



## National Survey for Wales, 2018-19: Childcare

18 December 2019  
SB 59/2019

The National Survey for Wales asked parents of 0-14 year olds whether they needed to arrange childcare and what types they had used. Parents were also asked how many hours per week of childcare they arranged, how easy it was to get childcare, and the provision of childcare in Welsh. Parents who didn't use childcare were asked the reasons for not doing so.

### Main points

- 48% of parents with children aged 0-14 arranged childcare so that they could work, study or go on training.
- Those with qualifications at degree level were more likely to use childcare (59%) than those with no qualifications (27%).

### Of the 48% of parents that arranged childcare:

- Free childcare provided by family and friends was the most common type of childcare used with 76% of parents using this type. Of these, half made use of unpaid family or friends for up to ten hours a week.
- 74% of parents who arranged formal childcare said it was easy to get childcare that fitted in with their working hours.



- 31% of parents with pre-school age children said the formal childcare they used was entirely or mainly in Welsh or an equal mix of Welsh and English. 44% would like provision to be entirely or mainly in Welsh.

### Of the 52% of parents who didn't use childcare:

- The most common reason why parents of children aged 0-14 didn't use childcare was that one parent is always around (73%).

### About this bulletin

This bulletin provides more detailed analysis of the 2018-19 results for the questions on childcare. It also compares results over time.

The full questionnaire is available on the [National Survey web pages](#).

More tables can be found in the [Results viewer](#).

### In this bulletin

<a href="#">Introduction</a>	2
<a href="#">Childcare use and types</a>	3
<a href="#">Ease of accessing formal childcare</a>	6
<a href="#">Use of Welsh in formal childcare</a>	7
<a href="#">Reasons why childcare isn't used</a>	7
<a href="#">Terms and definitions</a>	9
<a href="#">Key quality information</a>	11

## Introduction

Early Years is one of the Welsh Government's five priority themes under [Prosperity for All: the National Strategy](#). The aim is to ensure that children from all backgrounds have the best start in life and that everyone has the opportunity to reach their full potential. There is substantial evidence that delivering the right support for all children is a good way of breaking the poverty cycle and raising aspiration and attainment for everyone. Attending a high-quality early education and care setting can have a significant influence on a child's development, especially for those children who come from a disadvantaged background. Affordable, flexible and accessible childcare can also enable parents to work or access training.

The National Survey questions on childcare were introduced to help measure progress in these policy areas. The results will help in understanding, for example, whether factors such as the lack of childcare or its cost or inaccessibility influence a parent's decision not to work, or to work fewer hours. This is particularly important in relation to the Welsh Government's [Childcare Offer](#), which is intended to support working families. Views on the quality of childcare and the availability of Welsh-medium childcare provision are also of particular interest to the Welsh Government.

The Welsh Government's [Childcare, Play and Early Years Workforce Plan](#) was published in 2017 and the results from the National Survey were used to inform both the design of this 10 year workforce plan and of the Welsh Government's Childcare Offer, which is now available in all parts of Wales. National Survey results continue to be used to inform the development of the Welsh Government's policy in relation to early years.

Questions on childcare were first asked in the 2014-15 National Survey for Wales and then again in 2016-17. Many of the same questions were asked in 2018-19 along with some new childcare questions, and this bulletin presents the latest findings and discusses changes over time where they are significant.

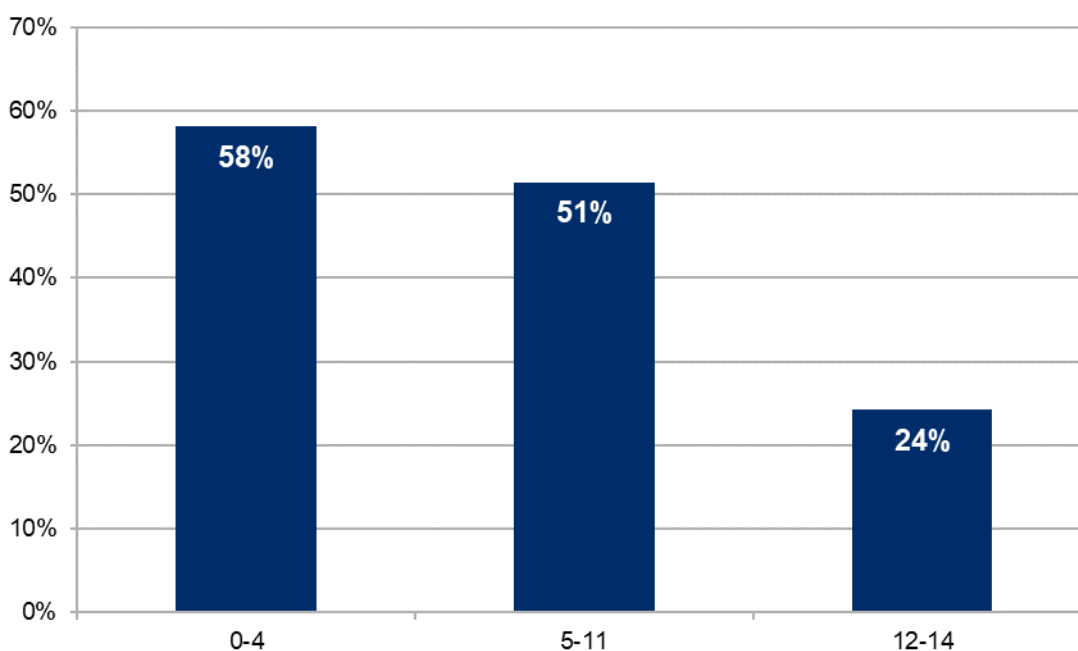
## Childcare use and types

### Childcare use

In 2018-19, 48% of parents<sup>1</sup> of 0-14 year olds said they arranged childcare so they could work, study or go on training. These are similar results to those collected in 2016-17 and 2014-15.

The need to arrange childcare varied depending on the age of the child. Chart 1 shows parents' use of childcare by age of child.

**Chart 1: Use of childcare, by age of child, 2018-19**



58% of parents with children aged 0-4 and 51% of parents with children aged 5-11 used childcare. Parents of older children were less likely to arrange childcare. 24% of parents with children aged 12-14 used childcare.

The following groups are more likely to say they arranged childcare to work, study or train:

- Those without a limiting long term disability or illness (51%) were more likely to arrange childcare than those with a limiting condition (41%).
- 55% of those parents who lived in owner-occupied accommodation said they arranged childcare. This compares with 44% of parents in private rented accommodation and 31% of those in social housing.
- Those not in material deprivation were more likely to arrange childcare (51%) compared with those in material deprivation (38%).
- Those with qualifications at degree level<sup>2</sup> were more likely to use childcare (59%) than those with no qualifications (27%).
- 65% of parents in households in which all the adults worked used childcare compared with 24% where some worked and 16% where none worked.

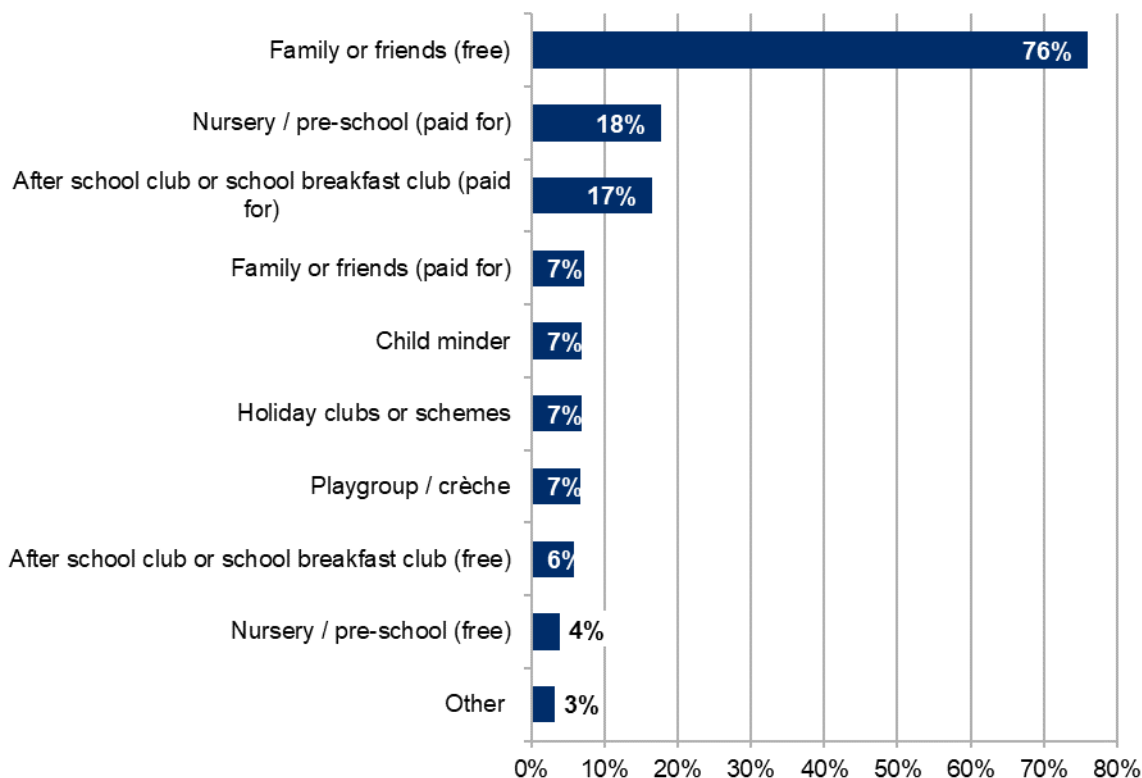
<sup>1</sup> Throughout the bulletin the term 'parents' refers to a parent or legal guardian of the selected child.

<sup>2</sup> Qualification level - see [Terms and Definitions](#)

## Types of childcare

Parents were asked to select which types of childcare they had used from a list of options.

**Chart 2: Types of childcare used, 2018-19 (a)**



(a) The category 'other' includes those who selected 'Babysitter who comes to your house' and 'any other type of formal childcare'

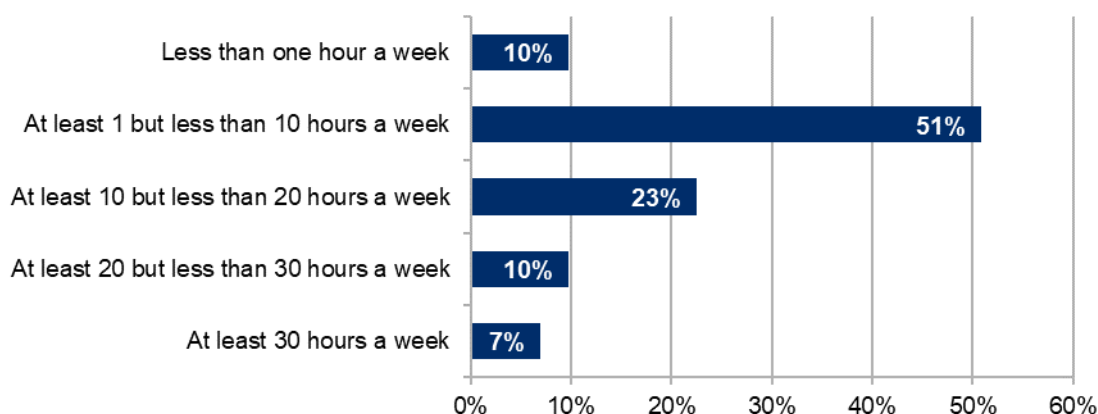
Chart 2<sup>3</sup> shows that free childcare provided by family and friends was the most popular choice. 76% of parents who arranged childcare used this option. A further 7% of parents paid family and friends to provide childcare. Both of these results were similar to those in 2016-17. 18% of people used paid-for nursery / pre-school care; this was a 5 percentage point increase on the 2016-17 results. The type of childcare used varied with the age of the child. 92% of the oldest children (12-14) were looked after by family and friends (unpaid) compared with 73% of the youngest (0-4).

### Childcare provided by family and friends (for free)

Parents were asked about the average number of hours of childcare provided by family and friends, for free, so that they could work or attend other regular commitments. As shown in Chart 3, the majority of parents who used unpaid family and friends as a form of childcare did so for at least 1 but less than 10 hours a week. This result was similar to that found in 2016-17.

<sup>3</sup> Parents were able to choose more than one type of childcare, therefore percentages may sum to over 100%.

**Chart 3: Average number of hours of childcare provided by family and friends, 2018-19**



### **Use of formal childcare**

24% of parents with children aged 0-14 used formal types of childcare (that is, any childcare that isn't provided by family and friends for free). Of those parents who use formal childcare, 64% combine this with childcare provided by family and friends. A further 42% of parents of pre-school aged children who didn't currently use formal childcare did expect to use it between now and when their child starts full time education. There was no difference in response when the parent answering the questions was male or female.

### **Further analysis – formal childcare**

Cross-analysis indicates that various factors such as age of child, employment status, age of parent, tenure, whether in household material deprivation and parental education level may be connected with whether a parent chose to use formal childcare.

However, these factors are all interlinked (so for example, people with no qualifications are also more likely to be in material deprivation). To get a clearer understanding of how strongly linked each particular factor is to using childcare, we looked at a range of factors<sup>4</sup> in turn while controlling for other factors<sup>5</sup>. By using this approach, we found that the following were each independently linked with the use of formal childcare:

- the child being younger (age 0 to 4)
- parent having degree level qualifications<sup>6</sup>
- living in households where all adults were working.

An association was also observed between the use of formal childcare (Welsh or English medium) and the Welsh speaking ability of the parent, but there was no clear pattern to this. As with all analysis of this kind we are unable to attribute cause or effect.

<sup>4</sup> The full list of factors in the model were: gender of parent, gender of child, type of household, number of children in household, whether parents speak Welsh, economic status of the parents, age of child, whether parent has a long term limiting illness or infirmity, household material deprivation, whether the household is in an urban or rural area, tenure, highest qualification of the parent and the number of working adults in the household.

<sup>5</sup> This method is known as logistic [regression](#). Information about the method used can be found in this [technical report](#).

<sup>6</sup> Qualification level - see [Terms and Definitions](#)

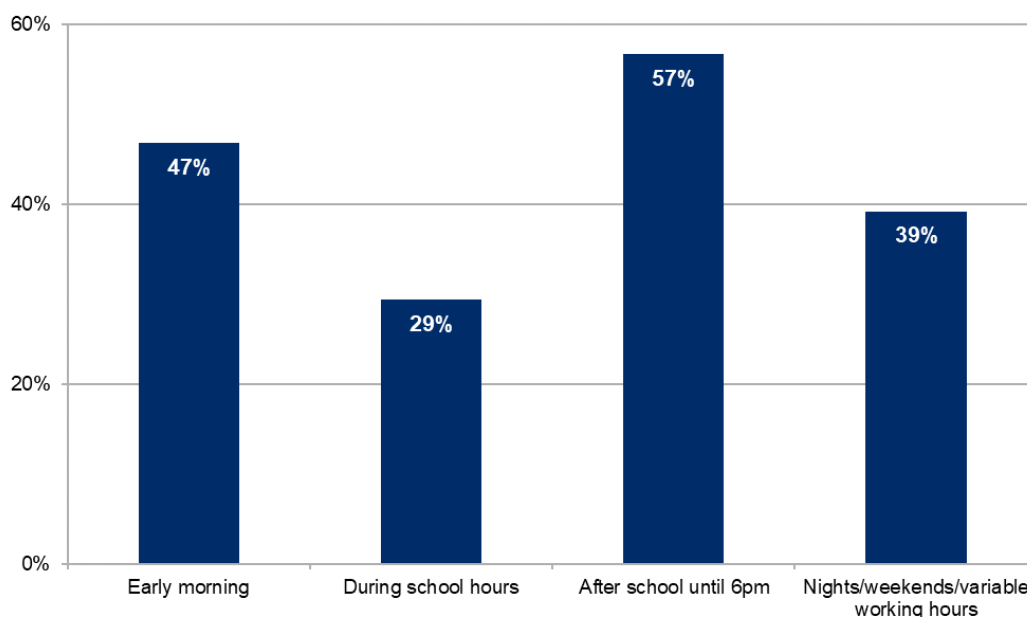
## Ease of accessing formal childcare

Parents who used formal childcare were asked how easy or difficult they found it to access the types of childcare they used during school holidays and also how well these fit in with their working hours. 74% of parents thought getting childcare around their working hours was easy (26% found it difficult). 73% of parents found it easy getting childcare during school holidays (27% found it difficult). Once again the results were similar to those in 2014-15 and 2016-17.

The ease of getting childcare during working hours varied depending on whether the household was in material deprivation or not. 76% of those not in material deprivation found getting childcare that fitted in with their working hours easy, compared with 58% of those in material deprivation. This may be explained by the materially deprived being employed in jobs with unsociable working hours. Perhaps surprisingly, neither parental access to a car nor urban/rural location resulted in any variation with the ease of getting childcare during school holidays or during working hours.

A new question in 2018-19 asked parents who said they had difficulty accessing childcare at what time of day childcare provision needed improving to allow them to work, study or to go on training. 26% of parents who used formal childcare found it difficult to arrange. Chart 4 shows the days and times where they felt access to childcare needed improving.

**Chart 4: Time of day childcare needs improving, 2018-19 (a)**



(a) Parents could give more than one response so percentages may sum to over 100%.

Over half of the parents who found accessing suitable childcare difficult said they would like improved childcare from 3pm to 6pm. Parents also had difficulty arranging childcare early in the morning, at night, at weekends and to cater for variable work patterns.

## Use of Welsh in formal childcare

New questions were introduced in 2018-19 about the provision of childcare in Welsh for pre-school age children. 31% of parents of pre-school age children used childcare that was entirely or mainly in Welsh, or an equal mix of Welsh and English. The remaining 69% of parents used childcare that was mainly or entirely in English.

Parents who were using, or expecting to use, formal childcare were also asked which language they would prefer childcare to be in. 44% of parents would like childcare to be entirely or mainly in Welsh or an equal mix of Welsh and English, and 55% of parents would prefer childcare that is mainly or entirely in English.

Parents who lived in rural areas were more likely to want childcare to be entirely or mainly in Welsh or in an equal mix of Welsh and English (59%) compared with those in urban areas (37%).

Welsh-speaking parents were also more likely to say they wanted childcare entirely or mainly in Welsh or an equal mix of Welsh and English (86%) than those who couldn't speak Welsh (28%).

## Reasons why childcare isn't used

In 2018-19 questions were introduced which asked parents why they said they didn't arrange any form of childcare<sup>7</sup>.

**Chart 5: Reasons why childcare wasn't used, 2018-19**

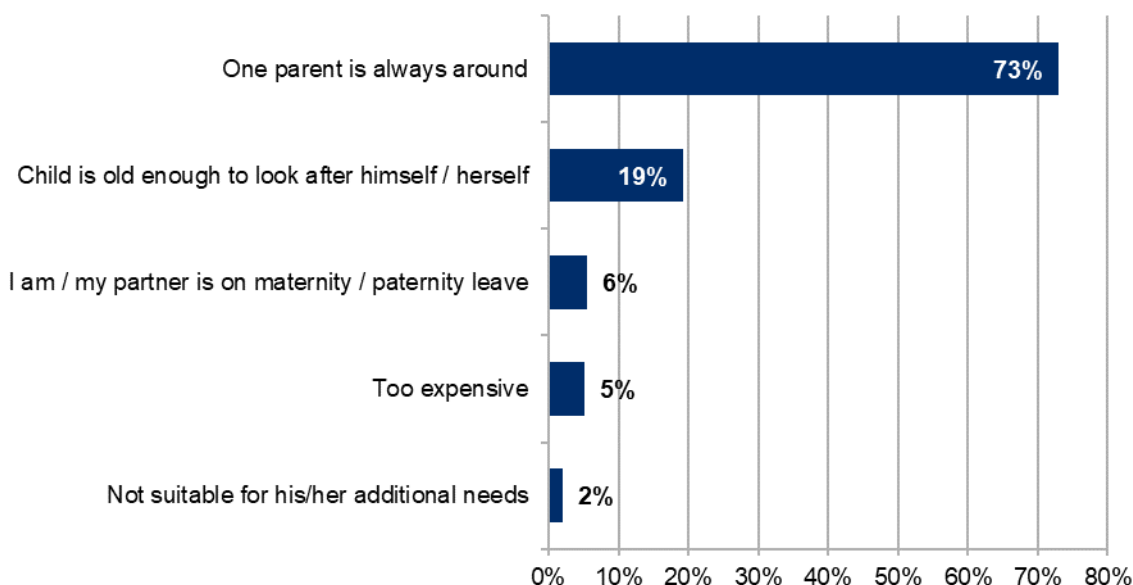


Chart 5 shows that the most common reason parents gave for not having used childcare is that one parent is always around (73%). Looking at these results in more detail:

- 79% of parents of children aged 0-4 said that one parent is always around, compared with 85% of parents of children aged 5-11 and 51% of parents of children aged 12-14.

<sup>7</sup> Parents were able to choose more than one type of childcare therefore percentages may sum to over 100%..

- People living in social housing (78%) and private rented accommodation (79%) were more likely to say that one parent is always around compared with those in owner occupied properties (69%).
- 81% of parents with no qualifications said that one parent was always around, compared with 68% of parents with qualifications at degree level<sup>8</sup>.
- 75% of parents living in two adult households said that one parent is always around compared with 64% of parents in single adult households.

19% of parents said that the child is old enough to look after him/herself. Unsurprisingly almost all (95%) parents of children aged 0-11 did not give this response. However, 47% of parents with a child aged 12-14 said the child is old enough to look after him/herself.

---

<sup>8</sup> Qualification levels - see [Terms and definitions](#)



## **Terms and definitions**

### **Welsh Index of Multiple Deprivation**

The Welsh Index of Multiple Deprivation (WIMD) is used as the official measure of deprivation in Wales. Deprivation is a wider concept than poverty. Deprivation refers to wider problems caused by a lack of resources and opportunities. The WIMD is constructed from eight different types of deprivation. These are: income, housing, employment, access to services, education, health, community safety and physical environment. Wales is divided into, 1,909 Lower-Layer Super Output Areas (LSOA) each having about 1,600 people. Deprivation ranks have been worked out for each of these areas: the most deprived LSOA is ranked 1, and the least deprived 1,909. For this bulletin, we have grouped the people living in the 20% of LSOAs that are most deprived based on WIMD score and compared them against the 20% of the LSOAs that are least deprived. – see also Material Deprivation below.

### **Urban / rural**

“Urban” includes settlements with a population of 10,000 or more and small towns and their fringes, where the wider area is less sparsely populated. “Rural” includes all other areas.

### **Material deprivation**

Material deprivation is a measure which is designed to capture the consequences of long-term poverty on households, rather than short-term financial strain.

Non-pensioner adults were asked whether they had things like ‘a holiday away from home for at least a week a year’, ‘enough money to keep their home in a decent state of decoration’, or could ‘make regular savings of £10 a month or more’. The questions for adults focussed on whether they could afford these items. These items are really for their ‘household’ as opposed to them personally which is why they were previously called ‘household material deprivation’.

Pensioners were asked slightly different questions such as whether their ‘home was kept adequately warm’, whether they had ‘access to a car or taxi, when needed’ or whether they had their hair done or cut regularly’. These also asked whether they could afford them, but also focussed on not being able to have these items for other reasons, such as poor health, or no one to help them etc. these questions were less based on the household and more about the individual.

Those who did not have these items were given a score, such that if they didn’t have any item on the list, they would have a score of 100, and if they had all items, they had a score of 0. Non-pensioners with a score of 25 or more were classed as deprived and pensioners with a score of 20 or more were classed as deprived.

Parents of children were also asked a set of questions about what they could afford for their children.

In this bulletin the non-pensioner and pensioner measures of deprivation are combined to provide an ‘adult’ deprivation variable. The terms ‘adult’ and ‘household’ deprivation may be used interchangeably depending on context.

## Qualifications

Respondents' highest qualifications have been grouped according to the National Qualification Framework (NQF) levels, where level 1 is the lowest level of qualifications and level 8 is doctoral degree or equivalent. For the National Survey, respondents have been grouped into 5 groups, those with no qualifications are in the lowest category and respondents with qualifications at levels 4 to 8 have been grouped together in the highest qualification category.

To provide more meaningful descriptions of the qualifications, these short descriptions have been used in this bulletin.

<b>National Qualification Framework levels</b>	<b>Description used in bulletin</b>
NQF levels 4-8	Higher education (Level 4+)
NQF level 3	'A' level and equivalent (Level 3)
NQF level 2	GCSE grades A to C and equivalent (Level 2)
Below NQF level 2	GCSE below grade C (below Level 2)
No qualifications	No qualifications

## Key quality information

### Background

The National Survey for Wales is carried out by The Office for National Statistics on behalf of the Welsh Government. The results reported in this bulletin are based on interviews completed in 2018-19 (1 April 2018 – 31 March 2019).

The sample was drawn from the Royal Mail Small Users Postcode Address File (PAF), whereby all residential addresses and types of dwellings were included in the sample selection process as long as they were listed as individual addresses. If included as individual addresses on the PAF, residential park homes and other dwellings were included in the sampling frame but community establishments such as care homes and army barracks are not on the PAF and therefore were not included.

The National Survey sample in 2018-19 comprised 24,762 addresses chosen randomly from the PAF. Interviewers visited each address, randomly selected one adult (aged 16+) in the household, and carried out a 44-minute face-to-face interview with them, which asked for their opinions on a wide range of issues affecting them and their local area. A total of 11,922 interviews were achieved.

### Interpreting the results

Percentages quoted in this bulletin are based on only those respondents who provided an answer to the relevant question. Some topics in the survey were only asked of a sub-sample of respondents and other questions were not asked where the question is not applicable to the respondent. Missing answers can also occur for several reasons, including refusal or an inability to answer a particular question.

Where a relationship has been found between two factors, this does not mean it is a causal relationship. More detailed analysis is required to find whether a factor causes change in another.

The results are weighted to ensure that the results reflect the age and sex distribution of the Welsh population.

### Quality report

A summary [Quality Report](#) is available, containing more detailed information on the quality of the survey as well as a summary of the methods used to compile the results.

### Sampling variability

Estimates from the National Survey are subject to a margin of uncertainty. Part of the uncertainty comes from the fact that any randomly-selected sample of the population will give slightly different results from the results that would be obtained if the whole population was surveyed. This is known as sampling error. Confidence intervals can be used as a guide to the size of the sampling error. These intervals are calculated around a survey estimate and give a range within which the true value is likely to fall.

In 95% of survey samples, the 95% confidence interval will contain the 'true' figure for the whole population (that is, the figure we would get if the survey covered the entire population). In general,

the smaller the sample size the wider the confidence interval. Confidence intervals are included in tables of survey results published on StatsWales.

As with any survey, the National Survey is also subject to a range of other sources of error: for example, due to non-response; because respondents may not interpret the questions as intended or may not answer accurately; and because errors may be introduced as the survey data is processed. These kinds of error are known as non-sampling error, and are discussed further in the quality report for the survey.

### **Significant differences**

Where the text of this release notes a difference between two National Survey results (in the same year), we have checked to ensure that the confidence intervals for the two results do not overlap. This suggests that the difference is statistically significant (but as noted above, is not as rigorous as carrying out a formal statistical test), i.e. that there is less than a 5% (1 in 20) chance of obtaining these results if there is no difference between the same two groups in the wider population.

Checking to see whether two confidence intervals overlap is less likely than a formal statistical test to lead to conclusions that there are real differences between groups. That is, it is more likely to lead to "false negatives": incorrect conclusions that there is no real difference when in fact there is. It is also less likely to lead to "false positives": incorrect conclusions that there is a difference when there is in fact none. Carrying out many comparisons increases the chance of finding false positives. Therefore, when many comparisons are made the conservative nature of the test is an advantage because it reduces (but does not eliminate) this chance.

Where National Survey results are compared with results from other sources, we have not checked that confidence intervals do not overlap.

### **Regression analysis**

Where further analysis has been carried out selection of the initial variables used in the regression was based on; the results from cross-analysis, policy direction, and the practicality of using the variable. The results for some factors were only available for a sub-sample of respondents, or there were a large number of 'missing' results which resulted in a substantial drop in the sample size on which the regression model could be tested. For this reason some variables/factors were omitted from the investigation. The final models consisted of those factors that remained significant even after holding the other factors constant. These significant factors are those that have been discussed in this bulletin and the use of regression analysis is indicated by the statement that we have 'controlled for other factors'. It is worth noting that had a different range of factors been available to consider from the survey, then some conclusions about which factors were significant may have been different.

More details on the methodology used in the regression analysis in this report are available in the [Technical Report: Approach to regression analysis and models produced](#).

## Technical report

More detailed information on the survey methodology is set out in the [technical report](#) for the survey.

## National Statistics status

National Statistics status means that our statistics meet the highest standards of trustworthiness, quality and public value, and it is our responsibility to maintain compliance with these standards.

The continued designation of these statistics as National Statistics was confirmed in 2017 following a compliance check by the Office for Statistics Regulation [[letter of confirmation](#)]. These statistics last underwent a full assessment [[full report](#)] against the Code of Practice in 2013.

Since the latest review by the Office for Statistics Regulation, we have continued to comply with the Code of Practice for Statistics, and have made the following improvements:

- provided more detailed breakdowns in the [Results viewer](#) and made it easier for users to compare results across years;
- updated the survey topics annually to ensure we continue to meet changing policy need; and
- made regression analysis a standard part of our outputs to help users understand the contribution of particular factors to outcomes of interest.

## Well-being of Future Generations Act (WFG)

The Well-being of Future Generations Act 2015 is about improving the social, economic, environmental and cultural well-being of Wales. The Act puts in place seven well-being goals for Wales. These are for a more equal, prosperous, resilient, healthier and globally responsible Wales, with cohesive communities and a vibrant culture and thriving Welsh language. Under section (10)(1) of the Act, the Welsh Ministers must (a) publish indicators (“national indicators”) that must be applied for the purpose of measuring progress towards the achievement of the Well-being goals, and (b) lay a copy of the national indicators before the National Assembly. The 46 national indicators were laid in March 2016.

Information on the indicators, along with narratives for each of the well-being goals and associated technical information is available in the [Well-being of Wales report](#).

Further information on the [Well-being of Future Generations \(Wales\) Act 2015](#).

The statistics included in this release could also provide supporting narrative to the national indicators and be used by public services boards in relation to their local well-being assessments and local well-being plans.

## Further details

The document is available at:

<https://gov.wales/childcare-national-survey-wales-april-2018-march-2019>

## Next update

Not a regular output

## We want your feedback

We welcome any feedback on any aspect of these statistics which can be provided by email to [surveys@gov.wales](mailto:surveys@gov.wales).

## Open Government Licence

All content is available under the [Open Government Licence v3.0](#), except where otherwise stated.

