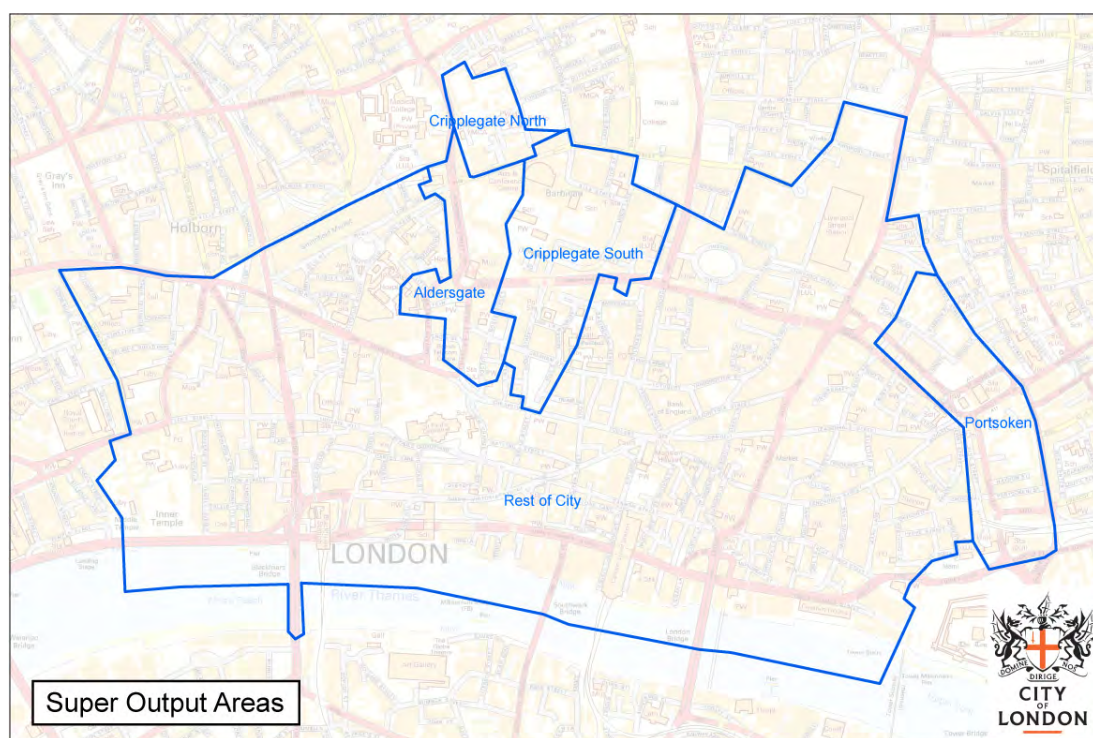
Both the national and local contexts have changed significantly since 2008; with the country having experienced an economic crisis and consequent recession. The findings of the CSA 2011 (particularly when compared to those from 2008) give an indication of the impact that this has had on the childcare market.

3. Methodology

Coda Consultants Ltd were commissioned to manage the production of The City of London Corporation CSA 2011. This was undertaken in partnership with Morgans Research Ltd.

The CSA analyses childcare supply and demand data within the geographical structure of The City's three Super Output Areas (SOAs) shown in the map below.

Figure 1.



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3.1 Desk research and collation of demographic data

Coda Consultants undertook desk research into the various demographic factors that could potentially have an impact on the childcare market. These include:

- Population projections
- Housing and residential data
- Labour market statistics
- Relative deprivation

This demographic data has been factored into the gaps analysis in Section 8.

3.2 Consultation with City resident parents

During January and February of 2011 Morgans Research consulted **210** parents living in The City of London. This consultation was conducted through two methods: telephone interviews and face to face surveying at locations around The City.

A questionnaire was drafted in partnership with staff from The City of London Corporation, and this was used in both survey methods

Parents who chose not to complete a questionnaire face-to-face were offered the opportunity to complete the questionnaire via a telephone call at a more convenient time of their choice. Around 25 parents chose to do this.

Morgans staff conducted face-to-face surveying at the following locations:

- Barbican cinema and art club
- Barbican Centre foyer/coffee area
- Barbican estate
- Barbican playgroup
- Barbican library
- Camomile Street Library
- City Child Day Nursery
- City of London Community Education Centre (COLCEC)
- City of London Girls School
- Golden lane Estate
- Golden Lane Campus
- Golden Lane Children's Centre
- Mansell Street estate
- Middlesex Street estate
- Museum of London
- Portsoken Community Centre
- The Neaman Practice
- The Portsoken Health Centre
- Shoe lane library
- Sir John Cass's Child and Family Centre
- Sir John Cass's Foundation Primary School
- St Pauls Cathedral School

All surveying visits were first arranged with the responsible manager for the venue or setting.

In some cases the researchers found that many of the parents present at certain venues lived outside of The City of London and could not therefore be surveyed.

3.3 Consultation with childcare providers and other stakeholders in The City

Morgans conducted a series of interviews with managers of the five nursery settings located in The City, and with The City's two childminders.

Coda also undertook a telephone interview with the a representative of Jobcentre Plus.

3.5 Consultation with children

Two consultation groups were facilitated with children aged between seven and 10 years old. The groups were held at two after school clubs, and a total of 15 children participated.

3.6 Analysing gaps

Data collected from the parents survey was analysed by Morgans and passed to Coda Consultants. This was brought together with all other data collected for the CSA so that an analysis of childcare sufficiency gaps could be carried out.

Coda does not use a single formula to analyse childcare sufficiency. The varying factors that can contribute to a gap are too diverse and nuanced to be rationalised into one single equation. Instead, all the various factors that could work together to create a gap or issue are considered together.

In order to illustrate this process, the gaps analysis in Section 8 is laid out in a tabular matrix, showing how different data has been factored into the conclusions that Coda has made.

4. Demographics of The City

The City of London is unique in many ways. Geographically small but hugely significant, not just to the country but the world. The City's role as the heart of the UK's financial industry means that its daytime working population dwarfs its number of permanent residents.

This resident population may be small, but it is growing steadily, as data in this section shows. One of the functions of a Childcare Sufficiency Assessment is not just to measure current gaps in the childcare market, but to anticipate where services may become stretched in the future. A population that is growing – and changing – can affect future demand for childcare and other services for families, and the CSA must try to map this so that the local authority can plan how to meet the changing needs of local families.

This section of the CSA therefore looks at current and projected demographic features of the Square Mile in order to provide context for the gaps analysis in Section 8.

4.1 Population

Table 2. Total population of The City of London

City of London	London	UK
12,400	7,668,300	61,792,000

Source: ONS Mid-year estimates 2010

Table 2 above shows the current (projected) total population of The City of London and compares it with the population of Greater London and the UK as a whole.

Estimating an accurate population figure for The City is difficult. With such a small population, the margin for error is far greater. Many residents are believed to have homes elsewhere for instance, and ONS migration estimates based on the International Passenger Survey are flawed by the fact that people often mistakenly state an intention to live and work in The City of London when they actually mean metropolitan London.

The document *City of London Resident Estimates and Projections* (February 2011) proposes an alternative method of estimating population by applying the ONS 2001 occupancy projections to the current housing stock. This gives a 2010 population figure of **9,900** – lower by 2,500 than the figure in Table 2.

Table 3. Population of children and young people in The City of London

Year	0-4	5-10	11-14
2001	244	308	144
2008	349	425	204
2011	386	473	261
2014	419	511	306
2020	451	577	345

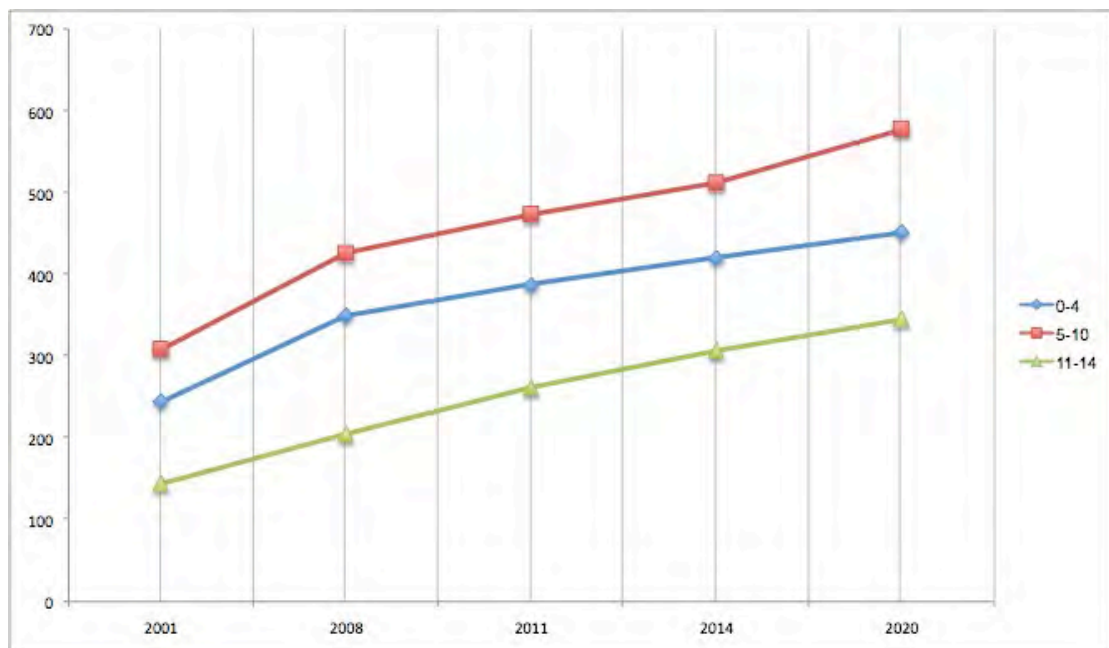
Source: GLA 2006 Round of Demographic Projections

The age range covered by the statutory guidance for CSAs is 0-14. Table 3 above shows the increasing population of three age groups for the following years:

- 2001
- 2008 (when the last CSA was conducted)
- Current (projected) population for 2011
- Future projected population for 2014
- Future projected population for 2020

Figure 2 plots these projections on a line graph.

Figure 2. Projected population of children and young people in The City



The graph in Figure 2 shows the steady rise in population of children since 2001. According to these projections, the 5-10 age group is set to rise most sharply in the longer term, but between 2001 and 2014 the 0-4 age group shows a marginally steeper increase than the other two age groups.

Issue

The population of children in The City of London is rising. The total population of 0-14s is projected to rise by 10% by the time of the next CSA in 2014.

4.2 Housing

Office for National Statistics (ONS) data from the Census 2001 showed 4,000 households in The City of London, and projected this to increase to 12,000 by 2033.

The Mayor of London's housing strategy in the London Plan 2008 calls for the creation of a minimum 30,500 new homes per year. The target allocation for The City of London is 90 housing units a year¹. According to The City of London *Resident Estimates and Projections* document, current projections for housing developments up to 2013 are concurrent with this target. The document concludes that:

'Sound population projections should be within the levels that can be facilitated within the constraints of the projected housing stock.'

Table 4 below shows the current number of units in City housing stock, and the percentage of the overall housing in The City that these make up.

Table 4. Number of housing units for the main residential areas in The City of London

Residential Area	Number of units	Percentage
Barbican estate	2003	34.4%
Smithfield	725	12.4%
Golden Lane estate	653	11.2%
Queenhithe	324	5.6%
City West	250	4.3%
Mansell Street estate	249	4.3%
Carter Lane	209	3.6%
Middlesex Street estate	199	3.4%
Temples	129	2.2%
Rest of City	1,085	18.6%
Total	5,826	100%

¹ Revisions to the London plan are likely to see this figure increase to 110 units per year.

4.21 Size and number of households

ONS defines a household as '*One person living alone or a group of people (not necessarily related) living at the same address with common housekeeping – that is a shared living/sitting room and at least one meal a day.*'

The number of households is projected by ONS to increase from 4,300 in 2001 to 7,200 in 2031. These projections are based on the same methodology as the ONS population projections – which The City of London has questioned (see 4.1). If true these figures would be outside of the constraints of projected housing stock.

The average household size is projected to increase from 1.63 persons per household in 2001 to 1.77 in 2011, remain consistent till 2016 and then decrease to 1.71 by 2031.

The number of households with dependent children is projected to rise from 600 households in 2001 to 900 in 2031.

4.3 Deprivation in The City of London

The Office for National Statistics (ONS) produces the Index of Multiple Deprivation (IMD) which provides a national measure of the deprivation in areas of the country. The geographical units used to measure the index are called Super Output Areas (SOAs). These are small geographical regions containing an average population of 1500 people.

The deprivation score given to each SOA is calculated from data on a number of factors that are known to affect quality of life and life chances. These are grouped into seven domains that in combination provide an overall deprivation score for each SOA. The domains are:

- Income
- Employment
- Health and disability
- Education, skills and training
- Barriers to housing and services
- Living environment
- Crime

The City of London has five SOAs:

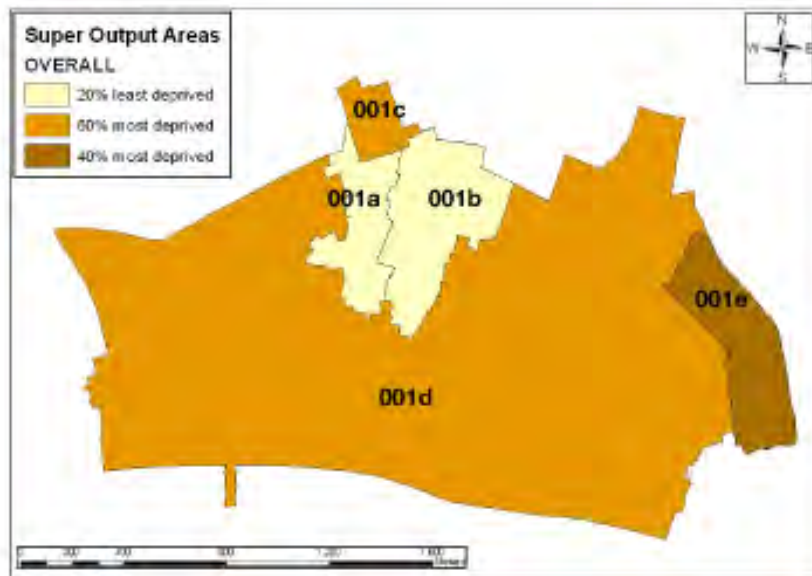
- 001a - Aldersgate
- 001b - Cripplegate, south
- 001c - Cripplegate, north

- 001d - The Rest of The City
- 001e - Portsoken

The map in Figure 3 shows the rankings of The City of London's five SOAs on the 2007 Index of Multiple Deprivation (IMD)². The map illustrates the diversity of deprivation within the small geographical area of The City.

Portsoken (001e) is among the 40% most deprived SOAs in the country, while Aldersgate and Cripplegate South (001a and 001b) are among the 20% least deprived.

Figure 3. Average IMD ranking of City of London Super Output Areas



Super Output Area 001e (Portsoken) ranks highest of any City SOAs for the majority of the seven domains that make up the IMD: employment deprivation, income ranking, health and disability, education and training.

However, for the domain 'barriers to housing and services', SOAs 001c and 001d are the most deprived areas of The City - in the 20% most deprived nationally. Low availability of housing in general, and affordable housing in particular contribute to this deprivation ranking. Much of Greater London is within the 20% most deprived for this domain for the same reasons.

Issue

The Portsoken area of The City of London contains a relatively high level of economic and material deprivation.

² 2007 IMD data is the latest available.

4.31 Employment and economic activity

Table 5. Jobseekers Allowance (JSA) claimants, January 2011

City of London	London	UK
0.9% (86 people)	4%	3.7%

Source: NOMIS

Table 5 above shows the number of JSA claimants in The City of London in January 2011 and the percentage of the population that this represents. When compared to the percentages for London and the UK as a whole The City has a very low relative rate of unemployment.

Table 6. Gross weekly pay in The City of London

City of London	London	UK
£928.20	£642.3	£500.40

Source: NOMIS

Table 6 compares the average gross weekly earnings in The City with those of London and the UK.

4.32 Families and deprivation

The document *City Family Profiling Project* includes a range of statistics for socio-economic factors affecting families in The City and their children. Table 7 below summarises some of these. The document gives the total number of families in The City as **422** and the total number of children as **697**.

Table 7. Deprivation factors affecting City families

Factor	Total	Percentage of population
Children in low income households	170	24%
Children in workless households	70	12%
Children on free school meals	23	16%

5. Results of the consultation with parents

This section reports on the responses given by parents who were surveyed for the CSA 2011. A total of 210 parents were interviewed either by telephone or face-to-face. Their responses have been collated and analysed together.

The City of London CSA 2011 looks at informal as well as Ofsted registered childcare. Often the term 'childcare' can be used in reference to an informal type of care, or to describe an activity for older children.

5.1 Demographics of the survey sample

5.11 Gender, age and ethnicity

80% of parents surveyed were female and 20% were male.

Three parents stated that they had some form of disability or special need.

Table 8. Age of parents

Age band	Percentage of sample
20 – 24 years	3%
25 – 29 years	10%
30 – 34 years	17%
35 – 39 years	25%
40 – 44 years	29%
45 – 49 years	10%
50 – 54 years	1%
55 – 59 years	2%
60 – 64 years	1%
65 years and over	<1%
Refused	2%

The most frequent age group of parents surveyed for the CSA 2011 was 40-44 years (29%). This is relatively high in the experience of the researchers. In similar surveys conducted in London the most frequent age group tends to be 30-34.

Table 9. Ethnicity

Ethnicity	Percentage of interviewees
White (UK)	46%
Other White	11%
Black African	5%
Black Caribbean	<1%
Other Black	1%
Asian – Bangladeshi	13%
Asian – Pakistani	1%
Asian – Indian	2%
Asian – Chinese	1%
Other Asian	2%
Mixed White and Asian	1%
Other Mixed	1%
Other European	12%
South American	3%
Refused	<1%

Table 9 above shows the ethnicities of parents who were interviewed for the survey. The proportions broadly match those of the sample from the CSA 2008 survey, with one exception. In 2008 the percentage of parents giving their ethnicity as Bangladeshi was 6%, whereas in 2011 over twice that number participated in the survey (13%).

Comparison with 2008

Over twice the number of Bangladeshi parents took part in the survey for the CSA 2011 than in 2008.

5.12 Children

Table 10. Number of children in household

Number of children	Percentage
One	54%
Two	37%
Three	8%
Four	1%

The most frequent number of children living in a household was one, followed in frequency by two. The average family size across the whole sample was 1.6 children.

Table 110. Ages of children

Age	Number of parents	Percentage
Under 1	49	23%
1	40	19%
2	30	14%
3	28	13%
4	24	11%
5	18	9%
6	21	10%
7	19	9%
8	20	10%
9	15	7%
10	14	7%
11	15	7%
12	10	5%
13	12	6%
14	8	4%

Table 11 above shows the frequencies of children's ages in the families of parents surveyed. The most frequent ages were four years and under, with babies under one year being the most frequent age of child.

5.121 Children with additional needs

Seven parents stated that they had a child with additional needs. The details of these children's additional needs are listed below (some children had more than one impairment).

- Four children had a physical disability
- Two children had a behavioural or emotional difficulty
- Two children had a learning disability
- Two children had a hearing impairment
- Two children had a sensory impairment

The ages of these children were very widely spread: 2, 3, 5, 9, 14 and two children aged 11. All but one of these children lived in two parent households.

Four of the children with additional needs were accessing childcare or activities outside of The City of London, while three children were using provision within The City.

The most frequent ethnicity of children with additional needs was Asian (three children).

Parents of children with disabilities and additional needs were asked what was the biggest problem they faced in accessing childcare. The most frequent response was their child’s dependence on medication and the need for this to be regularly administered. However, 71% of the seven parents who had children with additional needs stated that they did not need any further support or assistance to enable their children to access childcare or activities.

Finding
 Two parents stated that their child’s need for regular medication was a problem when accessing childcare or activities. Although 71% of parents who had children with additional needs said that they would not require any further assistance to access provision for their children.

5.13 Income and employment

Two parent households made up 89% of the parents surveyed. The most frequent household income range among two parent households was £66,000 - £100,000 a year.

Among the 11% who were lone parents, the most frequent annual household income was under £10,000.

Table 12 below shows the responses given by parents when asked to give their annual household income.

Table 12. Annual household income of respondents

Annual Household Income	Percentage of interviewees
Under £10,000	11.5%
£10,000 - £14,999	7%
£15,000 - £19,999	3%
£20,000 - £29,999	5%
£30,000 - £39,999	10.5%
£40,000 - £65,999	11%
£66,000 - £100,000	13%
Over £100,000	10.5%
Rather not say/don't know	28.5%

Table 13. Employment status of respondents

Circumstance	Percentage of parents
At home caring for children	39%
Part-time employment (16 - 29 hours)	20%
Part-time employment (16 hours or less)	7%
Full-time employment (30 hours or more)	27%
Maternity/paternity leave	7%
Self-employed	0
Unemployed	4%
Student	3%
Training course	0
Carer	0
Volunteering	<1%
Retired	1%
Disabled Living Allowance	<1%

Table 13 above shows the responses given by parents asked to describe their current employment status. Some parents gave multiple responses.

54% of respondents were in some form of paid employment at the time of the research, most frequently on a full-time basis. 89% of respondents' households had at least one member who was in paid employment. 11% of households did not have anyone in paid employment.

91% of responding parents stated that they had a partner. Table 14 below shows the employment status of these partners. The majority of respondents were female, so it is fair to assume that the majority of partners were male. This is concurrent with the high frequency of full time working amongst partners.

Table 14. Partners' employment status

Circumstance	Percentage of parents
At home caring for children	7%
Part-time employment (16 - 29 hours)	9%
Part-time employment (16 hours or less)	3%
Full-time employment (30 hours or more)	68%
Maternity/paternity leave	2%
Self-employed	0
Unemployed	8%
Student	2%
Training course	0
Carer	0
Volunteering	0
Retired	<1%
Disabled Living Allowance	<1%

5.131 Working hours

Parents who responded that they either they or their partner were working or studying were asked to describe the hours in which this took place.

Table 15. Respondents and/or partners working outside office hours

Work/study hours	Percentage of applicable respondents and partners
Normal office hours	68%
Normal office hours plus overtime	19%
Fixed times mainly out of normal office hours (8am-6pm weekdays)	3%
Shift work (various shifts)	10%
Early mornings	3%
Evenings	5%
Overnight	1%
Weekends	5%

Table 15 indicates that approximately one-third of responding parents or their partners worked or studied outside of office hours. This applied to two parent families with a higher frequency than it did to lone parent families.

23% of applicable respondents had a child aged 0-2 years and were working normal hours plus overtime.

Finding

The survey found evidence of a long hours culture amongst working families. 23% of parents with a child under two stated that they or their partner worked from 8am-6pm every day plus overtime.

5.2 Use of childcare

Parents who were interviewed for the survey were asked to describe the childcare they were currently using.

As stated in the introduction, the survey for The City CSA 2011 did not just focus on formal (registered) childcare. Parents in the survey were also asked about informal childcare that they might use. This could include childcare provided by family, friends or nannies, as well as activities for older children and young people that are not required to register with Ofsted.

30 (62%) of respondents were accessing childcare at the time of the research. The proportions of formal and informal use were:

- 50% using formal childcare only
- 6% using informal childcare only
- 6% using both formal childcare and informal childcare

80 (38%) respondents were not accessing childcare at the time of the research.

Finding

The majority (62%) of parents surveyed were currently using a form of childcare; either formal, informal or both.

5.21 Formal/informal childcare use and income

The income of parents who were only accessing formal childcare was most likely to be over £100,000. These families were almost twice as likely to be only accessing formal childcare (ie. not in combination with any informal childcare) than those whose annual household income was under £10,000.

The parents whose were accessing formal childcare only with the lowest frequency were those with an annual household income of £40,000 - £65,999.

Finding

Use of formal childcare only – without any informal childcare - was most frequently found in families with annual incomes over £100,000 and least frequently found in families with incomes of £40,000-65,0000. This could be an indication that middle-income families find formal childcare harder to afford.

The parents accessing only informal childcare with the highest frequency were those with an annual household income of £20,000 - £29,999.

5.22 Use of childcare inside and outside of The City of London

Parents interviewed for the survey who were currently using childcare were asked where it was located.

Table 16. Location of childcare used

Childcare location	Percentage
All of the childcare I am using is in The City of London	60%
Some of the childcare I am using is in The City of London	23%
None of the childcare I am using is in The City of	17%

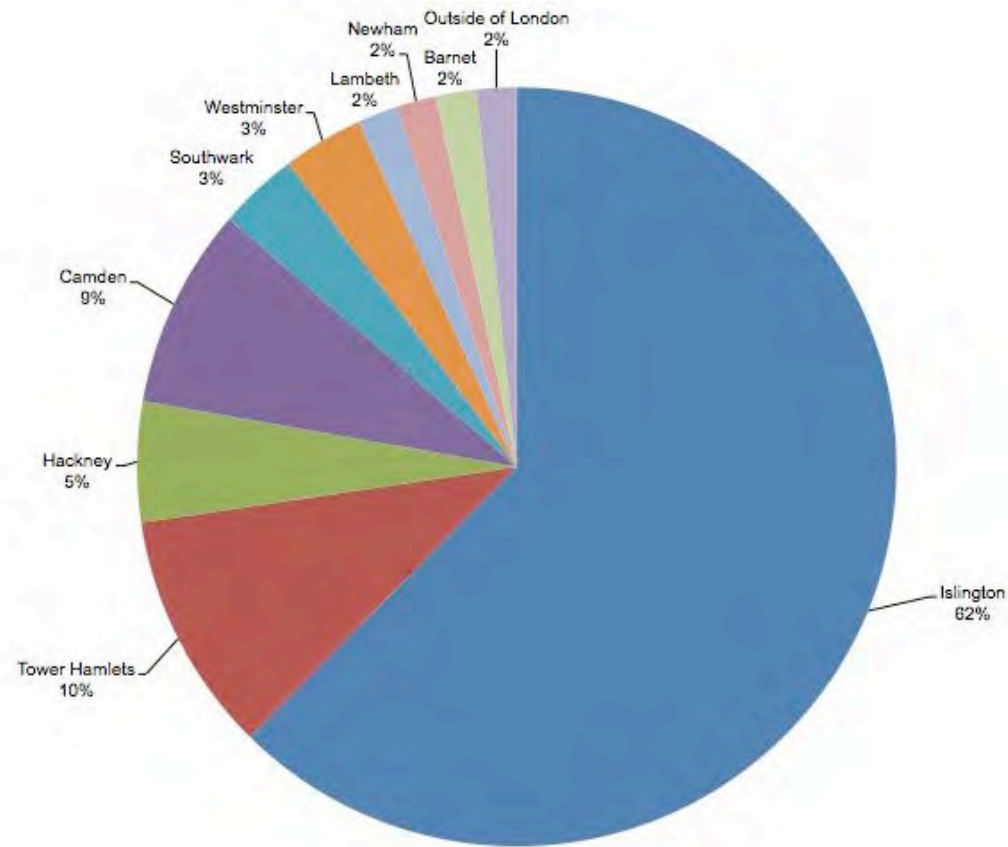
London	
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Finding
 40% of parents surveyed who were using childcare were accessing some or all of their provision outside of The City.

Comparison with 2008
 64% of parents surveyed for the CSA 2008 who were resident in The City were accessing childcare in the Square Mile. In 2011 83% of parents surveyed were accessing some or all of their childcare in The City.

Parents responding that they were using childcare outside of The City were asked to state which local authority area the childcare was located in. The results are shown in the pie chart below (Figure 4).

Figure 4. Percentage of parents using childcare in other local authorities



(Note: parents were able to provide multiple answers).

The majority of non-City childcare used by parents who were interviewed was in the London Borough of Islington (62%). The percentage was far greater for Islington than for any other of The City’s neighbouring boroughs.

Reasons given by parents for using childcare in another local authority area are shown in Table 17 below.

Table 17. Reasons for using childcare outside of The City

Reason	Percentage (number)
I like a particular setting/childminder	40% (21)
It is the closest option to where I live	33% (17)
It is more convenient to my place of work or study	10% (5)
It is a more affordable option	4% (20)
I prefer the times available	2% (1)

Parents with a reason other than those listed in Table 17 were asked to provide this:

- 9 parents (17%) using childcare outside of The City gave the reason for this as ‘because The City does not provide this type of care’.
- 2 parents said that they used childcare elsewhere because of a lack of available places in The City.

Finding
Some parents report that they access childcare in other local authority areas because there is no childcare of that type available in The City.

5.23 Use of childcare in term time

122 (58%) parents were accessing a form of childcare during term-time at the time that they were interviewed for the survey.

88 (42%) were not using childcare during term time. The five most frequent reasons given by parents not using childcare in term time were (in order of frequency):

- One parent is always at home: 43%
- Child is too young: 19%
- Childcare is unaffordable: 14%
- Parent is on maternity leave: 11%
- There are no places available with preferred childcare provider: 9%

Finding

The most frequent reason given for not using childcare during term time was because at least one parent in the family stays at home (43%).

Parents who were using childcare in term time also gave their reasons for this. The three most frequent reasons for were:

- Socialisation for children: 52%
- In order to work or study: 46%
- To prepare a child under five for school: 12%

Table 18 below shows the types of childcare provision – both informal as well as formal – that parents interviewed in the survey were currently accessing during term time.

Table 18. Types of childcare being accessed during term time

Type of childcare	Percentage	Number
Formal childcare		
After school club	28%	34
After school activity (on school premises)	20%	25
Day nursery	18%	22
Primary school nursery class	14%	17
Independent school nursery class	6%	7
Registered childminder	5%	6
Pre-school	3%	4
Breakfast club	2%	3
Creche	2%	3
Special provision for children with additional needs	1%	1
Informal childcare		
Grandparents	12%	
Nanny/home childcarer	8%	10
Other relatives/friends/neighbours	6%	7
Youth club	2%	3

The figure for use of grandparents as informal childcare is much lower than would normally be found in other local authority areas (based on other Childcare Sufficiency Assessments conducted by Coda in 2010-2011).

This can be as high as 40% in a suburban borough such as Barnet, and is clearly an indication that less grandparents of City residents live in close proximity to their families.

Comparison with 2008

The parents survey for the CSA 2008 consulted parents working in The City who did not necessarily live there, whereas in 2011 only City-resident parents were consulted. The results are not therefore directly comparable but it is still interesting to note how the findings differ.

The survey for 2011 found more parents using a day nursery – 18% compared to 10% in 2008, and a big increase of parents using primary school nursery classes – 14% compared to only 2% in 2008.

The household income band of families most frequently found to be using either a day nursery or a nursery classes in a primary school was under £10,000 a year. This seems to indicate that these parents are benefiting from the free entitlement to early years education.

Higher numbers of parents were found to be using early years childcare than in 2008. This is also likely to be as a result of the free entitlement and awareness of it among parents having grown.

Finding

Early years childcare was most frequently being accessed by parents with household incomes of less than £10,000 a year.

5.231 Average childcare hours per week accessed during term time

Parents who were currently using childcare during term time were asked to give the mean average hours per week that they used with each type of provider. Table 19 on the next page shows the overall averages calculated from the responses given. Hours have been rounded up to single figures.

Table 19. Average childcare hours per week accessed during term time

Type of childcare	Average hours per week
After school club	8
After school activity (on school premises)	4
Day nursery	29
Primary school nursery class	27
Independent school nursery class	20
Registered childminder	12
Pre-school	13
Breakfast club	4
Creche	4
Special provision for children with additional needs	8
Nanny/home childcarer	26
Youth club	5

Table 19 shows that most of the parents surveyed were not accessing full daycare hours which can be 40 or 50 hours per week. Even users of day nurseries (where 8am-6pm provision is available) were on average only accessing 29 hours per week. This suggests that parents are either using the nursery for less than five full days or accessing shorter hours per day.

Finding

The average hours per week being accessed from formal childcare providers in term time by surveyed parents indicate that full time daycare is not generally being accessed.

With the exception of pre-schools (13 hours per week) the hours being accessed per week in nursery settings were higher than the hours funded through the free entitlement – currently 15 per week.

5.24 Use of childcare in school holidays

68 (32%) of surveyed parents were accessing childcare during school holidays at the time of the research. Table 20 shows the numbers and percentages of parents using different types of childcare during holidays.

Table 20. Types of childcare being accessed during school holidays

Type of childcare	Percentage	Number
Formal childcare		
Holiday playscheme	49%	33
Day nursery	12%	8
Independent school nursery	10%	7
Registered childminder	6%	4
Special provision for children with additional needs	1%	1
Informal childcare		
Grandparents	16%	11
Nanny/home childcarer	12%	8
Activity club	7%	5

The three most frequent reasons given by parents for using childcare during the school holidays were:

- In order to work or study: 60%
- Socialisation for children: 34%
- Something for a child/children to do during the school holidays: 25%

Finding

Childcare use during the school holidays is more likely to be in order to enable a parent to work than childcare used during term time. 60% of parents gave work or study as their reason for using childcare during the holidays, compared to 46% in term time.

5.241 Average childcare hours per week accessed during school holidays

Parents who were using childcare during the school holidays were asked to state the average hours per week that they accessed. Table 21 on the next page shows the overall averages calculated from parents' responses.

Table 21. Types of childcare being accessed during school holidays

Type of childcare	Average hours per week
Holiday playscheme	32
Day nursery	17.8
Independent school nursery	31
Registered childminder	27
Special provision for children with additional needs	30
Nanny/home childcarer	51
Activity club	39

The average hours per week of childcare used during school holidays were much higher overall than in term time. This is concurrent with needs of working parents.

5.3 Satisfaction with current childcare

Parents using childcare were asked whether or not their current arrangements meet their needs.

Of the 130 parents using childcare, 97 (75%) said that their needs are currently being met. 33 (25%) reported that their current childcare arrangements do not meet their needs.

Finding

75% of parents currently using childcare reported that their current arrangements meet their needs.

The responses to this questions were analysed along several other categorisations of responding parents. In most cases the proportions were broadly the same with more parents responding that their needs were being met. The one exception to this was lone parents, where slightly more people stated that their current childcare was not meeting their needs (58% versus 42% respectively). The number of lone parents surveyed was however very low (only 12 in total).

Parents of children aged 5-10 years most frequently stated that their childcare was meeting their needs (almost 90% of applicable respondents).

Parents of 11-14 year olds were the least likely to say that their childcare was meeting their needs (just over half of applicable respondents).

9% more parents who accessed all of their childcare in The City of London stated that their childcare was meeting their needs than those interviewees who accessed all of their childcare elsewhere (77% versus 68% respectively).

Finding

Parents who accessed all of their childcare in The City of London were more likely to state that these arrangements met their needs: 77% compared to 66% of parents using childcare in other local authority areas.

Table 22. Reasons why childcare does not meet parents’ needs

Reason	Percentage (number)
Preferred choice of childcare not available	70% (23)
Can't get preferred hours/times	18% (6)
Cannot afford preferred childcare	12% (4)
Doubts about quality of childcare	12% (4)
No childcare located close enough	6% (2)

By a significant amount the most frequently cited reason for why childcare was not meeting a parent’s needs was that their preferred choice of childcare was not available. Approximately six times more parents gave this reason than cost/affordability – usually the most frequent reason in childcare sufficiency research.

Finding

The most frequent reason why parents stated that their childcare was not meeting their needs was that their preferred choice of provision was not available.

Parents using childcare were asked to rate their level of satisfaction on a five point scale. They were asked to rate their overall satisfaction with the childcare they were using, as well their satisfaction with its quality and cost. The responses are shown in Table 23 on the next page, with both the percentages and numbers of responses.

Table 232. Satisfaction with childcare currently used

Satisfaction rating	Childcare overall	Quality of childcare	Cost of childcare
Very satisfied	40% (52)	48% (63)	34% (44)
Quite satisfied	41% (53)	40% (52)	37% (48)
Neither satisfied nor dissatisfied	12% (15)	8% (11)	17% (22)
Quite dissatisfied	6% (8)	3% (4)	6% (8)
Very dissatisfied	2% (2)	-	6% (8)

The average, and most frequent, level of satisfaction with childcare overall was 'quite satisfied'.

Two parent families were more likely to be satisfied with the childcare they were currently using (42% 'very satisfied', and 42% 'quite satisfied').

Lone parents were most likely to give a neutral response ('neither satisfied nor dissatisfied'), with 33% of lone parents giving this as their overall rating.

Finding
Parents surveyed for the CSA 2011 were generally satisfied with their current childcare arrangements. However, parents were less satisfied with the cost of their childcare than its quality.

5.4 Issues faced by parents in the school holidays

All parents were asked what they found to be the biggest challenges to keeping their children occupied during the school holidays.

Just over half of parents said that they had no issues with this. The parents who did find issues with the school holidays gave a wide variety of responses but the five most frequent issues were:

- Lack of childcare and activities: 8% (16)
- Lack of a nurseries that opens through the school holidays – also reported in 2008: 6% (13)
- Cost: 5% (11)
- There is not enough to do (generally): 4% (9)
- There are not enough activities for children aged 10-14: 4% (8)

Other issues identified by parents included:

- Shortage of Stay and Play/drop-in sessions in The City of London
- Lack of a swimming pool
- Insufficient annual leave for parents during the school holidays

- Problems in finding activities for siblings of different ages
- Lack of open/outdoor spaces in The City of London
- Difficulty in hiring nannies on a temporary basis

5.41 Services needed during the school holidays

Parents were asked to suggest services or activities that they would ideally like to access during the school holidays. The three most repeated suggestions were:

- Activity clubs or centres: 18%
- Holiday playschemes: 12%
- Nursery places/opening hours during the summer school holidays: 8%

Suggestions from individual parents included:

- Greater use of church halls and community settings.
- Greater use of The City’s libraries.
- More reliability in terms of opening days and hours of playschemes.

Finding

Half of the respondents to the survey stated that the school holidays present difficulties for them as parents. Most of these parents felt that there is not enough childcare or activities for children during the holidays.

5.5 Preferred childcare use

5.51 Additional childcare needs of current users

The 117 parents who were currently using formal childcare were asked if they would prefer to be accessing different provision than they currently were. Table 24 below shows their responses.

Table 24. Additional childcare needs from current users

Preference	Percentage (number)
More of the same type of provision	9% (10)
Childcare from a different type of provider	44% (52)
More of the same type of provision AND another type	3 (3%)
No additional childcare needs	44% (52)

Finding

56% of surveyed parents who were currently using formal childcare stated that they would prefer different arrangements. For most of these this meant a different type of provision to the one they were currently accessing.

The 55 parents who said they would prefer to be accessing a different type of childcare provision were asked to specify what types of provision that would be.

Table 25 below, shows the frequencies of the responses given. It also shows the mean average hours per week that parents said they would prefer to use with each type of provider.

Table 25. Alternative types of childcare that users would prefer to access

Type of provision	Percentage (number) specifying	Preferred hours per week (mean average)
Holiday provision		
Activity club during school holidays	33% (18)	9
Holiday playscheme	29% (16)	26
Youth club	11% (6)	7
Day nursery	7% (4)	38
Independent school nursery	2% (1)	50
Registered childminder	2% (1)	40
Term time		
Youth club	11% (6)	5
Day nursery	13% (7)	22
School-based activity club	9% (5)	8
Independent school nursery	4% (2)	40
Nursery class in maintained school	4% (2)	24
Registered childminder	4% (2)	8
Pre-school	4% (2)	11
Nanny	2% (1)	25
Special provision for children with special needs / disabilities	2% (1)	10
Breakfast club	2% (1)	5
After school club	2% (1)	15
Others	15% (8)	

Of the 55 parents who stated that they would prefer to be using different childcare, the types of provision most frequently specified were holiday play provision – either activity clubs or registered holiday playschemes.

Youth clubs were specified with equal frequency (11%) for both term time and holidays.

In every case where a provider type featured in both term time and holidays, the preferred average hours per week were longer in the holidays.

Finding
Current childcare users most frequently specified holiday play provision as the type of childcare they would prefer to be using.

Parents who said that they would prefer to be accessing more of their current provision were also asked to give the average additional hours per week that they require.

Table 26. Users’ preferred additional hours with current provision

Current provision	Additional hours per week (mean average)
Day nursery	14
Nursery in maintained school	13
Pre-school	6
After school club	5
School-based activity club	1

5.52 Unmet childcare needs of non-users

Non childcare using parents were asked if they would prefer to be using childcare, if suitable and affordable provision were available.

65 (70%) of childcare non-users stated that they *would* ideally prefer to be accessing childcare if suitable and affordable provision were available.

Finding
70% of parents surveyed who were not currently using childcare stated that they would prefer to be using childcare if suitable affordable provision was available to them (65 parents).

Table 27 shows the frequencies with which different types of provision were specified (percentages and numbers) along with the mean average hours per week that non-users would like to be accessing.

Table 27. Childcare that current non-users would prefer to access

Type of provision	Percentage (number) specifying	Preferred hours per week (mean average)
Holiday provision		
Day nursery	18% (12)	26
Holiday playscheme	15% (10)	21
Activity club during school holidays	11% (7)	13
Independent school nursery	6% (4)	21
Youth club	5% (3)	2
Workplace nursery	3% (2)	35
Creche	2% (1)	16
Term time		
Nursery class in maintained school	31% (20)	13
Day nursery	28% (18)	22
Independent school nursery	12% (8)	16
After school club	6% (4)	5
School-based activity club	6% (4)	4
Pre-school	5% (3)	12
Creche	3% (2)	5
Workplace nursery	3% (2)	35
Registered childminder	2% (1)	15
Youth club	2% (1)	-
Others	3% (2)	

Day nursery was the type of childcare that most non-users said that they would ideally like to be accessing during school holidays, and the second most frequently specified in term time.

The most frequently preferred term time childcare specified by non-users was a nursery in a maintained school for an average 13 hours a week. This indicates an unmet need that could be met through increased availability of the free entitlement.

Finding

The most hours most frequently described as the preferred childcare arrangements of parents not currently using childcare were 13 hours per week in a maintained school nursery (20 parents out of 65, 31%).

Finding

30 parents not currently using childcare expressed an unmet need for an average 24 hours a week of day nursery provision across term time and school holidays.

The 65 non-users who expressed an unmet need for childcare provision were asked to state the reason why they would prefer to access childcare. The three most frequently cited responses were:

- In order to work: 40% (26)
- Socialisation for children: 22%
- Something for children to do during the school holidays: 14%

Finding

40% of non childcare using parents (26 applicable respondents) stated that the reason that they would prefer to be using childcare was in order to be able to work.

5.6 Financial assistance for childcare

The 130 parents currently using childcare were asked to provide details of any financial assistance method they were accessing to help with the cost.

Table 28. Financial support methods accessed by childcare users

Type of financial support	Percentage (number)
Child Tax Credit	28% (36)
Childcare Element of Working Tax Credit	-
Working Tax Credit (not childcare element)	15% (20)
Free early education entitlement	10% (13)
Childcare vouchers	8% (11)
Job seekers allowance	4% (5)
Salary sacrifice scheme	2% (3)
Fair access to care for disabled children	1% (1)

Perhaps the most striking finding in Table 28 is that none of the 130 parents surveyed who were using childcare were claiming the Childcare Element of Working Tax Credit (WTC).

When asked to give a reason why they were not claiming the Childcare Element, 48% (63) of parents responded 'don't know'. This seems to suggest that they were unaware of the benefit, although eight parents did actually give 'I am not aware of it' as their response.

Finding

None of the 130 parents using childcare who were surveyed for the CSA 2011 were claiming the childcare element of Working Tax Credit. 48% of these could not give a clear reason why they were not claiming, indicating a considerable lack of awareness.

Other reasons given for not claiming the Childcare Element of WTC were:

- Household income is too high: 36% (47)
- Not using eligible childcare: 5% (7)
- Not working enough hours: 3% (4)

5.61 The free entitlement to early years education

47 surveyed parents had a three or four year old in their family. Of these 83% (39) said that they were aware of the free entitlement, while 17% (8) were not aware.

Finding

Awareness of the free entitlement was high among parents of eligibly aged children. 83% of parents with a three or four years old were aware of the entitlement.

Of the 83% of parents who were aware of the free entitlement:

- 54% (21) were accessing their full entitlement of all 15 hours a week
- 5% (2) were accessing some of their entitlement
- 41% (16) were not accessing any of their entitlement

The most frequently reason given by parents for not taking up any of their entitlement was that their four year old is already attending a reception class (44% of applicable respondents; seven parents in total). Strictly speaking however, reception class still counts as a free entitlement place.

The second most frequent reason given for parents not accessing any of their entitlement was that the nursery setting of their choice did not have any available places: 38% of applicable respondents (6 parents).

Finding

Take up of the free entitlement was low among surveyed parents, with 41% of eligible parents (16 parents) not accessing any of their entitlement. Seven of

these however were accessing a reception class and did not realise that this counts as a free entitlement place.

Finding

Six parents with a three or four year old stated that they were not accessing any of their free entitlement due to a lack of available places.

Parents with a three or four year old were asked if they were aware that from September 2012 the 15 hours free entitlement can be stretched over additional weeks. Only 10 applicable parents were aware of this (21%).

5.7 Information

Parents were asked a series of questions concerning information about childcare and other services for families and how they access it.

5.71 Family and Young People's Information Service (FYI)

Table 29. Awareness of the Family and Young People's Information Service (FYI)

Aware of FYI?	Percentage (number)
Yes	42% (88)
No	58% (122)

Table 29 above shows that 42% of surveyed parents were aware of The City of London's Family and Young People's Information Service (FYI).

Finding

Awareness of the Family and Young People's Information Service was low among surveyed parents. Less than half were aware of the service: 42% (88 parents).

One of the few groups in which the majority of parents *were* aware of FYI was those who had stated that their current childcare was not meeting their needs. 58% of parents whose childcare did not meet their needs were aware of FYI, compared to 39% of childcare users whose needs were being met.

Of the 88 parents who were aware of FYI, 36 (41%) had contacted the service in the last 12 months. The reasons given by these 36 parents for contacting FYI are shown in Table 30 on the next page.

Table 30. Reason for contacting the Family and Young People’s Information Service (FYI)

Reason	Percentage (number)
Looking for childcare	42% (15)
Looking for activities for children	39% (14)
Enquiring about a school	14% (5)
In a professional capacity, checking new policies	6% (2)
Information about financial assistance for childcare costs	3% (1)

5.72 *What’s On* publication

FYI publishes a regular guide to activities, events and services for families in and around The City entitled *What’s On*. Parents were asked if they were aware of the publication.

60% of parents said that they were aware of *What’s On* (125 parents).

The highest rate of awareness was among parents of children aged 3-4 years. 82% (23) were aware.

Parents of a White ethnicity were twice as likely to be aware of *What’s On* than Asian parents (68% versus 33% respectively).

Table 31. Where parents had seen or received *What’s On*

Method or place of access	Percentage (number)
Delivered to home	30% (30)
Barbican Library	14% (17)
Unspecified library	12% (15)
Golden Lane Campus	10% (13)
Sir John Cass School	8% (10)
Health Visitor	4% (5)
Shoe Lane Library	3% (4)
Internet	2% (3)
GP practice	2% (3)
Cass Child and Family Centre	2% (3)
FYI	2% (2)

Of the parents who were aware of *What’s On*, 94% had actually read the publication and 6% had not.

Parents of Asian ethnicities who were aware of *What’s On* were the most likely not to have read it.

Parents who had read *What's On* rated its content as follows:

- Very useful: 16%
- Useful: 67%
- Not useful at all: 9%
- Don't know: 8%

Finding

There is some evidence that the *What's On* guide is not reaching parents of Asian ethnicities. Parents from these communities were significantly less likely to be aware of the publication and most likely to have not read it if they were aware.

5.8 Parents of children with additional needs

Eight parents who have a child or with disabilities or special needs were interviewed separately to the wider survey in order to gain an understanding of the particular issues that they faced in accessing childcare and activities.

The ages of their children were: two, three, five, nine, 10 and 14. With two children aged 11.

One child was severely disabled with multiple conditions. The other children's additional needs included:

- Physical disabilities (two children)
- Hearing impairment
- Learning disability
- Behavioural/emotional disability
- Cystic fibrosis
- Asthma

Only one of the children did not currently use any form of childcare or attend an activity, and this was because the parent considered the child to be too young.

Childcare usage among the other children was:

- Four children attended a holiday playscheme between eight and 30 hours a week
- One child attended a day nursery for 6 hours a week
- One child attended a nursery run by the school for 30 hours a week
- One attended an after school club for 2 hours a week.

5.81 General issues

Those parents with more severely disabled children found holiday times difficult to cope with as they felt that there was a lack of suitable activities in The City. These parents needed either special provision or specialist support from an additional member of staff.

Parents with other, fully able children also felt that the time and attention they were able to spend with these siblings was dependent on the condition, behaviour and mood of their disabled child. This sometimes led to feelings of guilt among these parents.

Those parents who were working also found holidays difficult. Their annual leave entitlement did cover the time their children had off school and stated that most holiday playschemes do not operate for enough hours in a day to be useful to them.

Some parents were fortunate enough to have family members living nearby who could provide informal childcare. Often the children will also have cousins to play with.

Parents with children aged between six and 10 were more likely to report a lack of activities for their children, and perceived that parents with older and younger children were better catered for.

5.82 Specific problems

Children with severe conditions requiring a full time carer and/or the regular administration of medicines reported that childcare options available to them were very limited. They are unable to access mainstream provision unless specialist one-to-one support is provided.

There was a general concern among parents of younger children about how their needs would be met as their children grew older.

6. Results of the consultation with childcare providers and other stakeholders

6.1 Nursery providers

Five nursery providers in The City that are registered to offer free entitlement places were consulted during February and March 2011 for the CSA 2011:

- Sir John Cass's Child and Family Centre
- Sir John Cass's Foundation Primary School Nursery
- Barbican Playgroup
- Bright Horizons City Nursery
- Newpark Nursery

Providers were interviewed either face-to-face or by telephone using a structured questionnaire format.

6.11 Changes in demand and the types of parents using the setting

Providers were asked if they had noticed any changes or trends in the usage of their nursery since 2008 (when the last CSA was conducted).

Two providers commented that they had noticed changes in the numbers of Bangladeshi families using their setting. One provider reported a decrease in usage from this community:

'We have seen a fall in the number of Bengali children... and an increase in the number of children from White professional families.'

However, another provider stated:

'A few years ago we were seeing increased numbers of parents from Eastern European communities, but that seems to have dropped off. Now it is predominantly Bengali, Indian and Pakistani families – who are especially occupying places in the morning, when their husbands are working or studying in The City.'

Three providers stated that since 2008 they have received more requests for additional hours.

Three providers stated that there had been an increase in the incidence of non-payment of fees since 2008.

6.12 Use of nurseries by City resident parents

Providers were asked to state (or estimate) the number of parents using their setting who lived in The City of London. The average proportion of City resident parents from the responses of all five providers was **56%**.

Finding

Nursery providers in The City of London reported that, on average 56% of the parents who use their setting live in The City.

6.13 Effects of the recession on demand

Providers were asked if their business had experienced any effects of the economic crisis and subsequent recession. Table 32 below summarises the responses to five questions that were put to providers.

Table 32. Effects of the recession on demand

Response	Number of settings
Occupancy has actually increased during the past two years, although we are able to meet the demand	0
Occupancy has actually increased in the last two years and we cannot meet the demand	1
The recession has not affected demand	3
The recession is responsible for a fall in our numbers	1
The recession is responsible for a sizeable fall in our numbers	0

As Table 32 shows, the most frequent response (from three of the five providers) was that no noticeable effect on their business had been caused by the recession.

The other two providers considered the recession to have had quite different effects on their provision, with one stating that demand has increased so much in the last two years that it was beyond what the setting could meet. The other provider had experienced a drop in demand in the last two years, for which they blamed the recession.

6.14 Anticipated future demand

Providers were asked how much higher or lower they expected demand for places at their setting to be in three years time compared to now. They were invited to respond on a five-point scale. Their responses are shown in Table 33 on the next page.

Table 33. Anticipated changes to demand by 2014

Response	Number of settings
Demand will be significantly higher	1
Demand will be higher but not significantly	3
Demand will remain about the same	1
Demand will be lower but not significantly	0
Demand will be significantly lower	0

Table 33 shows that most providers felt demand would raise over the next three years. No providers foresaw a drop in demand for their provision.

Finding

Five City nursery providers consulted for the CSA 2011 all predicted that demand for their provision will be higher in three years' time.

6.15 Factors affecting demand

Providers were asked to rate the extent to which a list of factors affected demand for their setting.

The following three factors were classified as '*always affects demand*' with the highest frequency by the five providers:

- Reputation of the setting (most frequent)
- Clear invoicing (as this satisfies parents that they are not paying top up fees)
- Quality, as evidenced in latest Ofsted report and classification

None of the five providers believed that any of the following factors affected demand:

- Location of the setting
- Competition from other local providers
- Support with advertising and marketing from FYI

6.16 Impact of the free entitlement on demand

Providers were asked if the free entitlement to early years education had any effect on demand for their setting. Two of the five providers responded that they believed it was negatively affecting demand at their setting and causing a reduction in the number of three and four year olds. The specific issue for these providers was the availability of the entitlement at maintained schools.

'A lot of parents are now opting to wait until the child is three before they start at an early years setting... when they can get their fifteen hours for free.'

'Parents who are using the free entitlement... would not have paid for their child to attend a nursery.'

Only one provider reported that they currently offering 'linked' free entitlement sessions, meaning two sessions can be linked within one day. This can incorporate a lunch session within the free entitlement which encompasses foundation stage curriculum activities and forms part of the learning outcomes for the children.

6.16 Take up of the Childcare Element of Working Tax Credit

Each setting was asked to estimate the proportion of the families accessing their setting who were claiming the childcare element of the Working Tax Credit (WTC). Table 34 below shows that most providers estimated less than a quarter of their parents were accessing this benefit.

Table 34. Estimated percentage of parents accessing WTC

Response	Number of settings
All of them	0
75% - 100%	0
50% - 75%	0
25% - 50%	1
Less than 25%	3
Don't know	1

6.17 Provider's view on childcare provision in The City

Providers were asked to give their options on the childcare market in The City of London and to rate various aspects of the provision of childcare for City families.

Firstly, providers were asked to rate the provision of childcare for three types of family:

- Families on low incomes
- Families with a child who has a disability or special needs
- Working families

Table 35. Providers' opinions of City childcare provision

Childcare provision	Excellent	Good	Satisfactory	Poor	Don't Know
Provision for families on low incomes	1	2	0	2	0
Provision for families who have a child with additional needs	1	1	2	1	0
Provision for working families	2	3	0	0	0

As Table 35 shows, in the opinion of these providers the type of families who were best catered for by City childcare provision were those who work.

Opinion was divided on the quality of provision income families and those with disabled children.

When asked how the needs of low income families might be better met, one provider said:

'Simple. Someone needs to focus on creating more subsidised places.'

Suggestions for better meeting the needs of families of children with special needs and disabilities included:

'Help to enable Cass to provide childcare for children who are wheelchair users.'

[The City of London Corporation] should consider organising more training and courses on inclusive provision, and provide more information to providers on what types of training are available.'

6.18 Provider's plans to extend their provision

Two providers stated that they had plans in place to increase their number of places over the next 18 months (from Spring 2011):

'We need to secure the funding, but we would like to offer more places for children with emotional needs and those who have family-related problems.'

'We would need more staff, but yes we have plans for more places.'

Two providers stated that they were interested in extending their provision but had no firm plans at this point to do so. One provider elaborated:

'We would be interested in extending, if we could find a bigger venue.'

'We would really like to increase the number of places but would be restricted by our tenancy agreement.'

All five providers plan to increase their fees in the next 18 months.

'For the parents who live in The City of London we have three fee bands and these are likely to increase in line with income. For the non-City parents it will be a flat increase.'

'We will have to, but not through choice... It will be because of reduced funding.'

None of the five providers had definite plans to increase their opening hours over the next 18 months.

6.19 Support from The City of London Corporation

Providers were asked to indicate the level of support for various services from The City of London Corporation that they would like to receive.

Table 36. Level of support required from The City of London Corporation

Parent/family background	No support required	Some support would be welcomed	Support would be essential
Marketing support and advice	2	2	1
Training	0	4	1
Business development	1	2	1
Inspection and registration support/advice	2	2	1
Support to network with other providers	1	3	0
Other	0	1	0

Finding

Nursery providers expressed a need for training from The City of London Corporation and would welcome more opportunities to network with other providers.

6.1 Childminders

The City's two registered childminders were also interviewed for the CSA 2011. They were asked a similar set of questions to those asked of nursery providers.

6.11 Effect of the recession on childminder's business

Neither childminder believed that the recession had had a noticeable effect on their childcare business. Neither had they observed any changes or trends in the types of families accessing their provision in the three years since the last CSA was carried out.

Childminders did however believe that the ongoing economic recession and rising unemployment (particularly of City workers) will have negatively affect demand for childminding in the next three years

Both childminders stated that they had noticed an increase in enquires about their service and felt that FYI had been publicising more widely since 2008.

6.12 Factors that affect demand

The two childminders both believed that between them they provided enough childminding to meet demand in The City is '*enough to meet demand*'.

They both stated that the most important factor affecting demand for their services is reputation.

6.13 Financial assistance for parents

Neither childminder is currently were accredited to provide the free entitlement. One stated that she would consider completing an accreditation course in order to the entitlement. The other childminder sais that she would not be interested at the moment as she does not know enough about what would be involved.

Neither childminder had plans to increase their fees.

'Parents simply wouldn't pay it.'

Both estimated that about 25-50% of parents were claiming the childcare element of Working Tax Credit.

6.14 Support form The City of London Corporation

Childminders stated that they would welcome support from The City of London Corporation with marketing their services.

6.15 Views on the provision of childcare in The City

Both childminders believe that The City has a good range of drop-in provision:

'Although some parents believe more Stay and Play and Music and Movement sessions would be good, these groups are always busy, particularly the sessions at Barbican library.'

Both childminders agreed that the big issue facing City parents on low incomes was a lack of options for affordable childcare.

6.3 Jobcentre Plus

The Jobcentre Plus Partnership Managers for the EC1 and EC4 areas were interviewed by a consultant from Coda. They were asked to give their perspective on childcare sufficiency in The City, and in particular the barriers it presented to those parents seeking work.

The key points they made are summarised below:

- Both report that finding a lot of City parents they come in contact with are still saying childcare is unaffordable to them, particularly those who live close to the border with Tower Hamlets (Portsoken). The majority of these parents are not aware of the help available through Working Tax Credit.
- Jobcentre Plus has seen evidence that there is still a lack of spoken English among some Bangladeshi parents in Portsoken and this might be hindering some parents approaching childcare and other services.
- Jobcentre Plus reported that parents in work are finding a lack of breakfast club places in The City and Islington border area, and anecdotal reports of long waiting lists in childcare settings in these areas.
- Short-term flexible childcare solutions are seen as being most important to parents seeking work.

6.4 Children and young people

Two consultation sessions with children were held and facilitated by Morgans Research for The City of London CSA 2011:

- One group with children at Sir John Cass school, attended by eight children.
- One group at Golden Lane Night Owls after school club, attended by seven children.

Participating children were aged between seven and 10 years old. The groups were mixed in terms of gender and ethnicity. Some children in the groups

attended after school clubs (run by the school), some attended other after school clubs, and some did not attend any after school childcare.

Children who attended an after school club run by the school did so at least one night a week. For some this was their choice but for others it was a necessity because their parents worked.

Children were asked what they liked about their after school club. Their responses were that it was fun, enjoyable and not as 'strict' as school. Children enjoyed the variety of different things to do and like being with their friends after school. Some children also appreciated the option of being able to play alone or in groups.

When asked what they disliked about their after school club, children's responses included:

- **Discipline; unruly children.** Some children stated that their enjoyment of the after school club was sometimes marred by other children '*messing about*' and '*spoiling things*'. Some felt that there should be greater control from the adult playworkers.
- **Can be tiring.** Some children, particular those who go to after school clubs several times a week and then on to Night Owls or Cass play centre found it tiring. It also impacted on their ability to do their homework as didn't get home until about 6pm. Some children even stated that they would prefer to finish clubs earlier and get home.
- **Emphasis on younger children.** Some children thought that there were not enough books suitable for older children available at Night Owls and some of the older children at the Cass Play Centre thought the provision was too focused on younger children and had less for those aged nine and over.
- **Some reluctance to spend long periods at holiday playschemes.** Some of the children in the focus group attended holiday playschemes by choice but others because their parents worked. Some of these who attended holiday clubs regularly stated that they actually would like to spend some time with their parents or be at home rather being out all day every day.

7. Childcare supply

This section comprises data provided by The City of London's Family and Young People's Information Service (FYI). As The City's Family Information Service, FYI holds the most up-to-date and accurate data on registered childcare in the Square Mile. FYI is informed by Ofsted of any changes to registration data such as new providers or closures.

Further to the information provided by Ofsted, FYI also conduct a regular audit of local providers to gather data on their current vacancies, costs and other features of their provision.

A glossary is included in Appendix 1 explaining some of the terminology used throughout the CSA, and this includes the names used for different types of childcare provision.

7.1 Registered early years childcare places by provider type and SOA

Table 37 below shows the maximum number of places that each provider is registered to offer.

Table 37. Registered early years childcare places by provider type and SOA

SOA	Provider type	Maximum registered places	Total places per SOA
001a - Aldersgate	Childminder	4	4
001b - Cripplegate, south	Childminder	5	57
	Day nursery	24	
	Pre-school	28	
001c - Cripplegate, north	Day nursery	54	54
001d – The Rest of The City	Nursery class of independent school	180	277
	Day nursery	52	
	Day nursery	45	
	Nursery class of independent school	*	
001e - Portsoken	-	0	0
Total		392	392

Source: City of London Family and Young People's Information Service, March 2011

*Data was not available for this setting at the time of writing.

Table 37 shows that there is currently a total of **501** registered childcare places in The City of London. **392** of these places are in early years provision and therefore available to children under five.

At the time of writing, there were 44 vacancies in The City nurseries: 10 full time day nursery places, 4 in a pre-school and 30 in the nursery of Sir John Cass's Child and Family Centre . It should be noted that vacancies can change on a daily basis this should not be taken as an indication of the ongoing rate of vacancy in The City.

Issues of occupancy are known with at least one setting where staffing is kept low due to a perceived lack of demand. By only employing a certain number of staff, the nursery is unable to offer it's full quota of registered places (due to child to adult ratio restrictions). The true figure for available places at this setting is therefore lower than the registered places would indicate.

Issue
Some nursery settings may not make their full quota of registered places available due to a perceived lack of demand. Evidence from the parents survey however suggests that there is unmet demand for nursery provision.

7.21 Free entitlement to early years education

Table 38 below shows the number of places in City of London early years settings that were funded through the free entitlement to early years education.

Table 38. Free entitlement places by term 2009-201

Term	Total places
Autumn 2009	28
Spring 2010	28
Summer 2010	34
Autumn 2010	13
Spring 2011`	14

Available data in Table 37 in section 7.2 shows that total number of 392 places available for 0-5s in The City of London. Not all of these places are potentially available to parents of three and four year olds under the free entitlement. For example the nursery classes of The City's two independent schools do not offer part time hours within their curriculum. It would therefore be unworkable for them to offer free entitlement places. This discounts 180 the known registered places giving a total of 202 places potentially available through free entitlement funding.

Of the seven settings providing childcare in The City, three are day nurseries and will have a certain number of their places taken up with children aged 0-2. The majority of the places in the remaining settings however will be sessional nursery places of the kind that the free entitlement is designed to pay for.

Since Autumn term 2010 one nursery has not been participating in the free entitlement scheme. This saw the number of places drop by more than half, but even before this take up was very low and would seem to suggest that providers were not actively offering the entitlement.

Finding

There is statistically high supply of early years childcare in The City but only a tiny proportion of the available places are being taken up through the free entitlement.

7.22 Relative supply of childcare for children under five

In order to gain a better understanding of sufficiency, the number of childcare places can be divided in to the total population of the eligible age group.

The figures for relative supply are not intended to show the actual provision available per child. To do so would be to assume that all children in that age group require a full time childcare place, which is obviously not the case. Also, some of the early years provision in The City has admissions criteria that limit its accessibility. The calculation of relative supply is merely intended to give a more proportional representation of childcare supply than places alone could provide.

The Greater London Authority's 2010 Round of Demographic Projections give a projected population figure of **386** for the 0-4 age group in The City of London. This gives a relative supply percentage of **98%**.

7.23 New provision planned

At the time of writing a new day nursery in The City of London is about to open. Its Ofsted registration is in process, and when complete will enable the nursery to offer 100 places.

FYI reports that there are currently three people expressing an interest in registering as childminders in The City.

7.3 Registered out of school childcare places by provider type and SOA

Table 39 below shows the available places registered places with out of school providers in The City.

Table 39. Registered out of school childcare places by provider type and SOA

SOA	Provider type	Maximum registered places	Total places per SOA
001d – The Rest of The City	After school club	45	45
001e - Portsoken	After school club	32	64
	Holiday playscheme	32	
Total		109	109

Source: City of London Family and Young People's Information Service, March 2011

109 places are registered for children aged 5 and over in out of school provision. Further provision is also available to City children at an after school club and holiday playscheme in Golden Lane Campus. This setting is located in the London Borough of Islington.

Play opportunities for 5-14s are also provided by The City of London Youth and Play Service.

The projected population of children and young people aged 5-14 for 2011 is **734**. This gives a relative supply percentage of **15%**.

Vacancy and occupancy data for out of school childcare was not available at the time of completing the CSA 2011.

Issue

While The City of London has a high level of relative supply of early years childcare, the level of supply of childcare for school-aged children is much lower.

7.4 Cost of childcare

Cost data was available for three early years settings. The overall average across these three settings and their separate age bandings was **£298.67** a week.

The Daycare Trust document *London Childcare Facts and Figures* gives an average weekly cost for early years childcare in London of **£103**.

Finding

Available data for early years childcare provision in The City indicate that it costs nearly three times as much as the Greater London average.

8. Gaps analysis

This section of the CSA brings together data on demographics, findings from the consultation conducted by Coda during the summer of 2010 and childcare supply. In doing so it aims to identify current and future childcare sufficiency gaps in The City.

A matrix approach has been used for the analysis. This enables the various factors contributing to the gap to be set out next to each other so that their combined impact can be more easily understood.

Issues have been grouped together under six themes, and there are recommendations for action in order to address the issues that have been identified. These will form the basis of a CSA action plan that will be implemented over the next three years.

When identifying issues in this section the six types of gap specified in the statutory guidance have been considered. Many of the issues cut across several of these however.

The six types of gap

- **Type gaps:** not enough childcare of a particular type
- **Income gaps:** shortage of childcare that is affordable to parents living nearby
- **Time gaps:** shortage of childcare that is available at the times parents say they need it
- **Age gaps:** shortage of childcare for children of certain ages, for example 5-14
- **Specific needs gaps:** insufficient childcare for families with disabilities or cultural needs
- **Geographical gaps:** a lack of childcare in certain areas and localities.

Area 1. Sufficiency of early years childcare

Issue	Demographic factors	Evidence from the parents survey	Evidence from childcare provision	Conclusions	Recommendations
<p>Supply of early years childcare in The City is relatively high but choice and accessibility is limited.</p>	<ul style="list-style-type: none"> The total population of 0-14s is projected to rise by 10% by the time of the next CSA in 2014. 90 new housing units per year are being created in The City. While incomes are relatively high in The City there are pockets of deprivation. 	<ul style="list-style-type: none"> 40% of parents surveyed who were using childcare were accessing some or all of their provision outside of The City. Some parents report that they access childcare in other local authority areas because there is no childcare of that type available in The City 70% of parents surveyed who were not currently using childcare stated that they would prefer to be using childcare if suitable affordable provision was available to them. 30 parents not currently using childcare would ideally be using 24 hours a week of day nursery provision across term time and school holidays. 56% of surveyed parents who were currently using formal childcare stated that they would prefer different arrangements. For most of these this meant a different type of provision. 	<ul style="list-style-type: none"> Relative supply of early years childcare is statistically very high: 98% (virtually one place per child). Nursery providers in The City of London reported that, on average 56% of the parents who use their setting live in The City. There is evidence that some nurseries are not offering their full quota of places due to a perceived lack of demand. Only two childminders are registered in The City (although three more are in pre-registration) 	<p>Despite a high figure for relative supply of early years childcare, the CSA found evidence of considerable unmet need indicating a lack of sufficiency.</p> <p>The admissions criteria of some of the settings could be the cause. One of The City's day nurseries is a workplace nursery only available to staff and to large providers of nursery places are independent schools.</p> <p>Childminding can be a flexible, affordable alternative to nursery childcare. However, few parents expressed a preference for childminding.</p>	<p>The City should plan how to met unmet need for early years childcare. One way of doing this would be to increase the number of childminders.</p> <p>Any recruitment of childminders would need to be supported by a publicity campaign publicising the benefits of this type of provision.</p> <p>The City should investigate whether nurseries are purposely under-staffed so as not to offer their full quota of registered paces. Evidence suggest there is unmet demand for nursery provision.</p> <p>Better data on occupancy and the true availability places is needed.</p>

Issue	Demographic factors	Evidence from the parents survey	Evidence from childcare provision	Conclusions	Recommendations
A very small proportion of early years places are being funded through the free entitlement.		<ul style="list-style-type: none"> 41% of eligible parents (16 parents) were not accessing any of their entitlement. Six parents with a three or four year old were not accessing any of their free entitlement due to a lack of available places. 20 non childcare using parents most frequently specified unmet need for a term time childcare of 13 hours per week in a maintained school nursery (20 parents out of 65, 31%). 	<ul style="list-style-type: none"> Of 202 applicable early years childcare places in The City only 14 were being funded by free entitlement in Spring term 2011. Data suggests that the average cost of nursery provision in The City is nearly three times that of the London average. 	<p>The evidence suggests that the free entitlement is not being properly offered by settings in The City.</p> <p>The cost of early years childcare in The City is prohibitively high from some parents who could be benefiting from free places.</p>	<p>Further research should be conducted into why so few places in early years settings are taken up by parents claiming free entitlement.</p> <p>If necessary stricter procedures should be implemented to encourage compliance from providers in publicising the entitlement and making their full quota of places available.</p>

Area 2. Sufficiency of childcare during the school holidays

Issue	Demographic factors	Evidence from the parents survey	Evidence from childcare provision	Conclusions	Recommendations
Supply of childcare for 5-14s is low in The City	<ul style="list-style-type: none"> The population of the 5-10 age group is projected to rise sharply after 2014. 	<ul style="list-style-type: none"> Half of the respondents to the survey stated that the school holidays present difficulties for them as parents. Most of these parents felt that there is not enough childcare or activities for children during the holidays. Current childcare users wishing to use different provision most frequently specified holiday play provision as the type of childcare they would prefer to be using. 	<ul style="list-style-type: none"> Relative supply of out of school childcare is 15%. Only one holiday playscheme is registered in The City. With 32 places it represents a relative supply for 5-14s of 4%. 	<p>The school holidays present the biggest challenges to working parents. One holiday playscheme does not seem sufficient, and demand could probably support further provision.</p>	<p>The City should encourage more childcare provision to operate in the school holidays.</p> <p>Term time out of school providers should be encouraged to run holiday playschemes or to open up their premises to another organisation who could run the provision.</p>

Area 3. Supporting the affordability of childcare

Issue	Demographic factors	Evidence from the parents survey	Evidence from childcare provision	Conclusions	Recommendations
<p>Average childcare costs in The City are comparatively very high.</p>	<ul style="list-style-type: none"> Portsoken area of The City is among the 20% most economically deprived nationally. 	<ul style="list-style-type: none"> Nearly a quarter (22.5%) of parents surveyed had a household income of under £20,000 a year. 	<ul style="list-style-type: none"> Available data for early years childcare costs in The City gives an overall average of £298.67 a week – over three times the reported London average. . 	<p>The cost of childcare in The City is prohibitively high for families on low incomes. WTC and free entitlement could help these families access childcare but both seem underused.</p>	<p>The City should prioritise increasing access to financial assistance methods that could enable more low income families to access childcare.</p>
<p>Data suggests low take up and awareness of the Childcare Element of Working Tax Credit</p>		<ul style="list-style-type: none"> None of the 130 parents using childcare who were surveyed for the CSA 2011 were claiming the childcare element of Working Tax Credit. 48% of these could not give a clear reason why they were not claiming. Jobcentre Plus staff report low awareness of WTC among City parents they work with. 	<ul style="list-style-type: none"> Nursery providers estimate that less than a quarter of their customers are claiming WTC. 	<p>There would seem to be sufficient numbers of families with incomes that would qualify them to claim WTC. A large proportion of parents in the survey could not give a reason why they were not claiming, which indicates a considerable lack of awareness.</p>	<p>A marketing campaign should be undertaken to raise awareness of the Childcare Element of WTC. This should focus on dispelling bad associations and reassuring parents that the benefit is worth claiming.</p> <p>FYI should consider providing basic 'better off calculations to parents to encourage take up of WTC.</p>

Area 4. Meeting the needs of families with children who have additional needs

Issue	Demographic factors	Evidence from the parents survey	Evidence from childcare provision	Conclusions	Recommendations
Some families with disabled children report that they find childcare in The City inaccessible		<ul style="list-style-type: none"> Two parents stated that their child's need for regular medication was a problem when accessing childcare or activities. 	<ul style="list-style-type: none"> Nursery providers expressed a need for training from The City of London Corporation and would welcome more opportunities to network with other providers. 	Some improvements could be made to the accessibility of childcare for disabled children by offering training to providers. Evidence suggests that providers would appreciate this.	<p>The City should consider running training for childcare providers in meeting the needs of disabled children, if possible including medical support to severely disabled children.</p> <p>Following this, FYI should ensure that details of provision on its database properly reflects provider's ability to include disabled children.</p>

Area 5. Ensuring access to Information

Issue	Demographic factors	Evidence from the parents survey	Evidence from childcare provision	Conclusions	Recommendations
Data suggests that Awareness of FYI is low among City parents		<ul style="list-style-type: none"> Awareness of the Family and Young People's Information Service was low among surveyed parents. Less than half were aware of the service. 	<ul style="list-style-type: none"> 	Because it is a service that people turn to only when they need it, marketing the FIS needs to be sustained. This can be costly but it is necessary if the service is to be effective.	FYI should explore ways of marketing its service to City residents, including more outreach to deprived neighbourhoods.
Evidence suggests that <i>What's On</i> is not reaching Asian families as well as it could	<ul style="list-style-type: none"> People of Asian ethnicities make up the largest BME group in The City of London and the second largest ethnic group after White. 	<ul style="list-style-type: none"> There is some evidence that the <i>What's On</i> guide is not reaching parents of Asian ethnicities. Parents from these communities were significantly less likely to be aware of the publication and most likely to have not read it if they were aware. 		The City has a significant population of Bangladeshi families but evidence suggests that the <i>What's On</i> guide is not meeting the needs of Asian readers. This is not necessarily a language barrier, it could simply be that people don't feel it is aimed at them.	FYI should consider ways to make <i>What's On</i> more inclusive of Asian families. This could include translated sections, or the inclusion of culturally specific features or sections.

9. Appendices

9.1. Glossary

This section provides definitions for some of the terminology used in this report.

After school club: childcare provided after school hours, until 6pm. Can be located on school premises as well as in other venues.

Breakfast club: childcare provided before school hours including healthy breakfast.

Childcare Any activity where a child is the responsibility of adults that are neither parents nor relatives for more than two hours. This does not include statutory education during the school day but does include clubs held before or after school and **reception classes** for under-fives.

Childcare Act 2006 An act of Parliament that made it law in England for local authorities to carry out certain duties in relation to childcare. These include measuring the sufficiency of childcare and publishing **Childcare Sufficiency Assessments** such as this document.

Childcare market (also 'childcare sector') All of the organisations and people providing professional childcare in the borough. Like any service industry, childcare is affected by levels of supply and demand for what it provides. It is the role of the local authority to ensure this works as well as possible for families. This is known as '**managing the market**'.

Childcare on domestic premises: At least four registered childcarers providing childcare on premises that are mainly used as somebody's home. The term is used by Ofsted when registering childcare in order to differentiate this kind of provision from nurseries and other settings which are classified as **Childcare on non-domestic premises**.

Childminder: A registered childcarer providing childcare in their own home.

Children's Centre (also Sure Start Children's Centre) Children's Centres provide a range of services and activities for families who live nearby. This can include parenting support, drop-in groups and health services. Some Children's Centres also have nurseries on site.

Day nursery A nursery where full daycare for children under five is provided. This is usually from 8am until 6pm but hours can vary.

Deprivation In this report deprivation is used to describe parts of The City where there people experience poverty, and poor quality of life. This is measured through the **Index of Multiple Deprivation**, which ranks small geographical areas known as **LSOAs** (see below) on a national scale depending on how much deprivation they contain.

Early Years Foundation Stage A programme of learning and development for children under five that all registered childcarers must provide when looking after children in this age group. (currently under review).

Family Information Service (FIS) An FIS provides impartial information advice and guidance about childcare and other services for families and young people. The City's FIS is called FYI (Family and Young People's Information).

Free entitlement to nursery education Children are eligible to receive 15 hours early years childcare from the school term following their third birthday, up until they are old enough to start school. This is funded by central government and administered by the local authority.

Holiday (play)schemes: Childcare provided during school holidays. Usually for children over five and often lasting for a full day over a period of one or more weeks.

Independent school nursery (also Nursery unit/class of independent school) An independent school is not managed by the local authority and is self financing – usually through charging fees to parents. Providers listed here are the nursery classes provided at these schools for children aged three to five.

Out of school childcare Any childcare for children of school age (over five) that is run outside of school hours, eg. **Breakfast clubs, after school clubs, holiday schemes**

Pre-school (sometimes called playgroups) A types of nursery (or early years setting) where childcare is provided for children aged from three (sometimes two and a half) to five years old. While some are open all day, this is

always divided into separate sessions of less than four hours. Because of this, pre-schools are classified by as **sessional** childcare.

SOA Super Output Area. The Office for National Statistics created Super Output Areas (SOAs) after the 2001 Census as a geographical unit for statistical study. There are two layers of SOAs: middle and lower (LSOAs). These are the smaller of the two and contain between 1000 and 5000 residents in 400 to 2000 households.

Statutory Required by a law made by government. For example, statutory education.

Appendix 2. Parents survey questionnaire

City of London CSA vers 3			
Interviewer name:			
Date of interview		Location	
<p>INTRO</p> <p>Good morning / afternoon / evening. My name is from Morgans Research, on behalf of the City of London. We are contacting parents & carers who live in the City to find out what City families need in relation to services that look after children such as children's centres, playgroups, nurseries, childminders, afterschool and holiday playschemes, weekend play activities etc.</p> <p>The City of London have asked us to talk with parents and carers specifically about the types of services that they use or would like to use and to find about any issues that stop parents / carers from using services or attending activities that they would like to use.</p> <p>Can I please check - do you have any children aged 0-14 or do you have any children up to 17 yrs old who have a disability in your household? And may I check that you are involved in caring for this child/ren?</p> <p>I'd like to assure you that all the information you give will be kept in the strictest confidence and used for research purposes only. It will not be possible to identify any particular individual or address in the results.</p> <p>Should you wish to verify the bona fide nature of the project you can call Kaimi Ithia, Family and Young People's Information Service Manager on Tel: 020 7332 1002, or email her at fyi@cityoflondon.gov.uk.</p> <p>Alternatively, we are members of the Market Research Society and you can call them on 0500 39 6999.</p>			

QA. May I start by asking how many children there are aged 0-14 in your household?	QB. How old is/are each of the child/children in the household? YOUNGEST FIRST - TYPE IN AGE(s)		QC. Do any of these children have a disability or any additional needs? TICK YES/NO FOR EACH CHILD		QD. Do you have a child aged 15-17 who is disabled or who has any additional needs?	
One <input type="checkbox"/>	Child 1		Child 1	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/> REF <input type="checkbox"/>
Two <input type="checkbox"/>	Child 2		Child 2	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
Three <input type="checkbox"/>	Child 3		Child 3	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
Four <input type="checkbox"/>	Child 4		Child 4	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
Five plus <input type="checkbox"/>	Child 5		Child 5	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
NONE <input type="checkbox"/>						
QX. What is the broad nature of the disability / additional need of this child?	CHILD 1 (QX1)	CHILD 2 (QX2)	CHILD 3 (QX3)	CHILD 4 (QX4)	CHILD 5 (QX5)	CHILD aged 15-17 (QDX)
Physical disability						
Behavioural or emotional disability						
Learning disabilities						
Sensory impairment						
Other (write in):						
DK/NA						

QE. Would you describe your household as a one parent family or a two parent family?	QF. Which of these activities best describes what you are doing at present?		QG. Which of these activities best describes what your partner is doing at present?	
One parent <input type="checkbox"/> Two parent <input type="checkbox"/> Other (WRITE IN): <input type="checkbox"/> -----	Work full-time (30 + hours)	1	Work full-time (30 + hours)	1
	Work part-time (16-29 hours)	2	Work part-time (16-29 hours)	2
	Work part-time (under 16 hours)	3	Work part-time (under 16 hours)	3
	Look after home / family	4	Look after home / family	4
	Registered unemployed	5	Registered unemployed	5
	Unemployed but not registered	6	Unemployed but not registered	6
	On a training scheme for work	7	On a training scheme for work	7
	Voluntary work	8	Voluntary work	8
	Student	9	Student	9
	Retired	10	Retired	10
	Carer	11	Carer	11
	Other SPECIFY	12	Other SPECIFY	12
QH. In a normal working week, do you (or you partner) tend to work within normal working hours eg between 8am & 6pm Monday to Friday, or do you tend to work at other times?				
Normal office hours	1	Early mornings	4	
Normal office hours plus overtime	2	Evenings	5	
Fixed times mainly out of normal office hours	3	Overnight	6	
Shift work (various shift times)	4	Weekends	7	

I'm now going to ask you about the childcare and activity arrangements you use for your child/children. Many parents use formal childcare such as childminders, day nurseries, playgroups and after school clubs as well as activity clubs after school at weekends or in the school holidays and/or informal arrangements such as older siblings, other family members including grandparents, friends or neighbours.

Q1. Do you use any services or make arrangements during TERM TIME to look after your children?	Q2. Do you use childcare or activities for all of your children during TERM TIME?	Q3C. And for which children do you use childcare during TERM TIME? GO TO Q4A
Yes	1	Yes, all of them
No (Go to Q3A)	2	Some but not all
Check use of family friends and if use any activities after school in TERM TIME		Child 1 <input type="checkbox"/> Child 2 <input type="checkbox"/> Child 3 <input type="checkbox"/> Child 4 <input type="checkbox"/> Child 5 <input type="checkbox"/> Child (15-17) <input type="checkbox"/>

Q3A. Why do you NOT use any FORMAL childcare or activities in TERM TIME?					
Can't afford it	1	Prefer my child is look after by someone my child knows	9	My child has additional needs and available provision doesn't meet those needs'	16
One parent always home	2	I don't trust anyone else to look after my child	10	Child too young	17
None suitable	3	Available childcare doesn't meet my needs	11	One parent works school hours only	18
Preferred childcare is full	4	Children old enough to look after themselves	12	One parent works from home	19
Poor quality	5	Grandparent/family available to help	13	Parents juggle work so one always home	20
Prefer to look after child myself	6	Don't know where to find information	14	I cannot access my preferred service	21
It's my choice/preference	7	Lack of childcare near to where I live	15	My family look after my child so I don't need childcare	22
Local childcare is not flexible or there is nothing available at the times I need it	8			Other SPECIFY:	23

GO TO Q5A

ASK CURRENT USERS OF INFORMAL AND/OR FORMAL CHILDCARE AND ACTIVITIES ABOUT TERM TIME – CHILD ONE IS YOUNGEST CHILD

Q4A. Thinking about a typical week, Monday to Friday during TERM TIME, please tell me what arrangements you use to look after your child/children?

	Q4A1. Childcare or activity used		Q4A2. For how many hours do you use this type of care/activity during a typical week-day?		Q4A3. Do you use this childcare or activity anytime before 8am?		Q4A4. Do you use this childcare or activity after 6pm at all?	
	C1	C2	C1	C2	C1	C2	C1	C2
INFORMAL								
Parent/carer (self partner)								
Grandparent								
Older brother / sister								
Relative / friend / neighbour								
FORMAL	C1	C2	C1	C2	C1	C2	C1	C2
Crèche								
Day nursery								
Private nursery on or attached to school premises								
Nursery run by a school								
Workplace nursery								
Registered childminder								
Nanny / home childcarer								
Pre-school playgroup								
Special provision for disabled children or additional needs								
Breakfast club/childcare (paid for)								
After school club/childcare (paid for)								
After school activity run by the school (like a sports club)								
Youth Club								
Other: (write in)								

Q4A5. Do you use childcare/activities at the weekends?
 Yes No

Q4A6. Do you need childcare/activities at the weekends?
 Yes No

If 'YES': Q4A7. What childcare do you need at the weekends and for what times? PROBE FULLY

Q4V. Why do you use this type of childcare/activity during TERM TIME? PROBE FULLY	Q4W. What is the MAIN reason?	
Necessity – out at work / training / study	1	1
Enable child to socialise	2	2
Free entitlement/nursery education place	3	3
Use informal childcare as cost of formal childcare too high	4	4
Prefer to leave child with someone parent and child knows	5	5
Get child ready for school environment	6	6
	7	7
Something to do after school	8	8
It's free / doesn't cost anything (use of informal care)	9	9
Low cost	10	10
Parent at home/preference	11	11
For flexibility/convenience	12	12
Work around school hours	13	13
Other - SPECIFY:	97	97

PROMPT ALL PARENTS TO CHECK ABOUT SCHOOL HOLIDAY TIMES HOLIDAY CARE

Q5A. Did you use childcare/activities during the School holidays?	Child 1	Child 2	Child 3	Child 4	Child 5
Yes - Go to Q5C					
No – Go to Q5B and then Q5C					
IF NO: Q5B. Why did you not use childcare or activities during the school holidays?					
Do not trust anyone else to look after your child					
Too expensive / cost					
Available childcare doesn't meet child's needs					
None available					
Times are not useful / too short					
Prefer to look after child yourself					
Prefer child is looked after by someone you know					
Child does not want to attend local holiday schemes					
Quality of local schemes is not good enough					
Not reliable					
Child (ren) old enough to look after self(ves)					
Child (ren) too young					
One parent always at home					
One parent works school term times only					
One parent works from home					
Other (write in):					

ASK ALL PARENTS

Q5C. What are the main issues you face looking after your children/keeping your children occupied during the school holidays? PROBE FULLY

Q5D. What do you need to be able to access during the school holidays in order to keep your children occupied or enable you to work/study? PROBE FULLY

IF NON USER OF CHILDCARE OR ACTIVITIES GO TO Q17B on page 8

FOR PARENTS USING CHILDCARE OR ACTIVITIES IN SCHOOL HOLIDAYS ASK:

Q5E. Do you use childcare for all of your children?

Yes, all of them

Some but not all

Q5F. What children do you use childcare for?

Child 1

Child 2

Child 3

Child 4

Child 5

Child (15-17)

FOR EACH CHILD SAYING YES AT Q5F:

SCHOOL HOLIDAY CARE – CHILD 1 (Age: _____) and CHILD 2 (Age: _____)

Q6A. Thinking about a typical week, Monday to Friday during the school holidays (eg last summer), please tell me what arrangements you used to look after your child/children or activities you used to keep them occupied?

	Q6A1. Childcare or activity used		Q6A2. For how many hours did you use during a typical week in the summer holiday?		Q6A3. Do you/will you use this childcare or activity anytime before 8am?		Q6A4. Do you/will you use this childcare or activity after 6pm at all?	
	C1	C2	C1	C2	C1	C2	C1	C2
INFORMAL								
Parent/carer (self partner)								
Grandparent								
Older brother / sister								
Other relative / friend / neighbour								
FORMAL								
Crèche								
Day nursery								
Private nursery on or attached to school premises								
Workplace nursery								
Registered childminder								
Nanny / home childcarer								
Special provision for disabled children or additional needs								
Holiday club/playscheme (school holidays)								
Youth Club								
Activity club (not school based)								
Other: (write in)								

NB – IF MORE THAN 2 CHILDREN (UP TO 6), CONTINUE ON ADDITIONAL FORM(s)

Q6V. Why do you use this type of childcare/activity in the holidays? PROBE FULLY	Q6W. What is the MAIN reason?	
Necessity – out at work / training / study	1	1
Enable child to socialise	2	2
Free entitlement/nursery education place	3	3
Use informal childcare as cost of formal childcare too high	4	4
Prefer to leave child with someone parent and child knows	5	5
Get child ready for school environment	6	6
Something to do in the holidays	7	7
Something to do after school	8	8
It's free / doesn't cost anything (use of informal care)	9	9
Low cost	10	10
Parent at home/preference	11	11
For flexibility/convenience	12	12
Work around school hours	13	13
Other - SPECIFY:	97	97

ASK ALL PARENTS WHO USE FORMAL & INFORMAL USERS (Term time and/or school hols)

Q7X. Which statement best applies to yourself?

1. All of the childcare/activities I use are located in the City of London
2. Some of the childcare/activities I use are located in the City of London and some OUTSIDE
3. All of the childcare/activities I use are located OUTSIDE the City of London

Q7Y (IF OUTSIDE CITY) Which borough (s) do you use?

- | | | |
|----------------|--------------------------|--------------|
| 1. Islington | 2. Tower Hamlets | 3. Southwark |
| 4. Lambeth | 5. Hackney | 6. Camden |
| 7. Westminster | 8. Other (Specify) _____ | |

Q7Z Why do you access childcare and activities outside the City of London?

1. It is the closest option to where I live
2. It is a more affordable option
3. It is more convenient due to employment/study arrangements
4. I like a particular setting/childminder/activity
5. I prefer the time offered
6. Other SPECIFY _____

Q7A. Overall how satisfied are you with your current childcare/activities?		Q7B. And how satisfied are you with the QUALITY of your current childcare/activities?		Q7C. And how satisfied are you with the COST of your current childcare/activities?	
Very satisfied	1	Very satisfied	1	Very satisfied	1
Quite satisfied	2	Quite satisfied	2	Quite satisfied	2
Neither satisfied nor dissatisfied	3	Neither satisfied nor dissatisfied	3	Neither satisfied nor dissatisfied	3
Quite dissatisfied	4	Quite dissatisfied	4	Quite dissatisfied	4
Very dissatisfied	5	Very dissatisfied	5	Very dissatisfied	5
DK/NA	6	DK/NA	6	DK/NA	6

Q8. Do you currently receive any of the following?		IF CODE 7 'Childcare element of WTC' NOT mentioned ASK Q9	
Child tax credit	1	Q9. Why are you not in receipt of the childcare element of the Working Tax Credit?	
Working tax credit (not childcare element)	2		
Childcare element of working tax credit	3	Household income too high	1
Childcare Vouchers	4	Not aware of it	2
Salary sacrifice Scheme	5	Application was turned down	3
Subsidised Workplace Nursery	6	Had a bad experience	4
Free early education entitlement/nursery education place	7	Application process is too confusing / difficult	5
Financial support with childcare from an employer	8	Other (WRITE IN):	97
Fair access to care for disabled children	9		
Other (WRITE IN):	97		
None of these	98	Don't know	99
REFUSED	96		

		IF NO at Q10 ask:	
Q10. Do your current childcare arrangements meet your needs		Q11. Why do you say that?	
Yes	1	Cost / can't afford to use preferred care	1
No	2	Poor quality	2
		Preferred care not available	3
		Location	4
		Can't get hours / times I need	5
		Other (WRITE IN):	97

ASK THOSE WHO CURRENTLY USE FORMAL CHILDCARE OR ACTIVITY

Q12A. Would you like to use more FORMAL childcare or activities in the future		
Yes, use more of the same	1	Ask Q12B then Q13
Yes, use another type of childcare	2	Ask Q12B then Q14A/B
Yes use more of the same AND another type	3	Ask Q12B, Q13 and Q14 A/B
No	4	Go to Q19a if 3-4 year old – otherwise Demographics (pg 19)

	Child 1	How many hours in term time?	How many hours in school holidays	Child 2	How many hours in term time?	How many hours in school holidays
Q12B. For which children would you like to use more formal childcare in the future?						
Q13. What existing formal childcare or activity would you like to use more of(FOR EACH CHILD)						
Creche						
Day nursery						
Private nursery on or attached to school premises						
Nursery run by a school						
Workplace nursery						
Registered childminder						
Nanny /Aupair /Home childcarer						
Pre-school playgroup						
Special provision for disabled children or additional needs						
Breakfast club/childcare (paid for)						
After school club/childcare (paid for)						
After school activity run by the school (like a sports club)						
Holiday club/playscheme childcare (paid for)						
Youth club						
Activity club						
Other (specify)						

ASK THOSE WHO WOULD LIKE TO USE ANOTHER TYPE OF CHILDCARE OR ACTIVITY FOR EACH CHILD (at Q12A)

Q14A. What NEW FORMAL childcare or activity would you like to use for your child?	Child 1	How many hours in term time?	How many hours in school holidays	Child 2	How many hours in term time?	How many hours in school holidays
Creche						
Day nursery						
Nursery class on or attached to school premises						
Nursery run by a school						
Workplace nursery						
Registered childminder						
Nanny / aupair/home childcarer						
Pre-school playgroup						
Special provision for disabled children or additional needs						
Breakfast club/childcare (paid for)						
After school club/childcare (paid for)						
After school activity run by the school (like a sports club)						
Holiday club/childcare (paid for)						
Youth Club						
Activity Club						
Other (specify)						

ASK Q17B FOR NON USERS OF FORMAL CHILDCARE OR ACTIVITIES ONLY

Q17B. If suitable and affordable formal childcare or an activity was available, would you consider using it?				YES <input type="checkbox"/>	NO <input type="checkbox"/>	GO TO Q19
IF YES ask:	Child 1	Child 2	Child 3	Child 4	Child 5	Child 6
Q17C. For which child / children would you use formal childcare or activities?						
Q18A. What type of formal childcare or activity would you use? (FOR EACH CHILD)						
	Child 1	How many hours term	How many hrs in hols	Child 2	How many hours term	How many hours in school holidays
Creche						
Day nursery						
Private nursery on or attached to school premises						
Nursery run by a school						
Workplace nursery						
Registered childminder						
Nanny/home childcarer						
Pre-school playgroup						
Special provision for disabled children or additional needs						
Breakfast club/childcare (paid for)						
After school club/childcare (paid for)						
After school activity run by the school (like a sports club)						
Holiday club/childcare (paid for)						
Youth club						
Activity club						
Other (specify)						

Q18B. Why would you use this childcare or activity? PROBE FULLY – WRITE IN FULL

ASK ALL PARENTS WITH A 3-4 YEAR OLD ONLY (regardless of use of childcare/activities)

Q19A. I would now like to talk specifically about your child aged 3 or 4. Three year olds in the term following their 3rd birthday and all 4 year olds are entitled to a free early education place for up to 15 hours a week for a maximum of 38 weeks per year.

Q19A. Are you aware of the free part time nursery education places available to all 3-4 year olds?		IF YES: Q19B. Do you currently use your free place?		IF SOME: Q19C. How many hours per week do you use (of your 15 hours?)
Yes	1	Yes – ALL of it	1	WRITE IN NUMBER:
No	2	Yes – SOME of it	2	
(IF NO GO TO Q19B)		No – NONE of it	3	

IF SOME OF IT: Q19D. Why did you not take up all of your free entitlement/nursery education place?	Q19D		OR – IF NONE OF IT: Q19E. Why do you not currently take up your free entitlement/nursery education place at all?		
Q19E					
Rather look after child myself	1	1	Don't know where it is offered	12	12
Prefer to use relative, family, friend	2	2	Provision not suitable for disabled children	13	13
Prefer child in a home-based setting	3	3	Too many hours for the age of my child	14	14
Quality of care not good enough	4	4	Priority is given to 4 year olds	15	15
Too far away	5	5	I believe my child too young for nursery	16	16
Lack of/difficult transport	6	6	Child not yet old enough (just turned 3 yrs)	17	17
Full up, no spaces available	7	7	Child already in reception class	18	18
None available at times I need	8	8	Other – WRITE IN:		
Can't cater for irregular patterns of usage	9	9			
Not available at the weekends	10	10			
Not aware of entitlement	11	11			

ASK ALL PARENTS WITH A 3-4 YEAR OLD

<p>Q20. From September 2012 the 15 hours per week over 38 weeks of the year will be stretched to allow you to take fewer hours per week but over a longer period of time eg 12 hours per week over 47 weeks. Were this available today is this something you would use?</p>	<p>Yes <input type="checkbox"/></p>	<p>No <input type="checkbox"/></p>
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ASK ALL PARENTS

<p>Q21. Have you heard of the Families and Young People’s Information Service?</p>	<p>Yes <input type="checkbox"/></p>	<p>No <input type="checkbox"/></p>
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IF ‘YES’

<p>Q22. If yes, have you contacted the Family and Young people’s Information Service in the past 12 months?</p>	<p>Yes <input type="checkbox"/></p>	<p>No <input type="checkbox"/></p>
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<p>Q23. If yes, what was your reason for contacting the FIS?</p>			
Looking for activities for children	<input type="checkbox"/>	Support for a child with additional needs	<input type="checkbox"/>
Looking for childcare	<input type="checkbox"/>	Support for childcare costs	<input type="checkbox"/>
Enquiring about a school or schooling	<input type="checkbox"/>	Parenting support	<input type="checkbox"/>
Benefits advice	<input type="checkbox"/>	Other (specify)	<input type="checkbox"/>

<p>Q24. How helpful was the FIS?</p>	<p>Very helpful <input type="checkbox"/></p>	<p>Not very helpful <input type="checkbox"/></p>
	<p>Somewhat helpful <input type="checkbox"/></p>	<p>DK/NA <input type="checkbox"/></p>

ASK ALL PARENTS

Q25. Have you heard of or seen the City’s What’s On guide which is full of information about childcare and activities in and around the City?

Yes No

Q26 (If yes) Where did you see the guide? **PROBE FULLY – WRITE IN**
Generate list of likely places

Q27. Have you ever read / used the What’s On guide?

Yes No

Q28. (if yes) How useful did you find the guide?

Useful Very useful Not useful at all DK/NA

Section for Parents of children with a disability/special/additional need ONLY.

You mentioned earlier that you had a child with a disability/special educational need (refer to QX).

Q29. What particular issues or problems do you face in caring for this child in terms of accessing childcare or activities? **PROBE FULLY**

Q30. What assistance or support in terms of childcare arrangements or accessing activities do you need?

PROBE FULLY

Demographics

QSEX – Select Gender of Respondent		QAGE. Can I ask you how old you are? Ask age and then record in relevant age range box below			
MALE	<input type="checkbox"/>	16-19		45-49	
		20-24		50-54	
		25-29		55-59	
FEMALE	<input type="checkbox"/>	30-34		60-64	
		35-39		65+	
		40-44		REFUSED	

QCARER. Can I just check your relationship with the child / children?			
Mother	1	Other family member	6
Father	2	Other – WRITE IN:	7
Step parent	3		
Partner of parent	4		
Grandparent	5		

QINC. What is your total household income?			
Less than £10,000	1	£40,000 - £65,999	6
£10,000 - £14,999	2	£66,000 - £100,000	7
£15,000 - £19,999	3	£100,000 plus	8
£20,000 - £29,999	4	Refused	9
£30,000 - £39,999	5	Don't know	10

QETH. Which of the following ethnic groups do you belong to?			
WHITE		MIXED	
English, Welsh, Scottish, Northern Irish, British Irish	1	White and Asian	11
Other White (write in)	2	White & Black Caribbean	12
		White & Black African	13
BLACK		Other Mixed background (write in)	14
African	3		
Caribbean	4	OTHER	
Other Black (write in)	5	Gypsy/Roma	15
		Traveller of Irish Heritage	16
ASIAN		OTHER (write in)	17
Bangladeshi	6		
Pakistani	7		
Chinese	8		
Indian	9		
Other Asian (write in)	10		

POSTCODE
May I just check your postcode please? Write in postcode:
WRITE IN NAME OF RESPONDENT:

QDIS. And finally, can you tell me whether you have a disability?			
Physical disability		Other – WRITE IN:	
Behavioural or Emotional disability			
Learning disabilities		NONE	
Refused		DK/NA	

Thank you for your time and comments. Please be assured that all of your responses will remain confidential.