Draft – 27 January 2011

London Borough of Richmond upon Thames

Childcare sufficiency assessment – gaps analysis

January 2011

Table of contents

1 Introduction

Childcare plays a crucial role in the lives of most families. It enables parents to go out to work to contribute to a decent family income when they have very young children. A growing body of evidence shows that good pre-school childcare gives children a flying start and leads to better outcomes as they move through school. It also allows older children to take part in a wide range of interesting activities that fosters their personal development in a safe environment.

Securing Sufficient Childcare: Statutory guidance for local authorities in carrying out their childcare sufficiency duties (DCSF[1], March 2010)

1.1 Context

Under the Childcare Act 2006 local authorities have a statutory duty to secure sufficient childcare for the needs of working parents/carers in their area for children up to the 1st September after they turn 14 years, or until they reach the age of 18 years in the case of children with a disability. A core element of this duty is to complete a Childcare Sufficiency Assessment every three years which assesses the supply of, and demand for, childcare in the local authority and identifies any gaps in provision.

The London Borough of Richmond upon Thames (LBRuT) published its first Childcare Sufficiency Assessment in March 2008. This new report (published March 2011) forms part of LBRuT's second Childcare Sufficiency Assessment.

Definitions of 'childcare' and 'sufficiency' are included in the appendix.

1.2 Objectives

This report uses a range of data collected as part of the Assessment process to identify gaps in the childcare market in LBRuT. The report seeks to quantify the scale and extent of gaps with the aim of helping the local authority and its partners decide which gaps to address as part of their action plan (the action plan is produced as a separate document).

This report focuses on the following 'types of gaps':

- **Income gaps:** where there is a shortage of affordable childcare for the income groups in the local area
- **Time gaps:** where there is a shortage of childcare at a time that parents/carers wish to use childcare. These could be at certain times of the day or days of the week, or might be seasonal, for example, during school holidays

[1] Department for Children, Schools and Families, which became the Department for Education on 12 May 2010.

- **Age gaps:** where there is a shortage of childcare suitable to the needs and requirements of a certain age group

- **Type gaps:** where there is a shortage in the type of childcare for which parents/carers may be expressing a preference

- **Specific need gaps:** where there is a shortage of suitable places for children with a disability, or children with other specific needs or requirements, including those from particular faiths or community groups

- **Geographical gaps:** where a geographical area has a general shortage of supply

In line with the statutory guidance, the report focuses on barriers in the childcare market affecting parents'/carers' ability to:

- Take-up or remain in work

- Undertake education or training that is likely to lead to work

- Access free early learning for their eligible child aged 3 or 4 years

- Access childcare for their disabled child

1.3 Data used as part of this assessment

A wide range of data has been used to inform this Childcare Sufficiency Assessment, including:

- **Profile of the supply of childcare:** information held by LBRuT was used to profile the childcare available in the borough. The analysis looked at number of places, number of children per place, opening times, vacancies, fees and quality. It looked at differences in the childcare market by type of provider, locality, age of child and time of year. The analysis of supply also included results from an online questionnaire sent to all childcare providers (and completed by 54) asking about their views of the childcare market.

- **Parent/carer demand survey:** a telephone survey was conducted with 510 parents/carers in Richmond upon Thames to find out about their views and experiences of childcare. The questionnaire included (amongst others) questions on childcare that they use, reasons for not using childcare, improvements required, and financial support[2]. The full report, completed by Ci Research, is available on request.

- **Focus groups with parents/carers:** three focus groups were held in October 2010 with: low income families in Barnes (11 participants); young parents

[2] For the remainder of this report, this is referred to as *Consultation with parents/carers*, October 2010

living in Whitton/Healthfield area (6 participants); and families from Black and minority ethnic groups (6 parents).

For the purposes of this analysis the London Borough of Richmond upon Thames has been divided into ten sub-local authority areas (SLAs). These were determined by geography, the spread of total population of 0-19 year olds in each ward, the number of providers in each ward and needed to be conterminous with ward boundaries.

Figure 1 shows the boundaries for each SLA and the wards that sit within them. Figure 2 shows the maintained school nurseries located within each SLA and ward.

1.4 Structure of this report

The remainder of this report is structured as follows:

- Section 2 provides a profile of the London Borough of Richmond upon Thames.
- Section 3 seeks to quantify the extent to which issues/problems with childcare are affecting families in LBRuT.
- Sections 4 to 9 provide commentary on each of the 'types of gaps' highlighted by the statutory guidance, i.e. income gaps, time gaps, type gaps, age gaps, specific need gaps, and geographical gaps.
- Section 10 is the appendix, containing definitions of 'childcare' and 'sufficiency'.

Figure 1: Wards within each SLA

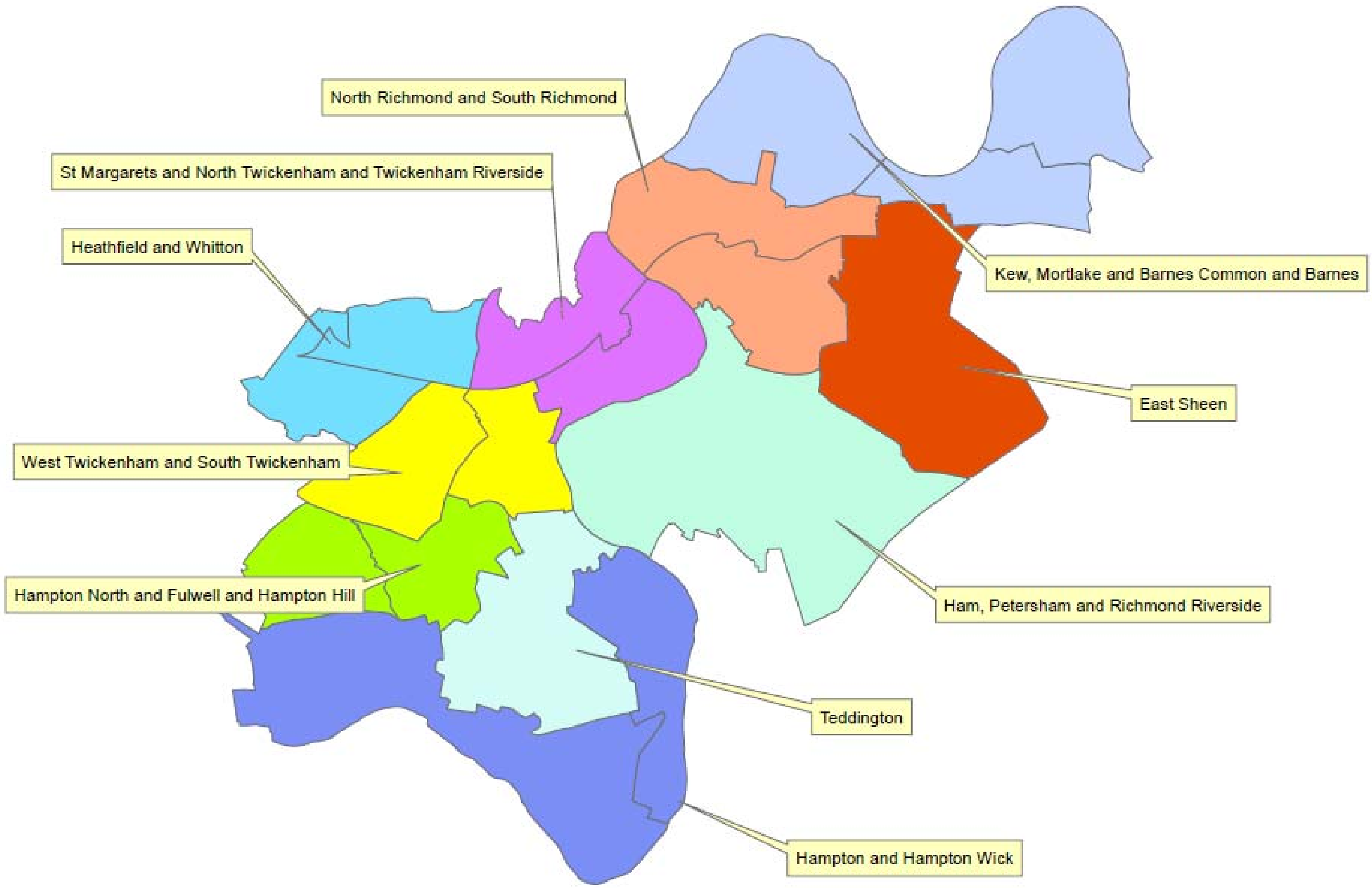

Figure 2: Maintained school nurseries within each ward and SLA

Name	Ward	SLA
Archdeacon Cambridge's	South Twickenham	West Twickenham and South Twickenham
Barnes	Mortlake and Barnes Common	Kew, Mortlake and Barnes Common and Barnes
Buckingham	Hampton North	Hampton North and Fulwell and Hampton Hill
Collis	Hampton Wick	Hampton and Hampton Wick
Darell	Kew	Kew, Mortlake and Barnes Common and Barnes
Hampton I	Hampton	Hampton and Hampton Wick
Hampton Wick I	Hampton Wick	Hampton and Hampton Wick
Heathfield I	Heathfield	Heathfield and Whitton
Holy Trinity	North Richmond	North Richmond and South Richmond
Lowther	Barnes	Kew, Mortlake and Barnes Common and Barnes
Meadlands	Ham, Petersham and Richmond Riverside	Ham, Petersham and Richmond Riverside
Orleans I	St Margarets and North Twickenham	St Margarets and North Twickenham and Twickenham Riverside
St James's	South Twickenham	West Twickenham and South Twickenham
St Richard's with St Andrew's	Ham, Petersham and Richmond Riverside	Ham, Petersham and Richmond Riverside
Stanley	Fulwell and Hampton Hill	Hampton North and Fulwell and Hampton Hill
The Russell	Ham, Petersham and Richmond Riverside	Ham, Petersham and Richmond Riverside

2 Profile of Richmond upon Thames

2.1 Introduction

The London Borough of Richmond upon Thames is a prosperous, safe and healthy borough. It covers an area of 5,095 hectares (14,591 acres) in southwest London and is the only London borough spanning both sides of the Thames, with river frontage of 21½ miles. The main town centre is Richmond and there are four district centres at Twickenham, Teddington, East Sheen and Whitton.

2.2 Our people

2.2.1 Population

Richmond upon Thames has a population of 187,200 according to the revised mid-year estimates for 2008; 51% females and 49% males. (ONS, released May 2010). The latest information can be found at: http://www.statistics.gov.uk/statbase/product.asp?vlnk=14060.

According to the ONS revised mid-year estimates for 2008 there are some differences between the population of Richmond upon Thames and that of the country as a whole. There is a greater proportion of people aged 0-9 years in Richmond (13.0%), and a smaller proportion aged 10-24 (15.2%). There are also more people of a working age, with 59.4% of the population aged 25-64. The proportion of those aged 65-84 (10.3%) is slightly lower than that of Outer London (11.2%), and lower than that of the country as a whole (14.0%). However, the number of people aged over 85 (1.3%) is very similar to the national picture (1.5%).

At the time of the 2001 Census, Richmond upon Thames had the highest percentage in London (44%) of people aged 65 and over living alone and this was expected to increase further. Ham, Petersham and Richmond Riverside wards have the highest count of population for both 65+ and 85+ age bands.

The ONS population projections suggest a rise in the total population of Richmond upon Thames to 189,000 by 2011 and to 198,000 in 2016.

Significant differences in age groups are as follows:

- The 0-19 age group will increase by 3.4 % by 2011 and by 9.9% by 2016;
- The 20-39 age group will decrease by 0.4% by 2011 and by 0.9% by 2016;
- The 40-64 age group will increase by 2.9% by 2011 and by 6.2% by 2016;
- There will be an overall increase in the 65+ age group, with a significant rise in the number of "younger" older people by 2016.

More detailed demographic data can be found at:
http://www.richmond.gov.uk/cenborough.pdf

Ward level data can be found at: Census information - London Borough of Richmond upon Thames.

2.2.2 Community

The borough has a strong community; according to the 2008/9 Place Survey, almost nine out of ten residents feel that people from different backgrounds get on with each other in their local area and almost two-thirds of all residents feel they belong to their immediate neighbourhood too.

2.2.3 Deprivation

Richmond is one of the least deprived areas in the country and the least deprived within London (Index of Multiple Deprivation 2007). No areas in Richmond are among the 20% most deprived areas in the country, and 55% of areas in Richmond are among the least deprived 20% in England. Figures also suggest that relative deprivation is decreasing: the borough's Index of Multiple Deprivation (IMD) rank score has reduced from 301 in 2004 to 309 in 2007.

However, there are pockets of relative disadvantage in the borough. Seven areas (Lower Super Output Areas) in Richmond are among the 20% to 40% most deprived areas in England. These are located in the following wards: Ham & Petersham, Heathfield, Hampton North, Barnes, Hampton and Whitton. In these areas there are concentrations of less well off residents facing higher levels of unemployment, worklessness, lower skill levels and poorer physical and mental health. Progress has been made through partnership working to tackle these issues and a targeted approach is now being developed to support households affected by disadvantage.

More information on the Index of Multiple Deprivation 2007 can be found at: Indices of Deprivation 2007 - Communities and neighbourhoods - Communities and Local Government.

2.2.4 Ethnicity

Richmond upon Thames is a relatively diverse borough when compared with England and Wales as a whole, but one of the least ethnically diverse boroughs when compared to London. The London Borough of Richmond upon Thames' Black, Asian and Ethnic Minority population comprises 11.5% of the total population of which the largest group is Indian (2.5%).

A further 12% have a non-British white background of which the greatest proportion is Irish (2.8%).

Heathfield ward has by far the largest concentration of non-white ethnic minority groups (16.2%) living in the borough. Whitton and West Twickenham are also more ethnically diverse compared to the borough average, approximately a quarter of all Indians in the borough live in these two wards. The least diverse ward in the borough is Hampton (JSNA 2009).

2.2.5 Employment

In 2009, approximately 71,300 people worked in jobs within the borough and of these 16,600 (23%) were self-employed workers. This is a much higher proportion than in London (15%) and England (13%). According to the 2001 Census, 11% of Richmond residents worked mostly from home compared to around 9% in London and England and this is likely to be underestimated.

70% of Richmond working age residents work in managerial, profession and technical jobs. Only 7% work in 'elementary' positions such as manufacturing processing and cleaning. There is a good supply of office premises in Richmond although the dense nature of the borough limits the availability of potential new developments.

Well over half of Richmond's residents hold at least a degree. This is 80% above the English average and 34% more than the London average. Richmond's resident weekly earnings are on average 24% higher than in London as a whole and 60% above the national average at £780 per week.

Many local people commute out of the borough to work and at the same time, many non-residents come to work in Richmond each day. In 2001 the census told us that 62% (55,500 people) of all employed residents commuted out of the borough to work – most significantly to The City, Westminster, Hounslow and Kingston. 38% (34,000 people) of the resident workforce both lived and worked in the borough, and 50% of the borough's workforce (34,500 people) commuted into the borough to work, mainly from Hounslow, Kingston, Wandsworth and north Surrey.

Although unemployment rose significantly during the recession, it remains relatively low. In July 2010, 1.6% of the borough's residents were claiming unemployment benefit, significantly lower than in London and England. Fewer Richmond residents experience long-term unemployment: 13.6% of all claimants have been claiming for over 12 months compared to 17% in London and 18% in England.

2.2.6 Education

The local authority maintains one nursery school and 16 nursery units, 41 primary schools, eight secondary schools for 11-16 year olds, and two special schools. Provision for children with special needs is made in all mainstream schools. The local authority maintained schools have 13,890 full-time and part-time primary pupils on roll, 6,660 secondary pupils, and 140 pupils attending the borough special schools.

Pupils eligible for free school meals represent 9% of the roll in primary schools, 17% in secondary schools and 39% in special schools. Overall, 20% of pupils are resident outside the borough, comprising 12% of primary school pupils and 35% of secondary school pupils.

The majority of pupils attending the borough schools are from white ethnic backgrounds (76%), with the largest minority ethnic groups being pupils from mixed backgrounds (9%) and pupils from Asian/Asian British backgrounds (7%). The diverse range of backgrounds of pupils is evident from the fact that pupils speak over 130 languages other than English.

2.3 Our place

2.3.1 Housing

At the time of the 2001 Census there were approximately 76,100 homes in the borough.

Owner occupation is the dominant tenure in the borough with 69% of households owning their properties. There is a large private rented sector in the borough, with 16% households renting privately. The borough has the 4th smallest social rented sector in Greater London, which amounts to nearly 12% of the borough's households renting their home from a housing association.

Comparing the average prices of houses across Greater London, Richmond is ranked the 7th most expensive borough in the capital; it is also the most expensive Outer London borough to buy in. The Land Registry's House Price Index shows the average house price in Richmond upon Thames in July 2010 was £436,578 compared to £343,730 in the London region.

Affordability is a key issue affecting residents in Richmond both in the ability to rent privately or buy property. In April 2009, there were 6,858 households on the housing register (who are registered for affordable housing) with numbers increasing since April 2001.

Although homelessness is still an issue it is lower than many London boroughs; in 2008/09 there were 130 homeless families and 203 households in temporary accommodation. With a large private rented and owner occupied sector house conditions remain an issue for the borough.

More detailed information on housing issues and housing need within the borough can be found at:
http://www.richmond.gov.uk/appendix_c_housing_strategy_evidence_base.pdf

More information on the Housing Strategy of the borough can be found at:
http://www.richmond.gov.uk/housing_strategy_2008-2012_final.pdf

2.3.2 Local Economy

Richmond is an enterprising borough. There were approximately 10,455 enterprises operating in Richmond in 2009 - 10% more than in 2000 - and 11,845 business units (an enterprise can have more than one business unit, such as multiple shops). The enterprise stock has grown faster than in London since 2000 and business density levels are high.

A telling characteristic is how businesses are spread across the borough. Although there are concentrations in major centres such as Richmond, Twickenham and Teddington, all smaller centres and neighbourhoods are dotted with small businesses. In fact, Richmond is characterised by the fact that 91.5% of all business units employ less than ten people, compared to 87.5% in London. In addition, in 2008, 19.5% of residents in Richmond were self-employed compared to 15.5% in London on average.

Richmond is a dynamic economy, creating more jobs and more businesses than the national average since 2001. It is also a diverse economy and the largest sectors in terms of employment are in expanding industries while there are few jobs in declining sectors. The largest amount of jobs are in business services, hotels and restaurants, property services/real estate and recreation and culture. Retail is also a large employment sector which has room for growth and is a major contributor to the visitor economy.

The visitor economy in Richmond supports at least 8,600 jobs in 770 business units (not including self employed) which is 12% of all jobs, compared to 8% in London. Over half of these jobs are in restaurants and bars. Major attractions like Kew Gardens, Hampton Court, Richmond Park and Twickenham stadium help to bring in around 3 million visitors per year, generating an estimated £292 million in the local economy.

3 Scale of childcare barriers

In consultations, a relatively small proportion of parents/carers report that the childcare that they use during term time and school holidays does not meet their needs; and few parents/carers report that they do not use childcare due to a constraint in the market, rather than out of choice. Consultation with childcare providers confirms an overall positive view about the childcare market and its ability to cater for specific groups. However, in consultations over one in three parents/carers in LBRuT report that childcare is a barrier to accessing employment and training. This suggests that there may still be some scope for improvements to be made to childcare within the borough.

Figure 3 summarises some of the key findings from the questionnaire conducted with parents/carers in LBRuT about childcare in the borough[3]. Overall, it suggests that the scale of childcare problems may be relatively small in LBRuT. For instance:

- 70% of parents/carers involved in the consultation reported that they do not use childcare. The data suggests that for the vast majority of people this is out of choice, rather than a constraint in the market. The main constraints appear to be affordability (raised by the equivalent of 2.4% of all parents/carers) and meeting specific needs of children and young people (raised by the equivalent of 1.4% all parents/carers). See Figure 3.

- A fairly low percentage of parents/carers say that the childcare that they use does not meet their needs during term time (the equivalent of 1.8% of all parents/carers). A higher percentage report that the childcare that they use does not meet their needs during school holidays (the equivalent of 5.1% of all parents/carers). Again this suggests that gaps, overall, may be relatively small in LBRuT. See Figure 3.

- Figure 4 shows what would happen if the results from the parent/carer questionnaire were scaled-up to all households with children in LBRuT[4]. It shows that improvements to childcare could benefit between 141 and 2,502 families with children in LBRuT, this is the equivalent of 0.7% to 12.4% of all households with children in LBRuT. For instance, affordability could benefit 2,502 families (12.4% of all households with children); of these, 1,937 families are likely to be using childcare and 565 are likely not to be using childcare.

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[3] Consultation with parents/carers, October 2010

[4] These calculations are based on 2001 Census data that shows that there are 20,182 households with dependent children in Richmond upon Thames. Data from the parental demand survey has been used to calculate the total number of people affected by a particular issue. For instance, affordability: 20,182 households x 30% who use childcare x 32% who 'tend to disagree' or 'strongly disagree' that childcare is affordable = 1,937.

- Consultation with providers shows a positive view about the childcare market generally and whether it caters for the needs of specific groups of parents/carers. For instance, Figure 6 shows that all aspects of the market were viewed positively, in particular, quality of provision and choice. Childcare providers were also positive about their ability to cater for different groups. The highest rating was given to children with a disability or special educational need and working families. This was followed by families seeking work and low income families (see Figure 7).

However, research also showed that across all parents/carers who were consulted, 35% 'tended to agree' or 'strongly agreed' that childcare is a barrier to accessing employment or training. The questionnaire analysis highlights that parents/carers in particular SLAs are more likely to experience childcare as a barrier to employment or training, i.e. Hampton and Hampton Wick; East Sheen; St Margarets and North Twickenham and Twickenham Riverside; and Hampton North and Fulwell and Hampton Hill. This suggests that there may still be some scope for improvements to be made to childcare within the borough.

Figure 3: Use of childcare and reasons why parents/carers to do use childcare or why it does not meet need (Please note: size of circles are indicative only; and percentages refer to proportion of all parents/carers). Source: Parent/carer consultation, October 2010

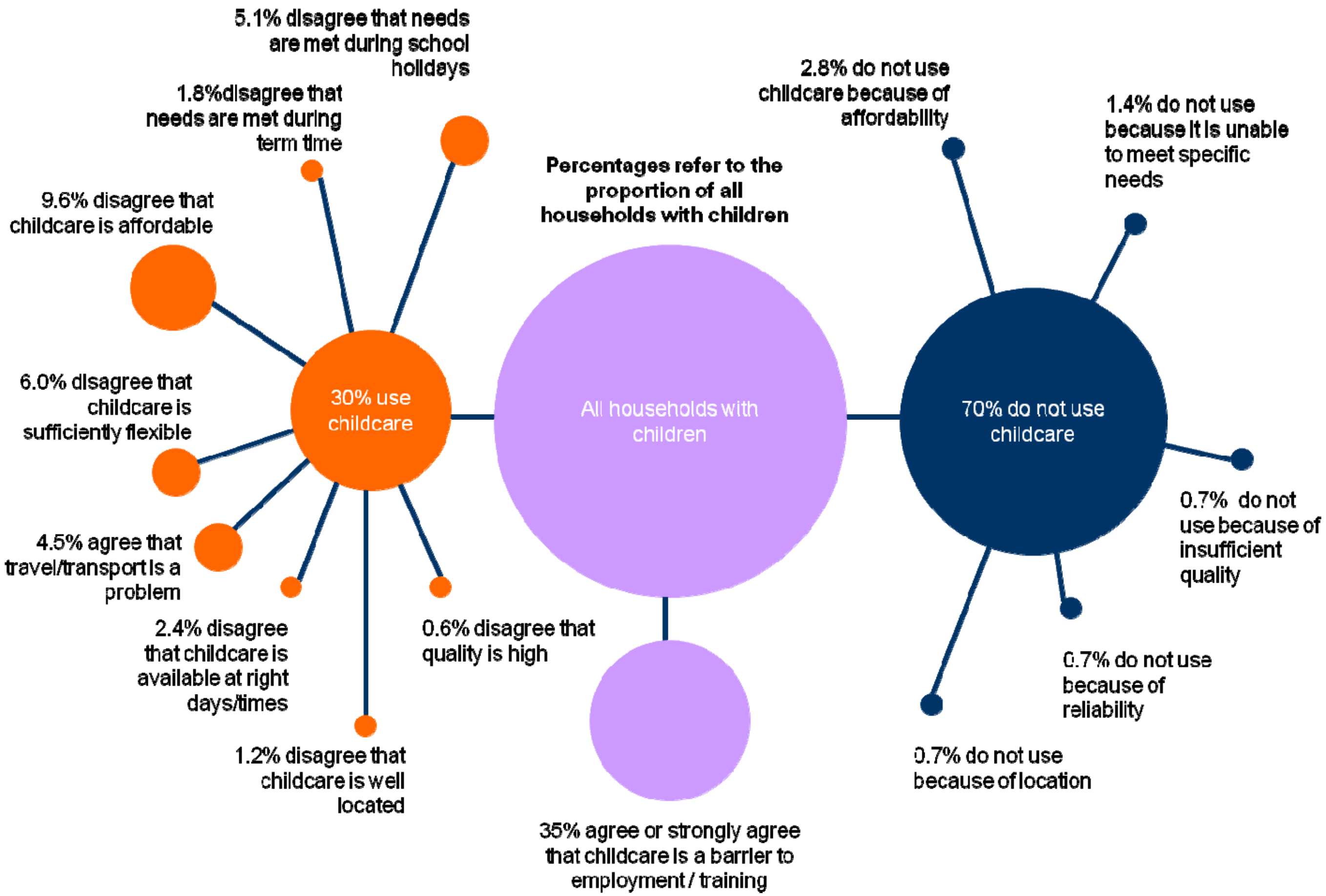
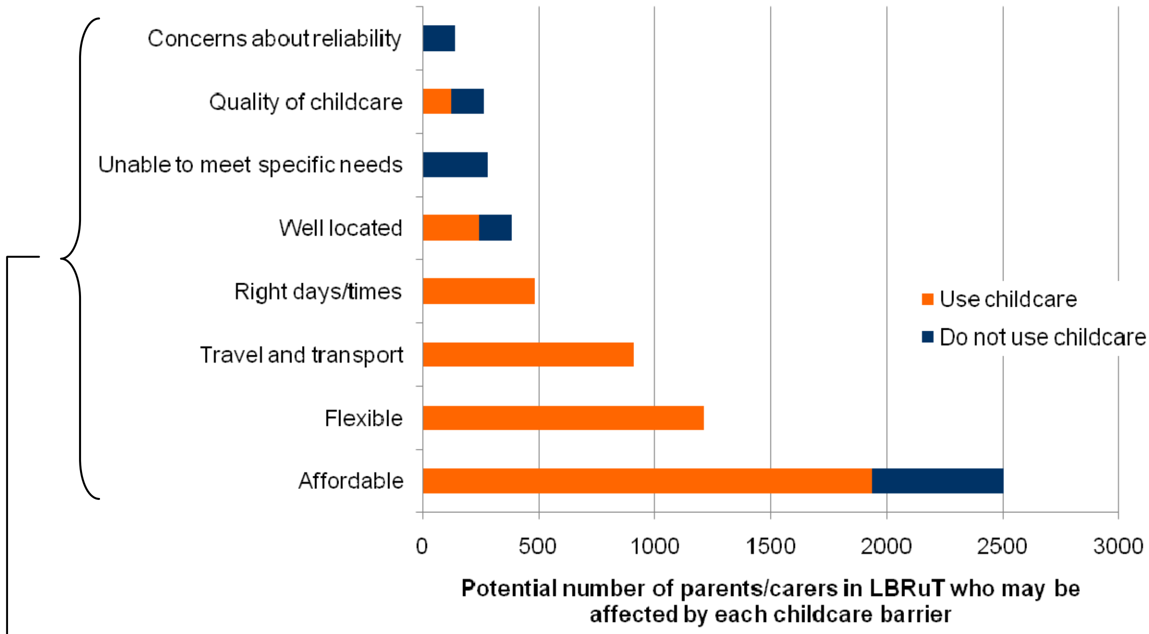


Figure 4: Number of parents/carers across LBRuT who may be affected by each childcare barrier. This diagram and table uses the data presented in Figure 3 to calculate the total number of parents/carers who may be affected by each childcare barrier. It multiplies the percentage of parents/carers who highlighted a particular barrier in the questionnaire by the number of households with children according to the 2001 Census. Source: Parent/carer consultation, October 2010, and Census 2001



Barrier	Parents/carers using childcare who…	Number	Parents/carers who do not use childcare because…	Number
Concerns about reliability			…of concerns about reliability	141
Quality of childcare	…disagree that childcare is high quality	121	…of lack of sufficient quality care	141
Unable to meet specific needs			…it is unable to meet specific needs	283
Well located	…disagree that childcare is well located	242	…there is a lack of care available in the right location	141
Right days/times	…disagree that childcare is available at right days/times	484		
Travel and transport	…agree that travel and transport is a problem	908		
Flexible	…disagree that childcare is sufficiently flexible	1,211		
Affordable	…disagree that childcare is affordable	1,937	…there is no affordable childcare	565

Figure 5: Improvement suggestions chosen by all parents/carers. Source: Parent/carer consultation, October 2010

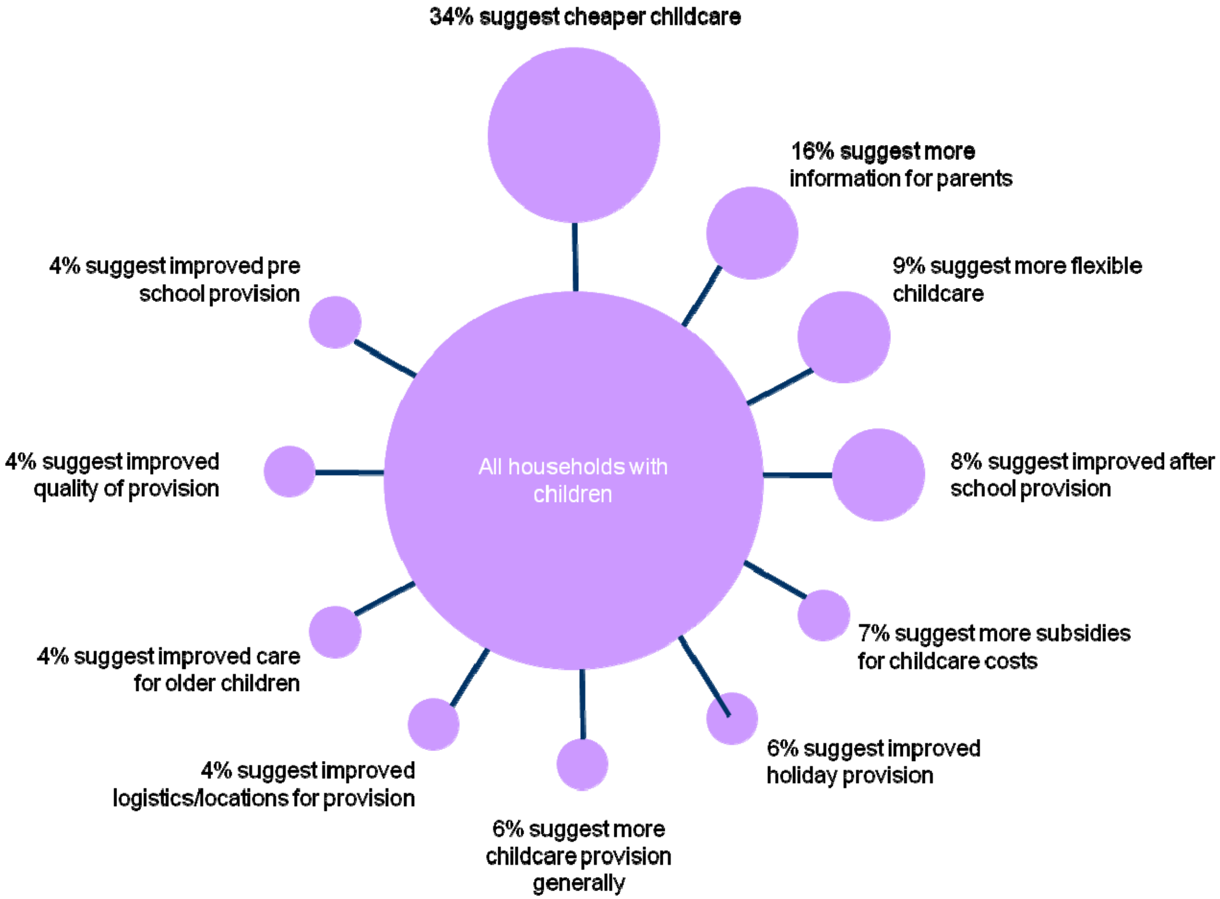


Figure 6: Average rating given to each aspect of the local childcare market by providers. (1=low and 5=high). Source: Analysis of supply, December 2010

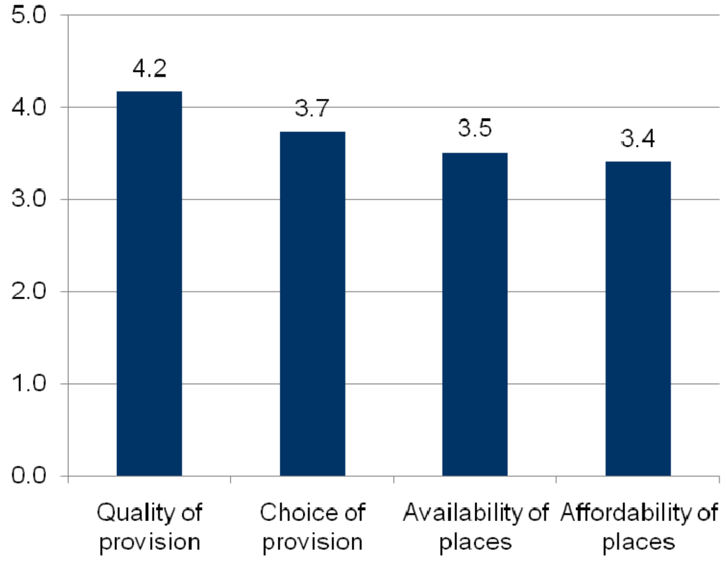
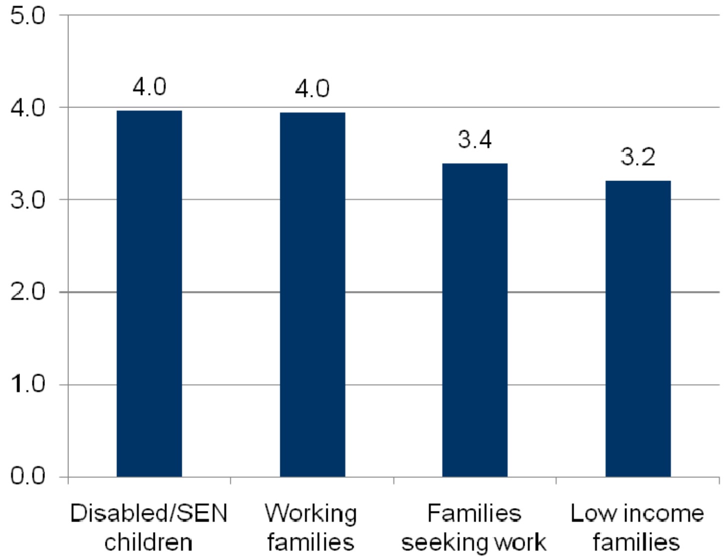


Figure 7: Average rating given by childcare provision for their ability to cater for specific groups. (1=low and 5=high). Source: Analysis of supply, December 2010



4 Income gaps

Affordability is the principal childcare gap experienced across LBRuT. It is the most popular improvement suggestion for those who use childcare and those who do not use childcare. It is also given a relatively low rating by childcare providers. Average hourly fee rates are above London and England averages. Data suggests that affordability may be a particular issue for parents/carers with children aged 0-2 years.

Despite being one of the least deprived areas in the country[5], affordability is the principal childcare gap experienced across LBRuT. Evidence to support this conclusion includes:

- 60% of all respondents 'tend to disagree' or 'strongly disagree' that overall childcare in Richmond upon Thames is affordable[6]. A lower percentage, 40%, 'tend to disagree' or 'strongly disagree' that childcare provides good value for money.

- 34% of all respondents reported that they would like to see cheaper childcare as an improvement to the childcare market. This was the most popular improvement (see Figure 5).

- 31% of those who use childcare 'tend to disagree' or 'strongly disagree' that childcare is affordable. Applied across the total number of families in LBRuT this is the equivalent of 9.6% of all families, or 1,937 households (see Figure 3 and Figure 4). This is the most popular improvement suggestion within this group[7].

- 4% of those who do not use childcare report that this is because there is no affordable childcare. Applied across the total number of families in LBRuT this is the equivalent of 2.8% of all families, or 565 households (see Figure 3 and Figure 4). This is also the most popular improvement suggestion within this group[8].

[5] See Analysis of Supply, December 2010

[6] Consultation with parents/carers, October 2010

[7] Consultation with parents/carers, October 2010

[8] Consultation with parents/carers, October 2010

- Childcare providers rate affordability of places and provision of low income families relatively low, although the overall rating is still above average (see Figure 6 and Figure 7)[9].

- Supply data[10] shows that the average fee rate across LBRuT is £5.67 per hour[11]. This is above London and England averages, in some cases by as much as £2.67 per hour[12].

Consultation with parents/carers shows that some age groups may be more likely than others to experience affordability as a gap[13]. For instance, parents/carers with children aged 0-2 years are more likely to highlight affordability as a reason for not using childcare (10% compared to 4% overall). In addition, parents/carers with children aged 0-2 years who use childcare are more likely to disagree that their provision represents good value for money. This is supported by data on how much parents/carers spend on childcare per week. Figure 8 shows that 41% (i.e. 23% plus 18%) of parents with children aged 0-2 spend £150 or more per week on childcare, compared to an overall average of 26% (i.e. 16% plus 10%).

This relatively low rating for value for money was despite the fact that parents with children aged 0-2 years who use childcare were more likely to be receiving financial support: 38% reported receiving support, compared to 31% overall. Please note that the cost of providing a place for 0-2 year olds is higher than for other age groups. A staff ratio of 1:3 is required and settings may cover the cost of nappies and feeds.

Figure 8: Average weekly spend on childcare (Source: Parent/carer consultation, October 2010)

Category	Less than £50	£50 to £149	£150 to £250	More than £250
LBRuT	32%	41%	16%	10%
0-2 year olds	15%	45%	23%	18%
3-4 year olds	28%	36%	22%	14%
5-10 year olds	43%	36%	15%	6%
11-14 year olds	46%	35%	8%	12%

9 Analysis of supply, December 2010

10 Analysis of supply, December 2010

11 Please note that this data is based on data from 51 childcare providers in 2009. See analysis of supply for further information

12 This is in comparison to results from the Childcare Survey Costs 2010 published by the Daycare Trust. See analysis of supply for further information

13 Consultation with parents/carers, October 2010

Consultation with parents/carers suggests that the way information is provided about financial support may be contributing to concerns about affordability. For instance, 44% of all respondents ‘tended to disagree’ or ‘strongly disagreed’ that they knew where to find information about financial assistance for childcare.

5 Time gaps

Gaps in opening times affect a small proportion of parents/carers who use childcare. Flexibility of provision, however, is highlighted as more of an issue by parents/carers who use childcare and is the second highest improvement suggestion for this group. The data also suggests a possible gap in school holiday provision.

5.1 Opening times and flexibility

Only 8% of parents/carers who use childcare 'tend to disagree' or 'strongly disagree' that it is available on the right days/times. Applied across the total number of families in LBRuT this is the equivalent of 2.4% of all families, or 484 households (see Figure 3 and Figure 4). This is the fourth most popular improvement suggestion for parents/carers who use childcare[14]. This suggests that opening times are not experienced as a large gap within the borough.

Flexibility, however, is experienced as a larger gap. For instance:

- 9% of all parents/carers highlighted 'more flexible childcare options' as an area for improvement (see Figure 5). This was the third highest improvement suggestion.

- 20% of parents/carers who use childcare 'tend to disagree' or 'strongly disagree' that it is sufficiently flexible. Applied across the total number of families in LBRuT this is the equivalent of 6.0% of all families, or 1,211 households (see Figure 3 and Figure 4). This is the second most popular improvement suggestion within this group[15].

Of those who use childcare, parents/carers of younger children (i.e. 0-2 years and 3-4 years) are more likely to disagree that childcare is sufficiently flexible.

5.2 Term time and school holidays

Evidence presents a mixed picture in relation to gaps during school holidays versus term time. For instance:

- In consultation with parents/carers, 17% of those who use childcare report that they 'tend to disagree' or 'strongly disagree' that it meets their needs. This is the equivalent of 5.1% of all families, or 1,029 households (see Figure 3 and

[14] Consultation with parents/carers, October 2010

[15] Consultation with parents/carers, October 2010

Figure 4). This compares to 6% of those who use childcare during term time (the equivalent of 1.8% of all families, or 363 households). This suggests that school holiday provision should be a priority for improvement.

- Other consultation with all parents/carers on improvements required shows that 8% suggest improved after school provision and 6% suggest improved holiday provision (see Figure 5). This suggests that term time provision should be a priority for improvement.

- Data on supply[16] shows that there are a larger number of children per place during school holidays than during term time[17]. For instance, there are 2.4 children aged 0-4 per place during term time and 4.0 children per place during school holidays. However, data from the parent/carer consultation shows that term time provision is in higher demand than school holiday provision. These two pieces of data are shown in Figure 9 below. They show that for 0-4 year olds there is a 67% difference in the number of children per place in school holidays compared to term time, and a 39% difference in usage. This suggests that there may be a shortfall in supply. This is also the case for 10-14 year olds. However, provision for 5-9 year olds appears well-matched. This implies that despite lower demand there still may be gaps in the number of places during school holidays for some age-groups.

Figure 9: Number of children per place in LBRuT. Difference in number of children per place and difference in usage. Source: Analysis of supply, December 2010, and Parent/carers consultation, October 2010.

Age group	Term time	School holidays	Difference in children per place	Difference in usage[18]
0-4 year olds	2.4	4.0	+67%	-39%
5-9 year olds	6.2	7.6	+23%	-31%
10-14 year olds	46.0	84.4	+83%	-26%

[16] Please note that this data does not take into account clubs or groups offering holiday activities for children, e.g. sports, drama, scouts etc

[17] Analysis of supply, December 2010

[18] *Consultation with parents/carers*, October 2010. The age ranges used in the analysis of supply and the parent/carer consultation are slightly different. 0-4 has been calculated by combining 0-2 and 3-4. Data on usage for 5-9 year olds corresponds to 5-10 year olds in parent/carer consultation; and 10-14 year old correspond to 11-14 year olds.

6 Type gaps

There is little evidence to suggest that there are gaps in the types of childcare available in LBRuT[19]. Providers rate choice of provision highly and a relatively small proportion of parents/carers would like to see more childcare available. Data also suggests that provision across LBRuT is high quality.

6.1 Type of provider

The data suggests that a relatively small number of parents/carers would benefit from improvements in the type of childcare provision available. For instance:

- Childcare providers rate the quality and choice of provision highly (see Figure 6 and Figure 7).
- Only 18% of respondents 'tended to agree' or 'strongly agreed' that they would prefer to use a different type of childcare[20].
- 6% of parents/carers suggest that there should be more childcare provision generally (see Figure 5).
- 8% of parents/carers would like to see improved after school provision, 6% would like to see improved holiday provision, and 4% would like to see improved pre school provision (see Figure 5 and Figure 10).
- The analysis of supply suggests that there is a good range of provision and choice in childcare.

This is further supported by consultation with parents/carers which showed that only 17% of all respondents 'tended to disagree' or 'strongly disagreed' that they know where to find information about childcare. However, 16% of all respondents also suggested that childcare could be improved by providing more information. This was the second highest improvement suggestion.

[19] Please refer to the "analysis of supply" document to see a detailed analysis of the type of childcare supplied throughout the Borough. In addition to these they are also a number of crèches, non-compulsory register out of school and holiday playschemes available throughout the Borough.

[20] Consultation with parents/carers, October 2010

Figure 10: Improvements requested by type of provider. Source: Parent consultation, October 2010

Type of provider	Percentage of all respondents
Improved after school provision	8%
Improved holiday provision	6%
Improved pre school provision	4%

6.2 Quality of provision

The data suggests that there are few gaps in the quality of childcare across LBRuT. For instance:

- In consultation with parents/carers, only 2% of those who use childcare disagree that the quality of childcare is high. Scaled up to all parents/carers in LBRuT this is the equivalent of 0.6% of parents/carers, or 121 households (see Figure 3 and Figure 4).
- Also, only 1% of those who do not use childcare say that this is because there is nothing of sufficient quality. Scaled up to all parents/carers in LBRuT this is the equivalent of 141 households (see Figure 3 and Figure 4).
- The analysis of supply shows that quality across LBRuT appears relatively high with 87% of settings across the borough being rated by Ofsted as 'good' or 'outstanding'.
- In focus groups, the majority of parents/carers felt that childcare was high quality.

6.3 Future childcare need

Consultation with parents/carers suggests that the future demand for childcare is likely to fall over the next three years, except for those parents/carers with children aged 0-2 years. For all respondents, 46% report that they will want less childcare, whilst 18% report that they will want more childcare within the next three years (see Figure 11). This is an overall net reduction.

Only parents/carers with 0-2 year olds report that they will use more childcare than less childcare over the next 3 years. Figure 11 shows that 42% will use more childcare and 19% will use less.

Please note that in Richmond in 2007 there were 2,883 births. At 72 per 1,000 females population aged 15 to 44 years, the birth rate in 2007 was higher than for

England and London. There has been a steady increase in the number of births in Richmond upon Thames borough from 2004 to 2007. Live births rose by 11.6%, from 2,584 in 2004 to 2,883 in 2007. Coupled with the growth in the number of women of childbearing age, we expect the trend in births will increase in the next 10 years.

Figure 11: Respondents' future childcare needs over the next 3 years. Please note that multiple responses were allowed. Source: Consultation with parents/carers, October 2010

All children	18%	46%	47%
0-2 year olds	42%	19%	40%
3-4 year olds	22%	45%	33%
5-10 year olds	13%	37%	50%
11-14 year olds	6%	55%	39%

7 Age gaps

Overall, the evidence suggests that the number of places across age-groups is well-matched to demand. The data also shows different priorities for improvement for different age-groups. For instance, parents/carers with 0-2 year olds are more likely to highlight affordability and provision during school holidays. Parents/carers of children aged 3-4 are more likely to highlight problems with childcare that impact on employment and training and lack of choice. Parents/carers with 5-10 year olds appear generally happy with childcare, whilst parents/carers with 11-14 year olds have relatively high satisfaction rates but possibly problems with transport and access to financial information.

7.1 Gaps in the number of places by age group

The analysis of supply suggests that there are significant gaps in the provision of childcare for older children. It shows that the number of children per place is significantly higher for older children than for younger children (19 times difference in term time and 12 times difference in school holidays). Data from consultations with parents/carers shows that this gap does not reflect the differences in childcare use, for instance 10-14 year olds are 6 times less likely to use childcare than 0-4 year olds. This suggests that there is a gap in the number of places for older children. See Figure 12 for further information.

However, when asked directly about improvements required, only 4% of parents/carers say that childcare for older children should be improved. This is the same as the proportion of parents who would like to see improvements in pre school provision. In addition, supply data suggests shows that there are no children aged 10-14 on a waiting list. Overall, therefore, the number of places for each age-band may be appropriate for the level of demand.

Figure 12: Number of children per place compared to differences in childcare use. Source: Analysis of supply, December 2010, and Consultation with parents/carers, October 2010

0-4 year olds	2.4	4.0	57%
5-9 year olds	6.2	7.6	31%
10-14 year olds	46.0	84.4	10%
Difference between youngest and oldest age bands	19 times difference	12 times difference	6 times difference

7.2 Other gaps by age group

Figure 13 summarises the key differences in experiences of the childcare market by age of child, drawn from the parent/carer consultation and the analysis of supply. It suggests that:

- **Parents/carers with children aged 0-2 years:** affordability is likely to be a particular issue for this group. They are more likely not to use childcare because of affordability issues. Those who use childcare are more likely to report that childcare is not value for money and this is despite the fact that they are more likely to report that childcare is high quality. These parents/carers are also more likely to disagree that childcare during school holidays meets their needs. This is despite the fact that 0-4 year olds have the lowest number of children per place during school holidays (see Figure 9 above) and that the rate appears to be consistent with changes in demand over this period[22]. Other aspects of the childcare market are a relative strength for 0-2 year olds, e.g. flexibility, choice, travel/transport and information.

- **Parents/carers with children aged 3-4 years:** quality and provision of financial information appears to be a relative strength of the market for 3-4 year olds. Interestingly, parents with 3-4 year olds are more likely to report that issues with childcare are a barrier to employment or training. This may be connected with a perceived lack of choice highlighted by parents/carers. Data

[21] *Consultation with parents/carers*, October 2010. The age ranges used in the analysis of supply and the parent/carer consultation are slightly different. 0-4 has been calculated by combining 0-2 and 3-4. Data on usage for 5-9 year olds corresponds to 5-10 year olds in parent/carer consultation; and 10-14 year old correspond to 11-14 year olds.

[22] It is possible that the supply data age band of 0-4 years disguises some shortfalls in supply for 0-2 year olds, compared to 3-4 year olds.

relating to the take-up of the free entitlement to early learning and childcare for 3-4 year olds shows that the average take-up rate is 89%, but varies from 78% in Ham, Petersham and Richmond Riverside; and in Heathfield and Whitton; to 98% in Hampton North and Fulwell and Hampton Hill.

- **Parents/carers with children aged 5-10 years:** overall the evidence suggests that the market for this group is meeting need. They are more likely to report that childcare meets their needs during school holidays, that it is well located and high quality.

- **Parents/carers with children aged 11-14 years:** overall the evidence suggests that the market for this group is meeting need. They are more likely to agree that they are satisfied with the childcare that they use, that childcare is good value for money, is affordable, sufficiently flexible and open on the right days/times. Two possible weaknesses relate to travel/transport (where they are more likely to agree is a problem) and provision of financial information.

Figure 13: Summary of differences in responses by age of child from the parent/carer consultation, October 2010; and from the Analysis of Supply, December 2010

Question	0-2 year olds	3-4 year olds	5-10 year olds	11-14 year olds
Reasons for not using childcare	• More likely not to use childcare because of affordability			
Costs of childcare	• More likely to pay £150 or over per week for childcare	• More likely to pay £150 or over per week for childcare	• Less likely to receive financial support	• Less likely to receive financial support
Views of those who use childcare	• More likely to disagree that childcare during school holidays meets need • More likely to disagree that childcare is good value for money and is sufficiently flexible • More likely to agree that childcare is high quality	• More likely to agree that childcare is high quality	• More likely to agree that childcare during school holidays meets need • More likely to report that childcare is well located and high quality	• More likely to agree that they are satisfied with the childcare that they use • More likely to agree that travel/transport as a problem • More likely to agree that childcare is good value for money, affordable, sufficiently flexible, and open on the right days/times

<table>
<tr><th>Question</th><th>0-2 year olds</th><th>3-4 year olds</th><th>5-10 year olds</th><th>11-14 year olds</th></tr>
<tr><td>Overall views on childcare</td><td>• Most likely to feel well informed
• More likely to agree that there is good choice</td><td>• Least likely to agree that there is good choice
• More likely to feel that childcare is a barrier to employment
• More likely to know where to find information on finances</td><td></td><td>• Less likely to know where to find information about childcare</td></tr>
<tr><td>Differences in the supply of childcare[23]</td><td colspan="2">• Highest number of vacancies
• Highest number on waiting list
• Lowest number of children per place during term time and school holidays</td><td></td><td>• Lowest number of vacancies
• Lowest number on waiting list
• Highest number of children per place during term time and school holidays</td></tr>
</table>

[23] The analysis of supply uses different age bands, i.e. 0-4 years, 5-9 years and 10-14 years.

8 Specific need gaps

Statutory guidance on conducting a childcare sufficiency assessment notes that:

> *"It is vital that local authorities engage with, and support, providers in ensuring that childcare is inclusive and accessible to all. They should have particular regard to the childcare needs of families in challenging circumstances, including:*
>
> - *Low income families (including lone parents) and where parents are seeking work*
> - *Families who include children or parents with a disability*
> - *Families in Black and Minority Ethnic communities*
> - *Families in Gypsy, Roma and traveller communities*
> - *Families living in remote or rural areas*
> - *Armed Forces families"*
>
> (page 46)

This section focuses on the needs of these groups.

8.1 Low income families[24]

In the consultation with parents/carers[25], low income families were more likely to report that problems with childcare are acting as a barrier to employment and training (64% compared to 35% overall). There is a potential for this to change over time as this group are also more likely to report that they will want to use more childcare in the future[26]. Childcare providers confirm that provision for this group could be improved: they rate provision for low income families relatively low though still above average, i.e a rating of '3')[27].

Surprisingly, parents/carers with low household incomes who use childcare are more likely to agree that childcare is affordable (33% compared to 24% overall) and represents good value for money (50% compared to 37% overall)[28].

A slightly different picture regarding affordability was presented at the focus group conducted with 11 parents/carers with low incomes living in the Barnes area. About half of participants stated that it was difficult to find childcare that was affordable. They highlighted overall fee rates, difficulties with accessing

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[24] Those with a combined income of less than £18,000 per year

[25] *Consultation with parents/carers*, October 2010

[26] See *Consultation with parents/carers*, October 2010. Not quantified in the report.

[27] Analysis of supply, December 2010

[28] *Consultation with parents/carers*, October 2010

concessionary rates (e.g. they exist but you have to ask rather than being publicly advertised), registration fees for nurseries increasing costs, and holiday playschemes being particularly expensive.

Other issues highlighted by the 11 parents/carers in the focus group with low income families included:

- Choice: about three quarters of focus group participants highlighted lack of provision or choice in the Barnes area. Issues varied and included: lack of nursery provision, timings of holiday clubs, lack of places/choice overall and lack of afternoon activities.

- Quality: a number of parents/carers highlighted that the childcare that they used was high quality.

8.2 Parents/carers who are seeking work or who are studying/training

The parent/carer consultation shows that 35% of parents/carers agreed that childcare is a barrier to employment/training. This is reinforced by consultations with childcare providers who rate childcare for families seeking work second lowest (but still above average).

8.3 Parents/carers with disabled children

Parents/carers with disabled children are more likely to be report that they do not use childcare (17% use childcare, compared to 30% overall)[29]. 2% of those who do not use childcare say that this is because it does not cater for their child's specific needs. This is the equivalent of 1.4% of all families in LBRuT or 283 households. This suggests that this group may be experiencing particular barriers to the take-up of childcare.

Provision for disabled children is rated highly by childcare providers.

8.4 Parents/carers from Black and minority ethnic groups

The focus group with six parents/carers from Black and minority ethnic groups highlighted the following key issues[30]:

- Affordability: three parents/carers felt that childcare in LBRuT was not affordable. For one parent/carer, the price of childcare was affecting the take-up of childcare. For another, minimum charges meant that she had to pay for more childcare than she needed.

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[29] *Consultation with parents/carers*, October 2010

[30] Please note that this is commentary is based on feedback from six parents/carers from a range of ethnic origins, i.e. Africa, Russia, Thailand, and Australia

- Information: focus group participants felt that parents/carers who have newly arrived in the UK – and to an extent, in LBRuT – have difficultly accessing information as there is an assumption that most information will be accessed via school, friends or word-of-mouth.

- Meet parents/carers and children's needs: one parent/carer highlighted that childcare could be better at meeting needs if there was better communication between teacher and parent (language was felt to be a barrier). Another highlighted the need for improvements in meeting the needs of disabled children and improving choice.

8.5 Other groups

The current evidence collected did not highlight any specific needs for:

- Lone parents/carers
- Parents/carers who are seeking work or who are studying/training
- Parents/carers who are disabled
- Gypsy, Roma and Traveller families
- Armed Forces families

The childcare sufficiency action plan may recommend further consultation with these groups to better understand their needs.

9 Geographical gaps

Location is a relatively small gap in LBRuT. Where it is experienced, it is more likely to be experienced by parents/carers who currently use childcare and is likely to be connected with issues related to travel and transport. Parents/carers in East Sheen; Hampton and Hampton Wick; Hampton North and Fulwell and Hampton Hill; and St Margarets and North Twickenham and Twickenham Riverside are more likely to report that problems with childcare impacts on employment and training.

9.1 Geographical gaps across LBRuT

The evidence suggests that there are few geographical gaps across LBRuT. For instance:

- Only 1% of those who do not use childcare report that this is because there is no childcare in the right area. This is the equivalent of 0.7% of all families in LBRuT or 141 households.
- Only 4% of those who use childcare disagree that childcare is well located. This is the equivalent of 1.2% of all families, or 242 households.

Related evidence suggests that travel/transport may be more of an issue. For instance:

- 15% of those who use childcare agree that travel/transport is a problem. This is the equivalent of 4.5% of all families, or 908 households. This is the third highest improvement suggestion.
- 4% of all households consulted report that logistics/location should be improved.

9.2 Gaps by Sub-Local Authority Area (SLA)

Childcare markets tend to be very localised in nature. As a result, looking at gaps at a borough level may not pick-up the different experiences of the market that parents/carers living in different parts of the local authority may have. Figure 14, therefore, summarises gaps that may exist at a Sub-Local Authority Area (SLA)[31]. A map showing SLAs is available at Figure 1.

[31] Some data is provided in the table below, but please refer to the full reports for more detailed information.

Figure 14: Gaps in childcare by SLA

SLA	Possible gaps
East Sheen	• Problems with childcare are more likely to be experienced as a barrier to employment and training (43% compared to 35% overall) • There are a relatively low number of places before 8am and after 6pm during term time and school holidays for 0-4 and 5-10 year olds • There are no places available at any time for 11-14 year olds during term time and school holidays
Ham, Petersham and Richmond Riverside	• Parents/carers are less likely to know where to access information about financial support for childcare[32] • There are a relatively low number of places for 11-14 year olds during term time and school holidays • There is a relatively low take-up of the free entitlement to early learning and childcare for 3 and 4 year olds
Hampton and Hampton Wick	• Problems with childcare are more likely to be experienced as a barrier to employment and training (48% in Hampton Wick, compared to 35% overall) • There is relatively low awareness of information channels (67% in Hampton, compared to 76% overall) • Affordability is likely to be a key barrier: there are relatively high fee rates and high deprivation in this SLA • Parents/carers report that the demand for childcare will increase in the future (in Hampton 26% report that childcare needs will increase, compared to 18% overall)

[32] Assertion made in report but no data presented.

SLA	Possible gaps
Hampton North and Fulwell and Hampton Hill	• Problems with childcare are more likely to be experienced as a barrier to employment and training (42% in Hampton North, compared to 35% overall) • Affordability is likely to be a key barrier: there are relatively high fee rates and high deprivation in this SLA • Parents/carers report that the demand for childcare will increase in the future (in Hampton North 25% report that childcare use will increase, compared to 18% overall) • There are a relatively low number of places after 6pm during term time for 11-14 year olds and before 8am and after 6pm during school holidays for 11-14 year olds
Heathfield and Whitton	• There are a relatively low number of places available after 6pm during term time for 11-14 year olds; and no places available at any time for 11-14 year olds during school holidays • There is a relatively low take-up of the free entitlement to early learning and childcare for 3 and 4 year olds
Kew, Mortlake and Barnes Common and Barnes	• Parents/carers report that the demand for childcare will increase in the future (in Barnes 36% report that childcare use will increase, compared to 18% overall) • There are a relatively low number of places after 6pm during term time for 11-14 year olds; and before 8am during school holidays for 11-14 year olds

SLA	Possible gaps
North Richmond and South Richmond	• Parents/carers report that the demand for childcare will increase in the future (in North Richmond, 24% report that childcare use will increase in the future, compared to 18% overall)
St Margarets and North Twickenham and Twickenham Riverside	• Problems with childcare are more likely to be experienced as a barrier to employment and training (43% in Twickenham Riverside, compared to 35% overall) • Information provision is likely to be a barrier in this SLA: there is low awareness of information channels (57% in Twickenham Riverside, compared to 76% overall) and parents/carers are less likely to know where to find information about financial support for childcare[33] • There are a relatively low number of places available after 6pm during term time for 11-14 year olds; and no places available at any time for 11-14 year olds during school holidays
Teddington	• Parents/carers are less likely to know where to access information about financial support for childcare[34]
West Twickenham and South Twickenham	• Parents/carers report that the demand for childcare will increase in the future (in West Twickenham, 25% report that childcare use will increase in future, compared to 18% overall) • There are a relatively low number of places after 6pm during school holidays for 11-14 year olds

[33] Assertion made in report but no data presented.

[34] Assertion made in report but no data presented.

10 Appendix

10.1 Definition of 'childcare'

The statutory guidance on securing sufficient childcare states that:

> *Childcare is defined in Section 18 of the Childcare Act 2006 as "any form of care for a child" including "education … and any other supervised activity".*

It goes on to specifically exclude from this definition: education or activities provided by a school for a pupil during school hours (except nursery and reception classes which are childcare), care provided by a parent or someone with parental responsibility, and care provided by a children's home, hospital or secure environment (amongst other institutions).

This report uses this definition and pays particular attention to childcare where a parent can claim the childcare element of the Working Tax Credit.

10.2 Definition of 'sufficient'

The statutory guidance states that local authorities are under a duty to ensure that there is sufficient childcare in order for parents to take up, or remain in, work; or undertake education or training that is likely to lead to work. In addition, local authorities have a responsibility to secure free early learning provision for all eligible children in their area.

This duty must be exercised "as far as reasonably practicable". This means that the local authority must take into account[i]:

> *The state of the local childcare market, including the level of demand in a particular locality and the amount and type of supply that currently exists;*
>
> *The state of the labour market and the potential for increasing the number of people working in childcare;*
>
> *The resources available to, and capabilities of, childcare providers (resources means not just the available funding, but also staff and premises, and capabilities will include experience and expertise);*
>
> *The need to develop an effective, phased programme to meet the sufficiency duty; and*
>
> *The local authority's resources, capabilities, and overall budget priorities.*

Importantly, the guidance goes on to stress:

> *…it will be for the authority to decide what is sufficient given the needs of parents in its area. A local authority may not be failing to fulfil the duty simply because an individual parent's particular need is not being met at a particular time, as it may be judged to be not reasonably practicable to do so. However, a local authority should not assume that it is not reasonably practicable to secure childcare that meets particular needs, such as childcare for a child with a disability or at atypical hours, just because it is difficult to do so.*

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