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gníomhaireacht náisiúnta tomhaltóirí

putting **consumers** first

**National Consumer Agency**  
**Childcare Price Survey**

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## 1 Introduction

This document presents the results of a National Consumer Agency (NCA) nationwide survey of childcare facilities, investigating levels of price display and fees charged for a number of routine childcare scenarios.

The study is the latest in the NCA's series of pricing and price transparency surveys, following recent investigations of GP/Dentists fees and price display, baby-care product prices, branded grocery prices and domestic heating product prices (oil and wood pellets). By providing timely, actionable pricing information the NCA promotes competition and supports the operation of transparent, healthy markets for the benefit of consumers and businesses alike.

A number of childcare options are available to parents requiring third party assistance in caring for their children. These range from the use of childminders, drop-in centres, full day care facilities and sessional services. Both private and community childcare providers offer some or all of these services. This survey focuses on private facilities offering day care services on a full-time and part-time (3 full days a week) basis. The methodology used is set out in full in Section 2.

The NCA acknowledges that price is only one of the relevant factors considered by the average consumer when choosing a childcare facility. Other considerations may include issues such as location, staff qualifications, the curriculum followed, play amenities, opening hours etc. However, in the current economic climate, accessible and easy to understand pricing information is critical to enable parents to make relevant comparisons and to assess overall affordability, relative to their circumstances.

The NCA firmly advocates the provision of transparent pricing information wherever reasonable and possible in the supply of both consumer products and services, as it believes

that such information promotes competition, empowers consumers to make more informed purchasing decisions and aids those seeking a fair deal.

The childcare facilities surveyed by the Agency are not named in this report or in the accompanying spreadsheets. The purpose of the survey is not to provide details of the commercial practices of individual operators. Its objective is to identify general trends in price levels amongst this group of service providers.

The report is divided into this introduction, a methodology section plus two further sections as follows:

- Section 3 presents the results of the survey of childcare facilities and
- Section 4 presents a summary of the findings from the survey.

*The Agency would like to thank the childcare facilities surveyed for their co-operation in the course of this study.*

## 2 Methodology

The National Consumer Agency undertook the survey of childcare facilities between December 13<sup>th</sup> and 22<sup>nd</sup> 2010. The methodology used is outlined in this section.

A list of childcare facilities was compiled using the Health Service Executive on-line listings<sup>1</sup> for 13 different locations across the country, detailed below. These locations were chosen due to their geographical spread and their urban nature. In the Greater Dublin Area, four areas were selected in order to represent a reasonable cross-section of the capital.

**Table 1 Survey Locations**

• Swords	• Tralee
• Waterford	• Dublin City Centre
• Galway	• Lucan
• Dundalk	• Sligo
• Letterkenny	• Limerick
• Cork	• Westmeath
• Dublin 6 & 6W	

In order to best replicate the experience of an “average” consumer, the Agency usually conducts pricing surveys anonymously. A pilot telephone survey, conducted in November 2010, identified a number of practical difficulties with the approach on this occasion, as many facilities were reluctant to give prices over the phone, prior to a more detailed discussion of the specific requirements. When it became clear that an anonymous, telephone based methodology would not work for a survey of childcare facilities, an alternative approach was adopted.

<sup>1</sup>[http://www.hse.ie/eng/services/Find\\_a\\_Service/Children\\_and\\_Family\\_Services/Pre-school\\_Services/Pre-school\\_inspection\\_services/List\\_of\\_pre-schools\\_by\\_county.html](http://www.hse.ie/eng/services/Find_a_Service/Children_and_Family_Services/Pre-school_Services/Pre-school_inspection_services/List_of_pre-schools_by_county.html)

A letter of introduction containing details of the survey was sent to each childcare facility selected to participate on December 6<sup>th</sup> 2010, a week prior to the survey being carried out. NCA staff members contacted the relevant childcare facilities by telephone between December 13<sup>th</sup> and 22<sup>nd</sup> 2010 to complete the survey questionnaire. Failing contact or determining co-operation on the first phone call, at least two follow-up calls were made.

Pricing information was sought on the three childcare scenarios outlined below, as well as information on availability of places and price display on the premises.

- Scenario 1: Full-time and Part-time care (3 full days a week) for a baby aged 6 months.
- Scenario 2: Full-time and Part-time care (3 full days per week) for a toddler aged 28 months.
- Scenario 3: Full-time care for two children (siblings) aged 9 months and 33 months.

The prices recorded for each facility were the prices for new entrants. The quotes received via the phone calls have not been audited in any way; they were taken in good faith and at face value. In the majority of the facilities offering care for a 6-month old baby, parents were required to provide baby formula, whereas food was included in weekly fees by the majority of the childcare providers in the toddler-care category. For ease of comparison, given the variety of opening hours, holidays and the fact that prices are quoted on a monthly, weekly or daily basis, all prices were converted to an equivalent price per week.

The Agency believes that the methodology and the sample size for this survey are robust and the Agency is confident that the results represent an accurate description of the levels of fees charged and price display across the country.

Given that the list of providers was obtained from the Health Service Executive's on-line database, it was considered reasonable to assume that all respondents to this survey

participated on the basis that they are fully compliant with relevant regulations regarding the ratio of carer to children in each age category.

In total, 176 childcare facilities were contacted and of these information was received from 102. Therefore information was not received from 42% of those contacted for either of the following reasons:

- Refusal to participate, or
- Messages left with staff members but calls not returned.

Of the 102 childcare providers that provided information, 81 were private and 21 were community facilities. Following data collection, a decision was made to report on survey results for private childcare providers only for two reasons:

- Community facilities are supported by the Community Childcare Subvention Scheme, which is a support scheme for community childcare services to enable them to charge reduced childcare fees to parents who are disadvantaged or on lower incomes. It is therefore difficult to compare *actual* prices paid, given that parents may be paying different fees depending on the level of subvention received.
- It was felt that the total of 21 community facilities surveyed would not provide a nationally representative indication of levels of price display and fees charged.

Across all the areas and different scenarios included in the survey 395 prices were recorded in relation to private childcare.

### 3 Childcare Survey – Results

This section presents the results of the telephone survey of childcare facilities.

- Section 3.1 presents information in relation to scenario one, that is childcare costs for a baby aged six months for both full-time and part-time care (3 full days a week) in a private childcare facility.
- Section 3.2 presents information in relation to scenario two, that is childcare costs for a toddler aged twenty-eight months for both full-time and part-time care (3 full days a week) in a private childcare facility.
- Section 3.3 provides pricing information in relation to two siblings, aged 9 months and 33 months, attending the same childcare facility.
- Section 3.4 provides information in relation to the level of price display and levels of availability.

#### 3.1 Cost of Childcare - Baby aged 6 Months

Table 2, Table 3, Figure 1 and Figure 2 below present the results for the weekly average price, maximum price, minimum price and price range for childcare for a baby aged six months.

The main results for **full-time care** are as follows:

- The overall average price across all regions nationally was €191<sup>2</sup> per week, with the average price ranging from a high of €233 in the Swords area to a low of €155 in the Waterford and Sligo areas, a difference of 50% (€78).

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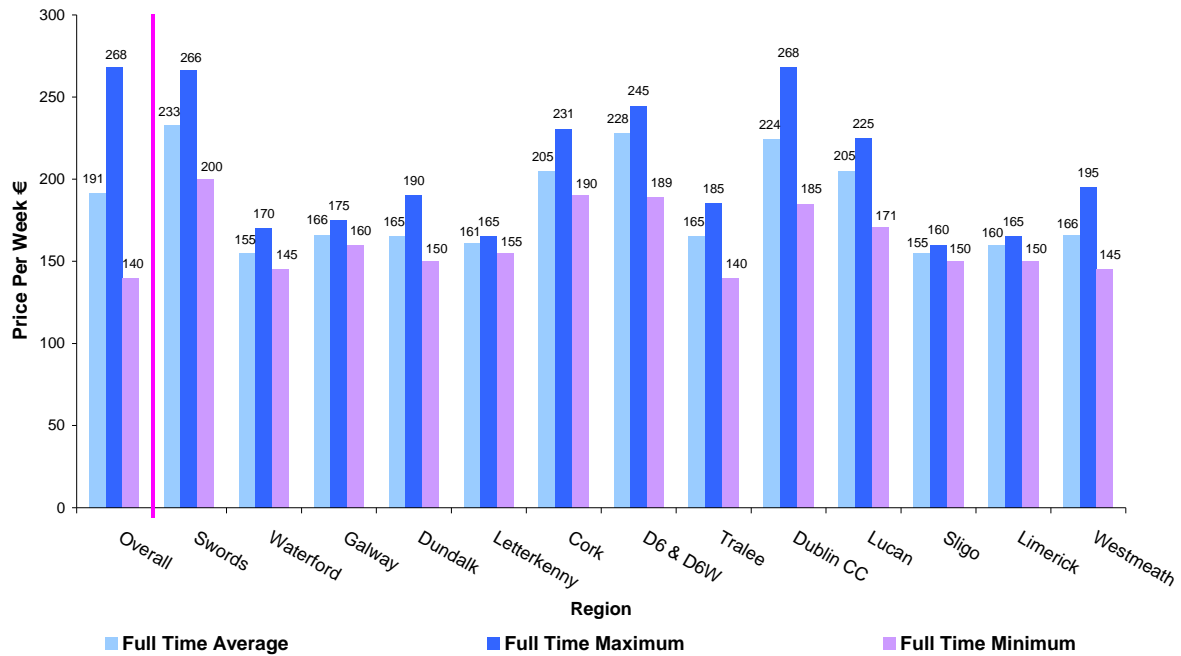
<sup>2</sup> Figures are rounded to the nearest euro.

- The highest overall price, €268 was recorded in the Dublin City Centre area and the minimum price, €140 was recorded in the Tralee area, which is a difference of 91% (€128).
- The Dublin City Centre area recorded the largest variation between the maximum and minimum price at 45% (€84) and the smallest price range, that is the difference between the maximum and minimum price, was 7%, (€10), recorded in both the Sligo and Letterkenny areas.
- In eight of the thirteen areas surveyed the price range recorded was €40 or greater in relation to full-time care for a six month old baby.

**Table 2 Average Price, Maximum Price, Minimum Price, Range – Full-time Care - Baby aged 6 months**

Full-time Care					
	Number of Quotes	Average Price €	Max Price €	Min Price €	Range €
Swords	6	233	266	200	66
Waterford	5	155	170	145	25
Galway	5	166	175	160	15
Dundalk	3	165	190	150	40
Letterkenny	4	161	165	155	10
Cork	5	205	231	190	41
D6 & D6W	12	228	245	189	55
Tralee	5	165	185	140	45
Dublin CC	4	224	268	185	84
Lucan	7	205	225	171	54
Sligo	3	155	160	150	10
Limerick	4	160	165	150	15
Westmeath	4	166	195	145	50
<b>Full-time - Overall</b>	<b>67</b>	<b>191</b>	<b>268</b>	<b>140</b>	<b>128</b>

**Figure 1 Average Price, Maximum Price and Minimum Price - Full-time care - Baby aged 6 months**



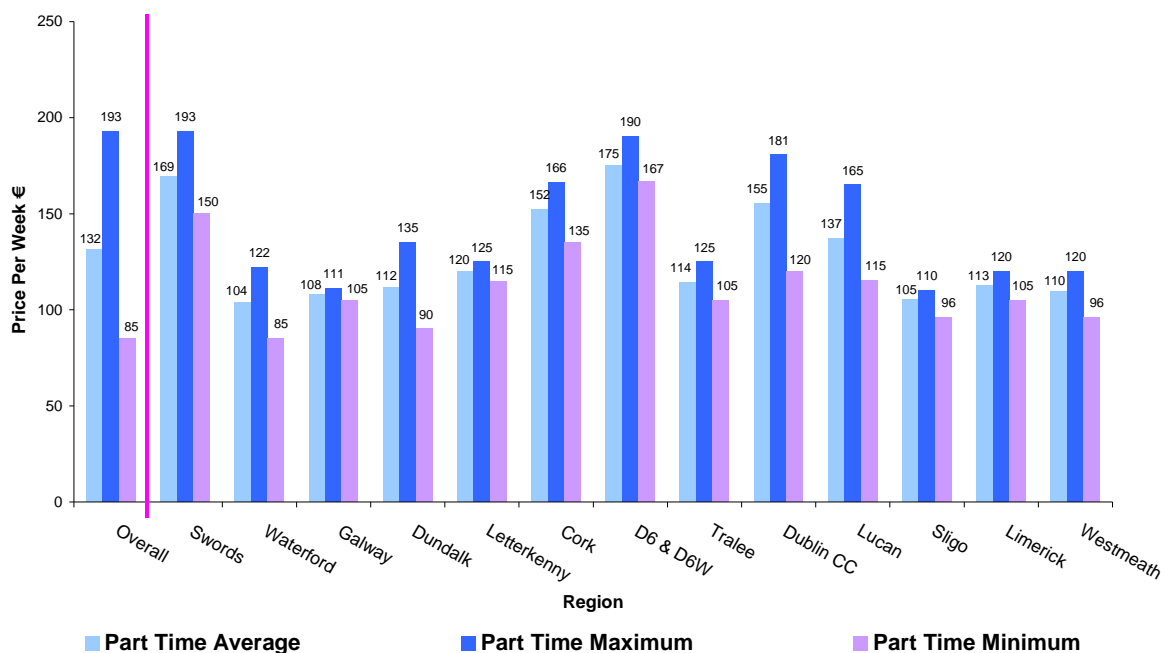
The main results for **part-time care** (3 full days per week) are as follows:

- The overall average price across all regions was €132 per week, with the average price ranging from the lowest in the Waterford area of €104 to the highest in the Dublin 6 & 6W area of €175, a difference of 68% (€71).
- The highest overall price, €193 was recorded in the Swords area and the minimum price, €85 was recorded in the Waterford area, which is a difference of 127% (€108).
- The largest variation between the maximum and minimum price within an area was recorded in the Dublin City Centre area at 51% (€61) and the smallest variation 6%, (€6) was recorded in the Galway area (note that only two quotes were obtained in this area for this scenario).

**Table 3 Average Price, Maximum Price, Minimum Price, Range – Part-time Care - Baby aged 6 months**

Part-time Care					
	Number of Quotes	Average Price €	Max Price €	Min Price €	Range €
Swords	5	169	193	150	43
Waterford	5	104	122	85	37
Galway	2	108	111	105	6
Dundalk	3	112	135	90	45
Letterkenny	4	120	125	115	10
Cork	3	152	166	135	31
D6 & D6W	6	175	190	167	23
Tralee	5	114	125	105	20
Dublin CC	3	155	181	120	61
Lucan	7	137	165	115	50
Sligo	3	105	110	96	14
Limerick	4	113	120	105	15
Westmeath	4	110	120	96	24
<b>Part-time - Overall</b>	<b>54</b>	<b>132</b>	<b>193</b>	<b>85</b>	<b>108</b>

**Figure 2 Average Price, Maximum Price and Minimum Price - Part-time care - Baby aged 6 months**



### 3.2 Cost of Childcare - Toddler aged 28 Months

Table 4, Table 5, Figure 3 and Figure 4 present the results for the weekly average price, maximum price, minimum price and price range for childcare for a toddler aged twenty-eight months.

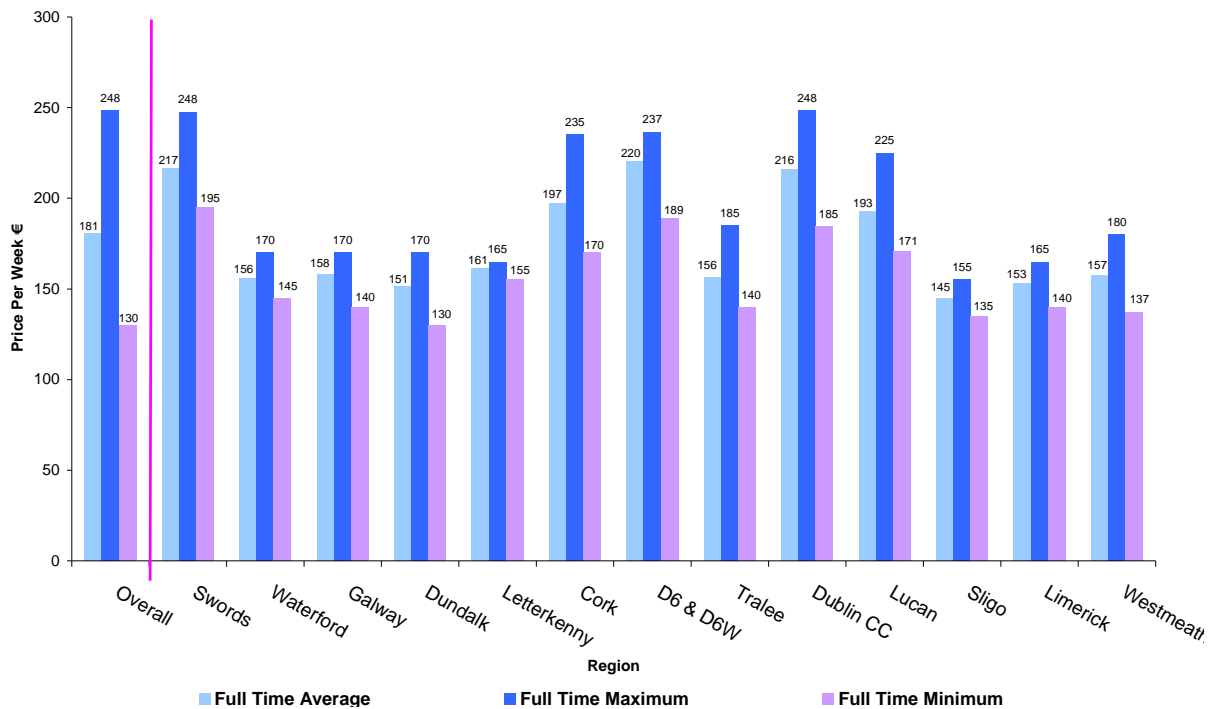
The main results for **full-time care** are outlined below:

- The overall average price across all regions was €181 per week.
- The average price ranged from a high of €220 in Dublin 6 & 6W area to a low of €145 in the Sligo area, a difference of 52% (€75).
- The largest variation between the maximum and minimum price was recorded in the Cork region at 38% (€65). The Letterkenny area recorded the smallest variation, 6% (€10), between the maximum and minimum price.
- The Dublin City Centre area recorded the highest overall price, €248 and the minimum price, €130, was recorded in the Dundalk area, which is a difference of 90% (€118).
- In eight of the thirteen areas surveyed the variation in price was €40 or greater per week in relation to full-time care for a twenty-eight month old toddler.

**Table 4 Average Price, Maximum Price, Minimum Price, Range – Full-time Care - Toddler aged 28 months**

Full-time Care					
	Number of Quotes	Average Price €	Max Price €	Min Price €	Range €
Swords	7	217	248	195	53
Waterford	6	156	170	145	25
Galway	8	158	170	140	30
Dundalk	4	151	170	130	40
Letterkenny	4	161	165	155	10
Cork	6	197	235	170	65
D6 & D6W	12	220	237	189	47
Tralee	7	156	185	140	45
Dublin CC	4	216	248	185	64
Lucan	9	193	225	171	54
Sligo	3	145	155	135	20
Limerick	6	153	165	140	25
Westmeath	5	157	180	137	43
<b>Full-time - Overall</b>	<b>81</b>	<b>181</b>	<b>248</b>	<b>130</b>	<b>118</b>

**Figure 3 Average Price, Maximum Price, Minimum Price - Full-time care - Toddler aged 28 months**



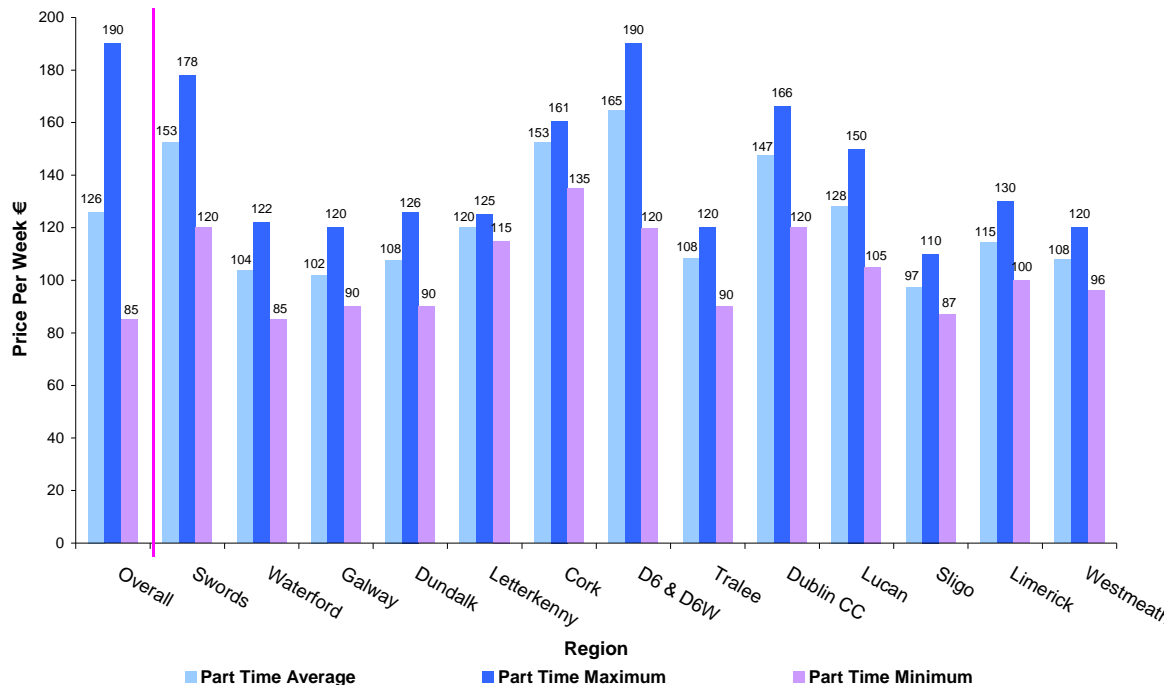
The main results for **part-time care** (3 full days per week) are outlined below:

- The overall average price across all regions was €126 per week, with the average price ranging from a high of €165 in the Dublin 6 & 6W area to a low of €97 in the Sligo area, a difference of 70% (€68).
- Dublin 6 & 6W recorded the largest range between the maximum and minimum price at 58% (€70) whereas a range of 9% (€10) between the maximum and minimum price was found in the Letterkenny area.
- The highest overall price, €190 was recorded in the Dublin 6 & 6W area and the minimum price, €85 was recorded in the Waterford area, which is a difference of 124% (€105)

**Table 5 Average Price, Maximum Price, Minimum Price, Range – Part-time Care - Toddler aged 28 months**

Part-time Care					
	Number of Quotes	Average Price €	Max Price €	Min Price €	Range €
Swords	7	153	178	120	58
Waterford	6	104	122	85	37
Galway	6	102	120	90	30
Dundalk	4	108	126	90	36
Letterkenny	4	120	125	115	10
Cork	4	153	161	135	26
D6 & D6W	9	165	190	120	70
Tralee	7	108	120	90	30
Dublin CC	4	147	166	120	46
Lucan	9	128	150	105	45
Sligo	3	97	110	87	23
Limerick	6	115	130	100	30
Westmeath	5	108	120	96	24
<b>Part-time Overall</b>	<b>74</b>	<b>126</b>	<b>190</b>	<b>85</b>	<b>105</b>

**Figure 4 Average Price, Maximum Price, Minimum Price - Part-time care - Toddler aged 28 months**



### 3.3 Cost of Childcare - Full-time Childcare for two Siblings

Information in relation to full-time childcare for two siblings attending the same childcare facility was also sought. In over 90% of the cases a discount was offered when two siblings attended. The discounts offered varied from a nominal fixed sum discount to a percentage discount. Discounts for siblings are discretionary in certain cases therefore it may be beneficial to the parent/guardian to request a discount when more than one child is attending.

Given the high incidence of discretionary discounts, a decision was made not to present prices for this scenario. Overall, for all facilities that gave an actual figure, it was found that on average a discount of 7% was offered. This varied substantially from cases where no discount was applied to cases where a discount of up to 12% on the combined fee for both children was deducted and cases where a discount of up to 35% on the fee for one child was given.

### 3.4 Price Display, Availability and Discounts

In relation to price display, it was found that overall, 44% of childcare facilities surveyed displayed their prices at their premises. It was indicated in some cases that price information is available as part of an information pack provided to parents/guardians upon request, or is published on a website. The National Children’s Nurseries Association, the main representative body for the sector, suggests as a guideline that childcare providers *“display... fee schedule for parents to view”*<sup>3</sup>.

In relation to full-time care for a baby aged six months, 61% of childcare providers indicated that they had availability at the time of the survey. Two in three (67%) indicated that they had places available for full-time care for a toddler aged 28 months. This indication of availability may suggest that parents/guardians have a greater degree of choice than in previous years when looking for childcare.

For all three scenarios, it was found that discounts on scheduled fees may be available in some cases, were a parent to specifically ask for a lower fee.

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<sup>3</sup> National Children’s Nurseries Association News Ezine Policy Link - October 2010

## 4 Key findings

- The average price across all regions for full-time care for a baby aged six months was €191 per week. The average price ranged from a high of €233 in the Swords area to a low of €155 in the Waterford and Sligo areas, a difference of 50%.
- For full-time care for a baby aged 6 months, the largest variation, €84 (45%), in an individual area between the maximum and minimum price was recorded in the Dublin City Centre area. The smallest variation, €10 (7%), was recorded in both the Sligo and Letterkenny areas.
- The overall average price across all regions for full-time care for a toddler aged twenty-eight months was €181 per week. The average price ranged from a high of €220 in the Dublin 6 & 6W area to a low of €145 in the Sligo area, a difference of 52%.
- The largest variation in an individual area, between the maximum and minimum price for full-time care for a toddler aged twenty-eight months was recorded in the Cork region, €65 (38%). The Letterkenny area recorded the smallest variation, €10 (6%), between the maximum and minimum price.
- In over 90% of the cases a discount was offered when two siblings attended, discounts in certain cases appeared to be discretionary.
- For all three scenarios, it was found that discounts on scheduled fees may be available in some cases, were a parent to specifically ask for a lower fee.
- Over 60% of childcare providers indicated that they had availability.