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Affordable childcare when you need it?

Childcare opening hours in the context of the Childcare Act 2016



OxPolicy is a student run think tank that seeks to investigate and subsequently improve the quality of debate about important issues in our society.

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Executive Summary

This research examines the efficacy of the Childcare Act 2016 in its stated aim of supporting working parents of children below school age in England. All three- to four-year-olds in England were previously entitled to 15 hours of free childcare per week. The Childcare Act 2016 provides for 15 additional free hours of public childcare to working parents, for a total of 30 free hours, with the double objectives of enabling parents to work more hours and reducing childcare costs.

This report takes a novel perspective by examining the extent to which public childcare is available during standard working hours. The research focuses on two London boroughs of disparate median income: Islington and Barking & Dagenham. The findings show that only 9 – 45 % of individual public childcare providers in these boroughs cover the entire standard working day from 8:00 AM to 6:00 PM. Furthermore, the hourly price of childcare outside the free hours allotment may rise to make childcare beyond the free 30 hours unaffordable. Thus, our research shows that while the Childcare Act 2016 does support families in which parents work for up to 30 hours during normal standard hours, the Act is less effective in helping parents who work more than 30 hours, and/or who work non-standard hours.

The research gives rise to seven policy proposals to improve the efficacy of the Childcare Act 2016. These proposals are embedded in the text so the reader can follow the rationale from which they flow, and are also listed separately on the final page of the report, following the conclusion.

Introduction

Why this research matters

In many policy statements from successive governments in the last 25 years, England has avowed its commitment to improve the possibility for parents, and particularly mothers of young children to engage in paid labour. Indeed, cuts to child benefits and measures making these benefits conditional on parents' employment have made labour market participation a necessity for many. At the same time, the availability of affordable, quality childcare in the UK is low by international standards, and parents working in the UK continue to struggle to combine work and childcare.

The Childcare Act 2016 was passed in March 2016. This report evaluates the efficacy of the Act in improving the provision of childcare for working parents with children under five. Particularly, the report presents original research by OxPolicy that fills a gap in the knowledge of how effective public childcare is working for parents: a case study of the overlap between childcare opening hours and parents' work hours. From this original research and other evidence concerning cost, quality and the special concerns of parents from minority backgrounds, this report develops concrete policy proposals to increase the efficacy of the Childcare Act for the improvement of overall childcare policy in the UK.

Political rationale and usage patterns of public childcare in the UK

Following women's steeply increased labour market participation since the 1970s, academics and politicians have observed the risk of a growing 'care gap' as more of the (traditionally female) carer's time is spent in paid employment (Lewis 2001), and the (traditionally male) breadwinner has not increased his involvement in care significantly (Lewis 2009). At the same time, women in work are seen as a key driver of economic growth, which has been decelerating across Europe in recent decades (Pierson 2001). A common policy response to address the care gap in a way that supports further economic growth has been the promotion of public childcare (Lewis 2009).

The Childcare Act 2016 is one such policy. It expands the existing entitlement for three- to four-year-olds in England to 15 free hours of public childcare by an additional 15 free hours per week for those families in which each parent earns the equivalent of at least 16 hours pay at minimum wage per week (Department for Education 2015a). In so doing, the Act seeks to address the problem in the UK that formal childcare (i.e. childcare not provided by family or friends) is viewed by many parents as prohibitively expensive (Lewis 2009).

In the UK, most parents rely on a combination of formal and informal childcare (Rutter & Evans 2012). Practically speaking, the availability of public childcare for children below the age of five is of specific interest to parents, as children aged five and older are eligible for school in the UK (Education Act 2016). In 2013, 96% of three- to four-year-olds in England were enrolled in some form of formal, government funded early education, with parents of children in this age group most likely to use formal childcare, “reflecting their entitlement to government funded early education” (Department for Education 2014: 15). The free hours entitlement can be used at all types of registered nurseries, children’s centres, playgroups and pre-schools that offer childcare as well as through registered childminders. While the use of formal childcare for three- to four-year-olds has been increasing in England, especially in childcare centres (as opposed to childminders), there is a difference in usage patterns related to socio-economic status. As Rutter and Evans (2012) report, children from parents in occupations with lower average incomes are more likely to rely on informal care than are children from higher income backgrounds.

From national to local: The context and logic of OxPolicy’s original research

Differentiating between the national and the local level is important because childcare is fundamentally a local service: childcare needs to be regularly available where people need it. Any original research on improving availability needs to focus on the local, as vacant nursery places in Scotland are of no use to children on wait-lists in Wales. Due to the greater availability of data, this report focuses on two boroughs in London, examined in the form of a comparative case study. However, before examining the individual boroughs, the special case of childcare in London is briefly illustrated.

In London as elsewhere in the UK, cost and quality are of primary concern with regard to childcare. Cost is often broken down not only in terms of how much a family is required to spend on childcare per child as a percentage of their income, but also in terms of availability of childcare. This is due to the fact that availability, like cost, is a function of supply and demand. The issues of and relationships between cost, availability, and supply and demand are detailed in part II, but we note here that London has the highest childcare costs across all formal childcare provision in Britain, both in absolute terms and as a proportion of average income (Rutter 2015; Greater London Authority 2012). For this reason, the need for free childcare hours is most pressing in London, which is why OxPolicy has focused the analysis there.

Yet public childcare availability in terms of opening hours must be examined more local still than the city level, since the opening hours of childcare services in the northernmost tip of London can be of little use to families at the southern city boundaries. Thus the analysis was conducted on the level of the borough, under the assumption that for most people the availability of childcare in one’s own borough will have a meaningful impact on the ability to make use of the free hours entitlement. Unfortunately, due to limited

resources, it was not possible to conduct an analysis of all 32 London boroughs. In order to gain a meaningful understanding of available opening hours for different socio-economic groups, two boroughs of differing median annual income levels were chosen for comparison: Barking & Dagenham and Islington.

Barking & Dagenham was the borough in London with the second-lowest household income for the fiscal year 2012/2013, with a median estimate of £29,420 (Greater London Authority 2015). Newham had a slightly lower median household income, at £28,780, but had slightly more skewed values, making the centre of the income distribution less clear (Greater London Authority 2015). Barking & Dagenham was thus chosen as the case study borough to investigate childcare opening hours in low-income localities. Islington was chosen as the comparison case, because in the fiscal year 2012/13, Islington's median household income of £39,790 was closest to the median household income of all London boroughs, £39,642 (Greater London Authority 2015). In this research, Islington thus presents an example of childcare availability in a 'typical' London borough. Also, Islington stands in contrast to Barking & Dagenham in that a household with an annual income of £39,790 will not be eligible for most benefits that exist to aid with the cost of children, making public childcare (capped at an income of £100,000) one of the few applicable government support for families in that income bracket (Department for Education 2015a).¹

The structure and purpose of the report

The following main body of the report is divided into two parts. The first part delves into OxPolicy's original research, addressing our methodology, findings and their interpretation. The second part contextualizes both our research as well as the Childcare Act 2016 within the landscape of UK and English childcare policy. This latter part of the report covers the economics of childcare, issues of quality, as well as particular concerns for parents from minority groups. The final conclusion summarizes both our findings and our arguments that are based on them, and is followed by an overview of our policy recommendations.

¹ Furthermore, Islington and Barking & Dagenham are comparable in terms of their demographics: they have similar proportions of retirees, working age people and children.

Part I: Is childcare available when parents work?

Literature Review: Parents' work hours and childcare opening hours

Parents work hours

As the Childcare Act 2016 was explicitly designed to help families better combine working and parenting (Department for Education 2015), the central question is whether the 15 additional hours it provides can be used when parents need them. To answer this question two types of information must be combined: When do parents work and when is public childcare available?

First it should be established that people of prime parenting age tend to work more than people of other age groups. In the UK, people between age 25 and age 49 have the highest labour force participation rate of any group at 86.3 %, almost 10 % higher than the average of 77 % as measured for the age group 16-64 (Office for National Statistics 2015). However, labour force participation differs greatly by gender. For the final quarter of 2014, nearly 10 % more men were in paid employment, with 83.3 % male and 74.5 % female employment. In 2009, 64.96 % of mothers with children aged 2-4 years who were in the labour market worked part-time. Much research suggests that this is in large part because women reduce their work involvement to care for children in this age group (Azmat 2015; Office for National Statistics 2013).

So when do parents work these many hours? According to the fifth European Working Conditions Survey, most active labour force participants work standard hours from roughly 9:00 AM to time 5:00 PM five days a week (Eurofound 2012: 38). However, people in the UK tend to work longer hours, compared to other European countries (Lewis 2009). For a more specific working hours estimate for parents of young children in the UK, OxPolicy was able to obtain preliminary data from the Harmonised European Time Use Survey (HETUS) 2014-15 (Fisher & Gershuny 2013). The answers of 2,242 respondents were weighted to give estimates representative of the British population, and indicate that 23.4 % of mothers, and 44.7 % of fathers of children under age five began work before 8:00 AM. Similarly, 34.1 % of mothers and 46.6 % of fathers of children under five ended their work day after 5:30 PM, as shown in table 1². Given that UK mothers perform a greater amount of childcare (Lewis 2009), the gendered nature of these numbers suggests that mothers might be beginning work later for childcare related reasons.

² Note: due to the multi-dimensionality of the described category (working hours of parents by gender with children below the age of 5), the number of observations are relatively small, resulting in relatively wide confidence intervals.

Table 1: Work times for parents of children below age five

Parents of children below age 5	Beginning work before 8:00 AM	95 % C.I.	Ending work after 5:30 PM	Ending work after 5:30 PM
mothers	23.4 %	14.0% – 36.3%	34.1 %	22.8% – 47.6%
fathers	44.7 %	44.7% – 56.3%	46.6 %	34.5% – 59.2%

Source: Adapted from a data preview of the unpublished UK HETUS 2014-15,

Table 1 shows that nearly a quarter of working mothers and almost half of working fathers of children under age five begin work before 8:00 AM. Further, more than a third of working mothers and again nearly half of working fathers end work after 5:30 PM.

Furthermore, research by the Daycare Trust has shown that parents of young children are more likely than people without children to work outside of standard hours: 35.8 % of those in employment have worked overtime at some time in their main job. 43 % of respondents worked outside normal office hours (8:00 AM to 6:00 PM) and another 37 % of parents had a partner who worked outside normal office hours (Rutter & Evans 2012). They further cited the Labour Force Survey of the April-June quarter of 2011 which showed that 19.3 % of those in employment worked more than 45 hours per week whilst 14.4 % of those in employment worked shifts most of the time in their main job. Furthermore, those employed in shift work are more likely to have lower incomes (Singler 2011), and thus fewer options to purchase formal childcare outside the free hours allotment. Those in lower income households are often employed in sectors that involve shift work, non-standardised working hours and uncertain working hours. “This indicates that low- income groups form a large part of the demand for atypical hours childcare” (Singler 2011: 2).

Opening hours of public childcare

There is very little research on the availability of public childcare in terms of opening hours in the UK. The sparse existing evidence suggests that there is little public childcare³ available outside the ‘standard working hours’ defined by the Daycare Trust as 8:00 AM to 6:00 PM (Singler 2011; Rutter & Evans 2012). The Department for Education’s 2013 Childcare and Early Years Provider Survey conspicuously fails to mention typical opening hours of both centre based care as well as childminders, while detailing information on total hours of care provided by both types of public care. In one

³ We use the term ‘public childcare’ to refer to formal childcare eligible to provide the free hours allotment. This includes all types of registered nurseries, children’s centres, playgroups and pre-schools that offer childcare as well as registered childminders.

of the few reports that explicitly addresses the hours of childminders, Fagan, Norman and Rubery (2012: 9) note that childminders typically offer weekday service, “at least seven hours a day and usually year-round”, tentatively suggesting that “opening hours may be more flexible than in private nurseries”. Day care centres and nurseries are described in the same way: “Monday-Friday, typically for at least seven hours per day” (Fagan et al. 2012: 9). In other words, these reports state the total daily hours, but not the specific times during which public childcare is available.

In the one relatively recent report explicitly committed to the question of public childcare opening hours in the UK, Singler notes, “very little centre based care is open beyond 8:00 AM - 6.00 PM from Monday through Friday. Only a small number of individual childminders and groups provide care outside of this and they tend to be expensive” (2011: 1). Singler’s study focuses on parents’ expressed demand for childcare at atypical hours, ascertained through surveys and interviews with parents. Her assessment of typical opening hours is thus likely derived from parents’ testimony rather than a survey of the hours stated by childcare centres and childminders. Nevertheless, Singler’s conclusion about opening hours remains the best source of information and is repeated in the sparse more recent literature (see, e.g., Verhoef et al. 2015), supporting the observation that little research has been conducted on the topic in the intervening years.

OxPolicy Original Research: Case Study of two London Boroughs

Methodology

To reduce the lack of empirical inquiry into childcare opening hours, OxPolicy conducted original research on the opening hours of public childcare facilities in the boroughs of Islington and Barking & Dagenham⁴. Using the Office for Standards in Education (Ofsted) database of registered childcare providers by category and postcode, OxPolicy compiled opening hours information for both childminders and childcare centres⁵ in Islington and Barking & Dagenham. OxPolicy was able to gather information on 114 Islington and 124 Barking & Dagenham childcarers⁶.

To find opening hours information, OxPolicy analysed the Ofsted database of registered childcarers, which lists the carers that can be paid through the government’s free

⁴ For the rationale on the choice of these boroughs, please see the introduction.

⁵ The category ‘childcare centres’ includes Early Education as well as Daycare centres.

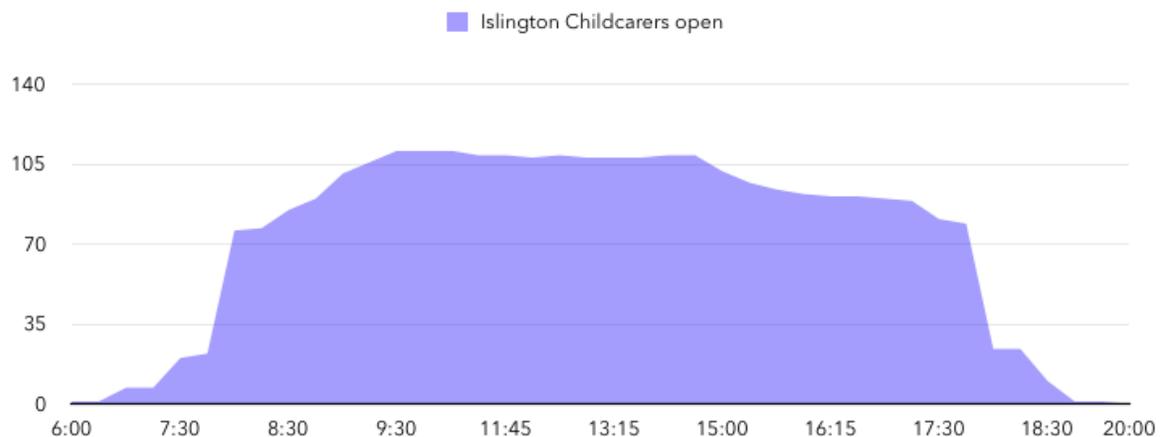
⁶ We use the term ‘childcarers’ to designate the combined number of Ofsted registered childminders and childcare centres.

childcare hours program. In Barking & Dagenham, there were 173 registered childminders and 112 registered childcare centres forming a total population of 285 Ofsted registered childcarers. Of these childcarers in Barking & Dagenham, 124 opted to make their names publicly available on the Ofsted website, and these childcarers subsequently constituted the study’s sample. In Islington, there were 199 registered childminders and 122 registered childcare centres for a total of 321 childcarers, 114 of which made their information available on Ofsted. With the total of 238 names made public on Ofsted, OxPolicy researchers were able to determine the opening hours of the sample’s childcarers, either by finding the website of the childcarer or through information available on the borough’s websites.

OxPolicy’s data was necessarily constrained by the accessibility to information on childcarers’ opening hours. However, we feel that our samples are representative as we assume that there is no correlation between a childcarer’s willingness to make their profile public on the Ofsted database and their opening hours.

Findings I: Childcare Opening Hours

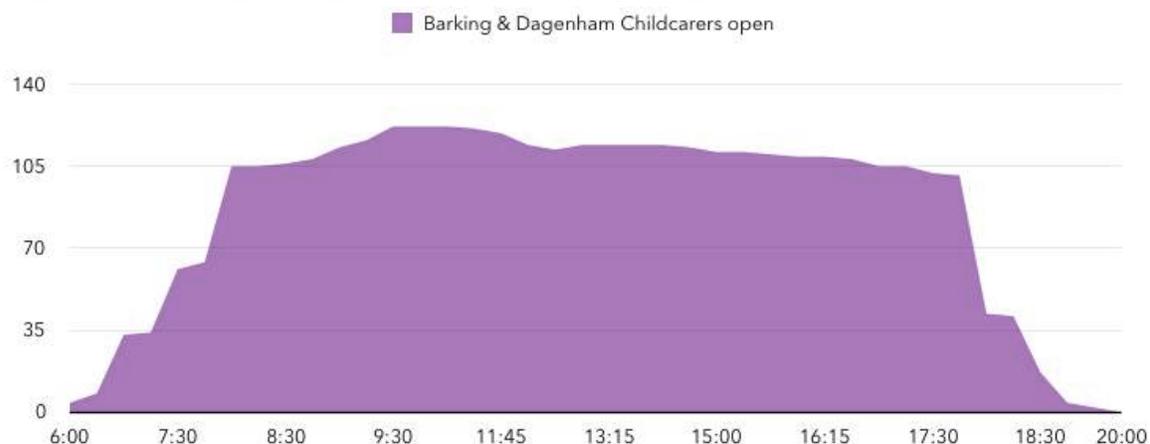
Figure 1: Islington Childcare Opening Hours



Source: OxPolicy original research.

Note: n = 114. Of these childcarers, 29 % are childminders, 71 % are childcare centres

Figure 2: Barking & Dagenham Childcare Opening Hours



Source: OxPolicy original research

Note: n = 124. Of these childcarers, 60 % are childminders, 40 % are childcare centres

Figure 1 and Figure 2 show how many of the 114 and 124 childcarers were open at a specific time of day in Islington and Barking & Dagenham, respectively. 66 % of the childcarers in Islington were open continuously between 8:00 AM and 5:30 PM. In Barking & Dagenham, 82 % of the childcarers were continuously open between 8:00 AM and 5:30 PM. The graphs show the times childcarers are open during the week, conditioned on the fact that the facility is open on the weekday in question⁷. Some of the childminders indicated that their hours were flexible or that they were available on weekends, but they generally listed standard opening and closing times (as shown in Figure 1 and Figure 2 above). We expect childminders to require an extra fee to work nonstandard hours (following Singler 2011), and thus have not included potential extra childminder working times in Figure 1 or Figure 2.

In sum, childcare opening hours are concentrated between 8:00 AM and 6:00 PM. In Islington, two-thirds of childcarers are open at or before 8:00 AM, and 21 % of childcarers close at or after 6:00 AM. In Barking & Dagenham, 86 % of childcarers open at or before 8:00 AM and 34 % close at or after 6:00 PM.

⁷ Most childcarers were open most days. In Islington, 1.7 % of childcarers were closed on Thursdays and 3.5 % were closed on Fridays. In Barking & Dagenham, 0.8 % of childcarers closed on Thursday.

Findings II: Degree of overlap between parents' work and childcare opening hours

In order to ascertain the degree of overlap between parents' working hours and childcare opening hours, it is important to keep traveling time in mind, which we categorically estimated at 30 minutes from workplace to childcarer⁸. Thus, if we define standard working hours as 8:00 AM to 5:30 PM, and assume that parents need 30 minutes to get from their work to the childcarer, only 28 % of childcarers in our sample can provide childcare for a full standard-hours working day. If divided by borough the numbers change dramatically, with the lower-income neighborhood Barking & Dagenham covering almost half of the standard working day (see Table 2 below).

Table 2: Percentage of childcarers covering standard working hours

Parents of children below age 5	% of childcarers covering 7:30 AM to 6:00 PM
Total	28 %
Islington	9 %
Barking & Dagenham	45 %

Source: OxPolicy original research

From these numbers it becomes clear that even when a modest amount of travel time is included, childcare opening hours do not cover standard working hours in the majority of cases. Referring back to the HETUS data on parents' working time in table 1, it becomes clear that there are significant numbers of parents who have to be at work before or after childcarers are open for business. While it may not be the same parents who arrive to work early and leave late, the combined numbers in table 1 and 2 give an indication of the limits to both parents in a family working a standard hour day.

Findings III: Interpretation

For both boroughs, the evidence suggests a mismatch between when parents are likely to be working, and when public childcare is available. However, these problems are starkest for working families in which each parent works more than 30 hour per week, all or some of which during non-standard hours.

⁸ In choosing the 30 minute commute estimate, we followed the HETUS 2014-2015 survey data pre-released to us (see section on Parents work hours above).

The mismatch is starkest in Islington, where only 10 % of childcarers cover the entire standard working day. This is problematic, as women (who are still most often the primary caregiver) in Islington are more likely to be working full time (see Table 3). This suggests that parents working full time in Islington resort to informal or entirely private childcare during the times when public childcare is not available, and here the Childcare Act 2016 does little to mitigate the costs incurred.

Table 3: Employment rates by borough and gender

Year 2011	Full time		Part time	
	male	female	male	female
Islington	46 %	39 %	6 %	11 %
Barking & Dagenham	42 %	29 %	7 %	17 %

Source: Office for National Statistics 2011 Census

In Barking & Dagenham, 45 % of childcarers cover the span of a standard working day. However, the lower employment numbers in Barking & Dagenham, coupled with the fact that low-income workers tend to work non-standard hours (Singler 2011) suggests that childcarers may be covering far less than half of an actual working day for parents in Barking & Dagenham.

Thus, it stands to reason that the Childcare Act 2016 would be of greater use to parents across the income spectrum if it sought to increase opening hours of public childcare. This could be achieved by supplying the additional free hours only to childcares who meet a minimum of opening hours or hours flexibility criteria.

Policy Box 1

- Amend the Childcare Act so additional free hours are only subsidized if providers meet a minimum of opening hours or hours-flexibility criteria.

Conclusion

The 2016 Childcare Act aims to “help families by reducing the cost of childcare [and] support parents into work or to work more hours, should they wish to do so” (Department for Education 2015: 4). It does so by providing a total of 30 hours of free childcare to the parents of three- to four-year-olds if both parents earn the equivalent of 16 hours minimum wage per week and less than £100,000 per year. As before the implementation

of the 2016 Childcare Act, 15 hours of free childcare are provided to parents for each three- to four-year-old child regardless of parental earnings.

Thus, the new free hours allotment is only available to families in which both parents work, and is of greatest help to parents who struggle to meet the market price of childcare. Yet, as our research shows, childcare opening hours often fall short of the standard working day. This means that the Childcare Act is most beneficial to families in which both parents work at least 16 hours per week, and one parent works no more than 30 hours a week between 8:00 AM and 6:00 PM (the hours during which the bulk of childcare facilities are open). This kind of work pattern does not map on well to medium income families, in which the likelihood of both parents working full time is higher (as in Islington) or to low income families, who are more likely to work non-standard hours (as in Barking & Dagenham).

The problems facing parents who work non-standard hours are of particular relevance with regards to our case study. Many Londoners work very long hours or are engaged in shift work, working some of the longest hours of any UK region or nation (Rutter & Lugton 2014). In certain areas of London high proportions of jobs involve work outside normal office hours and one of the local authorities with the highest proportion of workers in these sectors was Barking & Dagenham at 43.4 % (from the 2011 Census cited in Rutter and Lugton 2014). Unsurprisingly, the Citizens Advice Bureau, in a report on the practicalities of childcare, concluded that “parents who need childcare outside the ‘9 to 5’ [...] will find it harder to make use of the government’s free early education provision” (Hignell 2014: 11).

Thus, while the increased free childcare allotment of the Childcare Act is certainly an improvement for many working families, its benefits are clearly limited by the opening hours of public childcare.

Part II: Contextualizing the Childcare Act

The Economics of Childcare in the UK

Childcare Cost: Issues for Parents

For most parents, even with 30 hours free childcare, cost is still a significant barrier to the uptake of childcare. This section will discuss the ways in which cost represents a significant barrier to the uptake of childcare. First, the high price of childcare in the UK compared to other countries is discussed. Second the efficacy of the 30 hours free childcare in relation to the cost of childcare is examined. Finally, the cost barriers to the uptake of childcare for single mothers and mothers wishing to rejoin the work force are given specific attention.

For most parents in the UK, the cost of childcare is burdensomely high. In terms of childcare cost, the UK is one of the most expensive countries in international comparison. The net cost of childcare is 40.9 % of the average wage, much higher compared to the 18 % OECD average net childcare costs as percentage of median wages. Additionally in the UK, childcare cost is 26.6 % of average family income where both partners make 100 % of the average wage. This is compared to an average of 11.8 % of OECD countries (OECD 2011). Furthermore, the Daycare Trust (2001) has demonstrated that the typical cost of a nursery place in the UK is more than the average household expenditure on food or housing, suggesting that the cost of childcare is high not only relative to other countries but also to other goods nationally. Furthermore, the net average cost of childcare refers to the direct fees, taking fees reductions, cash benefits, and tax concessions into account. This indicates that childcare net cost in the UK is comparatively high even after subsidies and tax rebates.

Importantly, the universal free childcare allotment of 15 hours has been perceived as underfunded by childcare providers. This has led to a price increase for those hours that fall beyond the free allotment, as providers are using non-free hours to compensate for a loss of earnings on free-hours (NDNA 2015). This indicates that parents may have to incur high childcare costs despite the 30 free hours if they wish to use more than 30 hours of public childcare, which is likely to be the case for parents who work full time. In other words, while the cost of public childcare per hour may decrease as a result of the Childcare Act, this would only be the case when using up to 30 hours. The cost of additional hours will likely remain expensive in comparison to other goods in the UK and in comparison to childcare costs internationally, and may even increase.

Policy Box 2

- Raise the subsidy level so that providers have no incentive to compensate a loss of earnings by increasing the hourly rate beyond the first 30 hours.

This potential increase in the cost of the hourly rate charged by providers offering ‘free-hours’ is one of two reasons why the Childcare Act lacks efficacy in achieving its aim of helping working families afford childcare. The other reason is that parents will have to shoulder the costs of childcare on weeks that are not part of term time. According to the Policy Statement for the Childcare Bill that preceded the Childcare Act parents will only have access to 30 hours of free childcare per week over 38 weeks (Department for Education 2015). However, parents can also opt for the same amount of hours but spread them across more weeks per year. This suggests that parents will be left with the burden of shouldering the costs of childcare on weeks outside of term-time. Based on a survey by the National Day Nurseries Association (NDNA 2015), 52 % of respondents stated that free childcare hours should be extended for the whole year instead of limiting them to term-time only⁹. Respondents went on to explain that working hours are not confined to term-time only and that they might not be able to leave their work to care for their child themselves beyond the 38 weeks. The survey indicated that the design of the Childcare Act may not be able to substantially benefit those that need childcare beyond term-time.

Policy Box 3

- Extend the availability of free childcare hours to the whole year instead of limiting their availability to term-time.

Two particular groups of parents may find childcare cost particularly burdensome. These groups are single parents, and mothers looking to (re)join the labour force. Single parents in the United Kingdom have particular difficulty paying for childcare costs. In one report 52 % of single parent-respondents viewed the financial burden of childcare as a challenge (Rutter 2015). Furthermore, 47 % of respondents cited the rise in childcare costs, insecure working positions, and low-paying jobs as grounds for borrowing money for childcare purposes. Subsequently, over half of the single parents in the study had to borrow money

⁹ Respondents consisted of 1,000 parents and caregivers of children under five across the UK. 95 % of the respondents were mothers; 81 % were part of households with two working parents; 71 % of families represented were customers of day nurseries.

to pay for childcare costs for 2014 and 2015. This suggests that single parents do not have sufficient personal funds to finance childcare. While borrowing money may be able to temporarily pay for childcare, it is not a sustainable way of financing childcare.

The second group for whom the cost of childcare is especially burdensome are mothers wishing to return to the labour force. The reemployment of mothers is a salient issue in the UK as the state's investment in women's human capital through education and training is lost if women exit the labour market permanently after childbirth (Duncan and Paull 2001). As childcare is still largely undertaken by women, they tend to pay a wage and position penalty as a result of intermittent labour market attachment. As women take the step of re-joining the labour force, they have to make alternative care arrangements for their young children. If childcare is not easily affordable, this delays women's return to the labour force (Duncan and Paull 2001; Viitanen 2005). Furthermore, an analysis on seven waves of the Family Resources Survey (FRS), covering the fiscal years 1997/8-2003/4, has shown that the labour force participation of mothers is sensitive to the cost of childcare. The results demonstrated that high childcare fees exhibit a significant and negative effect on the probability of women's labour force participation. However, as working mothers re-joining the workforce often do so by adding hours gradually, the Childcare Act can significantly ease the cost burden for parents working up to 30 standard working hours for 38 terms a week.

Childcare Cost: Issues for Providers

The high hourly cost of childcare outside of term time or beyond 30 hours a week hampers parents' demand for public childcare. However, it is important to look at the cost factors on the supply side. An awareness of the determinants of supply can help policymakers address both pricing and availability of childcare.

One of the main factors affecting the supply of childcare services is the cost incurred by service providers. This cost in turn is mostly made up of two components: staff costs and facility costs. The costs incurred by childcare operators mainly consist of staff costs, which are heavily influenced by regulation specifying the staff/child ratio as well as minimum educational requirements that Early Years teachers must meet. Childcare operators in London face high staff costs relative to the UK average. Wage rates for childcare workers are significantly higher in London than anywhere else in the country. This generally reflects the higher operating costs of businesses in London where, on average, the median wage is 39% above the UK average across all sectors (Clarke et al. 2011). A survey of Early Years providers in 2009 confirmed that London staffing cost differentials closely reflected differences in fees (National Centre for Social Research

2009). For example, pay rates in full day care nurseries were around 22% higher than the average for England. The government also introduced regulations that require Early Years teachers to meet the same entry and qualification requirement as teachers of school-age children. Yet providers have reported that opportunities for career progression for staff are few, identifying this as a challenge for them to compete for and retain staff in the local labour market (Department for Education 2015). As such, it is likely that childcare operators have to offer higher wages to retain childcare staff than they did before added qualification requirements were introduced. On top of staff costs, facility costs must also be considered. Nursery facility costs are significantly higher in London compared to other regions of the country, contributing to higher prices of childcare services (Clarke et al 2011). Hence, London childcare operators are more likely to incur higher costs in their provision of childcare services, which not only affects the viability of businesses providing childcare services, but also translates into higher childcare prices for parents.

The market structure of the childcare industry can also have a considerable impact on the supply and prices of childcare services. When there is an oligopoly or monopoly dominating the industry, firms are able to dictate market prices and charge excessively. This usually happens when there are high barriers to entry, which prevent new firms from entering the market. In contrast, when there are many firms in an industry, there is greater competition for customers. Consumers can easily switch to less expensive substitutes when a firm charges high prices, incentivizing price reduction across the industry. According to the Department for Education, the childcare market is characterized by an enormous number of individual nurseries, with nursery groups forming only a minority of the market (2015b). Many small-scale businesses have expanded locally, and many regionally-based nursery groups have increased coverage in their area. However, the childcare market still remains highly fragmented. The largest 20 nursery chains in the country have a combined market share of just over 10%.

While this means that firms generally do not raise prices to earn exorbitant profits, providers are usually small in size and unable to deliver significant economies of scale. If service providers are able to deliver more places, they are able to spread their fixed costs over more hours of provision, bringing down their unit costs. This increases the availability of childcare spaces in the market while allowing businesses to become more viable. This is because service providers tend to hire childcare workers on a contractual basis, which means that workers must be available to work during certain periods of time, and are in turn paid for the number of available hours, regardless of whether those hours are occupied. Since providers are unlikely to achieve perfect scheduling whereby they occupy all available hours of childcare workers, some inefficiencies result. While providers are able to manage their staffing requirements flexibly by anticipating levels of occupancy at different hours and relying on a mix of full-time and part-time staff, there is

still considerable scope for cost efficiency. Moreover, there may be spare capacity in terms of floor space available. If nurseries are able to open up more places, there is much potential for them to better utilise the spare capacity so as to realise economics of scale (Department for Education 2015b). This increases the availability of childcare services while lowering the average costs of operating childcare facilities, hence allowing businesses to become more viable while expanding to cater more spaces to parents and children.

Policy Box 4

- Incentivize the consolidation of the childcare market
 - so providers can become large enough to cut cost inefficiencies through economies of scale,
 - while avoiding an oligopoly with high prices and low childcare quality

Availability of Information on Childcare

The availability of information is also important in determining whether parents take up childcare services, as well as the type of services engaged. There are a number of sources of information on childcare available, including the Local Authority Childcare Information Service, Families Information Service, voluntary sector bodies, childcare service providers, local libraries, and Sure Start Children’s Centres. The Childcare Act 2006 obliges local authorities to provide information about registered and non-registered childcare providers to parents. This is most commonly delivered through individual Family Information Services (FIS), which are funded and run or subcontracted by local authorities or councils (Clarke et al 2011). Awareness of the Family Information Service among parents has been reported as low, with only 19 % of parents saying that they were aware of the service but had not used it and 12 % saying that they were aware and had used the Family Information Service before. The remaining seven in ten (70%) parents said they were not aware of the service (Department for Education 2014). Overall, according to the Department for Education, a significant proportion of parents say there is too little information about childcare in their local area (2015b).

As one would expect, there is an association between access to sources of information about childcare and parents’ usage of childcare. In the parents survey cited above, almost three-quarters (74%) of parents who used formal childcare reported to have had accessed at least one source of information, compared with 60% of parents who only used informal childcare and 59% who did not use a provider at all (Department for Education 2014).

Parents were most likely to receive information about childcare through word of mouth (40%), such as from friends or relatives, while schools were the second most common source of information (32%). Research has also shown that more advantaged groups find it relatively straightforward to access services, because they possess the social capital to get the information they need (Department for Education 2014). As explained in more detail in the section below on Parents From Minority Groups, language barriers are a further factor contributing to lacking information regarding the benefits and availability of public childcare.

The Childcare Act already makes modest provision for improving the dissemination of information with regard to childcare, codifying the “duty to publish information about childcare and related matters [...] at proscribed intervals [and] in a proscribed matter” (Childcare Act 2016). The research reviewed in this subsection highlights the importance of both the language and format being accessible to parents across the educational spectrum.

Policy Box 5

- Publish childcare information in language (non-jargon English, prevalent minority languages) and format accessible to parents across the educational spectrum.

Childcare Quality in the UK

While the Childcare Act is a starting place for addressing the issue of costs, it does not contribute to ensuring and improving the quality of childcare, considered by some parents to be more important in the choice of childcare providers (Waldegrave & Lee 2013). This chapter will address present issues surrounding the quality of childcare in the UK.

The discussion over the quality of childcare has been separated into measured and perceived quality. Parameters including Ofsted statistics, qualification requirements, wages and tensions between cost and quality are used to explain issues over measured quality. Meanwhile, perceived quality takes on a softer scale of analysis, using parents’ opinions, perceptions and value judgements as a lens to explore the experiences of childcare quality in the UK.

Measured Quality in the UK

At a national scale, four key issues can be identified with regard to measurable parameters of childcare quality. These are the generally low qualification requirements contributing to the perception of childcare as low quality¹⁰, dissatisfaction among practitioners about their pay and status in comparison to teachers, parents' sense that they are not receiving value for money, and resulting tensions between cutting costs while improving quality.

In the UK, the quality of childcare is often not highly regarded. One reason for this is that qualification requirements are generally quite low, especially for childminders. Unless the minder wants to deliver the free entitlement, s/he is not required to hold any qualifications. Furthermore, even for those delivering the free entitlement, qualification requirements are low, consisting of the completion of one training course within the first six months of registration and first aid qualification. Within childcare centres, managers and supervisors are required to be level three qualified, equivalent to an A level, whilst half of all other staff must be level two qualified, equivalent to a GCSE graded A*-C (Waldegrave & Lee 2013). In addition to these low qualification requirements, the Nutbrown review, an independent review of childcare qualifications, suggested in 2012 that there is a degree of mistrust within the childcare sector over the consistency of the wide variety of childcare qualifications being granted (Nutbrown 2012).

The low and inconsistent level of qualifications contributes to the perception of low status for carers in comparison to teachers. Dissatisfaction among childcare staff stemming from both the status and pay disparities between child carers and teachers has been argued to inhibit the quality of childcare provision for the following reasons. Firstly, childcare is widely regarded as both a low-status and low-paid profession (Shorthouse 2015). This is evident in the large disparities in pay between the average 2012 hourly pay of a level three day care supervisor, £8.10, and that of a teacher, £20.50, (Waldegrave & Lee 2013). The acceptability of this level of pay is questionable given that childcare is a professional job requiring skills (Ball 2013). Pay and status of carers are of central importance for childcare quality, because low wage and low status employment tends to attract lower skilled workers, which has a detrimental effect on the quality of childcare services (Waldegrave & Lee 2013).

¹⁰ Notwithstanding some carers in Early Years Education childcare centres whose requirements sometimes match those of teachers, as discussed in the section on

Secondly, even highly-qualified childcare practitioners who have achieved Early Years Professional Status (level 6, equivalent to a degree) do not feel they are afforded the same recognition as those with qualified teaching status (Nutbrown 2012). Thus, on the one hand, poor pay and low status is likely to be a strong contributing factor to reduced motivation even in more highly qualified staff, which in turn can have a negative effect on the quality of childcare. On the other hand however, higher qualification requirements may exacerbate the shortage of childcare practitioners.

Policy Box 6

- Raise the standard of qualification levels for carers (both in centres and for childminders) and insure a consistency of qualification levels.

The result is that the childcare profession is stuck in a position whereby poor qualifications and low status and pay form a vicious cycle whereby poorly qualified staff are afforded low wages and status, yet poor wages and status further inhibit the possibility of raising the demands upon the qualification levels of childcare practitioners. This issue has resulted in many parents in the UK feeling that they are not provided value for money with regard to the quality of childcare they are receiving in light of what they pay for it. This is particularly notable when contrasted against the high ratio of childcare costs to wages (as discussed in the section on cost issues for parents above). Therefore, despite parents paying a comparatively high price, issues over low pay inhibiting improvements in quality persist.

Perceived Quality in the UK

In addition to more easily quantifiable indicators such as qualifications, pay, status and cost, it is important to analyse the quality of national childcare provision using other, ‘softer’ indicators including the ways in which parents judge childcare quality and what motivates their decisions when picking providers. Thus, an emphasis on quality of childcare as perceived by parents takes a bottom-up perspective. This section examines how parents make judgements about childcare quality, often using informal and localised methods, revealing areas for improvement with regard to official measures such as Ofsted reports. Secondly, this section addresses how the preference of high quality childcare or affordable childcare bears different weighting, dependent upon family income and resulting in low income households not being able to prioritise quality over cost when making such decisions. Finally, this section discusses the recent changes in the perceptions of childminders in comparison to centres.

Evidence suggests that parents are more likely to judge childcare quality in localised and informal ways, rather than using official measures such as Ofsted reports (Waldegrave & Lee 2013). This includes word-of-mouth information and visits to childcare centres. Whilst these methods are deemed ‘informal’ they are not suggestive of a devaluation in the importance of quality in decision making, as a Department for Education survey suggested that the reputation of a centre, and thus its quality of provision, was the primary factor for parents’ decision making. To gain this knowledge, 46% of parents used word-of-mouth, whilst a YouGov poll of 1,600 parents in 2012 found that before choosing a childcare provider 71% of parents had visited the setting, in comparison to 50% of parents who had read the Ofsted report. Reasons included the inaccessibility of Ofsted reports, which use technical language with which many parents struggle. Furthermore, Ofsted reports have been criticised by parents for not including enough information on the quality of interactions between the child and the provider, a factor considered important in the decision making process (Waldegrave & Lee 2013). Furthermore, Ofsted reports have been criticised for not being a good measure of quality as current guidelines dictate that childcare settings only need to be inspected once every 47 months, meaning many reports are dated and thus provide a potentially inaccurate assessment of the quality of care. **Policy Box 5** gives our recommendation for increasing usability of information disseminated by the government (such as Ofsted reports) through the use of more parent-friendly language.

However, childcare is still too expensive for low-income households to make decisions based on quality rather than cost. Waldegrave and Lee (2013) found that on average, parents named quality as the most important factor in choosing a child care provider, with 53% prioritising quality in comparison to 36% prioritising cost. However, when focusing exclusively on low-income families, cost becomes a more pressing issue, with 47% prioritising cost compared to 45% prioritising quality. Thus, lower income families are less able to be selective about the type of care their children receive.

Such a prioritisation of cost over quality is particularly damaging because low-income families are often considered to be the families that may benefit most from high quality childcare, as more priority is placed upon childcare providing a learning environment that such children may not have at home. As such, the requirement of a childcare facility to provide a learning environment was emphasised by 97% of households with a gross income below £20,000 compared to 88% of households with a gross income above £60,000 (Waldegrave & Lee 2013). Thus, whilst low-income families may have the most to gain from childcare, the current costs of provision results in costs, rather than quality, dictating their childcare decisions.

While childminding is often regarded as the more affordable lower-cost solution, childminders have ‘historically been seen as marginal providers of care’ (Brooker 2016: 1). Childminding has predominantly been viewed as performing the role of an accordion pleat, contracting and expanding in response to the changes in demands for childcare spaces. Since the 1990s, childminding spaces have been subject to a decline as the National Childcare Strategy 1998 favoured the expansion of centre-based care. Nevertheless, in recent years a shift has been witnessed towards an increasingly positive perception of childminding which is considered to possess unique qualities. The quality provided by childminders is now largely considered to be on par with that offered by childcare centres, despite the lower standard of qualifications required of childminders. Furthermore, they have been increasingly recognised by both parents and professionals for the special qualities they may provide a child, including a ‘family-like’ experience, personalised care, flexibility and socialisation with the local community, helping to introduce children to the everyday world.

These factors amount to an emerging perception that childminding can be a distinctly positive point of childcare. Indeed, parents who would prefer their child to be cared for at home but are unable to provide home care at all times, are increasingly looking to childminding as the second best option. This perception, held by some parents, of childminders as providing good quality care is increasingly important as childminders are able to offer the government sponsored free hours of childcare. This can be particularly beneficial to working parents as the flexibility of childminding means that free hours could be more easily provided during hours that fall outside standard work hours.

Policy Box 7

- Raise awareness of the facts that
 - the free hours entitlement can be used with childminders, and that
 - childminders eligible for the free hours entitlement have higher qualification requirements.

Parents From Minority Groups

This section will first highlight the particular issues affecting minority parents’ access to formal childcare to suit their working hours. Second, it will show the extent to which intersectionality between race, class and income affects the decisions made by minority parents. The analysis draws on the importance of London for minority groups and then compares the issues facing minority parents in the two boroughs. Third, the chapter

examines the extent to which the Childcare Act addresses the needs of parents from minority groups.

The Childcare Act seeks to open up access to formal childcare in the UK by making it less of a financial burden. However, parents' views of childcare differ depending on their income level and their ethnic and cultural background (Bell et al. 2005). When examining specific issues affecting minority groups, it is crucial to be specific about the groups discussed. Little research has comprehensively analysed the position of "all" ethnic minority groups in the UK regarding formal childcare. This section focuses on Pakistani and Bangladeshi parents, as evidence suggests that parents in these groups are least likely to use formal childcare (Speight et al. 2010). One suggested reason for this are the comparatively high levels of unemployment among Pakistani and Bangladeshi mothers (Campell-Barr & Garnham 2010), which also makes these parents ineligible for the additional 15 hours of free childcare provided for by the Childcare Act.

However, these groups of parents are by no means homogenous in terms of their labour market participation or their values. Campell-Barr and Garnham (2010) have argued that working mothers from both groups see the developmental benefits centre-based care can provide for their children, and are therefore more likely to use childcare unlike their non-working counterparts. In this regard, working mothers from both Pakistani and Bangladeshi origin have more similar attitudes to centre-based care than non-working mothers from both groups. Differences in the attitudes of parents towards childcare from this ethnic minority group exist with regards to the skills, education level and work status of the parent. Unfortunately, a more in-depth discussion of the relationship of such parental characteristics and the use of formal childcare is beyond the scope of this report¹¹.

Previous sections highlighted the particular barriers faced by parents working non-standard hours, and that parents in non-standard work are more likely to be living on low income. Additionally, these parents are also more likely to be members of an ethnic minority group (Campell-Barr & Garnham 2010). This means that parents from ethnic minority groups disproportionately face the intersecting barriers of both low-income and non-standard work.

London in particular has both high levels of low-wage and non-standard hours work (as discussed in the

Conclusion of the findings section above), as well as a broad ethnic diversity of communities. In Islington, the case study borough with the higher median income, Black/African/Caribbean British and African persons make up around 13% of the

¹¹ Interested readers should consult Campell-Barr & Garnham (2010) and Bell et al. (2005).

population, whereas British Asian Pakistani, Bangladeshi and Indian make up only 4% of the population in this borough (Office for National Statistics 2011). In Barking & Dagenham, the lower-income case study borough, Black British African, Caribbean or other black make up 20% of the population whereas British Asian Pakistani, Bangladeshi and Indian make up 12.4% of the population (Office for National Statistics 2011). Barking & Dagenham is home to many on low-incomes and a relatively high proportion of minority ethnic background residents, a pairing consistent with national trends (Campell-Barr & Garnham 2010).

Further issues of particular concern to minority parents are those surrounding language and culture. Without a certain level of ability in the English language, parents' access to information regarding formal childcare and the public free hours provision is limited (Speight et al. 2010). In addition to the language barrier, Bell et al. (2005) have suggested that there is a cultural stigma surrounding the use of non-maternal childcare within many black and ethnic minority groups (BEMA). The traditional view of motherhood in many of these communities is said to involve the child to be cared for primarily by the mother, and the delegation of care responsibility to non-family members is viewed as poor parenting. However, Campell-Barr & Garnham (2010) have found that this stigma is slowly eroding as second-generation Pakistani and Bangladeshi parents' perception of the social value of formal childcare is becoming increasingly positive. This does not however imply a change in attitudes for new immigrant families who continue to arrive with children below school age. Providing information to these parents in their native language upon arrival could reduce misconceptions about formal childcare, and could give mothers in particular more agency in decision-making about childcare.

Conclusion

The Childcare Act 2016 will most likely make it easier for some working parents of three- to four-year-olds in England to afford formal childcare. Specifically, it provides the greatest support for families in which both parents work at least 16 hours per week, and one parent works during standard working hours: 8:00 AM to 6:00 PM, Monday through Friday and does not exceed 30 hours per week.

However, families in which both parents work more than 30 hours per week may face rising hourly costs for every additional hour beyond the 30 hours of free childcare. This is because, as seen in the wake of the previous 15 universal free hours entitlement to free childcare, providers may set compensatory prices for the hours exceeding the free entitlement. For parents working long hours or several jobs, the utility of the Childcare Act 2016 will depend on how expensive additional hours become.

For parents working non-standard hours, the efficacy of the Childcare Act 2016 is further limited. As the original research presented in this report shows, only 9 – 45 % of public childcare providers in the examined boroughs covered the entire standard working day from 8:00 AM to 6:00 PM. While this case study is not representative of opening hours across England and more such ground-level research is needed, it does give an important indication of the mismatch between parents' work hours and childcare opening hours.

These findings are of particular policy relevance as previous research has shown that parents of young children are more likely to work non-standard hours, as are people on low-income. Thus, the efficacy of the Childcare Act 2016 is reduced for low-income parents of young children – precisely the recipient group the act was designed to support.

A good childcare system will both span the day and be flexible to adapt to the changing day-to-day needs of working parents. And while the Childcare Act 2016 is an improvement for some working parents, there is a long way to go before parents can rely on affordable public childcare when they need it.

Summary of Policy Proposals¹²

- Amend the Childcare Act so additional free hours are only subsidized if providers meet a minimum of opening hours or hours-flexibility criteria.
- Raise the subsidy level so that providers have no incentive to compensate a loss of earnings by increasing the hourly rate beyond the first 30 hours.
- Extend the availability of free childcare hours to the whole year instead of limiting their availability to term-time.
- Incentivize the consolidation of the childcare market
 - so providers can become large enough to cut cost inefficiencies through economies of scale,
 - while avoiding an oligopoly with high prices and low childcare quality
- Publish childcare information in language (non-jargon English, prevalent minority languages) and format accessible to parents across the educational spectrum.
- Raise the standard of qualification levels for carers (both in centres and for childminders) and insure a consistency of qualification levels.
- Raise awareness of the facts that
 - the free hours entitlement can be used with childminders, and that
 - childminders eligible for the free hours entitlement have higher qualification requirements.

¹² This report and the policy proposals it issues are specifically addressed to the government. Yet there are other agents who could provide formal childcare in innovative ways that contribute to the kind of comprehensive, affordable childcare system needed in the UK today, and OxPolicy welcomes further research into such alternative approaches.

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