

# The 2014 Scottish Childcare Report

*Jill Rutter  
Katherine Stocker*

*There are huge variations in childcare costs between local authorities in Scotland. A parent buying part-time nursery care in the most expensive local authority would pay over £3,000 more every year than in its cheapest neighbour.*



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## Key findings and areas for action

Access to high quality, affordable childcare is essential for parents, enabling them to return to or remain in work. It is an investment in children's futures as high quality childcare supports educational achievement and helps narrow the gap between the most disadvantaged children and their more advantaged peers. Childcare also benefits wider society as it helps families move out of poverty, reducing their need for benefits, and it enables skilled women to remain in the labour market after they have children.

Over the last 15 years, much progress has been made to increase the availability, affordability and quality of childcare in Scotland. The number of childcare places in nurseries and out-of-school clubs has expanded and parents have been given help with their childcare costs through Working Tax Credit. All three and four year-olds are now entitled to 475 hours of part-time early education in Scotland and this provision will be increased to 600 hours in August 2014 to cover extra hours. Additionally, free early education is now being extended to looked after two-year-olds, those with kinship care orders and those living in workless households, with an estimated 8,400 children qualifying for this provision by August 2014.

Despite these measures, most childcare costs still fall on parents and for some of them this is a barrier that stops them returning to work after having children. In many places families still struggle to find childcare and in Scotland the legal obligation placed on local authorities to provide sufficient childcare is less prescriptive than in England and Wales. Aware of these concerns, the Family and Childcare Trust has partnered with Children in Scotland since 2012 to publish an annual report on the state of childcare provision in Scotland. Using data collected from the Family and Childcare Trust's Britain-wide survey of childcare, the Scottish Childcare Report provides an in-depth analysis of childcare provision in Scotland.

This year's report has found that costs for childcare have continued to increase faster in Scotland than in England, putting extra pressure on families' budgets. There are substantial variations in costs between local

authorities, much more so than in England and Wales. The survey highlights improvements in the supply of childcare over the last year, but there are still serious gaps in provision in Scotland: for working parents, school-aged children, disabled children and those living in rural areas.

In the last year there has been new legislation on early education in Scotland, with the passage of the Children and Young People (Scotland) Act 2014 providing the legal framework for extending the hours of free early education. Early education and childcare have risen up the political agenda in Scotland and all parties are looking seriously at this issue. There are varying views on the optimum models, but there is a consensus on the importance of early education and childcare from the perspective of improving outcomes for children and for economic development. This is welcome, but there is room for improvement. There are concerns that the needs of families with school-aged children have been given much lower priority in terms of legislation and resourcing.

### Key findings *Childcare costs*

- The cost of sending a child under two to nursery part time (25 hours) is now £106.04 per week in Scotland or £5,514 per year.
- There are large variations in childcare costs between local authorities in Scotland. A parent buying part-time nursery care in the most expensive local authority would pay £3,341 more every year than its cheaper neighbour.
- The average cost of an after-school club is now £49.54 in Scotland or £1,883 per year.
- Even part-time childcare costs more than the average mortgage. For a family with two children the cost for one child in part-time nursery care and one at an after-school club is £7,397 per year, 22 per cent higher than the average mortgage in Scotland (£6,053). Where the family uses full-time nursery care, the yearly bill is £11,143.

- Over the last year, the costs of all forms of under-fives childcare have risen above the rate of inflation in Scotland, with a nursery place for a child under two increasing by 4.8 per cent since 2013.
- Most parents buying full-time childcare spend 20-30 per cent of their gross income on childcare.

### ***Childcare supply***

- There have been increases in the supply of childcare since the 2013 survey, but under a quarter (23 per cent) of Scottish local authorities felt they have enough childcare for working parents. This compares with 54 per cent of local authorities in England.
- There are also serious gaps in provision for school-aged children, disabled children, children who live in rural areas and for parents with atypical work patterns.
- Some 82 per cent of local authorities now undertake assessments to see if they have enough childcare, up from 44 per cent in 2013.
- Where there are gaps in provision, targeting funding at parents through tax credits and vouchers can lead to spiralling costs.

### ***Extension of free early education***

- The majority of local authorities (74 per cent) are confident that they will meet the August 2014 target of extending free early for three and four year olds to 600 hours per year.
- Free early education is also being offered to two year old children in workless households, but only 19 per cent of local authorities felt they had the capacity and financial resources to ensure enough places for this group and meet the August 2014 target for implementation.

### **Fixing the system**

Our research shows that the current childcare system is not working for anyone. Costs are high and there is a childcare lottery in Scotland, with large variations in prices between local

authorities, for the under-fives and older children. Although there have been some improvements in meeting the gaps in provision over the last year, there is still not enough childcare to meet parents' needs in many parts of Scotland.

This means that children are losing out on vital early education and families remain trapped in poverty because they cannot make work pay. Women fail to return to the labour market after they have children and the economy loses their skills and their taxes. The state faces greater welfare bills and high administrative costs for delivering a complex support system.

The priority must be to address the increasing costs for parents and to fill the gaps in provision. In the short term, the steps that best meet these aims and support families are to:

- Put pressure on the UK Government to up-rate working tax credit to account for costs increases since 2005.
- Set up a Government inquiry to investigate the reasons for the substantial variations in prices between local authorities and take action to ensure that Scotland's parents do not face a postcode lottery of costs.
- Make free early education available to all two year olds in Scotland.
- Take action to address the serious gaps in childcare provision in Scotland by strengthening the legislation to oblige local authorities to provide sufficient childcare for all children that need it.
- Make better use of school premises to provide high-quality and flexible childcare provision, particularly in rural areas.

But these recommendations are only short term measures. They will not address the post-code lottery in Scotland. They will not solve the problems of high costs, gaps in provision and complexity in the system. Bold reform is needed to address Scotland's childcare challenges. We need a childcare system that gives children the best start in life and that enables parents to remain in work.

Over the next year we will be setting out our vision for childcare and we want to see all political parties commit to a long-term strategy that delivers for providers, for parents, and crucially, for children.

Table One: Average weekly childcare costs by nation and English region, 2014

Region/ Nation	Nursery 25 hours (under 2)	Nursery 25 hours (2 and over)	Childminder 25 hours (under 2)	Childminder (2 and over)	After-school club 15 hours	Childminder after-school pick up
Scotland average	£106.04	£102.06	£95.59	£96.84	£49.54	£77.90
England	£110.95	£106.19	£100.74	£101.51	£48.40	£64.75
Wales	£103.17	£102.28	£94.24	£94.24	£45.98	£55.61
Britain average of regions and nations	£109.89	£105.52	£99.77	£100.52	£48.19	£65.08
East of England	£111.90	£105.02	£121.28	£120.45	£51.13	£58.37
East Midlands	£94.30	£97.19	£86.27	£86.05	£46.48	£61.84
London	£140.12	£136.93	£136.40	£138.77	£49.04	£93.83
North East	£108.24	£102.66	£90.88	£90.09	£49.52	£55.72
North West	£98.00	£97.58	£84.81	£89.27	£49.27	£60.59
South East	£130.08	£121.58	£110.32	£115.86	£47.68	£66.10
South West	£109.70	£104.96	£100.48	£99.54	£50.75	£61.54
West Midlands	£112.17	£101.85	£85.52	£82.85	£46.85	£62.37
Yorks and Humberside	£94.03	£87.94	£90.68	£90.75	£44.84	£62.38

Source: Family and Childcare Trust Annual Childcare Costs Survey, 2014

## Background

Working parents with young children use different forms childcare, with their choices depending on factors that include family income, childcare availability, parental employment patterns and age of the children. Formal childcare provision includes day nurseries, nursery provision in children or family centres, pre-schools or play groups, registered childminders, nannies, breakfast and after-school clubs and holiday childcare schemes. Many families also use informal (unregulated) childcare provided by relatives, friends, nannies and babysitters.

The Care Inspectorate's most recent Childcare Statistics indicated that there were 2,519 nurseries offering daycare in Scotland at the

end of 2012, providing daycare to 20.6 per cent of under-fives (Care Inspectorate, 2013). A further 3.9 per cent of under-fives were registered with sessional pre-schools or playgroups, of which there were 371 in Scotland in 2012. Some families, particularly where parents are studying or working part time, use sessional crèches, with 199 of them in operation at the end of 2014, most of them run from day nurseries or children centres.

An estimated 3.5 per cent of Scotland's under-fives used childminders and there were 5,750 working childminders at the end of 2012. When children reach school-age, children may attend *breakfast and after-school clubs*, with 6 per cent of children registered to use the latter type

of provision at the end of 2012. There were 685 childcare providers who primarily offered after-school provision at the end of 2012 and another 285 after-school clubs run by other types of childcare provider (ibid).

Other families use *childminders* to pick up their children after-school. Families with school-aged children may also use *holiday childcare*, particularly during half-term periods and over the summer holidays and there were 584 registered holiday play schemes in Scotland at the end of 2012. Parents of older children may also use after-school and holiday arts, sports and leisure activities as surrogate forms of childcare, with these activities usually run by schools, local authorities, sports clubs and third sector organisations.

There are 140 children or family centres in Scotland and many of them also offer childcare. Some 48 per cent of them had nurseries in 2012, 21 per cent of them ran sessional crèches. Another 11 per cent offered after-school childcare at the end of 2012 and 7 per cent of children centres had breakfast clubs at the end of 2012. One feature of childcare provision less common in England is providers who offer additional childcare services to different age groups. Some 226 nurseries also ran breakfast clubs in 2012 and 231 also offered after-school childcare.

In addition to formal childcare, many families also use informal care, usually offered by grandparents. Research from the Family and Childcare Trust has shown that families in Scotland are more likely to use *grandparent care* than families in other parts of Britain with research (Figure 2) showing that over half (51 per cent) of Scottish families had used this form of childcare in the last six months, compared to just 32 per cent across Britain (Rutter and Evans, 2011). The higher than average use of informal childcare in Scotland reflects demographic patterns in Scotland where families are more likely to live close together than in other parts of Britain. The shortage of

affordable formal childcare is another factor that contributes to a reliance on informal childcare in Scotland.

While not a form of childcare, 'shift-parenting' is another family caring strategy, where parents work at different times, although this is not an option for some single parents. Informal childcare and shift-parenting are frequently used where parents have 'atypical' work patterns such as shift-work or irregular work patterns, as formal childcare may be difficult to find (Rutter and Evans, 2012).

Both the UK and the Scottish Governments rely on a regulated mixed market to deliver childcare places. In Scotland, as elsewhere in Britain, childcare provision is delivered by the private, not-for-profit and maintained (public) sectors. But there are some important differences between the Scottish childcare market and that in England and Wales. In particular, there is less involvement by private sector providers in nursery care in Scotland, with 63 per cent of all provision run by local authorities in December 2012, compared with under 10 per cent in England. Few of the large nursery chains that offer provision in England are operating in Scotland. There are also differences in the ownership of out-of-school and holiday childcare, with a much greater involvement of parents and the not-for-profit sector in Scotland.

Childcare is essential for families in Scotland. It is an investment in the future of children, and also in parents who need affordable childcare in order to return to or remain in work (Children in Scotland, 2012). But until the late 1990s many parents found it difficult to find affordable childcare and as a consequence mothers often left the labour market when they had children. The ability of many families to escape from poverty was therefore constrained.

By the mid-1990s, as a result of campaigning, the demand for childcare was being heard and politicians across all the main political parties acknowledged this need. In 1998 the Scottish Office launched *A Childcare Strategy for Scotland*. Published at the same time as the *National Childcare Strategy* (covering England and Wales) it committed the Government to

increasing the availability and affordability of early childhood education and childcare. Since then successive governments, in London and in Edinburgh, have worked to increase the amount of high quality and affordable childcare available to families in Scotland. This infrastructure of support includes some part-time free early education for the under-fives and the subsidy of parents' childcare costs through employer-supported childcare vouchers and the childcare element of Working Tax Credit, the latter administered by the Department for Work and Pensions, with levels of support determined by Westminster.

In the years since the 1998 strategy a number of initiatives have helped make childcare more affordable. In England, Scotland and Wales all young children receive some part-time free early education, usually provided by nurseries. The Children and Young People (Scotland) Act 2014 will increase the amount of free early education for three and four year olds in Scotland from 475 hours to 600 hours per year (typically 12 hours per week over 50 weeks or 15 hours per week over 40 weeks), with a target of August 2014 given for implementing this entitlement. Free early education for two year olds is also being extended in Scotland, with all children in workless households entitled to 600 hours of free early education by August 2014. This provision will be further extended in 2015 to take in families receiving free school meals and other benefits such as Working Tax

Credits and by August 2015 some 15,400 two-year-olds - 27 per cent of the age cohort - will receive free early education.

The current infrastructure of support also includes help with childcare costs through the childcare element of Working Tax Credit. At present working parents on low incomes can receive up to 70 per cent of their childcare costs through tax credits, up to a maximum of £175 per week for one child in childcare and £300 per week for two or more children. This means that a family can receive up to £122.50 help with childcare costs for one child and up to £210 for two or more children, although for most families the amount of help they receive is much lower than the maximum. These levels were set in 2005 and have not been updated since then, despite big increases in childcare costs over this period. Moreover, it is only the most deprived working families that receive this type of help, as the childcare payment starts to taper off steeply if the first earner in a household earns more than £15,910 per year before tax and National Insurance are deducted.

The tax credit system is now being merged into the single Universal Credit, with 2017 being the target date for its full implementation. Within Universal Credit the overall maximum support levels will remain, although these will be now calculated monthly. Universal Credit will also be

Figure Two: Percentage of parents using grandparent childcare use in last six months by GB region and nation



N=1,413

Source: Rutter and Evans, 2012

administered online and these two changes will enable greater flexibility for parents whose childcare costs fluctuate from week to week. This is particularly important for parents who face a big increase in childcare costs during the school holidays.

Parents who work less than 16 hours per week will qualify for help with childcare costs through Universal Credit, a move that eliminates some of the benefit 'cliff edges' that can disincentivise moving back into work. In March 2013 the Government announced that it intends to increase the level of childcare support in 2016 through Universal Credit to 85 per cent of costs, from 70 per cent of costs that parents receive today (HM Treasury, 2013).

Some parents also receive help with their childcare costs through employer-supported childcare vouchers, either as an additional benefit on top of their salary or as a salary cent between 1996 and 2007. In Australia state subsidies for childcare are mostly targeted at parents, through the Child Care Benefit and the Child Care Rebate. The latter is similar to the UK's tax credit support for childcare and reimburses up to 50 per cent of parents' childcare costs (Brennan and Fenech, 2014). In 2008, when support through the Child Care Rebate was increased to cover 50 per cent of costs – up from 30 per cent – childcare prices increased by 10 per cent over the next year. This was because many childcare providers saw the increased Childcare Rebate as an opportunity to increase their prices.

Looking at international best practice, many organisations are calling for more radical childcare reform and shifts to subsidies that are targeted at providers. As the Referendum and the 2015 General Election approach, all political parties are considering this issue as part of their manifesto commitments. As discussed above, the UK Government has already pledged extra funding for childcare, delivered through Universal Credit, the £2,000 voucher and through local authority expenditure on free early education for two year olds. The Labour Party has committed itself to a guaranteed after-school childcare place and to extending free early education for three and four year olds to 25 hours per week. Liberal Democrat policy is also to increase the hours of free early education and to offer some free early

sacrifice before they pay tax. Those receiving childcare vouchers can save up to £55 per week if they are basic rate taxpayers and higher rate taxpayers who joined a voucher scheme before 5 April 2011. Childcare vouchers can also be 'banked' and used at a time when childcare costs may be particularly high, for example, during the school holidays. However, the Government has announced that it will phase out the present employer-supported childcare voucher scheme and replace it with a tax free 'voucher' of £2,000 per year in 2015.

This new help with childcare costs is welcome, but there are concerns that targeting state subsidies at parents, rather than providers, may further push up prices, particularly where there are gaps in supply. This has already happened in a number of other countries, most notably Australia where childcare reforms led to rapid price inflation, with costs increasing by 100 per cent for one year olds. The Scottish National Party proposes extending free part-time early education to cover 50 per cent of two year olds by the end of a first parliament in an independent Scotland and to increasing the number of free hours for three year olds to 1,140 per year (typically 30 hours per week over 38 weeks of a year), in line with the hours of primary education (Scottish Government, 2013).

While these proposals to increase investment in childcare are welcome, all the main parties have focused their attention on childcare for the under-fives. Both parents and civil society organisations are concerned that a commitment to childcare cannot be confined to the early years. The importance of out-of-school care cannot be underplayed. It helps create a stronger economy by increasing employment, particularly among women and at present the rates of maternal employment dip for mothers of five year old children. Out-of-school care also provides high quality learning and development opportunities for school-age children, something of particular significance for those from the most deprived families.

Given the major gaps in educational attainment in Scotland between children from different socio-economic backgrounds, the role

of out-of-school activities in addressing inequalities must not be overlooked.

The 2014 Childcare Costs Survey has been undertaken at a time when childcare has risen up the political agenda. We hope that its findings will inform debate and remind policy makers and politicians of the importance of childcare for all children and their families.

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## Methodology

In December 2013 a survey was sent to all Children's Information Services in Scotland at the same time as a survey to all Family Information Services in England and Wales. Details were requested about the costs and availability of different types of childcare, the same information that was requested for previous surveys.

Local authorities were asked to provide costs for 25 hours and 50 hours of childcare, provided by nurseries or childminders. The former figure – 25 hours – is the typical amount of childcare that a parent who works part-time might purchase, or a parent in full-time employment who purchases an extra 25 hours childcare on top of the free hours of early years' provision available to three and four year olds in Scotland. The survey also asked for the average price for 15 hours childcare in an after-school club and for childminders who pick up children from school.

It is important to emphasise that this survey does not ask childcare providers to estimate what their services cost to deliver. This is likely to be a different amount than the price information we requested because of the complex systems of cross-subsidy and the array of business models used by different childcare providers. The survey also represents an *average* cost to parents and there will be parents who have higher or lower costs than implied in the survey.

Alongside high costs, many parents report gaps in childcare provision. The Childcare Costs Survey also examines childcare supply and looks at whether local authorities have sufficient childcare for different groups of children. The 2008 Early Years Framework

requires local authorities to have '*a strategic view of childcare accessibility*' and a longer-term objective that families have '*access to integrated pre-school and childcare services in every community matched to an assessment of local demand*'. The survey asked local authorities to draw on their most recent analysis of childcare supply and report if they had enough childcare for children aged 2 or under, 3-4 year-olds, 5-11 year olds, 12-14 year olds, disabled children, children who live in rural areas, parents who work full-time and parents who have atypical work patterns such as shift workers.

In order to ensure an adequate response rate Freedom of Information (Scotland) Act requests were used collect the information where the survey methodology had failed. Responses were received from 28 of Scotland's 32 local authorities and 184 local authorities in the national survey from which we drew our Britain-wide data. This is an 88 per cent response rate in Scotland and 89 per cent in the Britain-wide survey.

## Childcare costs

### Childcare costs for the under fives

For a child under two the average cost (price charged to parents) for 25 hours childcare in a nursery is now £106.04 per week in Scotland, or £4.24 per hour. This is 3.5 per cent less than the average cost in Britain (Table One). On an annual basis parents who buy 25 hours of childcare for an under two would now expect to pay £5,514 every year in Scotland. Full-time childcare at 40 hours every week would cost £8,819 every year.

The most expensive nursery in Scotland costs £306 per week for 25 hours childcare for an under two. Over the year a full-time place (40 hours) in this nursery would cost £25,459 per year.

Table Three breaks down childcare costs regionally, showing eastern Scotland as the most expensive region for under-fives childcare. But the greatest variation in cost is not between regions, but across Scotland as a whole where there are large differences in

prices between the most expensive local authorities and the cheapest. Overall, costs are highest in three types of local authority. Those with the largest populations and shortages of provision tend to have high prices. Local authorities with very little public sector provision also have high prices. Some rural local authorities also have higher than average prices.

The survey showed that the average cost for 25 hours care for a child under two is 80 per cent more costly in the most expensive local authority (at £148 per week) than it is in the cheapest (at £83.75 per week). These two local authorities border each other. The variation in nursery costs between local authorities in Scotland is much higher than in England. In neighbouring North East England the intra-regional variation in nursery costs for a child under two is just 43 per cent between the cheapest and most costly local authority.

Table Three: Childcare costs in Scotland broken down by Eurostat region

	Nursery 25 hours (under 2)	Nursery 25 hours (2 and over)	Childminder 25 hours (under 2)	Childminder 25 hours (2 and over)	After-school club 15 hours	Childminder pickup after-school
Eastern Scotland	£112.03	£102.65	£100.54	£98.58	£45.30	£75.98
Highlands and Islands and North Eastern Scotland	£102.07	£95.95	£98.53	£98.53	£48.52	£61.80
South Western Scotland	£102.48	£103.15	£90.34	£90.34	£52.36	£87.65
Scotland average of all local authorities	£106.04	£102.06	£95.59	£96.84	£49.54	£77.90
Britain average of regions and nations	£109.89	£105.52	£99.77	£100.52	£48.19	£65.08

Table Four shows the size of the price differences between local authorities in Scotland. The figures refer to the price differences between all the local authorities in the cluster that neighbour the local authority. For example, a parent living in Aberdeenshire would see price differences of £17.90 per week for 25 hours of childcare in the cluster of local authorities around Aberdeenshire. (We have not included Aberdeen, Eilann Siar and the Orkney and Shetland Islands in the table so as to ensure local authority anonymity in local authorities with few neighbours).

These differences in costs across Scotland are caused by a number of factors. As noted

above, there are differences in local childcare markets between local authorities, with much more subsidised public sector provision in some local authorities than in others. (Public sector nursery provision is 12 per cent cheaper than that offered by the private and not-for-profit sector in Scotland in this year's survey). Private and not-for-profit providers may have different operating costs in different local authorities and higher costs will be passed on to parents in the form of higher prices.

There is also a link between childcare supply and its cost. Childcare in Scotland operates on a regulated free-market principle. Increased demand is meant to increase supply and help

**Table Four: Differences in weekly and yearly childcare cost within clusters of local authorities, for 25 hours childcare per week for an under two**

Local authority	Price difference for 25 hours childcare for an under two every week between local authority and its most expensive neighbour	Price difference over one year
Aberdeenshire	£17.90	£931
Angus	£20.61	£1,072
Arygll and Bute	£45.93	£2,388
Clackmannanshire	£64.25	£3,341
Dumfries and Galloway	£60.90	£3,166
Dundee City	£20.63	£1,073
East Ayrshire	£16.23	£844
East Dunbartonshire	£50.01	£2,601
East Lothian	£77	£4,004
East Renfrewshire	£15.82	£823
Edinburgh	£31.30	£1,628
Falkirk	£64.25	£3,341
Fife	£49.25	£2,561
Glasgow	£15.82	£823
Highland	£16.94	£881
Inverclyde	£12.01	£625
Midlothian	£77	£4,004
Moray	£3.73	£194
North Lanarkshire	£64.25	£3,341
Perth and Kinross	£53.48	£2,781
Renfrewshire	£15.82	£823
Scottish Borders	£77	£4,004
South Ayrshire	£7.90	£411
South Lanarkshire	£60.90	£3,167
Stirling	£64.25	£3,341
West Dunbartonshire	£50.01	£2,600
West Lothian	£77	£4,004

keep prices competitive and therefore affordable. If prices increase, the implication is that supply is lower than demand. The survey showed that there was insufficient childcare provision in many local authorities in Scotland – an issue discussed later in this report. Often it was local authorities with insufficient supply that had higher prices.

These variations in costs are important and matter to families, because they mean that parents in neighbouring local authorities have large differences in their childcare costs that cannot be offset by differences in wages. For some clusters of local authorities, the variations in price within the clusters are large – up to £4,004 every year. Some families are much better off than others due to differences in childcare costs. This variation in costs across Scotland is indicative of a postcode lottery and a system that is not working for parents.

The differences in costs also matters to both the Scottish and the UK Government who subsidise the childcare costs of low income families through Working Tax Credit. This means that tax payers are subsidising extra childcare costs that are emerging from failure: differences in childcare policy, shortages of supply and market failure. This is money that could be saved and invested in childcare or other services. It also shows the childcare system is not working and is an argument for childcare reform and a greater channelling of state subsidies directly to providers.

### ***Childminders***

While fewer families now use childminders, the price of this form of childcare are generally a little lower than for nurseries costs. For a child under two the average cost of 25 hours childcare from a registered childminder is now £95.59 in Scotland (Table One). This is 4.3 per cent less than the average cost in Britain (Table One). On an annual basis parents who buy 25 hours of childcare from a childminder for a child under two would now expect to pay £4,971 every year. Full-time childcare at 40

hours every week would cost £7,953 every year. Again, Eastern Scotland is the most expensive region.

### ***Childcare costs for the over fives***

Childcare costs for the over fives are more expensive in Scotland than in England and Wales, with parents now paying an average of £49.54 per week for an after-school club in Scotland, compared with £48.40 in England and £45.98 in Wales. Over a year in Scotland, parents with one child in an after-school club would expect to pay £1,883 for childcare.

Table Three shows South Western Scotland is the most expensive region of Scotland for after-school clubs, but as with nursery care the big differences in costs are not between regions, but between individual local authorities. The average cost of an after-school club in the most expensive local authority (£60 per week for one child) is 54 per cent higher than in the cheapest local authority (£39 per week).

The higher costs of after-school clubs in Scotland, compared with England and Wales are indicative of a number of factors which include the higher costs of delivering out-of-school childcare in rural areas. There are also real gaps in provision in some areas and this lack of supply can act to push up prices. Local authorities also have different ways of supporting after-school clubs, with some of them offering grant-funding or rent-free premises and equipment or by subsidising staff costs. Variations in the level of support between local authorities can cause higher prices in some areas than others.

Some families with children aged between 5 and 11 use childminders to pick children up from school. This is often a favoured arrangement if parents sometimes work after six o'clock; childminders are usually more flexible than after-school clubs and can often provide extra hours of childcare. The average costs in Scotland for an after-school pick-up and 15 hours after-school childcare from a childminder is now £77.90 per week,

compared with £64.75 in England and £55.61 in Wales. A family with two children using a childminder for after-school care would expect to pay £5,290 every year, excluding school holidays.

While there has been much media focus on the costs of childcare for the under-fives there has been much less debate about the affordability of childcare for older children. Yet annual costs of £2,000 – £5,000 are a considerable financial

outlay for a family who may receive little help through tax credit support. As noted above, the Westminster government has recently announced additional help with childcare costs through the new £1,200 voucher. This will be available after 2015 when employer-supported childcare vouchers will be phased out. However, it will not be initially available to parents of children over five, leaving them without financial support.

## Changes in costs over time

During the last 12 months childcare costs for all under-fives childcare have increased above the rate of inflation in Scotland, with part-time nursery provision for an under two some 4.8 per cent more expensive than last year (Table Five). This year a parent in Scotland will be paying £252 more for part-time childcare for an under two than last year. The 2013 survey showed a negligible rise in under-fives childcare during 2012 (there was no increase in nursery costs and only a 0.1 per cent increase in childminder costs). One explanation for the significant price rise this year is that nurseries and childminders have put their prices up to compensate for keeping costs steady in the previous year.

Over the last year the average costs of after-school clubs has fallen in Scotland (and in the rest of Britain). The survey The Family and

Childcare Trust's work with these clubs has led us to conclude that many of them are conscious of the increased costs of living and the squeeze on family incomes and have attempted to maintain their prices.

Looking back over the last five years however, childcare costs in all parts of Britain have risen significantly at a time when wages have been stagnant (Table Six). For a child under two part-time childcare in a nursery is now 26 per cent more expensive than it was in 2009. For this part-time provision, parents are now paying £22.04 every week or £1,146 more per year in 2014 than they were in 2009.

Table Five: Changes in childcare costs between 2013 and 2014

Region/Nation	Nursery 25 hours (under 2)	Nursery 25 hours (2 and over)	Childminder 25 hours (under 2)	Childminder (2 and over)	After-school club 15 hours
Scotland	4.8%	8.2%	2.5%	4.2%	-1.8%
England	2.2%	0%	1.7%	4.4%	-2.6%
Wales	11.7%	13%	-1.4%	0%	-5.1%
Britain average of all nations and regions	3.3%	1.5%	1.6%	4.0%	-3.0%

Source: Family and Childcare Trust Annual Childcare Costs Surveys, 2013 and 2014

**Table Six: Changes in childcare costs over a five year period 2009-2014**

Region/Nation	Nursery 25 hours (under 2)	Nursery 25 hours (2 and over)	Childminder 25 hours (under 2)	Childminder (2 and over)	After-school club 15 hours
Scotland	26%	31%	19%	23%	3%
England	26%	30%	21%	22%	8%
Wales	32%	29%	19%	18%	18%
Britain change: average across regions and nations 2010-2014	27%	31%	21%	22%	9%

Source: Family and Childcare Trust Annual Childcare Costs Surveys, 2010-2014

## Impact of childcare costs on families

The survey shows that childcare is a significant outlay for working parents. Childcare costs take a large proportion of parents' income and many young families spend more on it than they do on their mortgage. The most recent Living Costs and Food Survey from the Office for National Statistics indicated that the average Scottish mortgage payment was £6,053 per year. For a family with two children, with one child under two using part-time nursery care (25 hours per week) and one school-aged child using an after-school club, the average yearly childcare bill is now £7,397, which is 22 per cent more than the average mortgage.

These costs also need to be seen in the context of the limited financial assistance that is offered by both the UK and Scottish Governments to help families with their childcare costs. Parents of all three and four year olds and some two year olds qualify for some free early education and others may receive employer-supported childcare vouchers. However, not all employers issue vouchers and not all childcare providers accept them.

Help with childcare costs is also available through the childcare element of Working Tax Credit, although the amount of help tapers off sharply after if the first earner in a couple household earns more than £15,910 per year before tax and National Insurance are deducted. Figure Five shows the impact of this taper on a single parent who works 37 hours per week and needs to purchase 42 hours of childcare costing

£190 every week or £9,880 per year. Earning the National Minimum Wage a parent would still be expected to contribute £3,510 or 28.1 per cent of their gross income. Help with childcare costs tapers off if the single parent earns more than £17,000 per year. Even at this income, the parent is spending more than a fifth (20.6 per cent) of her income on childcare. This is because tax credit regulations set a maximum level of help with costs of £122.50 per week for one child. The survey shows that there is not a single local authority in Britain where this would buy full-time childcare for a child under two and there are two local authorities in Scotland where this would not even purchase 25 hours of childcare for a child under two.

The average salary for a nurse in Britain is £31,000 per year. At this income a parent in Figure Five's model would only receive £994 help with her childcare costs through Working Tax Credit and would be expected to contribute £8,886 or 28.7 per cent of gross income to pay for childcare. A teacher earning £36,000 would receive no help with childcare costs and would be expected to pay all £9,880. A single parent working for 37 hours and needing to buy 42 hours of childcare would have to earn more than £49,400 to be paying less than 20 per cent of her income on childcare.

High childcare costs often have the largest impact on families of children aged two or under who need to purchase full-time or nearly full-time childcare. Of course, parents could stay at home and look after their children. However, it can be difficult to re-enter the labour market after protracted periods of unemployment (Ben-Galim, 2011). It is for this reason that many parents want to work after they have children and maintain their skills.

All children in Britain qualify for part-time free early education in the term after their third birthday and in Scotland this provision will be increased to 600 hours every year in August 2014. But even with this help, some parents are still contributing a substantial part of their income to childcare. Data from the OECD shows that parents in Britain are forced to set aside a very high proportion of their salary to cover childcare costs; in 2012 only Swiss parents contributed a higher percentage of their earnings. The average childcare contribution for all OECD countries is 11.8 per cent of parental net income. In France this figure is 10.4 per cent, in Germany it is 11.1 per cent while in the UK parents are paying 26.6 per cent of their net income for childcare<sup>1</sup>. For some parents high childcare costs are a barrier to work. As a consequence maternal employment levels for those with children under five – particularly for the least well qualified – are low, compared with OECD countries (Ben-Galim, 2011). Women's skills are lost and families become a cost to the Exchequer as they depend on benefits.

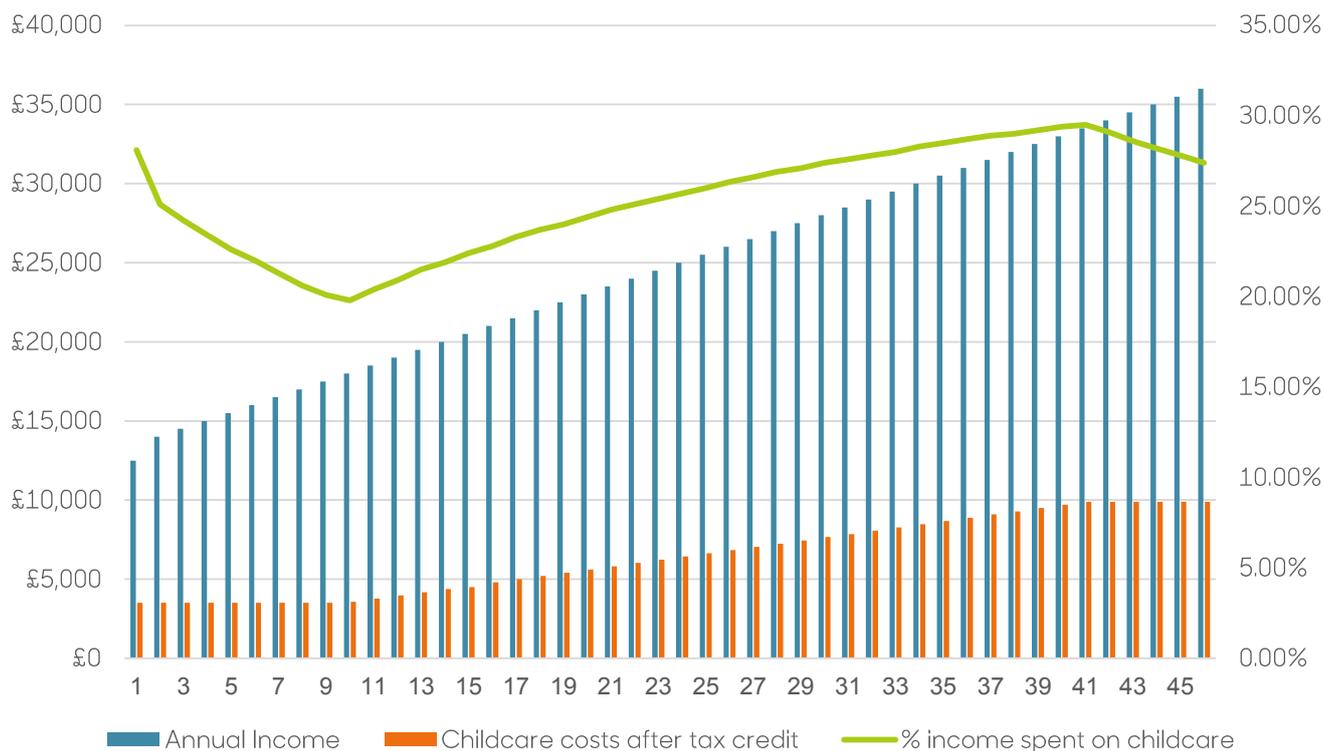
Even for parents who return to work after having children, the cost of childcare can prevent them taking full-time work. Parents, usually mothers, become trapped in low-paid and low status part-time work as the high cost of childcare prevents them from extending their hours. A 2014 survey for the Resolution Foundation indicated that 20 per cent of all mothers wanted to work more hours. The desire to work extra hours was highest in low income households.

Ensuring affordable childcare would enable parents to work, to extend their hours and to move out of poverty.

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1 OECD Family Dataset

Figure Seven: Tax Credit Support with childcare costs by income



Source: HMRC Tax Calculator

## Why is childcare so expensive?

While these costs represent a significant outlay to parents, it is important to remember that childcare by its very nature will always be expensive. It is inaccurate to argue that these costs are merely the result of childcare providers charging high fees to hard-pressed parents. The reality is more complex. Much of the costs of childcare are due to wages, with recent research in England suggesting that 77 per cent of nursery costs were staffing (Department for Education, 2012). At present regulations stipulate that for children under two in nurseries there must be one member of staff for three children (Scottish Government, 2005).

The quality of early education is strongly associated with staff qualifications and Scottish Government policy is to move to a better qualified early years' workforce (Scottish Government, 2008). In February 2014 the

Scottish Government announced a review of the early education and childcare workforce alongside £4 million funding for training and development. While salaries for nursery workers are not high, the need to maintain safe supervision levels and deliver high quality childcare does mean that childcare cannot – and should not – be provided 'on the cheap.'

But there are other reasons that childcare is costly in Scotland. Some schools and local authorities subsidise breakfast and after-school childcare, through grant funding, free premises and equipment, although as already noted, levels of subsidy varies from area to area. This means that some parents have more costly provision than others.

Much nursery care is delivered by the private and not-for-profit sector: 31 per cent of

nurseries delivering daycare were run by the private sector at the end of 2012, although the amount of private sector involvement differs between local authorities (Care Inspectorate, 2013). Most private and voluntary sector providers are required to pay business rates and many pay rent for their premises. Bank loans for expansion need to be serviced. Private sector childcare providers also aim to make a profit. The reliance on the private sector to deliver childcare is reflected in the differential costs of nursery provision. This year's survey showed that nursery provision for a child under two in Scotland is 11 per cent more expensive in the private and not-for-profit sectors than in the maintained (local authority) sector in Scotland.

Private and not-for-profit provision also attracts a public subsidy in the form of funding to deliver free part-time early education. This central government funding reaches providers through local authorities, but there are differences in hourly funding rates between different local authorities. The mean hourly rate received by nurseries in Scotland was estimated at £3.80 per hour to deliver this free provision, but the lowest rate received was £2.80 per hour (National Day Nurseries Association, 2014). Nursery providers argue that at this level of funding they cannot break and have no option but to recoup the losses in other ways, for example, by charging more for additional hours purchased above the 600 hours of free early education. Differences in funding levels account for price differences between local authorities in Scotland and means that some parents pay more than others for childcare. It also means that working parents are cross-subsidising free part-time early education in nurseries. Early years providers in some areas also operate other cross-subsidy systems, with the parents of three and four years olds cross-subsidising childcare for babies, where higher staffing requirements can make childcare too expensive for local markets to sustain.

There is also a link between childcare supply and its cost. As already noted, childcare in Scotland operates on a regulated free-market principle. Increased demand is meant to increase supply and help keep prices competitive and therefore affordable. If prices increase, the implication is that supply is lower than demand and that new entrants are not setting up to meet this unmet demand. This is a symptom of market failure in our childcare system. As already noted, there are concerns that where childcare provision is in short supply, extra financial supported targeted at parents may push up prices. This is because providers may see extra money in the hands of parents as an opportunity to increase their prices.

A further reason that childcare is expensive is that funding mechanisms for subsidising childcare are complex. Parents in Scotland receive financial help directly, through the childcare element of Working Tax Credit, through employer-supported childcare vouchers and through small schemes operated by Job Centre Plus and for student parents the Childcare Fund administered by further and higher education institutes. Other subsidies are channelled to providers to deliver free early education, with funding for this going from the UK Government through the Barnett formula to the Scottish Government, then to local authorities before reaching providers. All of these funding channels have administrative costs and there is considerable potential to simplify funding streams to reduce costs.

## Childcare supply in Scotland

Enabling parents to work requires that childcare is both affordable *and* available. As in other parts of Britain, the Scottish Government has taken steps to increase childcare supply. The 2008 Early Years' Framework requires that local authorities in Scotland have '*a strategic view of childcare accessibility*' and has a longer-term objective that families have '*access to integrated pre-school and childcare services in every community matched to an assessment of local demand*' (Scottish Government, 2008). This guidance was strengthened as the Children and Young People (Scotland) Act 2014 which outlines a new duty on local authorities to consult and publish plans for childcare, for both under-fives and out-of-school care.

Over the last 15 years, the number of childcare places has increased in Scotland, although, as in England, increases in the number of places have not been spread evenly across different forms of childcare. Nursery, after-school and holiday childcare provision increased significantly, and the number of children looked after by childminders has increased a little from 26,949 in 2004 to 30,390 in 2012 (Care Inspectorate, 2013; Scottish Government, 2004). However, the numbers of children attending session pre-schools or playgroups has fallen in Scotland as in England as has the numbers of providers – 901 in 2004 down to 371 at the end of 2012 (ibid).

Despite increases in the amount of full-time daycare and childcare for school-age children, there are still large gaps in provision in Scotland. In the last year parents in 40 per cent of local authorities reported a lack of childcare to Children's Information Services. The survey showed gaps in provision in all types of childcare, with the most acute shortages for disabled children, those who live in rural areas and for those children whose parents may have 'atypical' work patterns (Table Eight). These are all types of childcare which may be more expensive to deliver and where provision

cannot always be delivered at a profit by a free market.

Table Eight highlights improvements in the supply of childcare over the last year, particularly for three and four year olds where over half (55 per cent) of local authorities now have enough childcare for this group. Another welcome development is that greater numbers of Scottish local authorities are undertaking work to look at their local childcare markets and assess supply, demand and gaps in provision. In 2013 some 44 per cent of local authorities had no information on childcare supply and demand. In this year's survey 82 per cent of local authorities had collected this data and 68 per cent were planning further childcare sufficiency analysis to understand gaps in provision. Such an assessment is essential if gaps are to be filled, as interventions in local childcare markets require detailed knowledge about supply and demand for this service.

While much progress has been made over the last year, Scottish parents still face large gaps in provision compared with families in England. It is essential that when the new Children and Young People (Scotland) Act 2014 childcare plans are published, local authorities are held to account for gaps in provision.

Table Eight: Percentage of local authorities reporting sufficient childcare for particular groups of children, 2014

	Scotland 2013	Scotland 2014	England 2014	Wales 2014	Britain average of regions and nations 2014
Children aged two or under	20%	32%	54%	22%	49%
Three and four year olds	24%	55%	69%	17%	63%
5-11s	22%	32%	35%	11%	33%
12-14s	13%	23%	17%	6%	17%
Disabled children	16%	18%	28%	6%	25%
Children who live in rural areas	Not collected in 2013	14%	20%	0%	17%
Children of parents who work full-time	13%	23%	54%	28%	49%
Children of parents with atypical work patterns, for example, shift workers	8%	9%	14%	6%	13%

Source: Family and Childcare Trust Annual Childcare Costs Survey 2013 and 2014

## The extension of free early education

As already noted, free part-time early education is being extended in Scotland. From August 2014 all three and four year olds will become entitled to 600 hours free early education every year, up from 475 hours at present. As in England and Wales, free early education for two year olds is also being extended in Scotland, with all children in workless households, looked after children on those with Kinship Care Orders (about 8,400 children) becoming entitled to 600 hours of free early education by August 2014. This provision will be further extended in 2015 to take in children who meet the criteria for free school meals whose families receive Working Tax Credits. By August 2015 some 15,400 two-year-olds – 27 per cent of the age cohort – will receive free early education. These are ambitious policies which have the potential to make a real difference to the lives of working parents and to narrow the development gaps

between the most disadvantaged children and their peers.

This years' survey looked at the progress made by local authorities in delivering these programmes. The majority of local authorities (74 per cent) are confident that they will meet the August 2014 target of extending free early education for three and four year olds to 600 hours per year, although another 22 per cent of local authorities did not know if they would meet this target.

Some Scottish local authorities are already providing some free early education to vulnerable two year olds. Those prioritised for this help may include children who are looked after by the local authority, disabled children, those in kinship care and others for about

whom there are welfare concerns. But policies on offering this support vary between local authorities and the survey showed that there were large variations between local authorities in the numbers of vulnerable two year olds who are given some free early education, from none in some areas to a maximum of 285. The survey examined progress to meet the August 2014 targets to deliver free early education to an estimated 8,400 two year olds living in workless households. It asked if local authorities felt they had the capacity, human and financial resources to provide the required number of nursery places for vulnerable two year olds. Just 19 per cent of local authorities felt they had the capacity and resources to meet the August 2014 deadline for two year olds, 35 per cent stated that they did not have the capacity and resources to meet the deadline and a further 46 per cent of local authorities did not know.

There are a number of reasons why local authorities do not feel they have the capacity or resources to meet the August 2014 target for two year olds. Many of the reasons are similar to those articulated by local authorities in England who will be expected to find places for 277,000 economically disadvantaged children (40 per cent of the age cohort) by September 2014 (Rutter et al, 2012).

There is a geographical mismatch between supply and demand for these free places. There has always been less nursery provision in deprived areas, as there is less demand here. So local authorities have had to find provision in areas where there is already less provision.

Some local authorities in Scotland feel that the funding made available to them to distribute to providers is insufficient to meet the costs of delivery. The Scottish Government receives funding for these programmes from the UK Government via the Barnett formula and can decide itself how to spend this money. But local authorities in Scotland have complained that that the hourly funding rate is not financially sustainable, particularly as many of the children

in August 2014 will have additional educational or social needs. As already noted, many nurseries operate complex cross-subsidy mechanisms; they rely on working parents of three and four year old children to purchase extra hours on top of their existing free provision, and at a higher price, in order to cover costs. However, few parents of two year olds who qualify for free provision will be working, so they will not purchase extra hours. This means there is no cross-subsidy to cover costs. Another concern voiced by some local authorities is that there are not enough qualified early years' workers to staff the expanded provision.

The survey suggests that there is a real risk that some local authorities will miss their August 2014 targets for two year olds. It is essential that local authorities receive the support that they need to deliver this important programme and that revenue and capital funding from the Scottish Government ensure high quality early education for these disadvantaged two year olds.

## Conclusion

High quality, accessible, affordable childcare is essential for Scottish families. It supports children's social development and learning and enables their parents to work or study. Our research shows that the current childcare system is not working for anyone. Children lose out on vital early education and families remain trapped in poverty because they cannot make work pay. Childcare providers struggle with debts. Over 500,000 million women fail to return to the labour market after they have children<sup>2</sup> and the economy loses their skills and their taxes. The state faces greater welfare bills and high administrative costs for delivering a complex support system.

The priority must be to address the increasing costs for parents, make work pay and ensure that all children benefit from high quality early education. In the short term, the steps that will most effectively meet these aims and support families are:

- Put pressure on the UK Government to up-rate working tax credit to account for costs increases since 2005.
- Set up a Government inquiry to investigate the reasons for the substantial variations in prices between local authorities and take action to ensure that Scotland's parents do not face a postcode lottery of costs.
- Make free early education available to all two year olds in Scotland.
- Take action to address the serious gaps in childcare provision in Scotland by strengthening the legislation to oblige local authorities to provide sufficient childcare for all children that need it.

- Make better use of school premises to provide high-quality and flexible childcare provision, particularly in rural areas.

These measures will make a difference to parents and to providers. But they are not a long-term and sustainable solution to the lottery of provision and the problems of high costs, low quality and the complexity in the childcare system.

Bold reform is needed to address Scotland's childcare challenges. We need a childcare system that gives children the best start in life and that enables parents to remain in work. We need a childcare system that makes effective use of public money.

Over the next year we will be setting out our vision for a childcare system – and we want to see all political parties to commit to a long term childcare strategy that delivers for providers, for parents and, crucially, for children.

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## About the authors

**Jill Rutter** is Head of Policy and Research at the Family and Childcare Trust. Over the last two years she has led a major international study on informal childcare and the organisation's annual childcare costs surveys. Previously Jill was a senior research fellow in migration at the Institute for Public Policy Research. Jill has also lectured in education at London Metropolitan University and worked in as a policy advisor at the Refugee Council. Her publications include *Refugee Children in the UK* (Open University Press, 2006) and *Informal Childcare: Choice or Chance* (Daycare Trust, 2012).

**Katherine Stocker** was a research assistant at the Family and Childcare Trust. She has recently graduated with an MSc in Public Health Nutrition and is now working as a healthy eating adviser for in Lambeth's children's centres.

## About the Family and Childcare Trust

The Family and Childcare Trust works to make the UK a better place for families. Our vision is of a society where government, business and communities do all they can to support every family to thrive. Through our research, campaigning and practical support we are creating a more family friendly UK. For further information, go to [www.familyandchildcaretrust.org](http://www.familyandchildcaretrust.org).

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CVS is the UK's largest dedicated childcare voucher provider, responsible for the administration, management and development of childcare vouchers, an employee benefit available to all eligible working parents. CVS currently works with over 100,000 working parents, more than 14,000 organisations and over 87,000 carers each month. CVS has vast experience of the

childcare vouchers industry, reinforced by significant technology enhancements which benefit its diverse customer base, spanning every sector, from some of the UK's largest corporations to SMEs. CVS is a founding member of the Childcare Voucher Providers Association (CVPA) which represents childcare voucher providers and sets the benchmark for standards in the industry through its Code of Practice, to ensure carers, parents and employers receive the highest standard of service from childcare voucher providers. In offering the childcare voucher services, we undertake to act in accordance with the CVPA Code of Practice which is available on the CVPA website at [www.cvpa.org.uk](http://www.cvpa.org.uk). If you are dissatisfied with the outcome of any complaint made to us as regards Computershare's compliance with the CVPA Code of Practice, please send your complaint to: Childcare Voucher Providers Association (CVPA), 105 St Peters Street, St Albans, Hertfordshire, AL1 3EJ. For more information visit: [www.computersharevoucherservices.com](http://www.computersharevoucherservices.com)

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**Family and Childcare Trust**

**T** 020 7940 7520

**M** 07855 842 395

**E** [info@familyandchildcaretrust.org](mailto:info@familyandchildcaretrust.org)

The Bridge  
81 Southwark Bridge Road  
London, SE1 0NQ

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