Employment, Family and Community activities: A new balance for women and men

UK

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1. Introduction

The challenge of understanding the impact of the changing balance of activities for men and women in the three spheres employment, community and family life provides the backdrop to this report, which focuses on employment in the household services sector. In previous work for the European Foundation (Yeandle, Gore and Herrington 1998) we explored developments in these activities across all EU member states, identifying the following as central unanswered questions:

- What is happening to domestic work in the household?
- Which domestic tasks are being transported into the labour market?
- In which employment sectors are they re-emerging as paid jobs?
- How fast are these sectors growing, who is working in them and what are the characteristics of their jobs?

This report seeks to respond to these questions for the UK, using the concept of 'household services' as a framework for the study, in an approach which mirrors the seven other studies carried out for the European Foundation simultaneously in other EU member states: Austria, Finland, France, Germany, Italy, the Netherlands and Portugal. The research has included the following elements:

- a review of national level statistical evidence relating to employment in the different sub-sectors of household services - broadly defined as childcare, eldercare, cleaning, catering and home maintenance.
- an exploration, through interviews with key informants and consideration of relevant documentation, of national level policy developments and initiatives which affect the development of household services.
- investigation of household services development in two major cities, Leeds and Sheffield, using local level statistical evidence and documentation, supplemented with interviews with key informants in relevant public, voluntary and private sector bodies.
- research into the situation, experiences and attitudes of workers in a variety of household services (for illustrative purposes only) based in Leeds and Sheffield, using face-to-face interviews.

The research has produced an extensive body of evidence, which can only be summarised in this report. Much of the detailed statistical material is included in appendices to the report, together with a full bibliography.

2. National Level Analysis of Employment in Household Services

2.1 Background and context

A range of factors affect the growth of work in household services. These include: the respective roles played by the state, voluntary sector organisations, and the private sector in supporting jobs which deliver care and services; regulations governing employment in terms of wages, working conditions and qualifications; changes in demand for household services driven by demographic change and by altered participation in employment, especially by women; and the development of new services through entrepreneurial innovation and technological change.

Roles played by state, voluntary and private sector organisations in relation to jobs which deliver care and services

For most of the past two decades, the UK government (in three consecutive Conservative administrations 1979-1997) pursued a policy of trying to 'roll back the frontiers of the state'. Although this policy included a commitment to retain key elements of the UK's welfare system, significant changes to the arrangements established via the Beveridge reforms of the 1940s were introduced: central to these were changes in community care policy, which stressed the need for partnership arrangements between private, voluntary and public organisations, and a privatisation policy which saw certain functions of the state transferred to the private sector. Since 1997, a new Labour administration has introduced important changes, in both welfare and employment policy, which have acted as a stimulus to employment growth in the sector.

The welfare state structures of the 1940s were predicated upon assumptions about the role of the family and in particular about the respective roles of men and women. Now often categorised as a 'liberal/residual' welfare state, (Leibfried and Ostner 1993), or as a 'strong male breadwinner welfare state' (Lewis 1992: 16) the UK has a past which includes prohibitions on married women's employment (mainly in the 1920s and 1930s), institutionalised wage inequalities favouring men's employment (often secured through collective bargaining), and a variety of elements in welfare and social security policy designed to encourage mothers to remain out of the labour market, devoting full-time effort to the care of their families and to the well-being of their children instead.

Important modifications to this 'strong male breadwinner' model have been made during the last quarter of the twentieth century, and here sex equality politics, in tandem with European policies aimed at equalising some aspects of social protection (Pillinger 1992; Yeandle 1999) have played a key role. Important sex equality legislation was introduced in the UK during the 1970s through the 1970 Equal Pay Act, the 1975 Sex Discrimination Act and the 1976 Employment Protection Act, this last introducing protection in relation to maternity.

In the areas relevant to employment in household services, it is important to emphasise that the two sub-sectors most affected are childcare and eldercare. In the former, the Conservative administrations adopted a minimalist approach, encouraging some private sector developments (such as the development of workplace nurseries through tax incentives) but stressing that childcare was essentially a parental responsibility to be delivered through private arrangements except in cases of severe deprivation or need. As a consequence, publicly funded childcare provision lagged well behind that available in many other European

countries throughout the 1980s and well into the 1990s, and most of the growth in childcare employment occurred in the private sector. Alongside this, much childcare continued to be delivered informally, with many parents relying on family members to provide unpaid support. In the eldercare sector, the NHS and Community Care Act 1989 was particularly influential, requiring local authorities to work in partnership with the NHS Trusts and with voluntary and private providers to deliver and develop services[1]. There was a recognition of the need for more care to be provided 'in the community', rather than in residential settings, but critics of this policy argued that it was the family, and principally women within the family, who would bear the burden of the changes being advocated (Baldwin and Twigg 1991).

Since 1997, the UK Government has introduced its new 'Welfare to Work' agenda, which seeks to encourage employment amongst groups such as lone parents, young people, disabled people and the long-term unemployed. As part of this agenda, a 'National Childcare Strategy' was introduced in 1998, alongside a new policy (to be introduced in October 1999), the 'Working Families Tax Credit'. A key element of this new tax credit will be the financial support with childcare costs which parents on lower earned incomes will receive[2]. Already, significant additional funding has been allocated to developing new childcare places, and this is described below in the section on childcare.

There have been several other key policy developments. The 'Modernising Social Services' White Paper (1998) proposed changes in services both for adults (emphasising as key priorities 'promoting independence', 'improving consistency', and 'providing convenient, user-centred services') and for children (with proposals designed to enhance 'protection' and 'quality of care' for children and 'improving life chances')[3]. The National Carers' Strategy (announced in 1999) is designed to enhance support services for carers, in recognition of the fact that their needs are 'currently only being met patchily' (HM Government, 1999:5)[4]. A Royal Commission on Long-term Care for the Elderly reported in 1999, but the full response of the government to its advice is still awaited. Legislation dating from 1996 - the Community

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1 National Health Service

2 The Green Paper 'Meeting the Childcare Challenge' was published in May 1998. This set out a 'strategy to ensure good quality, affordable childcare for children aged 0-14 in every neighbourhood'. Working Families Tax Credit: 'The Childcare Tax Credit will provide up to £200m for 2000-1 to help families pay for eligible childcare, compared with £34.5m currently being spent on the existing method of subsidy, the Childcare Disregard in Family Credit, for which only 38,100 families are eligible. The Government estimates 1.5m families will be eligible for WFTC in its first year..... as many as two-thirds of all families in Great Britain will find that they can take the new Childcare Tax Credit into account as they make decisions about work and paying for childcare... ... Families will be able to apply if: they are an earning lone parent or a couple where both parents are earning; they are each working 16 hours per week or more; they are using eligible childcare; their child(ren) in childcare are aged under 14, or 16 for disabled children' (Daycare Trust 1998). Families with gross earnings of less than £22,000 (with 1 child in childcare) or less than £30,000 (with 2 or more children in childcare) can claim; the credit will be paid on a sliding scale, up to a maximum of 70% of childcare costs (maximum £100 per week for 1 child or £150 for 2 or more children.

3 The 'Modernising Social Services' White Paper introduced the 'Social Services Modernisation Fund' and announced a new special grant on prevention. This required local authorities to 'develop a preventative strategy and to provide, by 29 October 1999, a written policy (for the three year period to 2002-3) setting out: the preventative strategy; how they have worked in partnership with local health authorities and other relevant organisations in drawing up the strategy; how they intend to implement the strategy, and the indicators they intend to use to monitor progress towards implementation; how much of the grant they intend to spend on additional low intensity services' (Department of Health 1999).

4 This announced official action 'on family-friendly employment by offering unpaid leave for family emergencies for employees', plans to develop 'carers' centres' and to involved carers in 'planning and providing services'.

Care (Direct Payments) Act - now enables local authority social services departments to make payments to some persons requiring care, to enable them to buy care directly, for example from a personal assistant whom they employ.

Regulations governing employment in terms of wages, working conditions and qualifications
Compared with most other European countries, employment in the UK is relatively unregulated (Cousins 1999). Most notably, wage protection legislation (delivered via the UK Wages Councils in selected industries) was dismantled during the Conservative administrations, and no minimum wage legislation was introduced until 1998. The UK has a long tradition of legislation in the field of workplace and employment health and safety (first introduced in the 1830s via the Factory Acts and implemented in recent decades through the UK Health and Safety Executive). This legislation has governed hours of work, conditions in the workplace, protective clothing, and, for some occupations, minimum qualifications. Historically this body of legislation has distinguished three groups of workers: young persons, women and men. The two former groups have had rather more protection in terms of hours of work than men, although in respect of women, in most occupations, this changed with the introduction of sex equality legislation in the 1970s.

Although some professions and craft trades have had well-established vocational qualifications in place for many decades, much employment in the UK is open to unqualified individuals. The vocational qualifications framework in the UK has changed significantly since the introduction of a system of National Vocational Qualifications in the late 1980s, and there are a range of current developments in the vocational qualifications frameworks for employees in care occupations (see later sections of the report).

In 1998, new legislation was introduced which affects the employment of many workers in household services. The National Minimum Wage Act 1998 introduced a minimum hourly rate for adult employees (£3.60 per hour), although the 'genuinely self-employed' are excluded from its provisions, and the law does not cover au pairs and nannies. The Employment Relations Act became law in July 1999. Its main provisions had been foreshadowed in the 'Fairness at Work' White Paper (May 1998), and included leave for family and domestic reasons (parental and maternity leave, time off for family emergencies) and individual rights (regarding employment tribunals and unfair dismissal)[5]. In addition, the UK implementation of the European Working Time Directive introduced new regulations in 1998 governing minimum rest periods and breaks, annual paid holidays, a 48 hour maximum working week (except by voluntary agreement) and restrictions on hours worked at night[6].

Changes in demand for household services driven by demographic change and by altered participation in employment, especially by women
Demographic shifts in the UK, as elsewhere in Europe, represent some of the key drivers stimulating demand for household services. The most important of these are: the ageing population; the increase in individuals living alone, in middle and later life (often after the death of a partner, or following separation or divorce) and in youth (linked to changed patterns of family formation); and smaller average family size. 12 per cent of men, and 17 per

[5] On August 4th 1999 the UK government announced new employment rights (mostly in compliance with the 1996 EU Directive agreed within the Social Chapter): re paternity leave, leave to care for young children, extensions to maternity leave and time off for family emergencies.

[6] Some controversial amendments to the regulations were introduced in July 1999: these will remove salaried employees from the scope of the 48 hour working week, and removed the obligation on those who voluntarily opt out of the limit to keep records (*The Guardian*, 28 July 1999).

cent of women in the UK report that they look after or help someone sick, elderly or disabled and about 40 per cent of those women who care for a co-resident adult also hold full- or part-time jobs (Salvage, 1995). Motherhood no longer causes the majority of women to withdraw from employment for long periods, and increased maternal employment has been the key factor stimulating higher employment rates for women. Linked to this, the UK has particularly high levels of part-time employment, especially amongst women, although it should be noted that rates of employment amongst lone-parent mothers have been low throughout the past two decades.

The development of new services through entrepreneurial innovation and technological change

Developments arising from technological change and innovative practices include new information and communications technology (for example in food ordering and shopping from home), new food preparation and preservation techniques (for example in the development of 'ready meals'), small business innovation in domestic services, including examples of firms offering services across the traditional boundaries between shopping, cleaning, gardening and childcare, and expansion of national or multinational businesses in this sector through franchising and sub-contracting operations. Some care co-operatives have emerged during the 1990s, and there is some franchising by international firms in the food, cleaning and care sectors.

2.2 The household services sector

In Great Britain, the 1990s have been a decade of significant growth in household services (HS) employment. As Table 2.1 shows, in 1998 over 3.2 million people held jobs in the sector, representing a 10 per cent increase over the period 1992-1998. This is a large volume of jobs in an economy with total employment of 27 million jobs.

The 3.2 million figure represents the Labour Force Survey (LFS) estimates of employees in the standard occupation categories (SOCs) which were defined as within the household services (HS) sector for the purposes of the present study[7]. There are two important limitations to this method of assessing employment in the sector. First, the LFS uses SOCs which do not always enable HS workers to be distinguished from workers in similar occupations in the business and industrial sectors. Thus 'cleaners' (SOC 958) and 'gardeners and groundspersons' (SOC 594) will over-estimate HS employment since some in this group will be cleaners in hospitals and factories or gardeners in municipal parks. Second, there is estimated to be significant unrecorded employment in these sectors, much of which will not appear in the LFS figures, leading to underestimates. Furthermore, in selecting the SOC codes to include in our definition of HS work, we have excluded categories such as SOC 731 'roundsmen and women and van salespersons' (which may include those delivering ready meals to homes) and the SOC 80 category (food drink and tobacco producers and operatives), because of the likelihood that a majority of workers in these categories would be working outside the HS sector as defined here.

Other sources are also used to supplement the LFS data. These include Department of Health statistics on providers of care services, and on the number of places available for, or services delivered to, children and the elderly; commercial and government data on the growth of

[7] Appendix I Section 1 for details of the LFS.

services and products in the food sector; and some market research data which is in the public domain.

Tables 2.1 and 2.2 give an outline indication of employment in the HS sector. In 1998, three-quarters of those employed in the HS sector were female, and in most sub-sectors of HS there was very marked sex-segregation, although male employment in the sector had increased in the period 1992-1998 more rapidly (by 26%) than had female employment (by 6%). The HS sector also contained a large number of part-time jobs: in 1998 46% of all employees in the sector said that they were working part-time[8]. The share of employment in the sector which is part-time also appears to be increasing. The following discussion considers relevant statistical evidence by HS sub-sector.

Table 2.1: *Numbers of Employees in the Household Services Sector, 1992 and 1998, Great Britain*

	1992	**1998**	**% change**
Care - excluding childcare	540300	720390	+33
Child Care	299800	394900	+32
Catering	1160098	1241326	+7
Gardening	127050	138320	+9
Cleaning	825030	752360	-9
TOTALS	**2952278**	**3247296**	**+10**

Source: *Labour Force Survey 1992, 1998*

Table 2.2: *Household Services Sector: share of employment by sub-sector*

percentages

	1992	**1998**
Care - excluding childcare	18	20
Child Care	10	12
Catering	39	38
Gardening	4	4
Cleaning	28	23
TOTALS	**100**	**100**

Source: *Labour Force Survey 1992,1998*

Childcare

Employment in childcare arises in a range of different occupations in Britain, as summarised in Table 2.3 below. Childcare may be provided in a variety of settings: in the child's own home, by nannies or au pairs; in the childcare worker's home, e.g. by registered childminders; or in day nurseries, 'out-of-school' facilities and activity clubs by nursery nurses, playleaders, playworkers and childcare assistants[9]. This variety makes it difficult to assess with precision

[8] See Appendix I Section 1 for definitions.

[9] Au pairs enter the UK under special agreements with the UK immigration authorities. At present they must be aged 17-27, unmarried and without dependants, and nationals of one of the following states: Andorra, Bosnia Herzegovina; Croatia; Cyprus; Czech Republic; Faro Islands; Greenland; Hungary; Liechtenstein; Macedonia; Malta; Monaco; San Marino; Slovak Republic; Slovenia; Switzerland; Turkey. Au pairs must be registered in the UK for an English language course, may not stay in the UK for more than 2 years and are expected to help in the home of the family with whom they reside for a maximum of 5 hours per day, with two full days off per week. There are estimated to be about 40,000 au pairs currently in the UK. EU nationals are not subject to any of the above restrictions, and are not counted in this number.

the number of individuals working in the sector. Our minimum estimate is of 400,000 childcare workers, but it is likely that the figure is closer to 500,000.

Demand for childcare

Childcare employment arises when parents require services with respect to pre-school children aged 0-4 years[10] (usually because parents are engaged in paid work), and for school-age children when they are not at school (usually before 9am, after 3.30pm and during the annual 13 weeks of school holidays, during most of which parents may be working).

Public provision of childcare has been very limited in Britain until recently, and there is still scope for considerable expansion of the sector. As already indicated, the care of children was regarded by government as the private responsibility of parents throughout most of the 1980s and 1990s. As a result, informal arrangements for the care of children have dominated, with grandparental and paternal care cited as the most commonly used sources of childcare by employed mothers of pre-school children (Gardiner cited in Bruegel 1999). Cost has been a major constraint on demand for private childcare services, resulting in this form of care being used by professional dual earner families more frequently than by families on lower incomes and lone parents: childminders, nannies and day nurseries are all more commonly used by mothers employed in professional, managerial and non-manual jobs, than by their counterparts in manual occupations.

This situation is set to change with the introduction of the National Childcare Strategy, which is expected to create 90,000 new childcare jobs, will offer help with childcare costs to an estimated 1.5m lower earning families, and has placed an increased emphasis on 'out of school' provision (DfEE1998). Previous Conservative administrations had introduced 'pump-priming' funding for this latter form of childcare via the Out of School Childcare Initiative (introduced in 1993), as well as tax breaks for employers to establish day nurseries (in 1990 - it is estimated that some 600 'workplace nurseries' have subsequently been established). The increased emphasis on out-of-school care arises from twin governmental concerns - with 'latchkey kids', who it was feared were being inadequately supervised, and, especially under the Labour administration, with parental 'employability', including the 'employability' of lone parents. Most of the work in out of school childcare is part-time, but there are some interesting small businesses and voluntary/private sector partnerships emerging. The Labour government's other new policy emphasis has been on the establishment of 'early years development and childcare partnerships', which aim to provide better co-ordinated and tailored childcare services in each locality, and oblige local authorities to audit local childcare provision and to provide suitably marketed information services[11].

Childcare Provision and the childcare workforce in Great Britain

The LFS permits estimation of the numbers of employees in childcare occupations, but uses rather broad occupational definitions: nursery nurses (SOC 650, a recognised vocationally qualified group), playgroup leaders (SOC 651) and 'other childcare occupations' (SOC 659)[12]. Other ways of estimating trends in this employment sector are available and are discussed below.

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[10] Children attend school full-time, compulsorily, between the ages of 5 and 16 years in the UK.

[11] The New Opportunities Fund, from the National Lottery, also provides funding for After School Clubs.

[12] Nursery teachers have not been included in the analysis for this report.

Table 2.3: *Employees in Childcare in Great Britain, by occupation and by sex: 1992 and 1998*

	1992	%	1998	%	% change 1992-1998
	estimated numbers		estimated numbers		
Nursery Nurses	70400	100	109500	100	+56
Male	--	--	--	--	
Female	70400	100	109500	100	+56
Playgroup Leaders	21700	100	25200	100	+16
Male	--	--	400	1	
Female	21700		24800	99	+14
Other Childcare Occupations	207700	100	260200	100	+25
Male	3000	1	5000	2	+67
Female	204700	99	255200	98	+25
Total LFS childcare	299800	100	394900	100	+32
Male	3000	1	5400	1	+80
Female	296800	99	389500	99	+31

Source: *UK LFS 1992, 1998.*
Notes: -- = figure too low for reliability
na = data not available

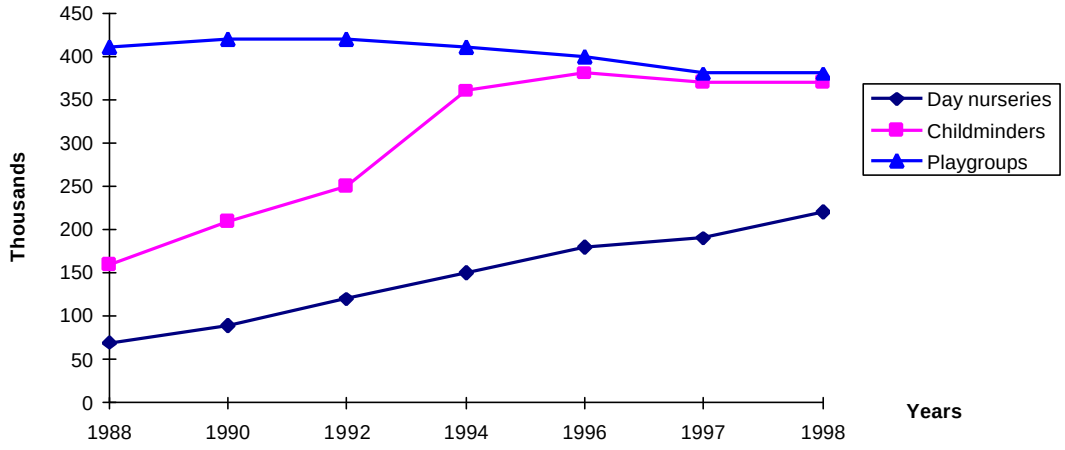
Table 2.3 shows that childcare is a very strongly sex-segregated occupation, and that the expansion of employment in this sector during the 1990s has made only a very small impact on this segregation. Notably, however, there were almost 100,000 more workers in this sector in 1998 than in 1992, representing a 32 per cent increase in a six-year period.

Appendix I includes further statistical information on this group of workers. Appendix I, Table 1 shows that while the overwhelming majority of playgroup leaders work part-time, and three quarters of those in 'other childcare occupations' do likewise, two thirds of nursery nurses are full-time employees. Appendix I, Table 2 shows that the large majority (96%) of childcare workers are white, with few workers from the non-white population (below the non-white population's national share of the total household population, which was 6% in 1997-8). 14 per cent of nursery nurses and 'other childcare' workers were in 'non-permanent' posts in 1998 (Appendix I, Table 3), while about one third of all childcare workers had been with the same employer for five years or more, and one quarter had held their current job for less than a year. LFS data on 'flexible' working hours enables workers who work 'term-time only' to be identified, and about half of playgroup leaders were in this category, compared with just over a quarter of nursery nurses, and just over one third of 'other childcare' workers. Between one quarter and one third of nursery nurses and 'other childcare' workers are located in a workplace with over 25 employees, while almost all playgroup leaders work in workplaces with under 25 employees. Size of workplace has implications for career development and progression.

Childcare in Britain is regulated in a variety of ways, with the Children Act 1989 the main relevant law[13]. At present, there are some legal provisions relating to who may work in childcare, what kind of premises they may use, and how many children, with what kinds of needs, may be in their care[14]. The quality issues, for childcare workers and for childcare provision, are discussed below. The legal requirement for registration means that there is an alternative source of childcare statistics to supplement the LFS data discussed above. The Department of Health (until 1997) collected data from English local authorities on both the numbers of persons and premises providing childcare, and on the number of places available for children in different age groups[15].

There has been a very large increase in the number of day nurseries in England over the past decade, and this upward trend seems likely to continue in the light of the policy context described above. Playgroup provision has declined, however, and this needs to be understood in the context of the role played by volunteer work in the pre-school playgroup movement in the UK. The declining availability of volunteer mothers (because of increased maternal employment) to sustain this form of childcare is a factor in this decline. Chart 2.1 shows the rise in the number of daycare places available in England during the same decade, from 640,000 places in 1988 (when two-thirds of the places were in playgroups) to 970,000 places in 1998 (when barely one third were in the playgroup sector). Here the percentage change over the period (Table 2.4) is 220% (places in day nurseries), 30% (places with registered childminders) and -10% (places in playgroups).

Chart 2.1: Day care places available for children under 8 years old in England; day nurseries, registered childminders and playgroups



Note: *From 1992, figures for childminders are affected by the extension of registration to places for children aged 5 to 7.*

[13] The Children Act 1989 was implemented in October 1991. See Smith, 1991.

[14] Proposals to transfer responsibility for the inspection of childcare provision from local authority Social Services Departments to OFSTED (the Office for Standards in Education) were announced in August 1999.

[15] Note that this data cannot be directly compared with the LFS data, which covers the whole of GB.

Table 2.4: *Premises or persons providing day care for children under 8 years old; day nurseries, registered childminders and playgroups, 1988-1998*[16]

numbers

	1988	**1990**	**1992**	**1994**	**1996**	**1997**	**1998**	**1988-1998 % change**
Day nurseries	2100	2900	4100	5000	5700	6100	6700	+220
Registered childminders	74600	93100	109200	96000	102600	98500	94700	+30
Playgroups	17400	17800	17500	17300	16500	15800	15700	-10

Figures have been rounded and may not add to totals because of this.

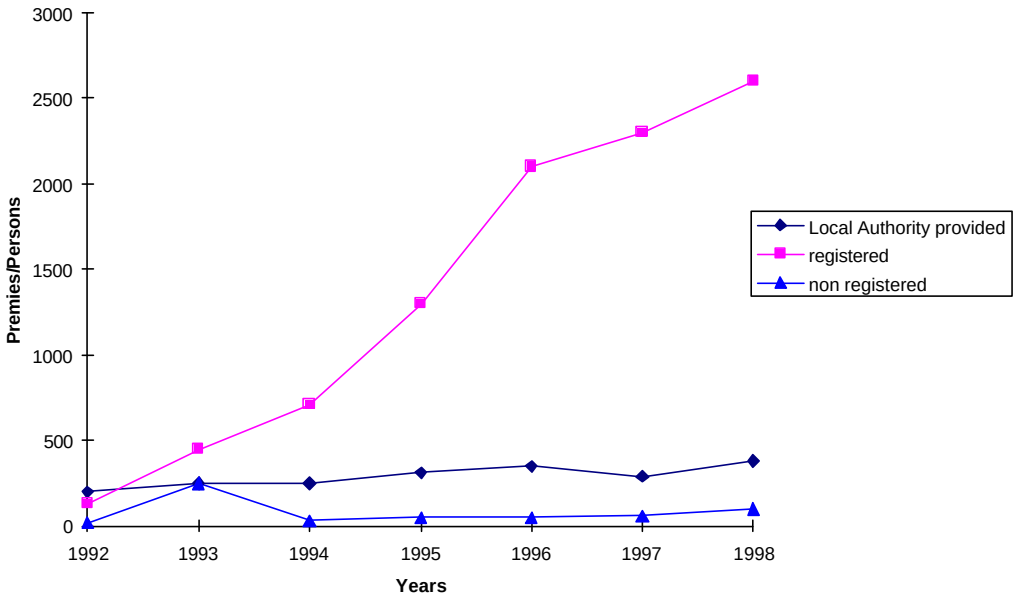
Sources: 1988-1997: Statistics of Education: Child day care facilities at 31st March 1998, England, DfEE, London: Children's Day Care Facilities 1997- p.14 Table 1.

Out of School childcare provision has been another area of rapid expansion, as can be seen in Chart 2.2. The number of out-of school clubs increased from 350 in 1992 to 3100 in 1998, and the number of places available increased from 12,000 to 93,000 (Appendix I Chart 1). This figure will rise further as the National Childcare Strategy (mentioned above) has allocated substantial funds to achieve its target of 60,000 additional out of school childcare places. For example, almost 17,000 new places in out of school clubs were created in England between May 1998 and February 1999 (DfEE 1999)[17]. Holiday schemes are the other main way in which childcare has been developed. As with out of school clubs, most of the growth has come via the voluntary and private sectors (sometimes working in partnership with local authorities). There was six-fold growth in the number of schemes in England between 1992-1998, which provided places for some quarter of a million children in 1998 (Appendix I Chart 2).

[16] Prior to 1992 data was collected for children under five only; data includes facilities provided by voluntary organisations under agency arrangements (Section 22 of the National Health Service Act, 1946).

[17] In addition, there were over 5,000 new places in this period established via the Early Years Development Plans, and funding to secure over 9,000 new places had been allocated to the Further Education Funding Council, to assist students with their childcare needs.

Chart 2.2: *Out of school clubs: premises or persons providing day care for five to seven year olds* [18]



Sources: *1992 - 1997: Children's Day Care Facilities 1997- p.16 Table 5, 1998: Statistics of Education: Child day care facilities at 31st March 1998, England, DfEE, London: Children's day care facilities 1998 p.19, table 6.*

The numbers of other childcare workers is hard to assess. The number based in, or residing in, family homes is not known. Those working in this category include nannies and au pairs, who may operate through one of the relevant training and placement agencies, all of which are private organisations[19]. It has not been possible to establish definitive national figures, but those involved in this sector estimate that there are perhaps 100,000 nannies and 40,000 au pairs working in the UK. Some of these will appear in the LFS 'other childcare workers' category. Young persons from other EU member states need not be recorded at all.

There are also some school-based childcare workers (excluding teachers), such as 'dinner supervisors' who oversee schoolchildren's mealtimes and lunch-time play activities. These workers work very short daily hours, although some may also have additional jobs as teachers' assistants or as school crossing patrol wardens.

Working conditions and quality issues childcare

Pay and conditions for childcare workers are affected by national legislation concerning employment rights, hours of work and pay. The rates of pay of most childcare workers are well below average gross hourly earnings for full-time employees in the UK (Daycare Trust, 1997), and 'childcare and related occupations' are listed as among the ten lowest paid occupations in Great Britain (Nichol 1998). Few childcare staff outside nurseries are entitled to paid holidays or sick leave, 50 per cent of staff are thought to be working without training, and there is estimated to be an annual staff turnover of 30 per cent in UK nurseries (Penn, 1995). Others resign due to stress and 'burn-out' (Cameron, 1998/9), whilst poor pay and

[18] 'Registered' clubs are run by voluntary or private bodies and registered by local authorities under the Children Act 1989. 'Non-registered' clubs are those which are exempt from the legislation.

[19] Mintel reported in 1999 that 56 nanny agencies were members of the Federation of Recruitment and Employment Agencies (Mintel 1999).

conditions contribute to reduced staff morale. Further difficulties can be experienced by childcare workers who are also parents themselves, trying to balance the demands of a poorly rewarded job with their own family responsibilities (childcare generally is not a family-friendly career).

As indicated, pay in childcare is low (see Appendix I Table 23). Nursery nurses, among the best paid childcare workers, rarely earn half the national average wage, although a qualified nursery teacher earns substantially more[20]. Childminders are usually self-employed and charge an hourly rate per child; often they get no pay for holidays and have no security of employment or income. Playgroup workers are mostly paid at or around the minimum wage, and the same applies to childcare assistants and playworkers. The New Earnings Survey 1998 reveals that childcare workers (SOC 659) earn average gross weekly pay of £191 - well below the average for all occupations which stood at £384 (Nichol 1998). Salary guidelines from professional childcare worker organisations recommend minimum starting rates of £5.60 per hour for nursery nurses (UNISON[21]) and £6 per hour for sessional playworkers (Kids Club Network), but many workers receive well below this level.

Low wage levels create disincentives to take up training, probably limit the range of applicants for work in the sector, and limit career opportunities. The Daycare Trust, which campaigns for improvements in childcare, argues that to work effectively, the childcare workforce needs paid sick leave, paid holidays, progressive training opportunities and membership of a professional organisation/trade union. Many currently do not have this, although the changes introduced in the Employment Relations Act 1999 offer some additional protection. The Qualifications and Curriculum Authority, working with the National Training Organisations, was asked in 1998 'to take forward work to develop and implement the framework for childcare qualifications and training' (QCA 1998). The QCA's stated aim is 'to put the framework in place by July 1999[22]. The Early Years National Training Organisation 'was recognised by the Department for Education and Employment' in May 1998 and launched in November 1998 (HERA 1999).

Eldercare

This report is not concerned with the whole of the workforce employed in eldercare, which would include professional nurses, but with the delivery of services to the elderly which might once have been the responsibility of unpaid family members. Hence the focus is on domiciliary services provided to elderly people in their own homes, day care support provided at least in part as a support for carers, and domestic cleaning and other services aimed at elderly consumers.

Demand for Eldercare

An increased demand for household services by or in support of the elderly population arises from several factors. First, the proportion of the UK population aged over 75 has risen (standing at 7% in 1997) and is predicted to increase (to 8% in 2011 and 8% in 2021, Social Trends 29, 1999 edition, Table 1.5 p. 31). In 1998, half of all single person households

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20 Teachers have not been included in our definition of the childcare workforce.

21 UNISON is a major trade union.

22 'The proposed framework will be founded on national occupational standards for all the job roles in the sector. It will aim to show clearly the training and qualifications which are appropriate for each role... To establish the framework, there will need to be intensive work with employer groups, awarding bodies, training providers, parent groups and other key stakeholders, to achieve consensus on the framework and secure its successful implementation' (QCA 1998: 3).

consisted of elderly persons living alone, with three quarters of women aged over 75 living alone, and over a third of men.

Second, in the past decade UK public policy has involved a shift away from the public provision of care services to the elderly and disabled towards a new 'mixed economy' of care provision, in which local authorities

> act instead as the assessors of individual need and co-ordinators of individual packages of care. A central part of this responsibility (is) to promote, or enable, competition between providers in order to achieve the volume, mix and quality of supply appropriate to identified needs. With the full implementation of the NHS and Community Care Act 1990 in 1993, this process of redefining the local authority role into one of managing and developing social care was sharply accelerated.
> (Young, 1999 p.102)

This legislation also served to develop a policy first advocated several decades previously. 'Care in the community' meant that residential care solutions, especially in large institutional settings, were to be replaced wherever possible by care arrangements 'within communities' themselves, with the result that enhanced services were required to support disabled or vulnerable adults to remain in their own homes.

Other recent legislative developments include the Community Care (Direct Payments) Act 1996 (which permits local authorities to replace direct service provision to individuals under 65 years old with payments enabling them to purchase their own 'packages of care') (Auld, 1999) and the establishment of the Independent Living Allowance, also restricted to persons aged under 65. In 'Modernising Social Services' (1998) the UK government committed itself to extending direct payments to people over 65 (Department of Health 1998), a development with important implications for homecare employment.

Finally, a variety of social changes have meant that the elderly population has also become a more diverse group, including some people who are relatively well off with significant purchasing power. This is not to deny the prevalence of real poverty among the elderly as well, and the particular financial problems of elderly women, many of whom have inadequate pension provision arising partly from their patterns of labour force participation in the past.

Many elderly people are independent and able to provide for their own daily needs. However, since physical and mental infirmities increase with age, it is not surprising that the services required by at least some elderly people include help with meals, domestic cleaning, personal care, household repairs, gardening and shopping. Suggestions about a range of 'good practice services' are among the proposals emerging from a study of early intervention strategies and services for older people (Fiedler, 1999). Some disabled older people need 'sitting services' either as a relief to, or as a substitute for a main unpaid carer; some elderly people have the means to pay for services which will enhance their comfort and well-being; others have needs which will entitle them to local authority supported home care of various types.

Eldercare provision and the eldercare workforce in the UK

As with childcare, a range of different statistical measures are available to assist in estimating the size of the eldercare workforce and the way in which services to the elderly population are delivered. The LFS includes two categories where it is reasonable to assume that most of the workers counted are involved in work with the elderly: SOC 644 'care assistants and

attendants' and SOC 640 'assistant nurses and auxiliaries' (although the latter includes some staff working with other groups). Professionally qualified nurses have not been included. Table 2.5 shows changes during the 1990s in the size of these two occupational groups: a marked increase in the number of care assistants and attendants, from just under 300,000 in 1992 to just over 500,000 in 1998, and a contrasting contraction in the assistant nurse occupational group. This may represent some movement of individuals between categories.

Table 2.5: *Employees in Care in Great Britain by occupation and by sex: 1992 and 1998*

	1992	%	1998	%	1992-1998 % change
	estimated numbers		estimated numbers		
Assistant nurses & auxiliaries	190160	100	147800	100	-22
Male	13340	7	17420	12	+31
Female	176820	93	130380	88	-26
Care assistants & attendants	298580	100	505080	100	+69
Male	17280	8	41510	6	+140
Female	281300	92	463570	94	+65
Total LFS care	488740	100	652880	100	+34
Male	30620	6	58930	9	+92
Female	458120	94	593950	91	+30

Source: *Labour Force Survey 1992, 1998.*

Table 2.5 also shows that these are strongly feminised occupations. About 94 per cent of care assistants were female in 1998, and 88 per cent of assistant nurses. The number of men working in these two occupations grew significantly between 1992 and 1998, by +31 per cent among assistant nurses and by +140 per cent among care assistants: by comparison female employment changed by -26 per cent and +65 per cent in the same two groups. More than half of the workers in both occupational groups work part-time (see Table 4 in Appendix I), and the overwhelming majority are white (about 95 per cent of care assistants, and about 93 per cent of assistant nurses), although for care assistants the increase in non-white workers was greater in percentage terms than that among white workers, with the number of non-white care assistants almost doubling between 1992 and 1998. Assistant nurses were much more likely than care assistants to work in establishments with over 25 employees in 1998, with over 90 per cent of assistant nurses were in such workplaces, compared with just over 50 per cent of care assistants. In both categories, the proportion of workers who had 'non-permanent' employment contracts increased between 1992 and 1998 - for assistant nurses from 5 per cent to 12 per cent, and for care assistants from 6 to 8 percent. Despite this, most people in these occupations have permanent jobs.

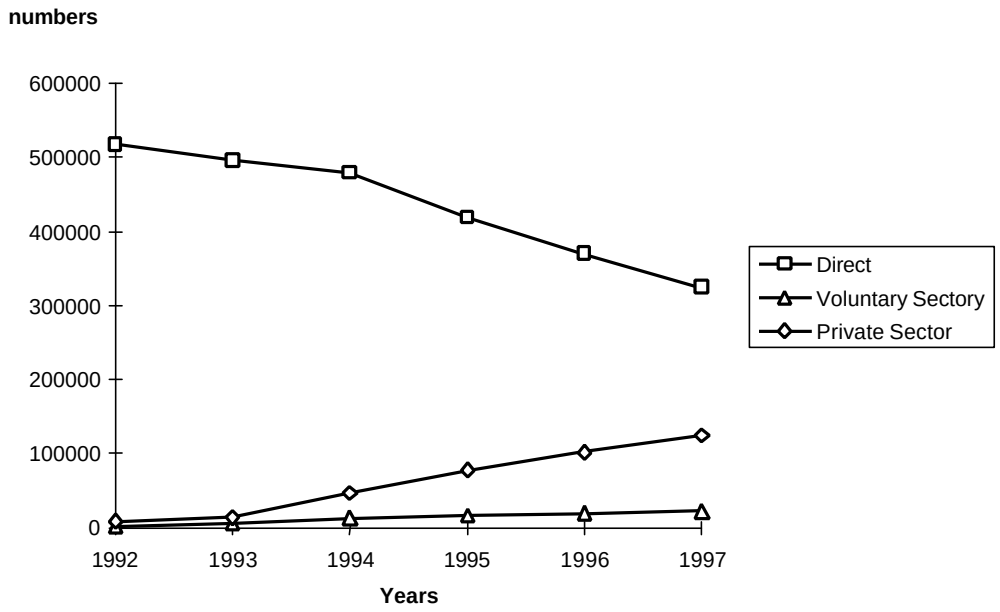
Estimates of the number of individuals comprising the eldercare workforce almost certainly underestimate the number of jobs in this field. As one study commented:

> The number of jobs does not necessarily equate to the number of people employed due to double job holding. A number of employers noted that care workers often put together a number of jobs and were on the books of a number of agencies. Further, people whose main job was not in domiciliary care, but who needed to top up incomes sometimes had second jobs as care workers.
> (Ford, Quilgars and Rugg 1998: 25)

Official statistics on community care provide an alternative source of data for assessing developments in this sector. These data include statistics on the numbers of households receiving home help or home care, the number of meals provided in people's homes, and the number of day centres provided. Additionally, data are available on local authority supported residents in a range of different kinds of accommodation, and on adult informal (i.e. unpaid) carers (See Table 7 in Appendix I).

The number of households receiving local authority supported home help or care decreased by 10 per cent between 1991 and 1997 from 528,800 to 471,000. This trend masks other important changes, as all of the decrease occurred in 'direct' local authority provision (-40 per cent), which in 1991 accounted for 98% of all households receiving help. Provision via the voluntary sector increased eightfold between 1991 and 1997 and that via the private sector fifteen fold (Chart 2.3). These statistics do not include support purchased privately by individuals. Mintel reports that 'age has a significant effect on the propensity to pay for domestic help' (1999: 4), noting that 12 per cent of survey respondents aged over 65 years regularly paid for cleaning[23].

Chart 2.3: *Households receiving home help or home care by sector*



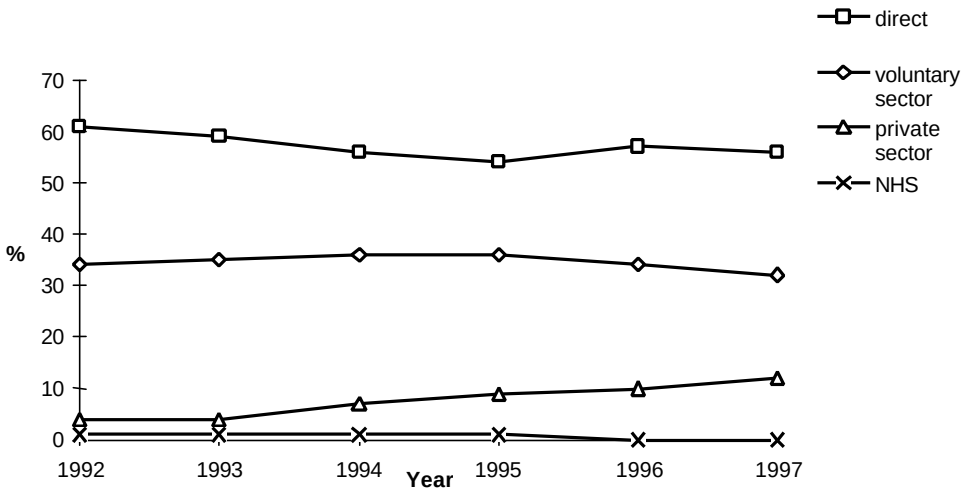
Source: *Community Care Statistics-Day and Domiciliary Personal Social Services for Adults, England, Table A1.1, (Department of Health, 1997).*

[23] This compared with 4 per cent of the 35-44 years age group in the survey.

The number of households receiving meals also decreased (from just under 200,000 in 1992 to 178,000 in 1997). Again, this trend disguises other changes, as through the 1990s direct (local authority) provision declined, while provision paid for from public funds, but delivered via the private sector, increased threefold. The section on Food (below) also indicates a range of alternative ways in which elderly people may now be able to obtain help in meal provisioning.

Statistics on day centres providing support for the elderly and details of the number of local authority supported persons in residential accommodation of various types are shown in Table 7 in Appendix 1.

Chart 2.4: *Meals delivered to people's homes, by provider, 1992-1997*



Source: *Community Care Statistics-Day and Domiciliary Personal Social Services for Adults, England, Table A2.1, (Department of Health, 1997)*

A number of commentators make the point that under the NHS and Community Care Act 1989, local authorities contract out significant amounts of care. Young recently summarised the situation in which a 'purchaser-provider' arrangement has emerged. She describes:

> strict contracting arrangements between the parties involved (Wistow et al 1994) .... the government also stipulated that, in England, 85 per cent of the Special Transitional Grant .... was to be spent on the independent sector. .... a second central objective of the community care reforms was the expansion of services ..... This led to a sustained increase in the size of the home-care market funded by local authorities from 1.8m contact hours in a 1993 survey week to 2.6m in 1997. Of these contact hours, 44 per cent were provided through the independent sector in 1997 compared with 29 per cent in 1995 and just 2.3 per cent prior to the reforms (Government Statistical Service, 1998). ... despite this expansion, home care services have for a number of years failed to keep pace with the growth of the older population; ..... the potential demand for expanded and pluralist home-care services to fill gaps left by statutory providers is clearly demonstrated... ... Laing and Buisson (1996) estimate that, excluding use charges for

> statutory services, private individuals spent a total of £420m on home care in 1995 (£340m on people aged over 65).
> (Young, 1999: pp. 102-103)

The UK Home Care Association (UKHCA) has introduced surveys of its members which provide an interesting picture of changes in the organisation of service provision (Hardy 1998). The most recent survey reveals that 'the independent sector's share of the local authority funded domiciliary care market has continued to grow' (p.38); but also reports that 'the percentage of providers from whom private payers represent most or all of their clients has ...increased - from 23% in 1995 to 30% in 1997' (p.18). Alongside this, the same source reported that there had been 'a steady trend of continuing growth in the proportion of private sector providers - from 66% .... to 86% - and corresponding decline in the proportion of not-for-profit and voluntary sector providers' (p. 7) and 'steady growth .... in the proportion of small providers' [24] - from 63% in 1995 to 82% in 1997 (p.11).

A further development during the 1990s, albeit on a small scale, has been the emergence of 'care-co-operatives', often, although not exclusively, funded by local authorities and providing domiciliary services to the elderly. ICOM (1998) reports that care co-operatives represent about 1 per cent of the market in contracted out provision of home care services, and that they are:

> thriving as business, and have experienced rapid growth; paying wages that are comparable or better than the private sector; benefiting from the co-operative ethos which helps to enshrine the motivation and commitment of the caring members - many workers feel the great sense of pride that comes from owning a successful co-operative business.
> (ICOM 1998: 5)

One co-operative in the West Midlands region expanded from 28 to 140 carers between 1989 and 1997 (ICOM: 15).

No co-operatives identified rely solely on private clients. With 62% relying on social services contracts for their main income, many provide as much as 90% of their care work under contract to social services departments, with the majority carrying out spot contracts. Of those interviewed only one has a block contract (to the year 2000) and preferred provider status, though another successful and well established business stated that it would definitely *not* prefer a block contract because of the pressure on the co-operative; it prefers the flexibility of the spot contract/private client mix (in its case 6% private individuals).
(ICOM 1998: 19)

Working Conditions and quality issues in eldercare

Ford, Quilgars and Rugg (1998) argue that in the 1990s different labour markets in the provision of domiciliary care have emerged. In a 'primary' sector, workers who were mainly employed by local authorities had better rates of pay (between £4.56 and £5.00 per hour), with paid holidays, provision for paid sick leave and (voluntary) pension schemes, with travel costs paid where appropriate. Most of these employees were guaranteed a minimum number of hours work per week, often having 'part-time' hours they could supplement with additional hours if work was available. In a 'secondary' sector, workers had considerably lower hourly rates (below the level at which the minimum wage rate was introduced shortly after their

[24] Defined as those providing 5,000 hours per month or less.

study was completed), less certainty about hours (often without minimum guarantees), with holidays, sick leave and pensions only 'rarely' provided for. 'Secondary' sector workers were located mainly in the 'for profit' segment of the domiciliary care labour market, although workers employed in voluntary sector organisations had variable conditions, spanning both the primary and secondary sectors identified.

Information supplied directly for the present study broadly confirms this picture. National recruitment agencies operating in the field indicated that most home care provision consists of self-employed persons working through agencies[25]. The working conditions of this group have now changed with the introduction of the Employment Relations Act, and the implementation of the Working Time Directive (which gives workers rights to paid holidays)[26].

The more established agencies work with a code of conduct, quality vetting of staff, and advocate increased training for workers in the sector. TOPSS (Training Organisation for the Personal Social Services) currently works collaboratively with relevant trade unions (UNISON), and the Department of Health has established a 'Fair Access to Care Task Force', which will deal with benchmarking, performance assessment and eligibility criteria. This may contribute to resolving the problem of variable practice between local authorities in terms of the services they will supply, and the costs they charge to clients (key informant interview).

One major recruitment agency contacted in the study estimated that there are about 300,000 individuals working in home care, mostly working part-time and on an irregular basis, with working patterns driven by demand as well as supply factors. Most workers currently lacked NVQs in homecare, and some difficulties in establishing better arrangements were noted[27]. For example, observing staff at work as part of their assessment was problematic, as it involved the consent of clients and had cost implications. Pay rates were thought mostly to be above the minimum wage level, but most care workers were paid only for direct contact hours. There was reported to be a widespread wish, on the part of workers, to opt out of the maximum 48 hour working week, particularly in the case of workers employed overnight.

Employment agencies felt it was not possible to meet demand for home care services from the available workforce. As a result, some agencies only deliver services 'for cause', i.e. where there is dependency, and one major organisation claimed to have withdrawn from 'convenience purchase' services. Recruitment was reported to be particularly difficult in metropolitan areas. In addition, some problems were experienced in 'matching' care workers to clients, and difficulties occasionally arose in relation to sex or race discrimination (on the part of clients). Agencies reported working with both the Equal Opportunities Commission and the Council for Racial Equality on such issues, and expected difficult equal opportunities issues to increase as more male workers enter the sector (key informant interview).

Advocates of care co-operatives suggest that these new organisations may offer especially good quality working conditions and standards of service, via two distinct models:

> In the 'agency co-operative' model, carers are self-employed and pay the co-operative a commission for centralised services such as administration and locating work (a form of

[25] See DTI (1999)

[26] The Working Time Directive 93/104/EC was adopted by the Council of Ministers in November 1993.

[27] NVQs - National Vocational Qualifications

employment agency). In the 'worker co-operative' model .. the co-operative itself employs its members to deliver the service - thus the carers are employees of the co-operative.
(ICOM: 17)

Food and Catering Products and Services

Demand for food and catering services

Changes in demand for food and catering services are affected by a range of factors, including: levels of affluence; pressures on time experienced by household members, especially those engaged in full-time employment; technological developments extending the range of food products and services; and changes in lifestyle, reflecting demographic change and more variety in living arrangements.

Levels of affluence have been rising steadily for most population groups throughout the past decade. More households are affected by time pressures than ever before (through the increase in single persons households containing full-time workers, and through dual-earner couples); freezing, chilling and marketing technology has led to a wider range of products and services, with some of the organisations developing them operating on a global scale; and lifestyles have become more flexible, incorporating more eating outside the home and a shift away from 'traditional' family meal arrangements.

Market research reports and business statistics, official statistics and data in the Labour Force Survey all suggest that this is an area of service provision undergoing considerable expansion and change. For some services, it is impossible to distinguish a clear boundary between the replacement of home-based domestic catering/provisioning with alternative food services and trends in leisure and culture. This report nevertheless casts the net wide to encompass all relevant activities, recognising this definitional problem.

Key elements of food services development can be summarised as including:

- the ready meals market (the 'convenience' foods which reduce the need to shop, prepare meal ingredients, and cook; this includes both chilled and frozen meals, the latter able to be stored for weeks or months)
- take-away restaurants and food shops (replacing home prepared meals)
- the prepared sandwich market (replacing the 'packed lunch' prepared at home)
- eating out (in canteens or restaurants as an alternative to eating at home)
- contract catering (providing meals in industrial and institutional settings and to health and welfare authorities and venturing into 'home meals replacement')
- Evidence relating to the above categories is included in Appendix I.

The workforce in food and catering services

The Labour Force Survey provides data on a range of workers in different occupational categories within the food and catering sector. As Tables 4 - 7 (Appendix I) show, the seven occupational categories included represent approximately 1.2 million people. Three of the groups contain over 200,000 people: catering assistants; chefs and cooks; and waiters and waitresses - and in each of these categories the majority of workers are female - 82 per cent of catering assistants, 52 per cent of chefs and cooks, and 75 per cent of waiters and waitresses. The catering assistants and the chefs and cooks categories both showed stronger growth among male than female workers - although the opposite was true for waiters and waitresses.

More than half of the jobs in the catering sector are part-time, with around three quarters of those working as catering assistants, kitchen porters, waiters and waitresses and bar staff employed on this basis. By contrast, 90 per cent or more of restaurant and catering managers and publicans/club stewards work full-time. The non-white population is over-represented in this sector, with 16 per cent of restaurant and catering managers, and 8-9 per cent of jobs as catering assistants, waiters/waitresses and kitchen porters. About 9 per cent of workers in the sector are on 'non-permanent' contracts, and this rises to 16 per cent for waiting staff.

Main developments affecting employment in this sector over recent decades include: increased demand for meals in health and education institutional settings[28]; closure of some industry based canteen facilities; increased distribution of prepared food products via supermarkets and other retail outlets in airports, railway stations and central shopping areas; and increased demand for chilled, frozen and 'ambient' ready meals (up 40 per cent between 1993 and 1998, and estimated to be worth £1,332m at the later date) (Mintel 1998 - Chilled Ready Meals, May 1998 Figure 4). Employment related to these developments includes those categories previously discussed, but also spills into the food and tobacco products occupational category where factory based employment related to food products is located. It has not been possible to assess the size of the employment created by this growth, but given the volumes and value of the sector, it can be assumed that significant numbers of jobs are involved.

Working conditions in food and catering services

Employees in this sub-sector are among the lowest paid in Britain (Appendix I Table 23). The 1998 New Earnings Survey lists 'kitchen porters, hands', 'bar staff', 'waiters, waitresses' and 'counterhands, catering assistants' among the ten lowest paid occupational groups, and in these categories the average weekly wages of full-time employees 'whose pay for the survey period was unaffected by absence' ranged from just £167 to £185 (Nichol, 1998). About three quarters of those employed in these occupations work part-time, with hours which may frequently start early or finish late, and with peaks in demand for certain types of services at weekends and in the evenings. Although such working hours may enable workers to manage family responsibilities, for example by working hours which enable a partner with more standardised employment to care for children, such hours of employment can be particularly difficult to combine satisfactorily with family life.

Many workers are of course employed in the preparation and packaging of sandwiches, ready meals and prepared ingredients, which will be retailed in supermarkets, stores or fast-food outlets, or delivered through local authority or voluntary sector meal delivery schemes. Working conditions for these workers are not dissimilar to those of other workers in routine machine operating and packing positions. It has not been possible to estimate the numbers of workers in this group for the study: however, one company reported to us that 500 employees, predominantly male and full-time workers, were employed in one factory in the South West preparing and packaging frozen meals which are subsequently delivered to elderly people at home under contract with 45 franchise operators on behalf of social services departments across the country. This company was a subsidiary of an international food products company

[28] But note that changes in government policy on school meals provision under the Education Act 1980 relieved local authorities from the obligation to provide such services. During the 1990s there have been large increases in the numbers of meals served by contract caterers in the following : government and agency workplaces; department store staff; schools, colleges and universities; hospitals. Some of this trend results from compulsory competitive tendering introduced under the Local Government Act 1988.

based in Germany (confidential communication from the company). The entire convenience food industry depends upon a chain of supply and labour which includes many workers outside the household services sector as defined in this report. The sector has been subjected to detailed and comprehensive market research and there is strong evidence in this of continuing growth in demand for both existing and new products.

Domestic cleaning and laundry

Demand for domestic cleaning

The demand for domestic cleaning arises from: the widespread view that the work involved is tedious and unrewarding (meaning that when they can afford to do so, many people will pay someone else to do their household's cleaning tasks); from the time pressure experienced by many households where all adults are in full-time employment (including single person households); and from the inability of some individuals, for reasons of infirmity, disability or ill health to carry out the tasks themselves. Mintel estimates that the fastest growing demand for domestic help is from the 35-44 age group. This is, of course, an age group containing many households with heavy requirements because of the additional cleaning and other domestic work generated by the presence of young children in the household. According to the same source, attitudes to purchasing domestic help are more positive in this than in other age groups. Cobweb Information Ltd (1999) states that:

> Domestic cleaning customers tend to be working households in higher income brackets... Spending on household goods and services, which includes domestic cleaning, is lowest in the North East of England and highest in the South East and London.

Another survey (of 500 people aged 30-40 years with a family income of £30,000 per annum or more) found that 78 per cent stated ‘paying someone to do chores causes them no guilt at all’. 54 per cent of women (and 42 per cent of men) claimed to ‘find it a real struggle to juggle all the demands of my home life’. For 55 per cent of women (43 per cent of men) ‘paying someone else to do it’ was the preferred solution to cleaning their home (39 per cent of women and 30 per cent of men responded thus about ironing and 33 per cent of women and 29 per cent of men about gardening) (Barclays Bank plc 1999). Attitudes to paying for this type of household service are more positive among this age group, but are also quite favourable among older people. As indicated above in the discussion of eldercare services, a significant minority of people over 65 (12 per cent) are already thought to pay for ‘domestic help’, and later material in the report, from the locality studies, suggests that companies entering this market rapidly find demand outstripping the supply of their services.

Service provision and the workforce in cleaning services

Data from the LFS shows that there were almost 700,000 people working as cleaners and domestics in 1998, over 80 per cent of whom were women. Unfortunately this figure is not very helpful in establishing the number of people working as cleaners in private households. The figures include cleaners working in large establishments (e.g. hospitals), but exclude those already counted as care assistants who may well have a cleaning role with some of their clients. A separate category indicates that approximately 22,000 people were working as domestic housekeepers, which implies a 'live- in’ role. Again, the overwhelming majority of these workers (92 per cent) are female. Workers defined as 'launderers, dry cleaners' include those whose tasks support private individuals with personal clothes care and the laundering of items such as bedlinen - but what proportion of the work done falls into this category, as opposed to the laundering of hotel or hospital linen cannot be estimated. An additional

difficulty is that large numbers of cleaners employed privately by individuals undoubtedly work 'cash-in-hand', and this group of workers may be working to supplement low wages in other jobs[29] or social security payments (Gregson and Lowe, 1994).

Mintel, in its market research report on 'Domestic Help' (1999), also takes the view that:

> the domestic help market is difficult to assess. Reasons for this include the large number of small service, individually run operations. There is no industry-wide association which represents the interests of its members and gathers reliable data. Most domestic help activities are offered locally and /or regionally. Furthermore, a high level of fluctuation characterises the different market sectors, as businesses come and go.

It goes on to estimate, however, that there are

> a minimum of 600 businesses advertising domestic services in the country's Yellow Pages. These include household cleaning, ironing, cleaning services when moving house, but also light industrial services; a large number of those businesses offer multiple services.

Taking all domestic services together, Mintel estimates that 'there are around 150,000 people working in the domestic help industry'.

Several major organisations operate in this market :

> the three most important companies in the home cleaning sector, Molly Maid, Merry Maid and Poppies, accounted for a combined turnover of around £12m in 1998.
> (Mintel 1999).

Molly Maid promotes itself as operating in one of the fastest growing segments of the UK economy, with particularly impressive growth recorded in the more affluent regions of the country, especially the South East. Overall, it is estimated that about 7 percent of all women, and 6 per cent of all men pay for domestic cleaning, and more would do so if they could afford it (Mintel 1999).

Working conditions in domestic cleaning

The LFS data referred to above shows that some 80 per cent of cleaners and domestics work part-time, while around half of launderers and dry-cleaners and domestic housekeepers work on this basis (Tables 13 and 14). Most workers in this sub-sector are white, but there is a notably higher representation of non-white workers among the 45,000 launderers and dry cleaners. Most workers in this sector have 'permanent' positions - indeed the LFS data for domestic housekeepers suggests that 100% of these workers have permanent employment.

Pay rates for cleaners are low - with this group of employees appearing consistently among the lists of the lowest paid occupations over time. Mintel (1999) suggests that:

> some people work in the domestic help market only in periods of unemployment or when doing other low paid part-time jobs. Supply is easily discontinued when better paid employment is found.

[29] In the LFS they would be likely to be classified as employees in this other employment.

The work involved in domestic cleaning (see also later sections of the report) is frequently isolating and repetitive: it can also be unpleasant and involve health hazards. The way in which the work is organised can mitigate against these risks - for example some companies routinely use teams of workers to clean private homes, offer workers relevant training and have strict guidelines about protective clothing and the way equipment should be used. For others, however, domestic cleaning can be a lonely task, and not surprisingly, very few workers in the domestic services sector are unionised. Franchises are recognised as a well established feature of the industry (Cobweb Information Ltd, 1999).

Many workers in domestic cleaning will be affected by the implementation of the Working Time Directive, but as most work part-time, 'it is the area of paid holidays that will most affect the industry. Questions of implementation are a concern.' (Cobweb Information Ltd, 1999: 6).

This source also suggests that the abolition of CCT (compulsory competitive tendering) and the introduction of Best Value practices 'will affect the cleaning industry', and that

> New legislation such as the minimum wage and the Working Time Regulations may at first have a negative effect on the industry, raising costs and prices and reducing jobs. However, in the long term it should help improve conditions for workers, making it a more attractive industry to work in.
> (Cobweb Information Ltd, 1999: 8).

Household maintenance and gardening

Demand for household maintenance and gardening

This sub-sector of household services is particularly difficult to measure and assess. Like domestic cleaning, demand for service arises from those who lack the time, inclination or ability to carry out the tasks involved themselves. As with domestic cleaning, demand is highest from 'busy professionals', including dual earner couples with above average incomes[30], and from older people who find themselves unable to manage tasks which they perhaps once regularly performed themselves. There are 20m gardens in the UK (Mintel 1999) and total spending on household goods and services for routine household maintenance was around £7 billion in 1997. High levels of home ownership in the UK population make this a particularly important issue, and this is recognised by national organisations working in this field, such as Care and Repair England, set up in 1986 by the housing charity Shelter and the Housing Associations Charitable Trust.

Care and Repair offers an interesting example of an organisation responding flexibly to 'the poor and unsuitable living conditions of people who are disadvantaged by old age, disability and poverty'. Working nationally with local authorities, housing associations and other bodies to develop home improvement agencies, the organisation offers advice and information, training and development services. In 1996/7 home improvement agencies undertook work for 27,000 people, valued at £44m. Of those helped, 90 per cent were over 60 and almost 50 per cent over 75 years old. This organisation has seen very significant growth in its activities across more than a decade of operation, yet it estimates that:

[30] Window cleaning is paid for by 28% of women and by 22% of men (Mintel 1999).

> among older home owners alone, there will over the next decade be 120,000 people in need of home improvement agency services, each year. This represents a potential demand for home improvement agency services of at least three and a half times the current capacity'
> (Care and Repair 1999).

This estimate is derived from the Department of the Environment's 1994 report 'Living Independently' which concluded that 'over 80 per cent of older people want to remain living in their own homes'. A particularly interesting aspect of the development of home improvement agency work has been the extension of service provision to new areas by many agencies - examples include: energy efficiency; decorating; home security; aids and adaptations; handyperson schemes; gardening; and daily living support (Care and Repair England 1997).

The workforce in home maintenance and gardening

By 1996, Care and Repair had expanded to a network of over 200 agencies, representing a significant small workforce of its own. However, despite its impact, many services in this sector are

> still provided by private companies or self-employed persons. Relevant occupations include painters and decorators, plumbers, electricians and builders, but it was decided to exclude these occupations from analysis for the report as it was impossible to distinguish those providing replacement services for work previously done on an unpaid basis, and those working in a well-established set of commercial trades. We have included window-cleaners and gardeners, however, although of course not all of those counted in the LFS will be employed by or on behalf of private householders (Tables 16 to 19). Additionally, the 'cash-in-hand' nature of much service provision means that there is significant undeclared working which goes uncounted.

The National Federation of Master Window and General Cleaners (NFMWGC) has around 2,000 members, mostly self-employed window and general cleaners and their employees (communication from the NFMWGC). An estimated 75 per cent of this number operate in the domestic window cleaning sector (Mintel 1999). The LFS estimates show 28,000 people working as window cleaners in Great Britain, and this number has increased by 19 per cent between 1992 and 1998. Almost all window cleaners recorded in the LFS are male and 70 per cent are full-time employees. This is also an occupation where there is known to be significant underreporting of employment because of undeclared work of either a casual or regular nature. Typically, window cleaners providing a service to private households accept payment in cash on delivery of the service or shortly afterwards. Arrangements to employ a window cleaner are usually made verbally with the fee for service being individually negotiated with the client. Window cleaners' average pay is particularly low for a mainly male occupation, given at £2.66 an hour in the 1998 LFS.

There is also a National Carpet Cleaners Association, based in Leicester, which has a membership of 8,000; the Association estimates that 60% of the carpet cleaning carried out by its members is of a domestic nature(Mintel 1999). Some evidence from one carpet cleaning company is reported in Section 4 of this report.

There were more than 138,000 workers in the 'gardeners and gardening' occupational category according to the 1998 LFS. This was a 9 per cent increase on the numbers in 1992. It

is impossible to assess what proportion of this group provide a service to private householders, but it seems likely from the growth in the number of landscape gardeners and others offering services to such clients that in affluent areas, demand has been increasing and may continue to grow. Gardens are known to be an important feature of British culture, and the large number of garden centres in business, together with the stimulus to gardening from a range of extremely popular radio and television programmes in Britain, bears witness to this. Eighty per cent of gardeners work full-time, although the numbers of part-time gardeners grew rapidly, by 46 per cent between 1992 and 1998. Almost all gardening employees are white, with ethnic minorities apparently seriously under-represented; about 90 per cent of gardeners report that they are in permanent employment. Average hourly pay of gardeners in 1998 was just under £5.50 an hour (See Table 23, appendix 1).

Working conditions and quality issues in home maintenance and gardening

Despite the existence of a range of associations representing workers in this sector, this is a sub-sector in which many workers are unqualified and unrepresented, and where the prevalence of self-employment and small businesses makes it impossible to generalise about working conditions. Pay generally is low, and in some occupations there are significant health and safety issues. It is not known how far these are occupations of choice for the workers concerned, nor how long workers stay within the occupations. There are limited opportunities to obtain relevant vocational qualifications, perhaps best developed in gardening and horticulture, but there is no established career structure for workers, and given the way the occupation is organised, it seems likely that many employees lack pensions, paid holidays and other benefits. Work has recently been completed on a revision of the vocational qualifications available in 'Cleaning and Support Services' including window cleaning, and from autumn 1999 NVQs at levels 1 and 2 will be available, having been 'brought together in one assessment workbook package' offering fifty units of assessment. The NFMWGC has played a key role in this development. There is a linked Assurance Society offering sickness, accident and other benefits for members, and the NFMWGC plays a major role in promoting health and safety within the occupation.

2.3 Summary of key national level policy issues

Section 2 of the report has outlined evidence about employment and service provision in household services at the national level, and has attempted to place this evidence in its background and policy context. It is appropriate at this point therefore to summarise the key policy issues at national level.

Policy context affecting all areas of household services

The UK labour market in the 1990s has been distinctive in Europe in being relatively unregulated, in having rather low levels of unemployment by European standards, in having rather wide variations in patterns of working hours, and in having high rates of female participation which are underpinned by very extensive part-time working. A New Labour administration came to power in May 1997 with a substantial parliamentary majority after almost two decades of Conservative rule. It has introduced a number of significant changes which affect the labour market, as well as retaining and developing certain features of service delivery, particularly in the field of community care, which were introduced in the 1980s and 1990s. Some of the changes introduced bring the UK into conformity with EU Directives on the labour market. These include the Working Time Directive, the Part-time Workers Directive, and the Parental Leave Directive. Steps to bring the UK into line with these guidelines affect workers in all sectors of the labour market, but their impact on the household

services sector will be particularly important because of the history of rather poor working conditions in the occupations concerned. The introduction of the National Minimum Wage likewise has particularly important consequences for low paid workers, and as has been shown, a large proportion of workers in household services come into this category.

The Labour administration also came to power with a range of commitments to improve what it terms 'fairness at work', which it has brought into the policy arena via the Employment Relations Act. A range of consultations involving employers, trade unions and other interested parties were set in train in relation to these developments, and one which is of particular importance for the household services sector concerns proposals to alter legislation governing employment and recruitment agencies. Again, this legislation is by no means exclusive to the sector, but because significant numbers of workers find their positions as home carers, childcare workers, etc. through the medium of employment agencies, the proposals have particular significance. Issuing its consultation document 'Regulation of the Private Recruitment Industry' (DTI 1999), the government stressed that its proposals were 'aimed at underpinning the growth of the economy and the creation of a more competitive labour market' (p.20). It emphasises five objectives of the proposed new regulations; 'increasing clarity'; 'promoting labour market flexibility'; 'proper protection for clients and the general public'; 'curbing payment abuses'; and 'safeguarding clients' money'. Overall the philosophy guiding the changes is summarised as:

> The new regulations ... form a package of reforms to employment legislation to create a framework which provides for a flexible labour market balanced against decent minimum standards for work-seekers. This partnership approach recognises the shared interest of employers and workers in the balance of rights and obligations which exist between them. By ensuring decent standards for workers, the legislative framework will improve motivation and productivity, and hence competitiveness. (p. 20)

Some criticism of this legislation is outlined in later sections of the report.

Policy development with regard to employment legislation and the regulation of the labour market has been complemented by a number of important new developments in the broad sphere of welfare and social security. Again, these developments are not specific to the household services sector, but they are profoundly important for the sector given the nature of the demand within it. The National Childcare Strategy (discussed in some detail above) and the Modernising Social Services White Paper are two key aspects of these developments. However, it is also important to stress the Labour administration's strong emphasis on its 'Welfare to Work' agenda in this context.

The National Childcare Strategy seeks to bring adequate childcare services of good quality into being across the country and to address issues of quality through a vocational training strategy. In addition, the planning of childcare, and the provision of adequate information about relevant services is being addressed. Modernising Social Services and a range of complementary policies, including the Nation Carers' Strategy, seek to develop the existing partnerships between public, private and voluntary sector organisations, to stimulate local authorities and the other sectors to offer more flexible services which are client focused, and to promote independence in vulnerable population groups through a strategy of 'prevention' aimed at enabling individuals to chose to remain in their own homes, supported by suitable services, where they wish to do so. The Welfare to Work agenda is less obviously connected to the household services sector. However, in its commitment to enhance the employability of

groups with low levels of employment, or difficulty in entering the labour market, the agenda identified both young people and lone parents as in need of additional support. The New Deal programme was first introduced in 1998 and has been extended in various forms since. Among the opportunities on offer to New Dealers are the chance to enter childcare work, as the government has explicitly linked the NCS and New Deal (Department of Education and Employment 1998). More generally, opportunities under New Deal are being developed via a range of voluntary and private sector partnerships with government, including opportunities to enter employment and secure training in occupations within household services. Family-friendly employment has also been placed on the political agenda, and has been included in the UK Employment Action Plans.

Policy issues arising from the evidence about employment in household services

This section of the report has given some detailed information about the people who work in household services occupations, their working conditions and the demand for their services. It is clear from this that occupations in the sector tend to be strongly sex-segregated, with the overwhelming majority of workers in the sector being female, although a small number of the occupations under consideration are strongly male dominated. Some future change in this gendered pattern of employment may be indicated by the larger proportional increases of male workers than of female in some of the female dominated jobs, but at the rate observed during the 1990s, the impact will be small.

Workers in the sector are almost universally low paid, and many work part-time. The latter is not necessarily a problem as in the UK many workers actively choose part-time employment and do not regard it as a second best alternative to full-time work. Additionally, some workers may be multiple job holders putting together 'portfolios' of employment to generate a combined salary on which they can live. Furthermore, as Bill McClimont of the UK Homecare Association has stated:

> Flexibility of working practice is especially important in home care, because the service we deliver concerns the personal lives of people, not the processing of a commodity which can be timed to suit the needs of the processors. Attitudes....that the only proper kind of job is a full-time, permanent nine to five job are not just anachronistic - they do not deliver the required service, they exclude many workers who cannot commit themselves to such patterns and so actually contribute to the kinds of unjust valuation of work (low pay) to which I have referred.
> (UKHCA, The Homecarer, February 1999, p. 7)

The problem of low pay is being addressed through implementation of the Minimum Wage legislation, and through government's allocation of additional funding for household services. The use of the New Opportunities Fund is a case in point. This has allocated £220m over a three year period to support the development of out-of-school care for 3-14 year olds.

Evidence considered in preparing this report makes it clear that there are low levels of unionisation or other forms of occupational and professional representation across the whole household services sector. This means that some workers are isolated and potentially vulnerable to exploitation, and may be unaware of either their rights at work or of opportunities to secure vocational training or occupational benefits and safeguards. UNISON, the UK's largest trade union, with 1.3 million members, represents 35,000 nursery nurses as well as other public sector childcare and playworkers, and has some members in private nurseries. UNISON campaigns for fair working conditions and access to training and career

development, and in collaboration with other bodies such as local government employers has set up 'Family Friendly' and 'Fairness at Work' Working Parties to address issues about the reconciliation of work and family life. It has 'successfully tackled the equal pay agenda' in relation to school meals assistants, and considers it can play a major role in promoting better pay for workers across most of the household services sector (key informant interview). It is currently campaigning for the national minimum wage to be increased from its present £3.60 per hour, and for the lower rate for younger workers to be abolished.

The national level data about household services employment and the policy issues outlined above form the context for the following two sections of the report, which offer analysis of household services at the local level, and from the perspective of workers within the services. These key issues emerge in a variety of ways in these analyses, and are revisited in the concluding section of the report (Section 5).

3. Local level analysis of employment in household services

3.1 Introduction

While the national trends and policy developments reviewed in Section 2 affect all areas of the UK, particular conditions and circumstances lead to them being played out in distinctive ways in different places. For this reason, case studies of a small number of localities can illuminate the factors that contribute to or hinder the growth of household services and associated jobs.

Two localities were chosen for this more detailed investigation of employment in household services in the UK, namely the cities of Leeds and Sheffield. Both are located in the same Government Office region, that of Yorkshire and the Humber, and hence are subject to the same regional level policy directions and initiatives. However, the two cities have very different economic histories and industrial traditions, as well as divergent trajectories in their readjustment to recent industrial decline and job loss. In this regard, Leeds has particularly benefited from its role as regional administrative, retail and financial services centre, the modern equivalent of its original function as the commercial focus of the West Yorkshire woollen industry. Sheffield, in contrast, is still searching to convert its renown as 'Steel City' into a coherent modern role, perhaps because of the much more recent decline of the iron and steel and associated engineering industries. In policy terms, this has resulted in Sheffield enjoying both Objective 2 status under EU Structural Funds (soon to become Objective 1) and Intermediate Area status under UK regional policy during the 1990s, whereas over the same period Leeds has had neither.

The contrasting scale and nature of the jobs being generated by these processes of economic regeneration will have a crucial bearing on the two cities' capacity to support an expansion in the provision of household services and the growth of employment associated with it. Unfortunately, it is difficult to give a precise estimate of such employment in the two cities, since the occupational data in the LFS (see above) can only be disaggregated to sub-regional level (South and West Yorkshire, including Sheffield and Leeds respectively). As the two cities are the largest settlements in both cases (with Sheffield contributing 41 per cent of the sub-regional population and Leeds 35 per cent), the figures that are available may be taken as a reasonable illustration of the trends in household services employment in the two case study areas.

As in Great Britain as a whole, the household services sector experienced marked employment growth in the Yorkshire region between 1992 and 1998 (Table 3.1), the regional increase being close to the national average of 10.5 per cent. However, both South and West Yorkshire had overall growth rates that were lower than this, suggesting perhaps that the expansion has shown greater vigour in the more affluent parts of North and East Yorkshire. Employment growth has been strongest in the care occupations, especially in West Yorkshire, and there has been a noticeable increase in the food and catering industry as well. Only in cleaning has there been a decrease, with West Yorkshire well above average. These figures should be interpreted with caution, though, because of the difficulty of distinguishing domestic from factory, office or hospital cleaning services. The scale of cutbacks in these spheres may well mask more modest growth in jobs providing cleaning services to households. As will be seen later in this section, there is some evidence that such growth is occurring in both Leeds and Sheffield.

Table 3.1: *Employment trends in household services, 1992-1998, South and West Yorkshire*

('000s)

Household Services Sectors[1]	South Yorkshire			West Yorkshire			Yorkshire & the Humber		
	1992	1998	% change	1992	1998	% change	1992	1998	% change
Catering	24	26	+8.6	39	42	+7.2	99	109	+9.6
Care	20	25	+22.7	29	43	+46.4	77	104	+36.0
Cleaning	20	17	-17.4	32	22	-30.0	81	68	-15.8
House Maintenance & Gardening	--	--	--	--	--	--	10	13	+30.0
TOTAL	67	71	+5.9	104	112	+7.7	267	294	+10.1

Notes : -- - figure too low for reliability
[1] - see Appendix I for occupational composition of household services sectors

Source : *UK Labour Force Survey (Crown Copyright)*

In the absence of any comprehensive and comparable sources of data on household services at the local scale, the locality profiles of Leeds and Sheffield that are presented in the remainder of this section rely on a range of disparate sources of information. Some quantitative data are available from surveys carried out on behalf of local agencies, such as those for the Training and Enterprise Councils for their economic strategies, or the 'childcare audits' completed as part of the City Councils' Early Years Development and Childcare Partnership Plans. Basic information has also been gleaned from business directories, 'Yellow Pages' telephone directories, voluntary sector handbooks and local authority registers. Finally, broad estimates of sector size and trends, as well as much valuable qualitative information, emerged from the 'key informant' interviews.

3.2 Leeds - summary

The city of Leeds acts as the regional centre of Yorkshire and the Humber for government, finance and business services. It also serves as a retail, cultural and entertainment centre for much of the West Yorkshire conurbation, giving it a population of over 2 million in its catchment area. Although the city's traditional industries of clothing, textiles and engineering still retain a presence, almost three-quarters of all jobs are at present in services such as retailing, hotels and catering, finance, law, public administration, education and health. Growth in these sectors over the last 15 years has in fact been the highest of any city in the UK. This has been particularly the case in banking, insurance and business services, where employment increased by 150 per cent between 1981 and 1996. As a UK financial centre, Leeds trails only London and Birmingham in employment terms. During the 1990s the city has also become one of the leading locations in the UK for telephone-based 'call centre' operations, especially for financial services, with current employment standing at around 15,000. The more flexible working hours required of staff engaged in such centres have clear implications for the level of demand for household services, particularly childcare.

The growth of jobs in sectors employing high proportions of women meant that by 1996 there were almost as many women as men employees in the city. Between 1991 and 1996 female employment in Leeds increased by over 16,000 or 11 per cent, compared with 5 per cent in Yorkshire and 6 per cent in Britain as a whole. Over the same period, male employment in the city grew by 6,000 (4 per cent), as against a 2 per cent decline regionally and a marginal

increase nationally. In 1996 54 per cent of women employees were in full-time jobs, compared to 90 per cent of men. Part-time employment for both women and men has been growing more quickly than full-time, but it remained the case in 1996 that almost three-quarters of employees (240,000) worked full-time, again underlining the potential demand for household services. These trends are forecast to continue in the future, with women expected to take up almost 90 per cent of projected job growth in the city.

The healthy employment growth in Leeds has contributed to a tightening of labour supply, with the unemployment rate falling to under 5 per cent by the beginning of 1999. This could give rise to recruitment difficulties and hence potentially reduce the capacity to meet demand for household services. However, much of the inner area of Leeds has not fully benefited from the economic boom that the city has enjoyed in recent years, with unemployment in these areas remaining persistently high (up to three times the city-wide level), and a high proportion of household income being derived from social security benefits. This marked disparity between prosperity and deprivation in different parts of Leeds has two contrasting implications as far as household services employment are concerned. Firstly, there may be scope for proactive measures to prepare people living in inner city areas for employment in childcare, eldercare, catering, cleaning or gardening. On the other hand, to the extent that new jobs are being taken by workers who commute into the city from outside (rather than inner city residents), this demand for household services may be displaced elsewhere, say to Harrogate or Skipton. Such demand would be particularly strengthened on account of the additional travelling time required by such commuters.

3.3 Sheffield - summary

Sheffield is a very different city in terms of both its history and its contemporary situation. For almost a century its reputation for quality steel production was second to none in the world, and the presence of associated engineering, tool-making and cutlery industries meant that it had a highly skilled, well-paid workforce. Since the late 1970s, however, global changes in the iron and steel industry have resulted in the rapid decline of steel-making in the city, to the extent that its traditional economic base is now a mere shadow of its former self. The result has been persistently high and long-term rates of male unemployment and economic inactivity in certain parts of the city as former steel workers have found that their skills are no longer in demand. At the same time, the city has struggled to carve out a new niche for itself, being eclipsed by Leeds to the north and Nottingham to the south as a regional centre, and only having relatively limited success in attracting government or business functions from elsewhere. This has prevented growth of women's employment on the same scale as in Leeds, which in turn has contributed to keeping the city's female economic activity rate well below the national average.

Having said that, figures for 1996 indicate that women employees now slightly outnumber men. This is more a reflection of the disappearance of employment opportunities for males than a result of an upsurge of female labour force participation on a similar scale to Leeds. It is also partially offset by the fact that there are four times as many self-employed men as women in the city. Over 30 per cent of all jobs are part-time, exceeding both national and regional averages, and having possible implications for the level of demand for household services. Apart from this aspect of growth, there appear to be relatively few dynamic features of the Sheffield economy at present, and its industrial structure retains a strong manufacturing and retail/wholesale distribution base, with financial and business services comparatively weak. In the public sector as well, job losses in local government have tended to be

compensated by employment growth in health services, and to a lesser extent in education. One major economic issue is the low business formation rate when compared with other UK cities of a similar size. Despite being one of the top ten cities in the UK, Sheffield is in the bottom 20 per cent of all local authorities for the number of businesses per 1000 population. This raises questions about the capacity of private enterprise in the locality to provide the scale of household services that might be in demand.

Although Sheffield serves as the sub-regional centre for South Yorkshire, this may be a mixed blessing, given that this wider area has witnessed similar decimation of its staple industries - coal, steel and engineering - over the last 20 years. During this time the whole area has undergone net out-migration, concentrated particularly among the younger age groups. The result was a 3 per cent decrease in Sheffield's population between 1981 and 1991; since then the level has stabilised at just over half a million. However, the proportion of elderly people in the city is higher than the national average, and this will have a strong bearing on the level of demand for eldercare services. On the other hand, the below average birth rate and the relatively high proportion of households living in poverty raise questions about the scale of demand for other types of household services, as well as the extent to which they could be afforded. This is a key challenge that policy in this sphere needs to address. At the same time, the social and economic divide that characterises the city, with fairly affluent managerial and professional households on the west and south sides, and high levels of unemployment, economic inactivity and welfare dependency in the east and north, may feed through into a 'consumer' and 'provider' divide as far as household services are concerned. However, such considerations merely serve to reinforce the relevance of Sheffield as a case study area.

3.4 Leeds - growth and development of employment in household services

Overview

A summary of household services providers in the Leeds area is shown in table 3.2. Over three-quarters of the entries are shared between food and catering, house maintenance and gardening, and domestic cleaning. It is likely that this is a fair reflection of the extent of activity in these sectors, given that they tend to be dominated by private sector, commercially oriented firms which need to gain access to potential customers via conventional channels such as business telephone listings. In contrast, the figures for childcare and elder- and disabled care would appear to be underestimates. For example, data from other sources (see below) indicate that there is a substantial number of registered childminders in the city, and that out-of-school clubs have been on the increase, but neither type of provision warrants an entry in Yellow Pages. This is probably because there tends to be much more public sector involvement in these care-related activities. Increasingly this has taken the form of indirect regulation and quality assurance, rather than direct provision as in the past, but it still means that local authority social services departments and National Health Service Trusts are the best places to go for information about where care services might be sought. Thus, parents seeking an individual childminder (who will generally operate on a self-employed basis) will probably contact social services in the first instance for a list of registered providers in their area.

Table 3.2: *Household services providers listed in Leeds Yellow Pages*

Yellow Pages Category/Household Services Sector	**Number of Entries in Leeds YP 1998-99[1,2]**	**% of Total Household Services Entries**
Building maintenance and repairs	51	
Painters and decorators	167	
Garden services/Turfing services	36	
Landscape architects/Landscapers	72	
Tree work	25	
House Maintenance and Gardening	351	26.9
Children's out of school care	n/a	
Babysitting and childminding services	n/a	
Nanny and childcare agencies	6	
Crèche facilities and services	1	
Playgroups and pre-schools	n/a	
Nursery schools	28	
Day nurseries	65	
Childcare	100	7.7
Nurses agencies and care agencies	25	
Residential and retirement homes	85	
Nursing homes	46	
Disability - information and services	8	
Social service & welfare organisations[3]	12	
Elderly and Disabled Care	176	13.5
Domestic services	6	
Cleaning and maintenance services[4]	18	
Dry cleaners	45	
Laundries/Launderettes	30	
Curtain cleaners	7	
Window cleaners	5	
Carpet and upholstery cleaners	51	
Domestic Cleaning	162	12.4
Food and drink delivered	20	
Take-away food	394	
Caterers	85	
Catering supplies - food and drink	8	
Fish and chip shops	107	
Food and Catering	514	39.4
Total - Household Services	1303	100

Notes : [1] - the same company may be included more than once if it has entries under two or more categories.

[2] - each branch or outlet of the same company was counted separately.

[3] - 'day centres' and 'resource centres' were excluded from this category.

[4] - companies offering services to industrial or commercial clients were excluded unless they explicitly stated that they provided domestic services as well.

The strong presence of private companies in the food, house maintenance and cleaning sectors also created obstacles to obtaining further information about these activities. Although several firms in each category were approached, most declined to be interviewed or to provide details of their operations, usually quoting pressure of time or commercial confidentiality as reasons for their unwillingness to respond. Conversely, it proved much easier to gather information on those sectors where the public sector has an involvement. To begin with, public sector officers have an interest in any exploration of key policy issues that affect them, and hence have a greater willingness to be interviewed. Secondly, in a field that is strictly regulated, private sector providers also have an interest in contributing to policy-related research studies; they also see what they are offering as a social as much as a commercial service, and hence are keen to share their experiences with a wider audience. For these reasons, the remainder of this sub-section on Leeds focuses on child care and eldercare services.

Childcare provision in Leeds

The Leeds Early Years Development and Childcare Partnership Plan 1999-2000 contains an audit of existing childcare provision in the city. Unfortunately, this includes very little information on the number of people directly employed in the sector. However, it does present considerable detail about different types of childcare facility or mode of delivery, and the following summary is drawn primarily from this source. The figures quoted are for the end of 1998 and are the latest available.

Pre-school care

The existing level of organised pre-school childcare services in Leeds can be summarised as follows :

- 36 Early Years Centres, providing full day care and early education and run by the City Council. These offer 1,422 full-time equivalent (FTE) places for children under 5, as well as some out of school care for children up to 9. Currently there are more than 2,000 children attending such centres on a full- or part-time basis, with a similar number on waiting lists.
- 62 private or community-run Day Nurseries, registered to take a maximum of 2,235 FTE children under 5.
- 255 Playgroups and Crèches, offering sessional childcare and registered to provide a total of 5,324 places. It should be noted that the majority of playgroups operate during school term times only.
- 1,256 Registered Childminders, approved to look after a total of 2,855 children under 5. Of these, only five are men.

In total, these four types of service provide 30.5 registered pre-school childcare places for every 100 children aged under 5 in the city. However, as will be seen below, there are a number of other arrangements that supplement such organised methods of childcare delivery, particularly those involving private arrangements between households and individuals (nannies and au pairs), usually via some intermediate agency.

Out of school childcare

There are also childcare services provided for children over 5, either during school term time (before or, more frequently, after school hours) or vacation periods:

- 106 Out of School Clubs, registered to take 2,223 children. Approximately a third of these operate throughout the year, the rest being term-time only. Only 4 of them cater for

children of secondary school age, with just 126 places for those up to 14 years of age. However, this is an area of considerable expansion at the present time, due to both increasing demand and the availability of government funding.

- 1,256 Registered Childminders, who have places for 2,026 children over 5 (in addition to the under 5's listed above).
- 167 Registered Holiday Playschemes, the majority of which are sessional and only operate during the summer school vacation. Around a fifth offer full day care. In all, these provide 11,089 places, 5,471 for the 5's to 8's and 5,618 for the 8's to 14's. There are 7 Playschemes for children with special educational needs, and 11 Integrated Playschemes which include at least 5 children with special needs in each group.

This level of provision equates to 16.9 places for every child aged between 5 and 14 in the city - bearing in mind that this level is not available at all times of the year.

Business Partnerships

A small number of employers in the city have established or purchase childcare services for their own employees. Most of these have linked into the City Council's Under 8's Service, and each scheme is individually tailored to meet the particular needs of the organisation and its employees. At present there are 9 such schemes in operation, either taking up places in the organised services already described, or involving their own bespoke provision. The latter covers the whole range, from day nurseries and out of school clubs to childminders and holiday playschemes.

Other forms of childcare

There are a number of additional methods by which childcare services are delivered in Leeds :

- there are approximately 100 nannies and 50 au pairs working in the city, mainly for families in the north and north-west suburbs. The number of au pairs usually shows a seasonal increase during the summer months.
- a number of voluntary agencies offer childcare services, particularly for children with special needs or disabilities. This type of provision may involve homesitting, respite care in day centres and short-term caring support during times of crisis or difficulty.
- Leeds City Council Social Services Department also provides similar caring support to parents with disabled children, including a short stay residential hostel, a day fostering scheme and short break placements with other approved carers.

The childcare workforce: qualifications and training

A survey of childcare workers was conducted by the City Council in November/December 1998. This revealed that the majority of those working in the different types of childcare were likely to have some form of relevant qualification, but that the range of specific qualifications was also very broad. Thus, those working in playgroups quoted 15 different qualifications, and those in holiday play schemes 10. The most frequently quoted routes by all childcare workers were NNEB/Nursery Nurse qualifications, BTEC, NVQ and PPA Diplomas.

The proportion of those who have received further training following entry into childcare varied considerably according to the type of provision. Thus, 86 per cent of those working in out of school clubs had been on at least one training course, compared with just 32 per cent of childminders. The most common subjects of training courses attended were first aid, food hygiene, child protection, special educational needs and counselling.

Current and future unmet demand

The findings from a number of surveys conducted by employers or community groups in the city illustrate the extent of latent demand for childcare services. Although based on small and therefore unrepresentative samples of parents and employees, they nevertheless give a flavour of what the overall picture might be.

- on average a third of parents stated that lack of accessible and/or affordable childcare had meant that they were unable to take up training opportunities, could only work part-time, or were prevented them from securing employment at all.
- the demand for out of school care was consistently high in all surveys, especially in vacation periods. In particular, it was felt that holiday playschemes should run for longer than they do at present. The provision of childcare throughout the year emerged as a key issue for many.
- there was a need for greater flexibility, often at short notice, both with respect to working hours and to the availability of childcare. Although most demand was confined to the period between 8 am and 6 p.m., there was also a significant minority of existing employees who required care services for around an hour beforehand.
- low levels of unemployment in the city were prompting employers increasingly to target their recruitment on women returners, for whom flexible childcare provision might well be a prerequisite for them to seek work in the first place. The emergence of non-standard shift patterns, for example in the growing number of call centres in the city, would accentuate this demand.

The local policy context

Supplementary information on the development of childcare provision in Leeds was given by the manager of the City Council's Under 8's Unit in one of the 'local informant' interviews. The remainder of this section draws primarily on this source. The respondent stated that the launch of the National Childcare Strategy (NCS) in 1998 had in many ways cemented developments that had been occurring in Leeds for some time. The pre-existence of the City Council's Under-8's Service, which serves as a local authority partnership bringing together several organisations under one umbrella, meant that in effect the NCS formalised much of what was already taking place within childcare in the city.

The Under 8's Unit is part of the Education Department of LCC. It covers several strands of childcare provision and supervision:

- *Educational* nursery school provision: providing nursery classes in schools, part time for 3 and 4 year olds.
- Public sector nursery *care*: it manages 36 Early Years Centres, providing care from 3 or 6 months to 5 years, and out-of-school holiday clubs for children up to 9 years.
- Responsibility for *registration and inspection* of all care and educational establishments for under 8's in Leeds (including private nurseries, out-of-school clubs and childminders).
- *Service development* role: the Unit provides a service similar to a childcare consultancy, which involves them working with and advising new private nurseries, businesses and workplace nurseries in the area. Examples include:

    - a contract with BT Mobile to advise staff returning to work or at work about childcare provision, vacancies for childminders locally, out-of-school clubs etc. An

Under 8's employee then makes all enquiries and chases references etc. on behalf of BT Mobile staff

- running tailor-made holiday play-schemes for businesses
- 'toybox services': helping parents relocating to Leeds find childcare and related services such as schools, riding lessons, nannies, babysitters etc. from a temporary register of such services. Like an agency, the service runs checks on those on its books.

In the future the Unit is likely to be working more in partnership with other providers and groups. Local childcare partnerships to be set up as a result of the NCS will serve to formalise and enhance what has already been going on in Leeds, at least since the Leeds Childcare Initiative was launched in 1995. It is now less competitive and more balanced than in the early 1990s. At that time a voucher scheme system was introduced. In Leeds, as elsewhere, this approach proved to be very divisive and lessened choice for parents. Many primary schools opened nursery classes, with the result that both childminders and playgroups found it difficult to fill all their available places. This increased competition among providers also led to some schemes closing down, or to childminders dropping off the register. Now schools are inviting playgroups in to use their accommodation, and nursery hours in schools are being extended in order to support parents in work or training.

Current and future staff supply

The major factor affecting staff supply is wage rates: the majority of private sector nursery staff in Leeds are probably paid at no more than minimum wage levels, and sometimes perhaps less. There appears always to be a number of young, unqualified women who want to work with children and are willing to accept low pay and poor conditions - at least for a time. The latter means that, in nurseries employing them, there will always be a high turnover of staff. There is also a minority of private sector nurseries in Leeds that are run purely for profit: they will only ever pay the minimum wage possible, while charging parents as much as they can. Despite potential increases in income via the WFTC, these nurseries may still keep pay rates as low as possible. This means there is very little choice in some areas. Paying the cheapest rates can mean children are receiving a minimal level of service, and does not help efforts to establish the sector as a feasible or attractive long-term career choice.

Training issues

The Under 8s Unit has a team of 'Early Years' trainers, including experienced nursery teachers. Courses are offered in a number of centres around the city, and training is offered to childcare staff in all sectors. This can be difficult for staff (in private nurseries especially), because of the long hours they work and courses may have to be self-funded. There is an urgent need for clarification of training and qualifications nationally. This should be provided through the development and the eventual introduction of Early Years National Training Organisation (EYNTO) training and qualification, depending on how this is structured in the future. Once national guidelines are produced, this could possibly result in improved pay and conditions. Schools also have a part to play in encouraging school-leavers with an interest in childcare to train, when they seek careers advice. This would help raise expectations of reasonable salaries.

Accredited courses available to Leeds childcare workers range from basic entry level to university degree. Local Colleges offer Certificate in Childcare and Education (CACHE) and Diploma courses; Pre-School Learning Alliance courses; and various National Vocational Qualifications (levels 2 and 3, and now developing 4). Both Leeds universities offer

playwork qualifications; Postgraduate Certificate in Early Years Education; and other in-service and Continuing Professional Development courses.

Regulatory frameworks (quality and safety)
LCC's regulation and inspection of facilities is carried out just once per year. Currently there are 12-14 FTE officers working in this sphere, which is good compared to other authorities. However, it is estimated that as many as 35 more are needed in order to make supplementary and unannounced visits, in order to improve the service. Inspection is the only effective means of raising standards in the least well-performing facilities. In particular, more support is needed for inspection and regulation of out of school clubs, though this might be coming on-line soon. Also the Under 8's Unit has relatively little power to force a nursery to improve.

Leeds probably had higher standards of regulation before the introduction of the Children Act 1989. LCC was then told their standards were too strict and rigid, so that some of the rules had to be relaxed. For example, before 1989, pre-school children were only allowed on the ground floor of childcare facilities. The removal of this stipulation now means bigger and bigger buildings are accommodating 100 plus children. These make much larger profits for the providers, sometimes to the detriment of childcare when outdoor play space becomes very limited. (The provision of outdoor play space by a childcare facility is not mandatory under the Children Act.)

Ofsted now provides a second, and sometimes contradictory inspection framework. Some nurseries have passed the LCC/Children Act inspection and then fail their Ofsted inspection[31].

The partnership approach
Relationships between childcare providers have improved since the establishment of the partnerships. However, relationships *within* the private sector have not always been co-operative and harmonious. There is a core of private nurseries in Leeds which are generally keen to share good practice and to improve standards, but other nurseries refuse to join them, mainly because of fears about competition. Therefore private nurseries do not always speak with one voice in the partnership. At times, it is difficult for all elements/sectors to be fully involved in the partnership. On a practical level, private and voluntary sectors have no funding for participating, whereas the City Council does. The partnerships were set up very quickly and have had to develop their audit and plan in a very short time frame – in reality, truly co-operative and harmonious working relations will take much longer to develop.

Eldercare provision in Leeds
Although the number of people over pensionable age resident in Leeds fell by around 3 per cent in absolute terms between 1989 and 1996 (Regional Trends 26 and 33), there are still almost 130,000 people in this group living in the city. This equates to roughly a fifth of the total population. Many in this group, especially women, are living much longer than previously, and there is a strengthening desire on the part of most to remain in their own homes as long as they possibly can. As their frailty increases, and correspondingly their ability to do everyday routine tasks diminishes, so their need for support in a wide range of activities grows. In the past such support at home has been the domain of public social services, usually organised and delivered by the local authority. While this role still remains, the Community Care legislation and associated policies encouraging the privatisation of such

[31] Following a Government announcement in August 1999, Ofsted is set to take on an expanded role in the regulation of childcare provision. At present its involvement is confined to educational aspects.

services has led to the emergence of voluntary sector or community-based organisations, which feel they can be more responsive and sensitive to local clients' needs, and of private sector agencies seeking to offer home care services on a more commercial basis. This pattern is mirrored by the way such services are provided in Leeds. The City Council still plays a major role, but increasingly the direct provision of services is performed on a sub-contracted basis.

Information on eldercare provision in Leeds was obtained in a series of 'local informant' interviews. Because of the marked differences between the providers involved, the findings from each interview are summarised according to each type of provision.

Local Authority Provision

Leeds City Council runs the largest eldercare service in the city as part of its statutory duty to provide support for the elderly in their own homes. In December 1998, it had around 14,000 users and employed 2,500 home care staff, 92 per cent of whom were home care assistants, the rest team leaders and managers. Home care assistants are employed on 10, 15 or 37 hours per week contracts, team leaders on 25 hour contracts, and managers on a full-time basis. The service employs predominantly white women as home care staff, with very few men or people from the ethnic minorities. Efforts are being made to recruit more staff in the latter category, especially in the 4 areas of the city with substantial ethnic minority populations. However, as well as cultural differences, there is a perception that such jobs involve low pay and have poor working conditions.

In fact, all Homecare staff have permanent contracts, providing paid holidays, paid sick leave, maternity/paternity leave, etc. The City Council has a 'no redundancies' policy, involving staff redeployment to other work if demand for home care drops. At present, however, the trend is in the other direction. The lowest grade of worker is on a hourly rate of pay that is well above the minimum wage of £3.60 per hour. Home care assistants attend a two and a half day induction course, plus other on-going specialist in-house training (e.g. St. Johns Ambulance, first aid, moving and handling, mental health issues etc.). The content of training broadly reflects the fact that the local authority services concentrates on the personal care aspects of support to the elderly, and that help with domestic tasks tends to come from other sources (see below). The service has recently set up bespoke cultural training for those working in the 4 areas with high proportions of ethnic minorities. Staff are also encouraged to take NVQ Level 4, and take up of this is currently over-subscribed.

Two key areas of national policy development are likely to impinge on Homecare in the immediate future. Firstly, as highlighted in the ‘Modernising Social Services’ White Paper, there are moves towards regulating standards of domiciliary care. In particular, this will mean that personal care training and food hygiene training will become increasingly important for home care assistants. Secondly, under the 'Best Value' initiative, local authorities are being asked to review the services they provide, with a view to assessing whether other providers could do the job more efficiently. The relatively good rates of pay, extensive training and job security of Homecare staff means that its overall unit costs are generally higher than other providers. Depending on what criteria are applied in determining 'best value', there could be some restructuring in the delivery of home care services to the elderly at local level over the next few years.

Meals on Wheels

Leeds City Council also operates a 'Meals on Wheels' service for the elderly and disabled. Originally clients received only 2 hot mid-day meals a week, but increasing demand for more meals resulted in the phasing-in of an initially experimental frozen meal service, whereby the same or fewer trips could be made to deliver meals for the whole week. This proved to be much more cost effective and met the needs of a much larger number of clients. At present, hot meals account for about 35% and frozen for 65% of the service. 555,000 meals on wheels are delivered every year in Leeds, using 35 vehicles, across 9 area office neighbourhoods.

The meals service works as a partnership between the City Council and several local voluntary organisations. It employs 12 drivers to deliver hot meals (two-thirds of them male, mostly full-time with other driving duties as well), and 18 frozen meals assistants (nearly all women and part-time) to collect meals from the freezer centre and deliver them to homes in the city. It is unlikely that any additional jobs will be created in near future. Indeed, existing jobs and roles are likely to change with a forthcoming switch to greater central co-ordination. No staff training is provided at present, although in future the service will look to send workers on courses for food hygiene (beyond the basic stipulated by Health and Safety regulations). There is no particular accredited qualification required for this type of work, and no formal career path either, although some drivers have moved into office co-ordination roles, but opportunities are limited. In addition, there is the question of client 'training' - they need to understand and follow the food safety guidelines re. freezing, storing and heating food.

The introduction of the frozen meals service had major implications for Leeds Homecare staff, who were freed from doing much of the previous food shopping and cooking for the elderly and disabled in their own homes. Now meals take 10 minutes to prepare using a microwave, and care assistants can concentrate on personal care tasks.

Voluntary Sector Provision

Involvement in eldercare is not the exclusive preserve of the City Council, although it remains the dominant player on account of its statutory obligations. One distinctive feature of eldercare in Leeds is the existence of 33 neighbourhood network schemes, covering specific geographical areas. One of these, operating in residential areas immediately to the north of the city centre, mainly offers assistance with a range of domestic matters, such as gardening, decorating, home insulation, home security and money and benefits advice. The network is increasingly organising social and educational activities, including holidays and day trips. This is in addition to volunteers maintaining regular social contact with elderly people via home visits. There is also increasing provision of support for family carers, especially in the form of bereavement counselling. This particular scheme employs 4 paid members of staff (3 full-time, 1 part-time, all women), who oversee around 50 volunteers, and help and support is given to over 300 elderly people. Although the 4 employees are all on short-term contracts that depend on external funding, their commitment to the work means that turnover rates are low. Volunteers, on the other hand, tend to be more transient. Many are students at the city's universities and colleges, and move on at the end of their courses; others are unemployed and through voluntary work often learn skills that can lead to formal paid employment. The scheme works closely with the local authority, making referrals to Social Services where personal care is required, liaising with the Housing Department or 'Care and Repair' on house repairs and maintenance, and wherever possible 'plugging the gap' where the City Council is unable to meet a specific need.

One issue that did emerge with respect to this particular organisation related to the ethnic minority population. Although the area served is very mixed, the vast majority of clients were white. When asked about enquiries made by potential clients from ethnic minorities, it was stated that they were referred to other agencies or organisations catering for specific ethnic groups. Responses from other informants suggested that this was part of a general tendency among Leeds voluntary organisations to refer or transfer potential clients of a different ethnic origin to another “culturally appropriate” organisation. However, the area-based nature of such organisations means that such clients may not receive the support they need, especially if the "appropriate" organisation already has a full workload. In any event, at least one voluntary organisation that was originally set up to serve a particular ethnic group has since become more inclusive, and now aims its services at all elderly people within its area of operation.

Private sector provision

There is a small number of private care agencies in Leeds which provide a similar range of eldercare services to the City Council, i.e., focusing on personal care. Most of these are likely to be on the City Council's 'approved' list of providers, as this is the principal source of their work. Essentially it means that they can enter into contractual agreements with the Social Services Department or the city's NHS Trusts to provide care services in cases where the latter would be unable to respond. These agencies also take on private clients, who pay directly for the care they receive. While the bulk of clients tend to be elderly, they also provide care to the disabled and to children with learning disabilities. The level of care can vary from half-hour visits to 24 hour support.

Although there are no figures available, local informants claimed that such private sector provision has grown considerably in recent years, and is likely to continue to do so as the organisation and delivery of social and care services undergoes its proposed restructuring in the next few years. Growing demand for eldercare services is likely to accompany such changes, and this will no doubt generate a considerable number of new jobs, as well as potentially transferring existing jobs from the public to the private sector. As the analysis of worker interviews in Section 4 below indicates, this raises issues about job security, rates of pay, working hours and workers' rights, and the extent to which compliance with the recently introduced 'fairness at work' provisions can be ensured. In broader terms, the scope for expanding the sector may well be limited by staff recruitment difficulties.

3.5 Sheffield - growth and development of employment in household services

Overview

Table 3.3 provides a selective picture of the scale and nature of household services agencies in Sheffield. The proportion of entries in each sector shows a very similar pattern to Leeds, with three-quarters shared between house maintenance and gardening, domestic cleaning and food and catering. However, these figures should again be interpreted with caution, as they are unlikely to be equally comprehensive in all sectors. In particular, other sources of evidence suggest that the numbers under the various childcare headings seriously underestimate the level of provision in the city, and omit individual childminders altogether (see below). Thus, while the listings may give a good reflection of private sector, commercially oriented activity in each sector, services operated by public and voluntary sector agencies and by self-employed individuals are under-represented.

As in Leeds, further information about food and catering and house maintenance and gardening was difficult to obtain because of the reluctance of private companies to be

interviewed. However, interviews were conducted with the managing director of a franchised operation offering domestic cleaning services and some of its employees, thus providing an example of innovative development (see section 3.6 below), as well as material on workers' characteristics and conditions (see section 4). Otherwise, the bulk of the detailed information forthcoming on household services in Sheffield concerned childcare and eldercare.

Table 3.3: *Household services providers listed in Sheffield Yellow Pages*

Yellow Pages Category/ Household Services Sector	**Number of Entries in Sheffield YP 1999-2000[1,2]**	**% of Total Household Services Entries**
Building maintenance and repairs	32	
Painters and decorators	105	
Garden services/Turfing services	34	
Landscape architects/Landscapers	63	
Tree work	32	
House Maintenance and Gardening	**266**	**23.6**
Children's out of school care	2	
Babysitting and childminding services	4	
Nanny and childcare agencies	4	
Crèche facilities and services	n/a	
Playgroups and pre-schools	2	
Nursery schools	42	
Day nurseries	32	
Childcare	**86**	**7.6**
Nurses agencies and care agencies	30	
Residential and retirement homes	88	
Nursing homes	53	
Disability - information and services	8	
Social service & welfare organisations[3]	15	
Elderly and Disabled Care	**194**	**17.2**
Domestic services	15	
Cleaning and maintenance services[4]	12	
Dry cleaners	33	
Laundries/Launderettes	13	
Curtain cleaners	8	
Window cleaners	6	
Carpet and upholstery cleaners	34	
Domestic Cleaning	**121**	**10.7**
Food and drink delivered	11	
Take-away food	290	
Caterers	42	
Catering supplies - food and drink	4	
Fish and chip shops	114	
Food and Catering	**461**	**40.9**
Total - Household Services	**1128**	**100**

Notes : [1] - the same company may be included more than once if it has entries under two or more categories.

[2] - each branch or outlet of the same company was counted separately.

[3] - 'day centres' and 'resource centres' were excluded from this category.

[4] - companies offering services to industrial or commercial clients were excluded unless they explicitly stated that they provided domestic services as well.

Childcare provision in Sheffield

Information on childcare provision in Sheffield is contained in the audit carried out for the city's Early Years Development and Childcare Partnership Plan 1999-2000, and in the regular bulletins of the Sheffield Children's Information Service. Most of the available data relate to the number of childcare providers and places offered by type, and only a limited amount of information on the number of people employed in the sector.

Pre-school care

The existing level of organised pre-school childcare services in Sheffield can be summarised as follows:

- 8 Young Children's Centres, day nurseries operated by the City Council and offering both full- and part-time care at low (or no) cost.
- 50 day nurseries run by private enterprise or voluntary organisations. Together with the Young Children's Centres, these provide a total of 6,565 places for children under school age.
- 94 playgroups offering care for up to 3 hours at a time, between one and five times a week. These provide 1,924 places for children under 5.
- 52 crèches providing 280 places in groups for limited amounts of time. They are usually attached to shopping centres, sports centres and colleges. Although mainly intended for younger children, some also cater for those of school age outside school hours or during vacation periods.
- 72 nursery education classes for 3 and 4 year olds, run by the City Council's Education Service. Most of these (62) are attached to infant schools, and they cater for 4,782 children (mostly 3 year olds) on a part-time basis and 4,443 children (mostly 4 year olds) on a full-time basis.
- 1,086 self-employed childminders providing 2,187 places. This figure represents a decline over previous years, as more nursery places have become available. It also includes an element of provision for those of school age (see below).

In addition, two initiatives seeking to promote provision for under 5's were awarded 'Early Excellence Centre' status by the government in February 1999. The two schemes are the Sheffield LEA network set up to bring together nursery education, childcare and other services in three areas of need (Birley, Manor and Shiregreen), and the Sheffield Children's Centre, a co-operative which offers advice and support to other providers, and runs nurseries and crèches on behalf of employers across the city.

Out of school childcare

The following summarises childcare services provision for children over 5 in Sheffield, either during school term time (before or, more frequently, after school hours) or vacation periods:

- 52 Out of School Clubs offering 946 places to children of school age, and run either by private enterprise or the voluntary sector. Results of a survey carried out by the Sheffield Out of School Network revealed that these clubs employed 211 members of staff, comprising 177 women and 34 men (an 84:16 split).
- 10 holiday playschemes offering group care for up to 838 school age children during vacation periods.
- an unspecified number of childminders with places for 853 school age children during term time.

Other forms of childcare provision

No figures are available for the following types of childcare in Sheffield, although it is known that such provision does exist:

- nannies and au pairs employed by parents and working in the child's home.
- childcare provided for employees by employers. An element of this may be included in the categories listed above (particularly playgroups, crèches and Out of School Clubs), although it appears that these are restricted to a few large organisations such as the two universities and the main hospitals.
- facilities to support children with disabilities or other special needs, such as respite care, homesitting and day fostering.

Current and future unmet demand

Surveys undertaken on behalf the Sheffield Young Children's Service have attempted to gauge the extent to which current provision meets parents' childcare needs, and what steps should be taken to cater for demand in the future. It is not clear how representative of Sheffield parents the survey samples were, but it is likely that they give a fair indication of the main requirements.

- the principal problem reported in finding childcare at present concerned the lack of easily accessible provision, especially with respect to childminders and nurseries.
- a fifth of parents also stated that it was difficult to gain access to 'flexible' care arrangements, to cover such things as irregular working hours and other unpredictable commitments.
- a quarter of respondents had not taken up their preferred childcare option because of an inability to pay.
- there was a high unmet demand for childcare for the under 3's, which had been aggravated by the recent decrease in the number of childminders in the city.
- there is a call for extended daytime care outside of nursery hours, as well as for all year round care, especially from working parents.
- many parts of the city require much greater diversity of provision than they have at the moment, although there is a surplus of nursery education places in some inner city areas.
- access to existing childcare for ethnic minority groups poses difficulties due to language barriers, cultural differences and a lack of childcare workers from these communities, as well as cost.

However, it is difficult to quantify how much of this demand will feed through into take-up of formal childcare places. In any event, the scale and nature of demand in the immediate future is likely to be volatile, as the local impacts of national level policies like New Deal for Lone Parents and Working Families Tax Credit begin to feed through.

Local policy and regulatory framework

The Sheffield Young Children’s Service (YCS) is part of the City Council's Education Department. It is responsible for the registration and inspection of all children’s services, including under 5's nurseries and the nursery grants system. The latter will enable 82 per cent of all 3 year olds to have 5 half day sessions of nursery from September 1999. YCS was set up in 1995, with a remit to co-ordinate and support the services for young children. It is administered at central council level, but operates locally across the city in 12 units or

corporate areas, where all councils services (education, housing, social services etc.) are brought together.

All YCS services are developed in partnership, with the local authority generally acting as the enabler rather than the provider. This partnership-forming role has been further cemented by the National Childcare Strategy, and the preparation of the Early Years Development and Childcare Partnership Plan. In other words, much of the existing work of YCS has been formalised by this current government initiative. The development of the Childcare Plan required much detailed consultation with many local groups. This strategic plan specifies exactly *how* the partnerships intend to deliver their childcare strategy. Particular consideration has been given to training requirements, special needs etc.

The main voluntary organisations involved in partnership with YCS include:

- Pre-School Learning Alliance, a local branch of a national organisation providing support and advice to pre-school and toddler groups. It employs 3 part-time development workers, and runs training courses for those working with the under 5's.
- Out of School Network, a charitable organisation providing advice, assistance and training to the city's growing number of out of school clubs. It currently employs 8 development workers and 6 administrative and clerical staff. A key aim is to encourage local businesses to join together to develop out of school provision for their employees.
- Community Childcare Network is an umbrella organisation representing 20 community-based not for profit childcare centres. It allows its members to share experiences, concerns and best practice, and it gives the community sector a voice in the formulation of local childcare policy and the development of partnership working. It has received local authority, SRB[32] and European funding.
- SCOOP Aid (Sheffield Committee of One Parents), an advice and support group working to ensure childcare services for single parents, and to provide information on welfare rights. It employs 5 people.
- Sheffield Childminding Association, an organisation providing information to childminders and parents on good childcare practice.

Training issues

A wide range of childcare-related courses are available in Sheffield, mainly through the Further Education sector and voluntary organisations. However, the multitude of subjects and qualifications makes for a chequered and confused picture. The introduction of a national training framework in the next couple of years should lead to a rationalisation of qualifications, standardisation of accreditation and hence greater overall clarity.

At present, training for childcare in Sheffield suffers from two particular problems:

- NVQ training in childcare is charged on a full cost basis because Sheffield College does not have FEFC funding for courses. Although City Council, TEC and European funding is available for people to take up places on childcare courses, this only covers part of the cost. Making up the difference can be prohibitive for both individuals and childcare providers.
- there is a lack of qualified trainers for childcare courses, especially for playworkers. This could become more acute as demand for formal childcare provision increases.

[32] SRB - Single Regeneration Budget

Eldercare provision in Sheffield

Although the number of people over pensionable age resident in Sheffield fell by around 4 per cent in absolute terms between 1989 and 1996 (Regional Trends 26 and 33), there are still just over 100,000 people in this group living in the city. This equates to roughly a fifth of the total population, two to three percentage points above the national average. The proportion in the very elderly (over 75) category is also relatively high, especially for women, many of whom are living on their own.

Unfortunately there is no comprehensive information about eldercare services in Sheffield. However, a number of separate support schemes operate across the city, and these are briefly described in the paragraphs below. A key aspect of many of these is how they combine, or provide a link between, different types of household service - as well as general care activities, they might also cover cleaning, home maintenance, gardening or catering.

Help at Home Scheme

This scheme is run by a local branch of a national voluntary organisation to provide domestic help to the elderly in their own homes. It was established in 1993 in response to changes in social services funding and the community care legislation, with full funding from Sheffield City Council Social Services until 1995. At that time charges (on an hourly contact basis) had to be introduced to cover staff wages, while SCC continued to pay for overheads, and clients provided their own cleaning materials.

The local authority subsidy has now been removed, and the scheme is fully self-financing. The charges to clients are calculated on a not-for-profit basis, covering staff costs and overheads. The scheme employs 35 homecare staff (all women) to provide help to some 250 elderly people with cleaning, laundry services, local shopping, collecting pensions, and making light meals. No personal care (bathing, dressing etc.) is involved. 29 of the staff work part-time, serving clients within walking distance of their homes, while 6 are full-time 'mobile' workers with cars, covering all parts of the city and outlying areas as well as providing sick cover for other staff.. These are all more recent recruits. The scheme is currently advertising for more staff, but recruitment is often a problem due to a local mismatch between supply and demand. Most applicants tend to live in north Sheffield where demand is least, whereas few people apply from south Sheffield where demand is highest.

Demand for the service is outstripping the supply of staff, and there is currently a waiting list for clients. Much of the demand is generated by word-of-mouth, leaflets in doctors surgeries, referrals from district nurses and other health professionals. However, many enquiries are for more specific services, like gardening and decorating services, and these have to be referred on to other organisations.

Sheffield Stay Put Scheme (including Home Safety Check Scheme)

This is one of three projects in Yorkshire offering help to elderly and disabled people to enable them to live with greater ease and comfort in their own homes (the others are located in Barnsley and Harrogate). It started up in 1990, and is run by a small charitable housing-related organisation with financial support from the Department of the Environment, Transport and the Regions (DETR), Sheffield Health Authority, Sheffield City Council Social Services and various individual and charitable sponsors.

The scheme provides a visiting service to give free advice on improvements, repairs, adaptations, insulation and security measures, help with applications for Home Repair Assistance grants and choosing a builder to get any work done, information and advocacy on welfare benefits and referrals to other support services that are available. Under the Home Safety Check scheme a comprehensive survey is undertaken of the homes of people aged 60 or over, with the aim of reducing the number of people injured in accidents there. This covers inspection of electrical wiring, gas appliances and identification of potential hazards such as loose carpets, high door thresholds, etc. This can then lead to improvements such as the installation of smoke detectors, fitting of handrails and grabrails on stairs or by the bath, and removal of any trip hazards.

The scheme employs 4 full-time workers, 3 of whom are men (the project manager, the technical officer and the safety officer), and 4 part-time workers, 3 of whom are women (2 project officers and the finance officer). Although the scheme has never been publicly advertised, demand is high and growing as knowledge of it has spread by word of mouth. Expanding the service to meet demand would be difficult, however, as funding levels are fixed over a given budgetary cycle. Thus there is a lengthening waiting list of clients, some of whose needs might be urgent. As there is no way of determining this until the first visit has been made, working through the list has to be on a 'first come, first served' basis.

Frozen Meals Delivery Service

This service is run by Sheffield City Council Direct Services (Catering and Cleaning Department) on a contract due to expire in August 2000. Because the meals are delivered in batches of at least 7 meals every fortnight, the service can run by employing just 2 drivers. At present, the meals are prepared in a workshop in Worksop, 15 miles to the east of Sheffield. This is a scheme subsidised by Nottinghamshire County Council to provide sheltered employment for adults with disabilities. The department also co-ordinates a shopping delivery service from the main Co-operative retail store to homes of the elderly and disabled, using the same fleet of refrigerated vans. The two schemes run separately at the moment, but there is clearly potential to combine them.

Before 1990 meal deliveries to the elderly in Sheffield were part of the hot school meal delivery service. Under this, clients would receive two hot meals a week for immediate consumption. The Social Services Department then wanted to change the service as a way of relieving its home carers from some of their food catering duties. Frozen meals were proposed as the way to achieve this, as a larger number of meals per week could be provided for each client. From 1990 to 1998 hot and frozen meal services ran alongside each other. However, the hot meal service was phased out between February and August 1998, and totally replaced by the frozen meals service. Despite some early teething problems, the service has now settled down with around 1,000 clients.

Garden Pledge

This is a gardening scheme run by Sheffield City Council for the elderly and disabled. The project was set up in summer 1998 and it currently employs and trains 35 people previously registered as unemployed (at present these are all men). It is a New Deal scheme, with funding shared between the City Council and a capital grant from central government to cover project supervision costs. The trainees work in 7 geographically based teams of 5 (including one supervisor), each covering mainly areas of council housing in the city. The work includes cutting grass, hedges, low branches on trees, weeding etc. Originally it served just the elderly and disabled on City Council housing estates, but growing demand led to expansion to owner-

occupiers who are either over 75 years old or registered disabled. The service is free to all eligible clients.

The demand for the service has been such that the waiting list of requested works had to be suspended in December 1998, only 5 months into the project. By July 1999, the project had carried out work for around 2,500 clients from the backlog, each of whom had received only one visit. It is hoped that some clients will be able to maintain their gardens themselves after this initial visit. A secondary waiting list has now been established for those requesting a subsequent visit from the team.

Most of the trainees are under 25, recruited through local Job Centres. 3 or 4 women have started the training in the past, but these have all left to move into full-time work. In fact, high staff turnover is a feature of the scheme, but this mainly indicates the number of trainees who have gained experience and training that enabled them to leave for full-time work or to gain NVQs or other qualifications (though not always in a related field). As they leave, the project recruits replacements off the unemployment register. Although there have been some reported problems of non-attendance, the scheme is generally regarded as being a resounding success.

The scheme involves 1 day per week at a local college for NVQ Level 1 training in horticulture. Some of the trainees are also on the Modern Apprenticeship scheme in horticulture run by SCC. All new trainees also undergo Health and Safety training.

A similar scheme using 3 teams of 4 or 5 New Deal trainees is the Housing Department's 'Environmental Stewardship' scheme, which carries out repairs and redecorating in council properties awaiting re-letting.

Private sector home care services

The degree to which private sector agencies have entered the eldercare sector in Sheffield during the 1990s may be gauged by the fact that their number increased from 6 in 1990 to 30 in 1999. The trajectory of one of the earliest of these businesses provides a good illustration of trends in the city. This agency was originally established by two partners in August 1990, using their own funds. Attempts to secure a bank loan or overdraft facilities and enquiries about support from Sheffield TEC both proved to be fruitless. At first all of the care work was undertaken by the owners themselves. After two years, the clientele had grown sufficiently for a small number of care workers to be taken on. One of these, a retired woman, started on a part-time basis (6 hours per week), but gradually became more and more involved on the administrative side, as more clients, and employees to cater for them, were taken on. Eventually, in 1997 she was promoted to Director of the service.

This agency made its first profit in 1994, and was converted into a limited company. Its growth has been assisted by its acceptance on the list of approved agencies kept by Sheffield City Council Social Services. This involves annual inspections, but assures prospective and existing clients that quality standards are being maintained. The agency now employs 40 home carers, although only about 30 of these are actively used at any one time. It also employs a number of team managers covering different parts of the city. Turnover has increased by 45 per cent over the last 5 years, but recently it was decided to stop taking on any new business to avoid straining the firm's management capacity. However, one aspect of eldercare work that the agency would like to expand into is provision of a day care centre in its core area. Employees are paid an unspecified amount above the Minimum Wage, and are entitled to 3 weeks paid holiday, but not paid sick leave.

3.6 Innovation in Household Services Provision - Three Case Examples

This part of the report contains descriptions of three enterprises in the Leeds and Sheffield localities where interesting innovations and developments were identified. These contain some good practice aspects, although innovation should not necessarily be understood as indicating improvement in quality of either jobs or services.

Childcare - example of an 'out-of school' club network established as a private enterprise
This enterprise was set up in 1995 with support from the local Training and Enterprise Council (TEC) in the form of a business start-up grant. Four years later it had become a network of eight separate clubs within Leeds, and was about to be registered as a PLC[33]. The enterprise had been managed from the outset by its current director- manager, a woman in her early 40s, divorced with one teenage child living at home. Interviews were conducted with the director-manager, with a playworker co-ordinator and with a playworker leader. The enterprise was of interest because it had been established in a successful manner, was attentive to health and safety and equal opportunities issues, had staff who were well and appropriately qualified for their roles and was well integrated into the local, regional and national networks relating to childcare. A part-time administrator had recently been appointed to help with the running of the clubs. Particular emphasis was given to health and safety issues in childcare work and to awareness of regulatory frameworks and quality concerns. However, it was regarded as important to be able to balance the good staffing levels necessary to achieve this with childcare fees which parents could afford to pay. The clubs offer 'before school' morning sessions (8-9am), and 'after school' sessions (3.30 - 6.00).

The owner-manager's qualifications included an NVQ in Management, a PSV (Public Service Vehicle) driving licence and a bus operator's licence. She organised staff training and gave talks and seminars on relevant issues - recent examples included a seminar on the implications of Working Families Tax Credit and talks on business start-up. She gained her initial experience of out-of-school childcare in the USA, and felt her management of the enterprise was influenced by this. She was a member of the national Kids Club Network, of Leeds Play Network and of the local Early Years Partnership. She earned £15,000 a year which she felt was a 'reasonable' income, but expected her earnings and benefits to change when the network became a PLC.

The Playwork Co-ordinator interviewed was a young single woman (aged 24) without children who lived with her fiancé. She had been working as a qualified Nursery Nurse before taking the job in response to a newspaper advertisement about 18 months previously. The job as Playwork Co-ordinator involved face-to-face playwork with children , but also co-ordination and organisation of the business side of the network with all eight clubs. Her working hours were mornings 7.30 - 12.30, and afternoons, 3.00 - 6.00. She described the job as 'what I'm qualified for', and one in which she had 'quite a lot of discretion' about how her job was organised. She was paid £13,500 p.a. which she felt was a 'reasonable' income, although she would have liked higher pay. She had a contract of employment, with paid holidays and maternity leave, but thought she was not entitled to paid sick leave. Her hours were 40 per week, with some flexibility provided they were balanced out each month. She was a volunteer member of the regional Play Association. She felt her job was secure, although not very flexible because the service has to be delivered regularly. She saw the job

[33] This development was due to take place two weeks after the interviews.

as temporary - although she enjoyed the work and responsibility, she hoped to develop her career, preferably within the play-work/ childcare field. She has had job-related training while in post, in childcare and IT skills.

The Playworker Leader interviewed was a married woman aged 40 with two children aged 7 and 10. Her present job in the network had developed from an initial role 'walking kids from school to the club', to casual work in one of the clubs, to a regular part-time job (16 hours p. w.). She was earning £5.30 per hour, had paid holidays and maternity leave entitlement, with a contract of employment. An additional benefit was free care for her own children within the club, and she felt her job was permanent and secure. Already qualified to 'O' level standard, in the job she had received relevant training in Child Protection, Food Hygiene, First Aid, and IT skills, and was preparing NVQ3 in Playwork (with funding from the TEC which she had arranged herself) when interviewed. She found her job rewarding and enjoyable, although she believed that better premises and resources would enhance provision.

All three of the interviewees were positive about men's involvement in childcare work, but were aware that this was a very female dominated field and that parents were sometimes resistant the employment of male playworkers.

Eldercare - example of a care agency linked to a national voluntary organisation promoting good quality provision for the elderly

This agency was jointly run by two female directors, and based in Sheffield. It had been set up in 1993 in the wake of the changes brought by implementation of the NHS and Community Care Act 1989, following which Sheffield Social Services (SSS) began to fund more services through the voluntary sector. The scheme provides domestic help to elderly people living in their own homes. Between 1993 and 1995 it was entirely funded by SSS, but client charges were introduced from 1995. It is a 'not-for-profit' enterprise employing about 35 homecare support staff and provides domestic support for about 250 elderly and disabled clients. Clients are charged £5.50 an hour to cover overheads and staff costs at £3.60 an hour, plus on costs (which have recently increased to include provision for sick pay and holiday pay). The service was thought to be cheaper than other commercially run care agencies[34], and many clients used their Attendance Allowance to pay for it. Much of the demand for the service came through 'word-of mouth', and the high quality reputation of the service meant that demand continued to outstrip supply. Three staff within the agency were interviewed - these included one of the Directors, a Team Support Worker and a Home Carer.

The Director, who earned £15,500 per year, had been in the job for about 9 years. She was in her late 40s, separated from her husband and living alone (although she had two adult children). Her job role, which occupied her on average for 60 hours per week, involved organising the home care service, allocating staff to homes, conducting initial assessments of clients' needs, establishing staff rotas, and responsibility for health and safety. She emphasised that provision of a high quality service was a key priority, and that this involved offering a 'varied' service to meet clients' differing needs, 'matching' clients to home carers so that both were comfortable with the arrangement, establishing health and safety procedures, and ensuring that staff were aware of guidelines on good practice. Particular emphasis was placed on electrical safety, rules about climbing on and moving furniture, and personal safety - all home carers were issued with mobile phones. Guidance was given to staff on suitable dress, and initial client assessment included checking that sexual harassment risks were

[34] which were thought to charge a setting-up fee and travel costs to clients.

identified (especially in the case of male clients suffering from dementia). Home care staff knew that they could immediately contact a director for guidance or help if they encountered difficult situations. The co-director, another woman, was a qualified nurse who took responsibility for staff training, had a role as 'Back Care Co-ordinator', and also dealt with staff wages. The agency tried to provide 'above average' conditions of service for staff, and regarded it as particularly important that staff should have choice and flexibility about the hours they worked.

The Team Support Worker was a single woman aged 28 who had previously worked as a nanny. Her job role included being 'on call' one week in four, doing some office work, and visiting elderly clients to assist them with getting up, dressing, preparing meals, cleaning and shopping. She had held the job for almost two years having responded to a newspaper advertisement. She saw the job as good experience for a possible future move into professional social work, although an enhanced role for her (which would involve additional training) was currently under discussion within the agency. This worker was very conscious of health and safety issues, especially regarding hygiene, electrical safety and lifting. She worked a regular 30 hour week and earned a gross salary of £533 per month (about £6,500 per annum), which she felt was 'OK' - however she supplemented this with separate work for an individual family, providing eight hours of childcare a week (earning £3.25p an hour) and 3 hours domestic cleaning a fortnight (which generated £10). In her agency role she had a contract of employment and saw her job as secure and flexible on both employee and employer sides. She enjoyed the job, and meeting elderly people, but said she would like more responsibility and more money. Negative aspects of the job had included some 'intimidating' incidents with clients and one example of verbal sexual harassment - however she felt this had been dealt with promptly and appropriately by the agency management.

The Home Carer interviewed was a 37 year old married woman with a teenage child and a husband in full-time employment, who had previously worked for nine years as a childminder. Her current job was full-time (36 hours per week) and involved 'doing anything elderly /disabled clients can't do themselves' - washing, dressing, cleaning, shopping and general support. She had obtained the job through word-of-mouth and had taken it because it 'fitted in' with family life and she 'needed the money'. When interviewed, she had been in the job for between 2 and 5 years. She felt she 'had a lot of say' in how the work was organised, and was allocated to nearby clients, which meant that she normally had no more than a five minute drive to work. She was paid an hourly rate of £3.60 an hour, in addition to which the agency paid her health insurance contributions. She stated that she did not get paid holidays, sick leave or a pension. She felt the job was permanent, secure and flexible from her own point of view, and was happy with the hours she worked, apart from having to cover some weekends. She had looked for other work but found 'few allow you to choose your own hours', and this was important to her. She had previously worked for another agency in a similar role, but had left because the enterprise was poorly organised and she was expected to lift clients without help. She did not recall having any training in the previous two years, but thought it was 'not needed'. Generally, she enjoyed her job, although the lack of contact with other homecarers meant it could sometimes feel isolated. She emphasised that when her child had been younger, she had chosen childminding work because it was 'the best option' to fit in with his needs, however, now he was older the agency work fitted well because she could always arrange to be at home when he returned from school.

Domestic Cleaning - example of a franchise operation

This franchise operation was based within the Leeds travel-to-work area, in a nearby small town. It is one of 33 UK franchise operations of an international cleaning industry company (annual turnover approx. £4m) which also has operations elsewhere in Europe, in North America (where the company was founded) and in the Far East. The company has a mission statement which refers to 'quality, service and value', has been awarded 'Investor in People' status and holds other quality assurance awards. Interviewees included the director of UK operations (telephone interview), the franchise owner, a 'head cleaner' (who leads the cleaning team which attends the home being cleaned) and an 'office manager/cleaner/training officer'.

The UK operations manager estimated that 95 per cent of the company's staff were female: the 'vast majority' employed full-time, which the company prefers. All franchisees are provided with uniforms for staff and sufficient company cars for all cleaning teams to travel in a car marked with the company logo, and all cleaning staff have insurance cover and are 'fidelity bonded'. Franchisees provide all cleaning materials and pay vehicles running costs. Quality standards involve staff operating in cleaning teams with different employee roles to permit 'career progression to aid expansion'. All cleaning staff within franchises are on PAYE systems, and wages are calculated on a commission basis only. 'Head' cleaners, receive commission of 24% plus 2% for holiday pay (total 26%) and 'assistant' cleaners 20% plus 2% (total 22%) of a typical charge of £29 + VAT for 1.5 hours cleaning by two cleaners. This works out at approximately £5 per hour for a 'head' cleaner and approximately £4 per hour for an 'assistant' cleaner. The company was confident that all staff earn above the minimum wage, and the percentage (2%) for 'holiday pay has been introduced in compliance with the EU Working Time Directive. The company has increased its UK turnover by over 15 per cent in recent years and sees 'enormous potential' for further growth.

The franchise owner was a divorced woman aged 61 who had been running the business, which now employed 15 cleaners, for just over 5 years. She planned to sell the franchise soon so that she could retire. Originally her role had included some cleaning, but in recent years she had been fully occupied with recruiting staff and managing the business. Her earnings (which she refused to specify) are a share of the business profit, which paid for 'a reasonable standard of living' and enabled her to save. She also had the benefit of a company car. Her contract as a franchisee did not include provision for holidays, sick leave or pensions. She estimated that she worked 55 - 60 hours per week, and that she had had 'one week off in five years'. The position had been permanent and secure throughout but the hours had been 'too long' and the job stressful - especially 'when staff phone in sick at 7.30 am'. With few other franchises of the company locally, the role was also somewhat isolating.

The 'head cleaner' was a 31 year old woman with no formal qualifications who was separated from her husband but now living with her three children under 14 and a new partner. Her job involved cleaning other people's homes - initially to reach the required standard of cleanliness, and then to maintain that. She had been doing the job for 5 months, in response to a newspaper advert. She took the job because it 'fitted in with my family responsibilities', because she 'needed the money', and because the job offered the benefit of a company car. She was working between twenty and forty hours per week and was also in receipt of social security benefits (Family Credit[35], an 'in work' benefit for low earners with dependent children). She had a contract of employment, and a permanent job, and felt the job was secure although she did 'not know the hours from one day to the next'. Her training on joining

[35] Working Families Tax Credit will replace Family Credit during 1999.

the company had involved viewing a video and some instruction and support as she started the job. Compared with other jobs she had held (including work as a care assistant in a residential home), the job was not particularly stressful, although it could be monotonous. She felt that she could 'leave work at work and concentrate on the family at home'. Nevertheless she found it 'quite difficult to manage everything', and was responsible for most of her own domestic and childcare tasks. She had some support through informal family childcare and used an out of school club.

The office manager/ cleaner/ training officer was responsible for training all new staff, for quality control and for general cleaning of homes when needed. She also carried out clerical duties, including payroll work. She was a divorced woman in her early forties living with her two young adult children and her partner. She was qualified to 'A' level standard and had vocational qualifications in clerical work. She had a contract of employment specifying her potential hours as 8.30 - 5.00, and was happy with her normal working hours (30) each week - there was flexibility, by which she meant that she 'only worked when her employer wanted'. She estimated her weekly earnings at £150 per week, and enjoyed her job - 'I like doing a wide spectrum of jobs. The hours suit me - and leave time to do my chores at home. I am always working with someone else, so it can be good fun'. She would have liked higher pay and felt that 'cleaners aren't paid enough'. So far as she was aware there were no male cleaners employed within the franchise, although her partner was in the cleaning business. The job was really only suitable for younger people because it is strenuous work: 'turnover is high among women, because of the strain'. Generally, the job fitted 'extremely well' with her family life, in which she took main responsibility for most of the domestic chores. Her children now 'looked after themselves' , but she had not used any paid or informal childcare when they were young. Her household made some use of meal delivery services, but did not pay for any other household services.

4. Worker Level Analysis of Employment in Household Services

4.1 Introduction

This section of the report outlines the findings of the interviews conducted with workers in childcare, eldercare and cleaning employment in Leeds and Sheffield. In common with the other national studies, our target was to interview 36 workers in a variety of roles within relevant enterprises which had been identified in the two local studies. Enterprises were selected according to two distinct criteria - that about half should represent some form of innovation or interesting entrepreneurial activity, and possibly good practice, while the remainder should be drawn from areas of employment within household services where 'growth' or 'volume' (large numbers of employees) had been identified in the national and local analysis. This section of the report is divided into three main parts, each dealing with a different sub-sector of household services. As will be seen, boundaries between the sectors, especially for some of the workers, are not clear-cut. Three of the enterprises discussed are outlined in Section 3.6 of the report.

4.2 Eldercare workers

Workers supporting elderly people in their own homes were approached via the following enterprises and interviewed using a common research instrument[36].

- Private Home Care Agency, Leeds (3 workers)
- Private Home Care Agency, Sheffield (3 workers)
- Local authority meal delivery service, Leeds (3 workers)
- Local authority meal delivery service, Sheffield (3 workers)
- Not-for-profit organisation (Age Concern) Help-at-Home Service, Sheffield (3 workers)[37]

Characteristics of eldercare workers
The 12 women and 3 men interviewed from the five enterprises were aged between 26 and 61, most being in their late 30s/early 40s. All were White and British. In the private agencies, the women interviewed had both full and part-time posts. The one male manager interviewed worked full-time. In both local authority meal delivery services, all four female interviewees worked part-time and both men worked full-time. All three women interviewed in the not-for-profit service were part-timers. These gender patterns in full and part time working were very characteristic of the workers in these organisations as a whole (i.e. overall, women were more likely to be employed part-time and men full-time).

Of the fifteen workers interviewed, two women had relevant qualifications in Care (NVQ levels 2 and 3), and one home care agency manager was studying for a degree in Health and Social Care. Both male meal delivery drivers had passed the PSV (Public Service Vehicle) test. In each enterprise at least one of the interviewees had no vocational or educational qualifications.

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[36] For details of methodology, see Appendix III.

[37] Originally categorised as a cleaning service enterprise, but included because the service provided is specifically for the elderly.

Thirteen of the fifteen staff had children. Nine of these had children of school age and three had pre-school children, including two lone mothers with dependent children. All other parent workers lived with partners who were in full-time work. None of the eldercarers was co-resident with an elderly or disabled family member.

The nature of eldercare work

Across all sectors and services, the eldercare workers interviewed had, to varying extents, direct contact with elderly people in their own homes. In all cases, the service provided was intended to support the elderly person in remaining as independent as possible in their own home. Home care agency staff generally provided both personal care (bathing, changing, dressing and feeding) and domestic services (cleaning, cooking, shopping, pension collection); the not-for-profit home support workers were only contracted to perform domestic duties; and the meal service workers provided and delivered hot and frozen meals either daily or weekly.

The frequency and duration of visits varied according to the service provided and level of need, but in most cases, quite close medium- or long-term relationships were built up between the careworkers and their clients. This is reflected in the length of service of some workers. Some eldercarers at the not-for-profit service and meal delivery service had been employed from the start of both projects - 6 years and 18 years ago respectively. Most described part of the 'care' they provided as involving sensitivity, talking, listening, befriending and providing general support:

> the elderly are always appreciative of what you do, some are more like friends now and you feel quite committed to them. It's good to give service to the elderly.
> (Home Support Worker)

Although the day-to-day work of the Manager and Co-Director of both private Home Care agencies involved managing staff, rotas and contracts, both still maintained regular contact with their elderly clients. This contact usually involved initial home visits to assess clients' care needs, followed by subsequent visits to supervise staff, monitor the quality of care given, or deal with particular issues or complaints. Both agency managers had previous experience as care workers themselves and gained much job satisfaction from still having a 'hands-on' approach to their work. Both were in, or nearing mid-career (aged 35 and 49), and they had been in their present posts for 18 months and 9 years respectively, after seeing the jobs advertised in the newspaper. Both envisaged themselves doing the same or similar work in five years' time.

The overall care and well-being of their clients also related to wider health and safety issues, including formal or informal checks on potential hazards in the home, care in the use of appliances, correct food storage and cooking, and maintaining high levels of general hygiene and cleanliness. While all employers had at least some guidelines for staff (sometimes described as 'common sense'), others had very clear rules, regulations and policies in place, concerned particularly with food safety and hygiene, moving and handling clients, using hoists, and wearing protective clothing (gloves, aprons or padded clothing for those working with frozen foods). In some instances this was backed up by training, although workers frequently expressed the need for more training, particularly first aid.

As much of their work takes place in isolation from other colleagues and unsupervised, eldercarers were often in a position of trust. This was particularly the case for those collecting

pensions or money for meal deliveries. Most staff interviewed felt that they had at least 'some say' or 'a lot of say' in the way their job was organised. This was especially so for the care workers in one private agency and the not-for-profit service, who had some freedom to choose their hours of work. In the latter instance, home support workers could also choose their clients from a list which specified the duties required and the location of clients' homes. This meant that a number of staff could care for clients who lived within walking distance from their own homes. If they did not feel able to work with a particular client for any reason, workers felt free to change client with a minimum of fuss. Drivers also felt they had some freedom, being able to plan their route for the day and being 'out on the road'. In most cases this allowed workers to experience a high degree of autonomy and control over their working lives which added to their overall level of job satisfaction.

Jobs in eldercare were most commonly found through local newspapers or through 'word of mouth'. Two workers had also been doing the same or a similar job on a voluntary basis before being offered their current paid post. The reasons for entering work in this sector were generally very positive. The majority stated that they wanted this type of work. Meal delivery drivers had wanted a 'driving job'. Part-time working mothers chose the work partly because it 'fitted family responsibilities'. Nearly all mentioned that they liked working with the elderly. One private care agency worker was using eldercare to gain experience for a possible future career in social work, while a home help service worker recalled being made redundant from a well-paid job ten years before and subsequently caring full-time for her elderly mother who later died:

> I was then over fifty and had been out of the jobs market for about ten years; I didn't have much choice. I was offered this job, which fitted and I enjoyed it. I had lots of experience caring for my mother - (so I got this job) more by accident rather than design really.
> (Mobile Home Support Worker)

The majority of eldercare employees had previously worked in a caring profession, particularly in childcare as nannies, childminders and in a children's home. Others had previous experience of household services: cleaning; mother and housewife; school catering; and voluntary meal deliveries. Some had worked in unrelated fields and both male meal delivery drivers had previously worked as drivers.

Working conditions

For the managers of both private care agencies, salaries were approximately £15,500 per annum (plus bonuses in one case); neither was a member of a union or professional association. Unlike most of their eldercare staff, however, both managers were entitled to the full benefits of paid holidays, sick leave, pensions, maternity/paternity leave and paid emergency family leave. In one agency, the manager (as well as some of the more experienced staff) also received membership of a private health scheme.

Both managers had full-time contracts and worked a minimum 40-hour week, plus additional hours due to the 24 hour 'on-call' service both agencies provided. The male manager of one agency who was still relatively new to the post, regularly worked a 60-hour week. He felt that his salary was 'not reasonable' given the long hours and his responsibilities towards his young family. Both saw their jobs as secure and permanent. Each felt that the quality of their working lives could be improved by changes in staffing and better office facilities.

Relevant training for themselves (and their staff) was seen as important. The recently appointed manager had attended a number of courses on subjects including: customer care; moving and handling clients; IT skills; and management training. The more experienced manager of the other agency saw training as on-going and for updating skills and knowledge. She had recently been involved with a local authority social services initiative on 'adult abuse', and was studying for a degree in Health and Community Studies.

Most eldercare staff were paid an hourly rate for the time spent with the client. For most this did not include travelling time between jobs, which was significant as some eldercarers walked between clients' homes. Most eldercarers were paid the minimum hourly wage of £3.60. 'Mobile' home care support staff at the not-for-profit organisation were paid £3.75, plus a small mileage allowance for the use of their car and the further distances travelled around the city. Carers with an additional team support role were paid hourly rates of between £4.40 and £5.00. Six of the nine care workers receiving these wages thought they earned 'a reasonable income'. All had some form of employment contract, but none belonged to a trade union or professional association.

In both sectors most staff believed they had, or were about to gain entitlement to paid holidays and paid sick leave[38]. None had a pension paid for by the employer, or any entitlements to paid absence for family reasons. A number of staff were unsure whether they were entitled to paid maternity/paternity leave. One agency paid into a private health insurance scheme for some of its staff.

The agency eldercarers interviewed worked between 25 and 40 hours per week, with some flexibility over working hours both for themselves and for their employers, including weekend working. In both agencies the team support leaders were expected to be 'on call' for part of the time, which added to their hours. All saw their work as permanent, and all but one thought it was secure. These employees were generally happy with their working hours, apart from some discontent about weekend working. One mother found that although weekend work 'fitted in', enabling her husband to care for their children, she missed not spending the weekends with her family.

In contrast, the not-for-profit home care workers all worked part-time, between six and 27 hours per week, with staff choosing the location and duties required by clients from a list.

This provided the most flexible arrangement, where hours could be chosen to suit the workers' particular circumstances and schedules, and could potentially accommodate change from week to week. All workers for this organisation were happy with their hours, and all saw their jobs as permanent and secure.

Though both agencies had staff with fewer than 3 years' service, only one had provided training (in food hygiene, moving and handling, using hoists etc.) in the last two years. Mixed feelings were expressed by both sets of staff about whether more training was needed/wanted. Induction training was provided for recent recruits to the not-for-profit organisation, but longer serving staff were not provided with any further training, nor did they feel the need for this.

[38] Most did not have these entitlements until recent changes in legislation.

For the local authority meal delivery workers, rates of pay varied between the two local authorities. The lowest paid were the casual picker/packer staff involved with frozen meal deliveries (£4.56 per hour). The supervisor earned £4.80 per hour while drivers were paid £4.79 per hour. In the other local authority, both part-time frozen meal packers and deliverers were paid £5.60 per hour (with a higher rate for staff with more than five years' experience). Full-time transport drivers were paid monthly, at a rate equivalent to approx. £6 per hour. All local authority staff felt they received a 'reasonable' salary.

All these workers belonged to a trade union (UNISON or GMB) and one was a shop steward for the TGWU. All but the two casual staff had contracts of employment, which entitled them to the full range of benefits including a 'generous' pension scheme. Some staff were also entitled to health cover for eye and dental treatment and hospital stays.

The two casual staff (one driver & one picker/packer) were not entitled to any benefits at present. However new legislation meant that from June 1999, casual staff working for more than 13 weeks would be entitled to a temporary contract and a number of associated employment rights. One of the meal service workers, however, reported that as she was not entitled to paid leave, she would have to resign temporarily in order to look after her children (over the summer holidays), thereby failing to complete the full 13 weeks. Any reinstatement later would mean her 13 week period starting again from scratch[39].

In both authorities, the majority of women (including drivers) employed in the meal delivery services worked part-time while most men were full time. All the women interviewed worked between 14 and 25 hours per week, with some scope, when required, for working extra hours at the same rate. Two women wished to work regular full time hours, but had found opportunities limited. In both organisations, male drivers/deliverers worked full-time between 41 and 46 hours, with overtime paid at a higher rate. Both men interviewed were happy with their working hours. Full time male delivery drivers in each local authority were the only staff interviewed in the meal delivery services who had received recent training in first aid and food hygiene. Part time workers had not, but were all keen to take up further training opportunities in a range of work-related areas.

Despite some marked differences in working conditions, nearly all the workers interviewed in eldercare services stated that they 'liked' or 'really liked' their jobs. The reasons centred around job satisfaction in caring for the elderly; feeling they were doing worthwhile job appreciated by their clients; providing a good quality service and working to high standards. Their comments included

> Generally I like (the job) - colleagues are nice; it's nice visiting clients or helping them on the phone. I'm trying for promotion to a higher grade - I already do some aspects of the manager's job when she is away.
> (Meal deliveries worker)

Contact with other colleagues at work featured (highly) in the views of local authority staff (an experience stated as missing from the other eldercarers who work in relative isolation). Staff were often unsure whether they would remain in the same/similar area of work in 5 years' time, as they might move to other (care) jobs with more money and responsibility.

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[39] A 'loophole' in the law which may affect other casually employed working parents.

Across the board, a number of both full and part-time eldercare staff had additional employment, often in household services: other eldercare work, childcare or cleaning. One delivery driver supplemented his main income by taxi-driving in the evenings and weekends, while another casual part-time meal picker/packer kept on her previous job as a Casino croupier in the evening. In some cases these jobs added only a few extra hours to their main employment, often cash-in-hand; in others it meant working almost a full-time/40 hour week. For two meal delivery drivers (a woman, part-time and a man, full-time, both with dependent children) the additional work brought their total hours to in excess of 60 hours over 7 days.

A few interviewees stated that higher pay or different hours would be welcome, but many only mentioned this on prompting. Indeed, low pay and poor conditions seemed to be an accepted part of working in eldercare. Most interviewees were committed to their jobs and found the personal rewards of working with the elderly outweighed the low financial remuneration.

Voluntary and Community involvement

Four of the respondents (all female, working both full- and part-time) were involved in community or voluntary activities, all related to care work or providing a household service (helping on a 'soup wagon'). Most activities took up a few hours a week or month, and complemented rather than affected their paid work. One local authority meals deliverer who had delivered hot meals as a volunteer with the WRVS[40] 18 years ago had been offered her current paid post as a result of this.

Equal Opportunities at work

Gender divisions which emerged in the interviews indicated that full-time (in all cases male) local authority employees seemed to be earning more (per hour) than part time women workers doing very similar work, and there was also a suggestion that part timers (all women) had less opportunity for job training. All respondents thought that generally their work was an area of (potential) male employment: 'Men are just as physically & mentally capable - whether they want to do it is a different matter.' (Home Support Worker); 'Men relate differently to people, in a way that is still positive.' (Team Support Worker). Others expressed concern that older women may feel unsafe or prejudiced towards male carers: 'Yes, I have known of male carers, but it has its limitations - old women can feel threatened by men in their homes.' (Home Support Worker). '99 per cent of clients want a female - the elderly generation are used to women doing caring work. More women need the service and feel more comfortable with a woman (chatting etc.).' (Home Support Worker).

In both the local authority meal delivery services, the tasks carried out (with associated pay and conditions) appeared to be related to the gender of the staff. In one organisation, this was evident from the attitudes and observations of the staff themselves: 'Men generally do driving and delivering; women do the packing and cleaning in the depot.'(Frozen Meals Supervisor). 'Men see driving as a doddle – they can spread it out, and they see packing as a woman's job... sometimes they don't even want to clean out their vans; they think the women should do all the cleaning.' (Casual Frozen Meals Picker/Packer). Most thought that there was no difference in the ability of men or women to do the work, though it might make more of a difference to the client. When asked what sort of men may be attracted to this work, some suggested anyone could do it ('all sorts', 'of no particular background'), whilst others mentioned particular qualities such as 'those who can talk and listen' and were sensitive to the

[40] WRVS - Women's Royal Voluntary Service - a charitable voluntary organisation.

needs of the elderly. However, the overall consensus appeared to be either ‘younger men struggling to find other work, or those doing this as extra’ (co-Director of agency)or students/graduates looking for work experience before entering a related profession; or older men nearing retirement, with life experience of other caring skills, some of whom ‘were taking the part-time jobs that used to be done by women’. (Meals Officer). One eldercarer stated that for financial reasons the work did not suit most men: ‘(not) the middle-earning years. I can’t imagine 20-40 year old men being happy doing this. It doesn’t pay a living wage for a man: neither does £3.60 for a woman! Men are not used to the role historically. There aren’t many men used to doing domestic tasks - men don’t necessarily want to do it as work.’ (Mobile Home Support Worker).

Reconciliation of work and family life

Twelve of the fifteen staff interviewed stated that their work enabled them to manage family and other activities either 'quite well' or 'extremely well': the hours suited them and provided some flexibility. Of the three who found that managing everything was 'quite difficult', two were men working 60 hours or more, with dependent children. The other was a single parent mother of 4 children (2 school-aged), working full-time for £3.60 per hour. Most of these workers reported that at home, women did all or most of the domestic chores, including mothers working full-time. Partners were more likely to help with childcare, either occasionally or regularly. Male workers stated that they offered regular or occasional help to their partners who tended to be responsible for most or all of the domestic chores and childcare.

The most popular form of household service used on a regular or occasional basis was take away foods, followed by window cleaning. Meal delivery services (pizzas and Chinese food) were mentioned by two respondents, and one female eldercarer living alone and working 60 or more hours per week, employed the services of plumbers and builder/decorators when needed. Workers made the following suggestions about ways of achieving a better balance between work and family life:

> Not taking too much on. I could work more but would get too tired, so work balances with the family's needs. It’s important not to spread yourself too thin.
> (Home Support worker)

> Need help in the holidays for the kids, the pay doesn’t cover the cost of childcare. More free childcare should be provided for working mums.
> (Meal deliverer)

> Childcare can be a big problem, especially during a crisis. Inflexible attitudes of some managers (are a problem), especially in local government.
> (Private agency staff).

> Don't run your own business! but I cope because I do not have ties or family responsibilities.
> (Private agency staff)

4.3 Childcare workers

Workers involved in the delivery of two different forms of childcare were approached and interviewed using the same research instrument as in the eldercarer interviews.

- Private out-of-school club (network) , Leeds (3 workers)
- Voluntary sector out-of-school club (run by a management committee), Sheffield (vb 3 workers)
- Self-employed Childminders, Leeds (3 workers)
- Self employed Childminders, Sheffield (4 workers)

Characteristics of childcare workers

The 12 women and one man interviewed were aged between 21 and 58 years. All were White and British except one who gave 'other ethnic group' as her ethnic group. All the childminders were female. The childminders mostly worked full-time - over 30 hours per week, and two worked around 48-50 hours. One worked part-time. The out-of-school club workers' hours varied - one, in a director/manager role, reported working 60 hours a week, but for some playworkers hours were very 'part-time' - in one case 3-6 hours per week. Some stated that their work was 'casual', with a 'zero hours' contract, while others had contracted full- or part-time hours.

The childminders included two without qualifications and two with vocationally relevant qualifications. The out-of-school club workers were better qualified. Four had university degrees, and several had relevant vocational qualifications - some had both.

All the childminders were mothers, some with children now grown up. They had a range of personal circumstances: some were married, others single, divorced or separated. Most lived with another adult - usually their partner, but in one case an adult son. The part-time childminder was a single parent with a pre-school child. The out-of-school club workers included single. married and divorced people. Four of the out-of-school club workers did not themselves have children.

The nature of childcare work

The childminders described their work as involving caring for children while their parents were at work - playing with them, providing meals and snacks, and taking them to pre-school activities such as toddler groups, taking and collecting school-age children from school. Some mentioned the educational and developmental aspects of their role, others spoke about liaising with the schools and nurseries which the children in their care attended, and of their role in establishing suitable discipline. Childminders cared for children aged from very young babies to children aged 11 or 12 years old.

All the childminders interviewed worked in their own homes, except when they took children to activities (such a toddler groups) or went about their routine daily activities such as shopping or going to the park. All had been involved in childminding for several years, some for much longer. They had either 'fallen into' this area of work, sometimes almost by accident, or had taken a personal decision that this work would suit them and their family situation, often starting at a time when they had young children themselves..

Out-of-school club workers described their work as caring for, supervising, and facilitating the play of children of primary school age (4-11 years old). Some workers had management and business development roles within their clubs, as well as playworker duties. One had

secured the initial 'start-up' grant to establish the business from Leeds Childcare Initiative (see case description in the previous section of the report). Most had had some job-related training in the past two years, in some cases leading to recognised NVQs, for example in child protection, play development, first aid, and management.

Working conditions

Childminders commented that they felt they were 'in charge' in their jobs, although some felt the parents of the children they minded sometimes lacked consideration, and some had experienced problems with late payment of fees. Childminders also commented on the need to 'child-proof' their homes, and on the annual inspection visits by social services staff. Five of the six childminders belonged to the National Childminding Association (NCMA), and some used model contracts provided by the NCMA as a guide in drawing up agreements with parents. Earnings varied, and were usually derived from hourly fees which were paid per child. The hourly rate per child was in the range £2 to £3, the higher rate being paid when school pick-ups were involved. Childminders negotiated fees individually with parents, and some charged a reduced hourly rate for a second child from the same family. Some childminders had paid holidays, although this tended to 'depend on parents'. One reported getting half pay if on sick leave, but in most cases paid holidays, leaves and other benefits did not exist. One childminder complained the contract with parents was 'not worth the paper it's written on....The ball's in the parents' court. They often don't pay up, which has caused household budgeting problems in the past'.

Out-of-school club workers had rather variable working conditions. The workers interviewed had roles ranging from managing a business which was 'about to go public' and now comprised a network of 8 after-school clubs, to club co-ordinator roles, with some managerial responsibility, to casual and sessional work in one specific club. All (except one) felt their positions were permanent, but a few mentioned that they felt their work was insecure. Most did not get paid holidays or sick leave, and none had an employment-based pension. The Leeds based workers expressed satisfaction with their working hours, but those in the Sheffield club expressed a variety of reservations - hours were too changeable, unsociable - 'I would prefer to be at home preparing the meal when my daughter returns from school'- , or excessive (when combined with other jobs).

All the childminders reported being happy with the hours they worked and all said they liked their job. They liked working with children, enjoyed seeing children grow and develop, and felt they could 'switch off' once the children were gone at the end of the day. Some commented that some parents failed to recognise their work as 'a job', and mentioned problems with late collection of children by parents, 'never thinking of my unpaid time'. Others remarked on the low pay, and felt the status of their work needed to be raised, although most said they were able to generate a 'reasonable' income. There were mixed views about job security: one mentioned that because children grow up there is always change, but several felt that there was sufficient demand for childminders to make their work secure.

Out-of-school club workers all said that they 'liked' or 'really liked' their jobs. They liked working with children, enjoyed the work environment and relationships with colleagues, and in some cases mentioned their feelings of commitment to the work and to holding positions of responsibility. One commented: 'It's fantastic working with children and sincere people. Seeing (the children) become better people, it's so rewarding'. Some workers planned to stay in this or related employment fields, but hoped for improvement in working conditions and

better resources to do the job. Some saw the work as a stepping stone on a career ladder within childcare work.

Most childminders only did childminding work (although one worked one night a week in a bar). However, their previous occupations included work in sales, clerical, and waitressing occupations. All the out-of-school club workers in Sheffield currently held other jobs as well, with one having three other positions. These additional jobs included lunchtime supervisors in schools, school crossing patrol attendants, playworkers in holiday playschemes, caring for a disabled child, and (in one case) week-end waitressing on a casual basis. The out-of-school club workers had previously held jobs as teachers, civil servants, and in fast food outlets. None of the workers in the out-of-school club in Leeds currently had a second job, but these included the two workers who were working about average full-time hours and earning an annual salary.

Voluntary and Community involvement

Several childminders also undertook voluntary activities in their 'spare time': these included helping with a pre-school mother and toddler group (which could be combined with childminding some of the time) and with a junior club, and being a committee member of a sports club. The out-of-school club workers also included several who were active volunteers. Their activities included some voluntary work in the wider childcare field (e.g. within a regional Play Association), church activities, care support for neighbours or family members, fundraising activities for charity, and volunteer work in a charity shop.

Equal Opportunities at work

The childminders were very conscious that their occupation was almost exclusively female. One knew of a male childminder who shared the work with his wife, but there was also an awareness of the impact of parental attitudes - 'sometimes they're looking for "another mum" and may feel more comfortable with another woman'. There was felt to be 'a stigma against carers and men'. The childminders mostly felt that men 'with a strong caring side' or with 'lots of patience' could do the job just as well as women - however problems could possibly arise, one thought, with taking girls to the toilet, especially if using public toilets.

The out-of-school club workers recognised their area of work as strongly female dominated but most were positive about potentially greater opportunities for male employment in the field. Male workers were felt to be a positive benefit to developing club activities, especially in sport, and as valuable role models for children from lone mother families. Parents' attitudes were felt to be a barrier to involving more men in this type of childcare, and one male worker reported tensions around dealing with a child's 'crush' on him, with which he was receiving support from colleagues. There was an emphasis on men being potentially capable of taking on all the roles currently performed by female staff, except (as with the childminders) 'taking girls to the toilet'.

Reconciliation of work and family life

The childminders had main or sole responsibility for managing family activities and domestic chores (just one claimed these were 'shared equally'). There had been limited use of household services in their homes - take-away meals, window cleaners, and in one case out-of-school childcare and day nursery. Several described childminding as an excellent way of achieving a balance between work and family life, however there was mention of the need for higher pay, and of the importance of 'belonging to other childcare support groups and having adult contact during the day' to avoid isolation.

The out-of-school club workers all felt their work fitted in well with family life. Several mentioned the importance of ‘support from a partner’, and that shorter working hours would enable them to achieve a better balance. A few (those with higher earnings) used household services, such as paid domestic cleaning, purchasing ‘take away’ meals, but for childcare most relied on unpaid family care.

4.4 Workers in Domestic Cleaning

Workers involved in a range of domestic cleaning work in a variety of enterprises (see below) were interviewed using the common research instrument mentioned above.

- Franchised domestic cleaning agency, Leeds area (3 workers)
- Private domestic cleaning agency (female entrepreneur), Sheffield (4 workers)
- Carpet-cleaning enterprise, Leeds (2 workers)
- Window cleaning business (1 worker)

Characteristics of workers in domestic cleaning
The ages of the ten workers in this sector ranged from 18 to 79. All were white and British. All but one of the cleaners were female, and both the carpet cleaners and the window cleaner were male. In two cases the operations could be described as 'family businesses', since other members of the entrepreneur's families worked in the business. The franchised cleaning agency was part of an international company (described in Section 3.6): the franchisee was a divorced woman aged 63 with adult children but living alone. The other workers in this enterprise were aged 43 and 31, both had children and lived with a partner but were divorced or separated. Three of the workers in the Sheffield domestic cleaning agency were members of the same family - the woman entrepreneur (aged 40), who was married with two children aged 4 and 18, her student son, and her widowed mother (aged 79) who lived alone. One other worker was also interviewed, a cleaning supervisor who was an unrelated woman aged 30, married with two children aged 5 and 13. The two carpet cleaners were the owner of the enterprise (aged 53) who was married with five adult daughters, and his 25 year old son-in-law, who was married with a young baby and studying for a degree in medicine. The window cleaner was a single man aged 36, living with his sister and her family.

The elderly cleaner and two of the younger workers (one cleaner and the window cleaner) lacked any qualifications: however the others had a range of qualifications, few of which were directly related to their current work: two of the male workers were studying 'full-time', at a further education college and at Medical School; the franchisee was qualified as a sports instructor, and one of her staff had GCE 'A' levels and a vocational qualification in clerical work. The owner of the Sheffield cleaning agency had telephone switchboard qualifications, and both the owner of the carpet cleaning agency and the remaining domestic cleaner had left school having passed their leaving exams.

The nature of domestic cleaning work
The work they described varied according to their role in the enterprise. Workers in the two cleaning agencies described basic cleaning duties in private homes which involved cleaning, polishing, and in one case only ironing. The elderly 'cleaner', who described herself as 'the Ironing Queen', mainly did this work. Additional work in these agencies included checking quality standards, ordering and checking equipment and materials, recruiting staff, marketing and securing new business, training staff, and organising staff rotas. This work was the

responsibility of the franchisee and owner, although in both cases cleaners were organised in teams so that quality checking was performed by more experienced and somewhat better paid staff. The owner of the carpet cleaning business similarly emphasised the business side of his work, paperwork, ordering, etc. His business involved work both in private homes and in shops and nursing homes. The window cleaner's work involved cleaning the outside of windows in private homes, houses and flats (using a ladder), as well as some work cleaning windows for businesses.

Working conditions

Among the workers in this group, hours, wages and conditions varied considerably. None of the workers belonged to a trade union, although the franchisee was a member of the Franchise Forum. Those running enterprises tended to work long hours - about 50 per week in the case of the carpet cleaning firm, 55-60 per week for the franchisee, and 40-50 per week for the owner of the Sheffield cleaning agency. Two of the men (the two students) worked variable part-time hours, averaging 8 per week for the domestic cleaner and 4 hours per week for the carpet-cleaner. The 79 year old worker averaged 12-15 hours per week, and the cleaning supervisor 10-15 hours. The window cleaner averaged 25 - 30 hours per week. However, several of these workers had other employment, described below. In the franchised agency, apart from the franchisee, the other workers worked around 30-35 hours per week. It was only in this agency that workers reported having a contract of employment. The window cleaner had paid holidays and sick leave, but these benefits were not available to workers in the Sheffield agency. The franchise operation made a payment to workers to cover holidays, as an element in their commission on each job. These workers all had the benefit of a company car, but in the Sheffield agency the cleaning supervisor used her own vehicle for which she was given a petrol allowance.

All the workers showed an awareness of health and safety issues in their jobs. The carpet cleaners mentioned wet floors, chemicals and the importance of adequate ventilation. The window cleaner was insured, as were the workers in the franchised agency. The workers in the Sheffield agency showed awareness of health and safety issues, particularly in relation to hygiene and electrical appliances, but it was not clear what insurance cover they had.

Almost all of the workers in this sector enjoyed their jobs. The two carpet cleaners and the window cleaner both said the 'really liked' their jobs, enjoying the hours, and having outdoor work (window cleaner) and enjoying the contact with customers, satisfaction of doing a job well, and the income (the part-time carpet cleaner earned £10 a hour and the owner of the enterprise felt business was good as his annual turner had increased, standing when interviewed at an estimated £30-40,000. The workers in the Sheffield cleaning agency all liked their work, commenting that they enjoyed the satisfaction of completing a job well, like the company and their colleagues, and, in the case of the entrepreneur, that she enjoyed working 'for herself'. The workers in the franchise operation were a little less positive, and made more comments about the pressure of work.

These workers had previous work experience in a range of different occupations. Several had previous experience of small businesses - the elderly widow had for many years shared the running of a pub with her husband, the owner of the carpet cleaning business had previously been a partner in a franchise in the cleaning business, and had previous experience in training and sales work. The window cleaner had previously worked as a kitchen assistant in a residential home, and one of the domestic cleaners also had previous experience as a care assistant.

Several of the workers in this group currently held second jobs. The young student domestic cleaner also worked in the evenings, for 15 hours per week, as a barman and glass collector, one of the cleaners in the franchise operation also did 'cash-in-hand' private cleaning for 6 hours per week (at a rate of £5 an hour), and the medical student carpet cleaner also worked regularly, on a casual basis as a care attendant for an agency. This work had been mainly in residential care homes and paid £6 an hour. His employer had recently been taken over, however, and wages were now being cut, to £3.75 an hour. He was therefore taking alternative 'night care' work, which paid more, and where the job was mostly sitting with and being available for the clients. He liked this work because he was able to study at the same time, and was currently working about 10 hours per week.

Voluntary and Community involvement

None of the workers in the franchised agency participated in any voluntary or community activities, with one commenting that this was mainly due to lack of time. Both workers in carpet-cleaning were involved in church-based activities, the owner being a lay preacher, which took up 12 hour a week, and the younger worker spending about four hours a week on church-related activities including visiting elderly people. The oldest of the Sheffield agency workers spent one day a fortnight as a volunteer in a hospice, and also gave some time to helping in a church drop-in centre.

Equal Opportunities at work

All the interviewees were aware of the sex-segregated nature of their occupation, although all the domestic cleaners felt that men could work in cleaning jobs. One felt that 'women are better at running this business', and that experience gained in industrial cleaning work did not transfer easily to the domestic setting. The job was thought unattractive to men because of its low pay, and several workers commented that it might be attractive only to young men, perhaps students, and older men 'who want a bit of extra cash'. The window cleaner had never encountered a female window cleaner 'doing the outside of windows', though he remarked that 'females do inside cleaning'. The carpet cleaners both emphasised heavy aspects of their work, which they thought might deter women, commenting that the only women they had encountered in the carpet cleaning and upholstery business worked in office-based roles.

Reconciliation of work and family life

All the domestic cleaners in the Sheffield agency felt that their work fitted 'well' or 'extremely well' with family life, a view also expressed by one of the workers in the franchised agency, but not the other two who found it 'quite difficult' to achieve a balance. The two carpet cleaning staff and the window-cleaner all felt they were able to reconcile work and family life, although they recognised that most of the domestic chores fell to others. The young carpet cleaner with a young baby nevertheless commented that 'it's a challenge', and mentioned that to combine his university work with his paid work he got up at 5am to study. The manager of the Sheffield agency emphasised that she tried to organise the agency's work between 9am and 3pm because this was helpful to her cleaning staff who had childcare responsibilities to manage as well.

4.5 Commentary

The interviews with workers in household services raise a range of important issues. Although only indicative (as opposed to representative) of the situation of workers in this employment sector, when set against the evidence from the national and local level analyses in sections 2

and 3, these personal testimonies help to draw attention to key factors affecting: the job outlook in household services; the impact of employment in this sector on family life and community activities; and the role of household services employment in the reconciliation of work and family life.

Job outlook

Sections 2 and 3 of the report suggested that there has been a steady increase in the demand for household services, with continuing upward trends, although local as well as national conditions affect the pace of this growth, and there are some important differences between the localities.

The workers' interviews confirmed a picture of strong employee confidence in the demand for labour and service provision, of a growing awareness of the importance of quality assurance, training, and professionalism in the sector, and of the development of role differentiation among workers delivering household services which offers some scope for career routes to emerge.

In childcare, the job outlook is promising, as national level policy interventions are creating significant numbers of new jobs and strengthening partnerships between the public, voluntary and private sectors. Meanwhile the private circumstances of many families continue to stimulate their demand for more varied and comprehensive services of high quality. Although a relatively low birth rate (in historical terms) means there is no projected growth in the child population, the low level of provision in the past provides a strong platform for continuing growth at least for a decade.

Job roles in the sector are already varied, and there is strong evidence that in the future a qualifications framework will be introduced which will support the development of career routes for childcare workers. Workers value their jobs in childcare, and recognise its social importance. If the problem of low pay, which characterises the whole workforce, can be overcome through professionalisation and accreditation, the job outlook is promising.

In eldercare, population projections are strong factors driving demand upwards, and at national, local and worker level there was recognition that the strong preference among elderly people for continued independent living in their own homes will continue to call for varied domiciliary service provision. Workers in this sector gave indications of a range of ways in which this demand is being met, through partnerships between local authorities and private, voluntary and co-operative enterprises, and through service development and delivery which is sensitive to the growing diversity of the older population. This sub-sector, too, suffers from low pay and an undervaluing of the services provided. Despite their low pay, workers providing domiciliary care to elderly people showed high levels of confidence in the importance and social value of the service they provided, which contributed to their self-esteem and job satisfaction. Government pressures on local authorities to develop services which will 'support people' and 'promote independence' can be expected to stimulate further the existing partnerships between private enterprise, voluntary organisations and public services for the elderly.

In domestic cleaning, household maintenance, and gardening, market research evidence and the investigations for this study all suggest strong potential for job growth. High levels of home ownership in the UK, rising standards of living for most population groups, and the increasing number of households in which all adults have paid work outside the home are

important stimuli in these employment sectors. More sophisticated marketing and service provision also offers scope for growth. On the negative side, workers in these sectors include some with very low pay and with jobs which are sometimes seen as menial or undesirable, particularly in domestic cleaning. The worker interviews nevertheless revealed that it is possible to develop domestic cleaning services and enterprises which are imbued with a customer-focused ethos and where differentiated job roles offer workers some scope for advancement or career development.

In food services and products the job outlook is more difficult to assess. Activity is certainly increasing in food processing and packaging, in retail sales of prepared foods, in the consumption of meals outside the home, and in home delivery of ready-to-eat foods. While some job growth is undoubtedly associated with this development, the increasingly important role of sophisticated technology in food production and distribution makes it impossible to assess the scope for job growth from the evidence available here. Many jobs in this sector may continue to be low-skill positions, with many part-time roles, perhaps increasingly occupied by workers at labour market entry or exit points or as 'stop-gaps' by those needing to supplement other sources of income (e.g. students) and looking for part-time casual work.

The impact of household services employment on family life and community activities

Employment in household services was not seen as disruptive of family life for most of those interviewed. Indeed, some of the women workers claimed to have chosen an occupation in this sector because of its compatibility with their family rsponsibilities. Undoubtedly the part-time nature of some of the work was a key factor, as were the specific hours worked, sometimes with a marked degree of personal choice, by the worker. Many women workers with children of school age value the opportunity to finish work in time to be at home when their children return from school, although it should be noted that after-school clubs were unlikely to have been available to most of the workers interviewed, and that this situation is changing. Most of the workers interviewed reported that women in their households played the more prominent role in performing domestic and family duties.

The exceptions to the above comments were those workers who committed long hours to their work role. The entrepreneurs among them recognised that running a business, particularly one in an early stage of development or one with high staff turnover was a more than full-time occupation, and this had imposed some stress in personal and family life. For some, the satisfaction gained from managing the business compensated for this situation, but time pressure was recognised as a problem for family life and a barrier to voluntary activity in the neighbourhood or community.

The role of household services in reconciling work and family life

Household services are used and valued by consumers because they permit them to pursue lifestyles which would otherwise be difficult or impossible. For working parents, childcare services are frequently an essential underpinning which resolves the tension between employment and family responsibilities. Similarly, hard pressed full-time workers may find that using the services of domestic cleaners or providers of other services such as ironing, shopping or meals, renders tolerable an otherwise over-demanding lifestyle. Market research suggests that the proportion of professional women who claim that they 'couldn't live without' some of the services they use is growing. For consumers of home care services, whether direct purchasers, or more likely, recipients of services paid for by local authorities, the care provided may offer a lifeline which enables them to remain independent.Alternatively, it may provide a means of support for their unpaid carers, usually

family members, who may be enabled to retain their own paid employment by virtue of the service provided. The Joseph Rowntree Foundation is sponsoring several new research projects, commencing in late 1999, into the situation of employed carers which will provide fuller evidence relating to this situation.

5. Conclusions and policy options

This final section of the report summarises the main conclusions which can be drawn from the evidence assembled in sections two to four, and outlines some of the options available to those guiding policy in a field where a wide range of policy actions have recently been developed and are in the process of implementation. Where policy interventions are still at the developmental stage or have still to be fully implemented, it is of course not yet possible to predict or assess their detailed outcomes.

There is a recognisable household services employment sector

The evidence in this report suggests that the concept of a 'household services sector' within the UK economy is a useful one. This is not only because there are significant similarities between the working conditions, workers' characteristics and service delivery mechanisms across the different sub-sectors identified, but also because many workers are employed across the boundaries between them. The boundaries dividing social and commercial services may appear rigid, for example in the areas of domestic cleaning or food products and services, but for those consuming them the services considered here can all play a role either in reconciling work and family life or in promoting independence and security.

There is significant and growing demand for household services

In all the sub-sectors of household services there is evidence that demand for the service concerned is growing. Key demographic and policy changes which are stimulating this demand were outlined in some detail in section two of the report. In addition, rising affluence among some groups, in part a result of more dual-earner households, is creating a situation in which many families are 'work-rich' but 'time-poor'. These families have the means to purchase household services and are also likely to be eager consumers of any new services which emerge - shopping services may be one example. There is a risk that demand from this group will create a polarised situation in which affluent households employ low paid workers from poor households to do tasks which those poor households have no chance of buying in themselves. This threat of social polarisation needs to be balanced against the benefits of creating employment which relatively low-skilled or unqualified persons can readily enter. If appropriate steps are taken to ensure that these are not 'dead-end' jobs, but jobs with decent pay, training opportunities providing for advancement and qualification and employment security, then the most damaging effects of such polarisation can potentially be avoided.

The household services sector contains a number of sharply sex-segregated occupations

A worrying aspect of the research findings is the extent to which occupations within household services remain sharply divided by sex. Care work, particularly with young children but also with the elderly, remains overwhelmingly female, and steps need to be taken to recruit more men into these occupations and to change parental and client attitudes where these are a barrier to male employment. The best way of achieving this aim will be to ensure that services are of high quality, are regularly accredited as such, and that the occupations within the sector are ones for which workers have been properly trained. There may also be scope for some direct targeting of male recruits into these occupations, and already New Deal appears to offer one policy mechanism for developing this approach. Given the level of anxiety among UK parents about child abuse, and the seriousness of such abuse when it occurs, it is essential that all possible steps are taken to ensure that only suitably qualified and motivated persons work within the childcare sector.

Quality issues are critically important within the household services sector

A concern with quality comes across in all the sub-sectors of household services. This is not to say that there is no poor quality provision, indeed by the admission of commentators working within the sector such provision exists and is damaging to it. However, a range of key organisations, and many of the individual workers and service providers contacted in the course of the research, emphasised that much importance is attached to adequate and accredited vocational training, to safeguards for vulnerable client groups, to the development of career development opportunities for workers in the sector and to the improvement of their pay and benefits. Some informants emphasised that in care occupations workers are placed in a position of trust, maybe working unsupervised, and are providing services to vulnerable individuals. Less serious, but still of commercial importance, anxiety about the trustworthiness of workers entering the home to work within it, particularly while clients are absent at work is a recognised barrier to business development in domestic cleaning and some other services, and therefore a proper concern of enterprises seeking to develop their domiciliary services.

In the field of childcare it is clear that significant steps are being taken towards creating a sound qualifications framework which will be understandable to all parties, ensure that workers are fully capable of performing their roles, and offer a ladder of opportunity for career development. This is to be welcomed, and the enthusiasm with which a wide range of bodies active in the childcare field have greeted these developments and contributed to them (e.g. Kids Club Network) bears witness to this.

A parallel development needs to occur in eldercare/ homecare, and some of the steps toward this have already been taken. For example, the trade union UNISON has been active in advocating the importance of high standards in home care. In 1990, NUPE[41] passed a resolution committing the union to 'seek to establish national standards for home care assistants'. The UNISON 'agenda on the home help/care service' includes a public commitment to 'more regular and comprehensive training for home/carers', 'the extension of inspection and complaints procedures to domiciliary care', 'equal opportunities policies and procedures across all community care services', and 'better pay and conditions for home helps/carers' (UNISON 1993). Furthermore, in a speech to the UNISON conference on the future of the Home Care Service, the Chair of UKHCA (UK Home Care Association) emphasised that UKHCA currently represents a range of voluntary and commercial sector home care providers, and is also beginning to bring statutory providers into membership:

> This breadth reflects shared aims of enhancing quality of provision. It reflects an increasingly common regulatory regime - currently through voluntary registration schemes - and soon we hope through statutory registration and inspection... Traditionally, the commercial sector of home care was based on provision of temporary staff, agencies rather than providers; the voluntary sector came with substantially unpaid staff and unmeasured outputs, through grant funding; and the statutory sector came from a highly structured workforce position. All three are changing in the face of pressure from purchasers and regulators. The contract culture has done much to redefine and enhance standards of care..... I believe it is right for both the statutory and voluntary sectors to share the same regulatory regime with the commercial sector.....standards are a matter of hard work and assurance of standards requires independent monitoring.... The

[41] National Union of Public Employees. In 1993 this union joined with NALGO (National Association of Local Government Employees) and COHSE (Confederation of Health Service Employees) in forming the single trade union, UNISON.

> unregulated history of home care and irresponsible management by some purchasers has given rise to some unacceptable standards of work and has encouraged some people into setting up home care businesses who are unfit to do so. Where these people are controlled by local authority purchase contracts, there is at least some attempt at quality assurance. Where they are dealing directly with the public, there is no assurance at all and the risks... are entirely unacceptable.. I am outraged ... that this Government ...are currently proposing to leave this most vulnerable area totally unregulated.
> (UKHCA 1999)

The detailed proposals in the Modernising Social Services White Paper to which this is a response include the plan to provide for the mandatory registration of only those home care provider organisations which contract with local authorities, and for the registration of individual workers who are qualified. The UKHCA's position on this latter proposal is that 'registration of individual workers should be implemented at the earliest opportunity, regardless of formal qualifications'. In its view, only this approach will provide a mechanism permitting the 'exclusion of unsuitable people from the workforce' (op.cit.). The Government's announcement (in a DTI Press Notice, 31 May 1999) of new proposals giving 'extra protection against unsuitable agency workers' for 'children, the elderly and the vulnerable' will go some way to achieving this aim, but still falls short of the UKHCA's full demands.

Within the household services sector, partnerships are in place involving government, local authorities, private enterprise, and the voluntary sector (including co-operatives)

An encouraging aspect of the research is the evidence that local authorities, private enterprises, voluntary sector groups, and in some cases co-operatives are already working collaboratively to deliver the range of services required. This development was set in train by the NHS and Community Care Act 1990, the full effects of which are outside the scope of this report. It is evident, however, that within localities partnerships have been established which are bearing fruit. Early Years Partnerships are key elements in the implementation of the National Childcare Strategy and are being enhanced by it. Similar partnerships have emerged in respect of domiciliary services for elderly and disabled people, and the recent government initiatives on 'prevention' provide a further stimulus to their development. A driving force in these partnerships is the funding regime, and as other commentators have pointed out, this has already brought significant changes to the role of the voluntary sector, reducing its reliance on volunteer labour.

Government recognises the importance of the sector and wants to develop flexible service delivery

There is ample indication in Government announcements that its aim is to provide flexible services in both childcare and eldercare which will support parental participation in the labour market, and enable elderly and vulnerable people to remain in their own homes. In particular, steps are being taken to reduce perverse incentives to move such people into residential care. All parts of the sector are affected by recent policy initiatives and legislation. Unsurprisingly, most attention has been given to those areas where individual welfare is at stake, but the government's aims for the labour market as a whole are for flexibility and competitiveness, which is seen as a mechanism for driving up standards and quality.

There are still gaps in household services provision

Some agencies have expressed concern about gaps in provision. Some of those involved in promoting childcare service development have indicated that the government's agenda for

both volume and quality may be over-ambitious, and that any failure to achieve its targets may be damaging, both in political terms and to the standing of the sector. Particular anxieties have been expressed about the impact Working Families Tax Credit will have, which some claim has been exaggerated by the Government, and about whether sufficient attention has been given to provision for children aged 0-2. Additionally, some organisations fear that insufficient training opportunities will be available for the large numbers of people expected to enter childcare occupations, and those already in it who are working without training. Particular anxieties were expressed about whether there exists sufficient training capacity, within colleges and training organisations, to deliver on the ambitious training targets which have been set. At present, the majority of childcare staff are untrained, and there is no statutory requirement for childminders, nannies or playworkers to be trained or qualified, although as indicated in Section 2, a training and qualifications framework is currently being developed in childcare. This has been deemed an urgent priority since

> At the moment there are many qualifications and training courses available and there is no consistency as to what employers and local authorities look for when recruiting staff or registering childcare providers.
> (*Early Education and Daycare*, UK Government Consultation Paper, 1999)

At least half of the 100,000 nannies working in Britain are estimated to be unqualified (PANN, 1996), and au pairs and students from the EC employed by families to help with childcare are not normally expected to have any qualifications or training. Although some official guidance for parents in choosing nannies has now been issued, this group could remain largely unaffected by the new proposals for training, and some groups have expressed concern at the decision not to establish statutory arrangements for nanny registration. The early years workforce has itself stressed the need for comprehensive, coherent and affordable training (HERA2, 1999) in a survey of childcare workers. A range of twenty subject-based training needs were identified, including child development, observing and assessing children, special needs, managing behaviour, first aid, equal opportunities, child protection, food hygiene, curriculum planning, management and IT skills. Until now, vocational training has been delivered through a confusing plethora of courses run by many different organisations and institutions. Even after the establishment of the new training framework, unpicking this situation will remain a challenging task. The future costs of training may also have been underestimated. Training courses are expensive (e.g. £800 for NVQ Level 2), given the low wages of staff, and the question of who should pay for such training is not fully resolved: it may not be realistic to expect either employers or workers to be able to absorb them.

Changes in the voluntary sector may need attention

Some quite serious concerns were expressed about the way a variety of changes were impacting on the voluntary sector. In the late 1990s, 'the UK voluntary sector has been almost static..... the middle ground [organisations with] (annual incomes between £100,000 and £10m) [are] being squeezed' (NCVO 1999). Furthermore, the introduction of the National Minimum Wage, and other policies including New Deal are expected to affect the shape of 'the voluntary sector human resource' in the near future.

> General charities employ 465,000 paid workers which represents 2.2 % of all employees ..... the equivalent of 319,000 full time workers. This ...highlights the ... contribution of part-time and casual workers which total 194,000 and 44,000 respectively.....One in ten organisations report that some of their paid workers take a salary sacrifice and four out of

> five organisations report that some paid staff worked additional hours on a voluntary basis'
> (NCVO, 1999: 5).

Investigating the impact of contracting care services on the voluntary sector, one study found that:

> in the larger voluntary organisations..... volunteers and voluntarism have long seemed irrelevant. ..... contracts have drawn organisations at the smaller end of the spectrum into a managerial culture and operational environment which undermine the volunteer as 'active citizen'. ..... There is a need for the development of coherent and integrated policies on the role of the service delivery voluntary sector which are underpinned by greater understanding of volunteering; which recognise that this part of the voluntary sector is essentially different from the 'not-for-profit' and private sector agencies; which value the contribution which volunteers make.... and which reflect the particular significance of voluntary activity to the millions of people who participate every year'
> (Russell and Scott, 1997: 9)

Particular concern was expressed about possible damage to volunteering arising from a perception that voluntary organisations which are heavily dependent on contract funding lose much of their independence, from a blurring of boundaries between volunteering and paid work, and from inadequacies in the support available to volunteers. Willingness to volunteer seems to be relatively widespread, but the practical opportunity to volunteer which turns this willingness into voluntary action depends upon the way voluntary organisations are managed and operate, and on potential volunteers having some free time which they can commit in this way.

There is scope to develop more small businesses and more stimuli to entrepreneurship may be needed, particularly in the private purchase sectors

Women are under-represented among the self-employed in the UK. One means of approaching this situation may be to focus attention on the development of small businesses and self-employment in the household services sector. Those operating small businesses, particularly those directed at private clients paying for services from their own resources, almost all noted that there was demand for their services which they were unable to meet, and there was evidence of rapid expansion in some small businesses. This suggests that initiatives to promote entrepreneurial activity in this area could meet with considerable success, and in seeking to promote female entrepreneurship, local and national agencies may find it helpful to focus on the household services sector and to find ways of drawing on the expertise and experience within it, possibly through the establishment of networks of co-operating small businesses.

Household services are the essential underpinnings of family friendly employment policies

The development of family-friendly employment is on the agenda of the UK government, and a number of its initiatives in the childcare and eldercare fields are explicitly identified as elements in its achievement. Family friendly employment means treating employees' needs outside the workplace as the proper concern of employing organisations and putting in place policies to assist employees in achieving a satisfactory balance between work and family life. Household services have a key role to play in carrying forward this policy objective, and while childcare has a particularly high profile, all the other sub-sectors are also relevant to it.

Support services for elderly and vulnerable adults are critically important means of enabling many working carers to continue in employment, and even in those households whose members have no such demands on their time, the availability of cleaning, shopping, laundry and home maintenance services can make an important difference to the quality of life where household members work full-time outside the home.

At EU level, the importance of a 'high quality labour force' and of the maintenance of 'a comprehensive social protection system' is already recognised. Indeed, the European Commission has already identified as a priority area for policy development

> the development of support for care work, both childcare and elder care, including the provision of direct care services, in order to facilitate the further integration of women into the economy and to ensure that the move away from sole dependence on unpaid labour leads to an improvement and not a deterioration in the quality of care.
> (1998: 51)

This report offers ample evidence that within the UK policies are being developed and enterprises are operating which are supportive of this objective. There remain gaps in provision and activity, and concerns about quality issues, for employees in household services and for consumers of services. Opportunities exist for future employment growth, and many of the key issues are already being addressed. It is hoped that in bringing together evidence about the full range of household services, and the policy context in which they have developed, this report can contribute to better understanding of the way in which such objectives can be achieved.

Bibliography

This bibliography contains all documentary sources consulted in preparing the report, except those listed in Section 2, Appendix 1. In addition to the General References, in which all directly cited sources appear, other references have been grouped as follows:

- General References and references cited in the text of the report
- Care of Family Members (general)
- Childcare
- Eldercare
- Care of disabled people
- Food and Catering
- Voluntary Sector
- Private/Independent Sector
- Employment and Labour Market Issues
- Household Maintenance and Gardening

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Appendices

Appendix 1, Section 1: A note on the Labour Force Survey and the definition of Household Services

Appendix 1, Section 2: References to Statistical Sources

Appendix 1, Section 3: Statistical Tables and Charts

Appendix 2: Key informants contacted in the preparation of the report

Appendix 1, Section 1: A note on the Labour Force Survey and the definition of Household Services

The UK Labour Force Survey

The Labour Force Survey is a continuous sample survey carried out throughout the United Kingdom. Each quarter's LFS sample of 60 000 households is made up of 5 waves of 12 000 households. Each wave is interviewed in 5 successive quarters, so that there is an 80% overlap in the samples for successive quarters.

A systematic unclustered sample design is used for the survey so is representative of the whole of the UK. Because the Labour Force Survey is a sample survey, all figures are grossed up by weighting each case to what that case represents, using official population statistics.

Estimates below 10 000 have a relative standard error of 20% and are therefore unreliable. Data just over 10 000 may also be unreliable.

The data used in this study relate to Great Britain, rather than the UK, because questions on 'Ethnic Origin' are not applied to respondents living in Northern Ireland. Thus, to ensure comparability and consistency, any set of tables that include 'Ethnic Origin' as a category are issued for Great Britain only.

Definitions listed in the LFS

***Employees*:** The division between employees and self-employed is based on survey respondents' own assessment of their employment status.
***Employment*:** People aged 16 or over who did some paid work in the reference week (whether as an employee or self employed); those who had a job that they were temporarily away from (on holiday, for example); those on government supported training and employment programmes, and those doing unpaid family work.
***Ethnic origin*:** Census of Population definition.
***Full time/Part time*:** Based on self-assessment. People on government schemes who are at college in the survey reference week are classified as part time.
***Temporary Employees*:** Defined as those employees who say their main job is non permanent in one of the following ways; fixed period contract; agency temping; casual work; seasonal work; other temporary work.

The *Household Services* sector has been defined for the purposes of this study by combining the following Standard Occupational Classifications (SOC) codes:

Care - General
370 matrons, houseparents
640 assistant nurses & auxiliaries
644 care assistants & attendants

Child Care
650 nursery nurses
651 playgroup leaders
659 other childcare occupations

Cleaning
670 domestic housekeepers etc
673 launderers, dry cleaners etc
958 cleaners, domestics

Gardening and Window Cleaning
594 Gardeners, grounds
956 Window Cleaners

Catering
174 restaurant & catering managers
175 publicans, club stewards etc
620 chefs, cooks
621 waiters, waitresses
622 bar staff
952 Kitchen porters
953 catering assistants

Note that all Labour Force Survey (LFS) data are based on SOC codes for those employed in Great Britain for the specified year (Spring 1992 and Spring 1998). In the LFS occupations are identified and aggregated with reference to similarity of qualifications, training, skills and experience associated with the performance and tasks of the job. Not all definitions can be expected to relate to the specific job in a particular place or locality. A full description of each of these occupational categories follows.

Standard Occupational Classifications used in the definition of household services

The care sector

370 matrons, houseparents
Matrons and houseparents organise and control the work of day or residential nurseries and residential homes for children or the elderly and supervise the care and control of young people in homes, schools or institutions for young offenders.

640 assistant nurses and nursing auxiliaries
Assistant nurses and nursing auxiliaries assist doctors, nurses and other health professionals by providing nursing care for the sick and injured and others in need of such care.

644 care assistants and attendants
Care assistants and attendants attend to the personal needs and comforts of residents in establishments for the elderly and infirm.

650 nursery nurses
Nursery Nurses care for children in day or residential nurseries, children's homes, maternity units and similar establishments.

651 playgroup leaders
Playgroup leaders supervise play and other activities for pre-school age children.

659 other childcare occupations
Workers in this unit group perform a variety of childcare and related occupations not elsewhere classified in MINOR GROUP 65*: Childcare and related occupations.

* *Minor Group 65 – Child Care and related occupations: Child care and related workers supervise play and other activities for pre-school age children assist teachers with their non teaching duties and care for children in day or residential nurseries children's homes and private households*
650 nursery nurses, 651 playgroup leaders, 652 educational assistants, 659 other childcare and related occupations etc.

The cleaning sector

670 domestic housekeepers etc
Domestic housekeepers and related workers run private households and perform domestic tasks on behalf of their employer, supervise the activity of dining room and other domestic staff.

673 launderers, dry cleaners etc
Launderers, dry cleaners and pressers supervise and undertake the washing, dry cleaning, ironing and pressing of household and other linen, carpets and other articles.

958 cleaners, domestics
Cleaners and domestics clean interiors of private houses, shops, hotels, schools, offices, other buildings, ships, aircrafts, trains and road vehicles and wash and polish vehicle exteriors.

Food sector

174 restaurant and catering managers
Restaurant and catering managers plan, direct and co-ordinate the catering services and resources of hotels, hospitals, schools, clubs and restaurants

175 publicans, innkeepers and club stewards
Publicans, innkeepers and club stewards plan, organise, direct and co-ordinate the activities and resources of non-residential and residential public houses and the bar and catering facilities at non-residential clubs.

620 chefs, cooks
Chefs and cooks plan menus and prepare, season and cook foods in hotels, restaurants, clubs, private households and other establishments

621 waiters, waitresses
Waiters and waitresses serve food and beverages in hotels, clubs, restaurants and other establishments.

952 kitchen porters, hands
Kitchen porters and hands assist other kitchen and service staff in the preparation of food and perform various cleaning, fetching and carrying tasks.

953 counter hands, catering assistants
Counter hands and catering assistants serve food and beverages from counters of self-service restaurants, cafes and other eating establishments.

The maintenance sector

594 gardeners, groundspersons
This includes gardeners and groundsmen / groundswomen who cultivate flowers, trees, shrubs and other plants in public and private gardens, construct artificial features to improve the appearance of existing terrain, cut and lay turf and maintain areas for sports and recreation.

956 window cleaners
Window cleaners wash and polish windows and other glass fittings.

Source: *Standard Occupational Classifications, Volume 1, First Edition, February 1990, Structure and Definition of Major, Minor and Unit Groups, Employment Department Group, Office of Population Censuses and Surveys, London, HMSO*

Definitions used in Department of Health statistics

***Day Nurseries*:** Look after under 5's for a full working day, children may attend full or part time depending on the parents' needs.
***Childminders*:** Look after children aged under 5 and school age outside school hours and in the holidays. Provision is on domestic premises, usually the childminders' own home. Parents and childminders negotiate terms and conditions.
***Playgroups*:** Playgroups provide sessional care for children aged 3-5 providing learning experiences through structured play. Most playgroups are run by groups of parents on a self-help basis, sometimes with a few paid staff. A playgroup session is one that runs for a morning or afternoon and lasts no longer than 4 hours.
***Out of school clubs*:** Provide sessional care before and after school.
***Holiday schemes*:** Provide care all day during school holidays. A holiday scheme is counted once for each holiday period during which it operates.

Appendix 1, Section 2: References to Statistical Sources

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Appendix 1, Section 3: Statistical Tables and Charts

Tables

Table 1: *Employees in Childcare in Great Britain: 1992 and 1998 by occupation and by full and part-time employment status*

	1992	%	1998	%	1992-1998 % change
	Estimated numbers		*Estimated numbers*		
Nursery Nurses	**68300**	**100**	**109500**	**100**	**+60**
Full-time	50500	66	70700	65	+40
Part-time	17800	34	38800	35	+118
Playgroup Leaders	**21700**	**100**	**25200**	**100**	**+16**
Full-time	1400	8	1600	6	+14
Part-time	20300	92	23600	94	+16
Other Childcare Occupations	**207100**	**100**	**260200**	**100**	**+25**
Full-time	53100	26	63600	24	+20
Part-time	154000	74	196600	76	+28
Total LFS childcare	**297100**	**100**	**394900**	**100**	**+32**
Full-time	105000	35	135900	34	+29
Part-time	192100	65	259000	66	+35

Source: *UK LFS 1992, 1998.*

Table 2: *Employees in Childcare in Great Britain: 1992 and 1998 by occupation and by ethnicity*

	1992	%	1998	%	1992-1998% change
	Estimated numbers		*Estimated numbers*		
Nursery Nurses	**70400**	**100**	**109500**	**100**	**+56**
White	68100	97	104500	95	+53
Non White	2300	3	5000	5	+117
Playgroup Leaders	**21700**	**100**	**25200**	**100**	**+16**
White	21400	99	24400	97	+14
Non White	300	1	800	3	+167
Other Childcare Occupations	**207700**	**100**	**260200**	**100**	**+25**
White	203200	98	250100	96	+23
Non White	4500	2	10100	4	+124
Total LFS childcare	**299800**	**100**	**394900**	**100**	**+32**
White	292700	98	379000	96	+29
Non White	7100	2	15900	4	+124

Source: *UK LFS 1992, 1998*

Table 3: Employees in Childcare in Great Britain: 1992 and 1998 by occupation and by permanent and non-permanent employment status

	1992	**%**	**1998**	**%**	**1992-1998 % change**
	Estimated numbers		*Estimated numbers*		
Nursery Nurses	**65000**	**100**	**104900**	**100**	**+61**
Permanent	55700	86	90400	86	+62
Non Permanent	9300	14	14500	14	+56
Playgroup Leaders	**19100**	**100**	**22500**	**100**	**+18**
Permanent	17800	93	21000	93	+18
Non Permanent	1300	7	1500	7	+15
Other Childcare Occupations	**154500**		**187100**	**100**	**+21**
Permanent	137400	89	161400	86	+17
Non Permanent	17100	11	25700	14	+50
Total LFS childcare	**238600**	**100**	**314500**	**100**	**+32**
Permanent	210900	88	272800	87	+29
Non Permanent	27700	12	41700	13	+51

Source: *UK LFS 1992, 1998.*

Table 4: *Employees in Care in Great Britain: 1992 and 1998 by occupation and by full and part-time employment status*

	1992	***%***	***1998***	***%***	***1992-1998 % change***
	estimated numbers		*estimated numbers*		
Assistant nurses & auxiliaries	**189010**	**100**	**147800**	**100**	**-22**
Full-time	85810	43	69330	42	-19
Part-time	103200	57	78470	58	-24
Care assistants & attendants	**294180**	**100**	**504730**	**100**	**+72**
Full-time	117650	47	210500	47	+79
Part-time	176530	53	294230	53	+67
Total LFS care	**483190**	**100**	**652530**	**100**	**+35**
Full-time	203460	42	279830	43	+38
Part-time	279730	58	372700	57	+33

Source: *UK LFS 1992, 1998*

Table 5: *Employees in Care in Great Britain: 1992 and 1998 by occupation and by ethnicity*

	1992	**%**	**1998**	**%**	**1992-1998 % change**
	Estimated numbers		*Estimated numbers*		
Assistant nurses & auxiliaries	**189810**	**100**	**147800**	**100**	**-22**
White	178270	94	140070	93	-21
Non White	11550	6	7730	7	-33
Care assistants & attendants	**298300**	**100**	**505070**	**100**	**+69**
White	284220	95	477640	95	+68
Non White	14090	5	27430	5	+95
Total LFS care	**488110**	**100**	**652870**	**100**	**+34**
White	462490	95	617710	95	+34
Non White	25640	5	35160	5	+37

Source: *UK LFS 1992, 1998*

Table 6: *Employees in Care in Great Britain: 1992 and 1998 by occupation and by permanent and non permanent employment status*

	1992	**%**	**1998**	**%**	**1992-1998 % change**
	Estimated numbers		*Estimated numbers*		
Assistant nurses & auxiliaries	**187080**	**100**	**145840**	**100**	**-22**
Permanent	177550	95	128290	88	-28
Non Permanent	9530	5	17550	12	+84
Care assistants & attendants	**286760**	**100**	**489380**	**100**	**+71**
Permanent	269500	92	450620	90	+67
Non Permanent	17260	6	38760	8	+125
Total LFS care	**473840**	**100**	**635220**	**100**	**+34**
Permanent	447050	94	578910	91	+29
Non Permanent	26790	6	56310	9	+110

Source: *UK LFS 1992, 1998*

Table 7: *Local Authority supported residents by type of accommodation, 1994-1998, England*

Type of accommodation	**1994**	**1995**	**1996**	**1997**	**1998**	**% change 1994-98**
Local Authority staffed homes	70440	67330	61940	58750	53540	-24
Independent residential homes (registered)	48710	70150	91220	111530	119420	+145
Independent nursing homes (registered)	25150	43240	57250	66060	71660	+185
ALL staffed homes	144310	180720	210410	236340	244620	+70
Unstaffed and other accommodation	4420	5150	5140	5800	5970	+35
TOTAL	148730	185870	215550	242140	250590	+69

Source: *Community Care Statistics 1998: Residential personal social services for Adults, England, December 1998, Department of Health, http://www.doh.gov.uk, Table S1, Local Authority supported residents by type of accommodation and client group, 1994 to 1998.*

Note: *Local Authority supported residents excludes residents in unstaffed or other non-registered accommodation. For 1994 to 1997 figures include people aged under 95 in homes for elderly people.*

Table 8: *Employees in Catering in Great Britain: 1992 and 1998 by occupation and by sex*

	1992	***%***	***1998***	***%***	***1992-1998 % change***
	estimated numbers		*estimated numbers*		
Restaurant & catering managers	**124750**	**100**	**140210**	**100**	**+12**
Male	63890	51	76650	55	+20
Female	60860	49	63560	45	+4
Publicans, club stewards etc	**86540**	**100**	**74200**	**100**	**-14**
Male	53700	62	44140	59	-18
Female	32840	38	30060	41	-8
Chefs, cooks	**244050**	**100**	**248570**	**100**	**+2**
Male	95210	39	120280	48	+26
Female	148840	61	128290	52	-14
Waiters, waitresses	**171720**	**100**	**205608**	**100**	**+20**
Male	50480	23	50788	25	+1
Female	121240	77	154820	75	+28
Bar staff	**170808**	**100**	**188260**	**100**	**+10**
Male	50478	30	69900	37	+38
Female	120330	70	118360	63	-2
Kitchen porters	**168030**	**100**	**152170**	**100**	**-9**
Male	34240	20	51460	34	+50
Female	133790	80	100710	66	-25
Catering assistants	**194200**	**100**	**232308**	**100**	**+20**
Male	23630	12	41018	18	+74
Female	170570	88	191290	82	+12
Total LFS catering	**1160100**	**100**	**1241330**	**100**	**+7**
Male	371630	32	454240	37	+22
Female	788470	69	787090	63	+1

Source: *UK LFS 1992, 1998*

Table 9: *Employees in Catering in Great Britain: 1992 and 1998 by occupation and by full and part-time employment status*

	1992	**%**	**1998**	**%**	**1992-1998 % change**
	Estimated numbers		*Estimated numbers*		
Restaurant & catering managers	**124750**	**100**	**140210**	**101**	**+12**
Full-time	109520	88	126550	90	+16
Part-time	15230	12	13660	11	-10
Publicans, club stewards etc	**86160**	**100**	**74200**	**100**	**-14**
Full-time	81670	95	70850	95	-13
Part-time	4490	5	3350	5	-25
Chefs, cooks	**240970**	**100**	**248580**	**100**	**+3**
Full-time	153840	64	169620	68	+10
Part-time	87130	36	78960	32	-9
Waiters, waitresses	**157210**	**100**	**205170**	**100**	**+31**
Full-time	51720	33	50120	28	-3
Part-time	105490	67	155050	72	+47
Bar staff	**170350**	**100**	**188260**	**100**	**+11**
Full-time	45010	26	48770	24	+8
Part-time	125340	74	139490	76	+11
Kitchen porters	**166170**	**100**	**152180**	**100**	**-8**
Full-time	36230	22	44900	30	+24
Part-time	129940	78	107280	77	-17
Catering assistants	**191670**	**100**	**232300**	**100**	**+21**
Full-time	57080	30	66340	29	+16
Part-time	134590	70	165960	69	+23
Total LFS Catering	**1140000**	**100**	**1240000**	**100**	**+9**
Full-time	535070	47	577140	47	+8
Part-time	602210	53	663750	54	+10

Source: UK LFS 1992, 1998.

Table 10: *Employees in Catering in Great Britain: 1992 and 1998 by occupation and by ethnicity*

	1992	**%**	**1998**	**%**	**1992-1998 % change**
	Estimated numbers		*Estimated numbers*		
Restaurant & catering managers	**124760**	**100**	**140210**	**100**	**+12**
White	106470	85	117960	84	+11
Non White	18290	15	22250	16	+22
Publicans, club stewards etc	**86540**	**100**	**74200**	**100**	**-14**
White	86170	99	72500	98	-16
Non White	370	1	1700	2	+359
Chefs, cooks	**227400**	**100**	**236640**	**100**	**+4**
White	216340	95	225180	95	+4
Non White	11060	5	11460	5	+4
Waiters, waitresses	**156950**	**100**	**205600**	**100**	**+31**
White	140320	89	189650	92	+35
Non White	16630	11	15950	8	-4
Bar staff	**170800**	**100**	**187930**	**100**	**+10**
White	167630	98	184660	98	+10
Non White	3170	2	3270	2	+3
Kitchen porters	**168020**	**100**	**152180**	**100**	**-9**
White	154970	92	138890	91	-10
Non White	13050	8	13290	9	+2
Catering assistants	**194200**	**100**	**232300**	**100**	**+20**
White	182540	94	210340	91	+15
Non White	11660	6	21960	9	+88
Total LFS catering	**1128670**	**100**	**1229060**	**100**	**+9**
White	1054440	93	1139180	93	+8
Non White	74230	7	89880	7	+21

Source: *UK LFS 1992, 1998*

Table 11: *Employees in Catering in Great Britain: 1992 and 1998 by occupation and by permanent and non-permanent employment status*

	1992	**%**	**1998**	**%**	**1992-1998% change**
	Estimated numbers		*Estimated numbers*		
Restaurant & catering managers	**66430**	**100**	**80150**	**100**	**+21**
Permanent	64530	97	79400	99	+23
Non Permanent	1900	3	750	1	-61
Publicans, club stewards etc	**44590**	**100**	**28680**	**100**	**-36**
Permanent	43420	97	28230	99	-35
Non Permanent	1170	3	450	1	-62
Chefs, cooks	**227400**	**100**	**236640**	**100**	**+4**
Permanent	216340	95	225180	95	+4
Non Permanent	11060	5	11460	5	+4
Waiters, waitresses	**154510**	**100**	**203820**	**100**	**+32**
Permanent	129770	84	171410	84	+32
Non Permanent	24740	16	32410	16	+31
Bar staff	**166780**	**100**	**185020**	**100**	**+11**
Permanent	141830	85	164760	89	+16
Non Permanent	24950	15	20260	11	-19
Kitchen porters	**163040**	**100**	**150930**	**100**	**-7**
Permanent	142290	87	134040	89	-6
Non Permanent	20750	13	16890	11	-19
Catering assistants	**189380**	**100**	**228230**	**100**	**+21**
Permanent	170300	89	207440	90	+22
Non Permanent	19080	10	20790	9	+9
Total LFS catering	**1012130**	**100**	**1113470**	**100**	**+10**
Permanent	908480	90	1010460	91	+11
Non Permanent	103650	10	103010	9	-1

Source: *UK LFS 1992, 1998*

Table 12: *Employees in Cleaning in Great Britain: 1992 and 1998 by occupation and by sex*

	1992	%	1998	%	1992-1998% change
	Estimated numbers		*Estimated numbers*		
Domestic housekeepers	**13340**	**100**	**21840**	**100**	**+64**
Male	1100	8	1820	8	+65
Female	12240	92	20020	92	+64
Launderers, dry cleaners	**44140**	**100**	**44750**	**100**	**+1**
Male	13840	31	18420	41	+3
Female	30300	69	26330	59	-13
Cleaners, domestics	**767550**	**100**	**685780**	**100**	**-11**
Male	92890	12	129030	19	+39
Female	674660	88	556750	81	-17
Total LFS care	**825030**	**100**	**752370**	**100**	**-9**
Male	107830	13	149270	20	+8
Female	717200	87	603100	80	-16

Source: *UK LFS 1992, 1998*

Table 13: *Employees in Cleaning in Great Britain: 1992 and 1998 by occupation and by full and part-time employment status*

	1992	%	1998	%	1992-1998% change
	Estimated numbers		*Estimated numbers*		
Domestic housekeepers	**13330**	**100**	**21830**	**100**	**+64**
Full-time	5830	45	9760	45	+67
Part-time	7500	55	12070	55	+61
Launderers, dry cleaners	**43410**	**100**	**44750**	**100**	**+3**
Full-time	26990	60	25610	57	-5
Part-time	16420	40	19140	43	+17
Cleaners, domestics	**766310**	**100**	**685780**	**100**	**-11**
Full-time	634940	19	548130	20	-14
Part-time	131370	81	137650	80	+5
Total LFS care	**823050**	**100**	**752360**	**100**	**-9**
Full-time	667760	81	583500	78	-13
Part-time	155290	19	168860	22	+9

Source: *UK LFS 1992, 1998*

Table 14: *Employees in Cleaning in Great Britain: 1992 and 1998 by occupation and by ethnicity*

	1992	**%**	**1998**	**%**	**1992-1998 % change**
	Estimated numbers		*Estimated numbers*		
Domestic housekeepers	**13330**	**100**	**21840**	**100**	**+64**
White	13000	98	20540	94	+58
Non White	330	2	1300	6	+294
Launderers, dry cleaners	**44150**	**100**	**44750**	**100**	**-0.7**
White	38430	87	38150	85	-1
Non White	5720	13	6600	15	15
Cleaners, domestics	**767550**	**100**	**685780**	**100**	**-11**
White	739070	96	659830	96	-11
Non White	28480	4	25960	4	-9
Total LFS cleaning	**825030**	**100**	**752370**	**100**	**-9**
White	790500	96	718520	96	-9
Non White	34530	4	33860	4	-2

Source: *UK LFS 1992, 1998*

Table 15: *Employees in Cleaning in Great Britain: 1992 and 1998 by occupation and by permanent and non permanent employment status*

	1992	***%***	***1998***	***%***	***1992-1998% change***
	estimated numbers		*estimated numbers*		
Domestic housekeepers	**11648**	**100**	**21040**	**100**	**81**
Permanent	11648	100	20620	100	77
Non Permanent	0	0	420	0	na
Launderers, dry cleaners	**39930**	**100**	**40620**	**100**	**2**
Permanent	36350	91	38360	93	6
Non Permanent	3580	9	2260	7	-37
Cleaners, domestics	**722220**	**100**	**588560**	**100**	**-19**
Permanent	677860	94	44450	93	-7
Non Permanent	44360	6	633010	7	0
Total LFS cleaning	**773800**	**100**	**694670**	**100**	**-4**
Permanent	725860	94	647540	94	-5
Non Permanent	47940	6	47130	6	-2

Source: *UK LFS 1992, 1998*

Table 16: *Employees in Gardening and Window Cleaning in Great Britain: 1992 and 1998 by occupation and by sex*

	1992	***%***	***1998***	***%***	***1992-1998 % change***
	Estimated numbers		*Estimated numbers*		
Gardeners and Gardening	**127050**	**100**	**138320**	**100**	**+9**
Male	120530	95	132750	96	+10
Female	6520	5	5570	4	-15
Window Cleaning	**23600**	**100**	**27990**	**100**	**+19**
Male	22910	97	27990	100	+22
Female	690	3	0	0	--

Source: *UK LFS 1992, 1998*

Table 17: *Employees in Gardening and Window Cleaning in Great Britain: 1992 and 1998 by occupation and by full and part-time employment status*

	1992	**%**	**1998**	**%**	**1992-1998 % change**
	Estimated numbers		*Estimated numbers*		
Gardeners and Gardening	**119984**	**100**	**138320**	**100**	**+15**
Full-time	101142	84	110850	80	+10
Part-time	18842	16	27470	20	+46
Window Cleaning	**23600**	**100**	**27990**	**100**	**+19**
Full-time	18470	78	19600	70	+6
Part-time	5130	22	8390	30	+64

Source: *UK LFS 1992, 1998*

Table 18: *Employees in Gardening and Window Cleaning in Great Britain: 1992 and 1998 by occupation and by ethnicity*

	1992	**%**	**1998**	**%**	**1992-1998 % change**
	Estimated numbers		*Estimated numbers*		
Gardeners and Gardening	**127060**	**100**	**138310**	**100**	**+9**
White	125990	99	136800	99	+9
Non White	1070	1	1510	1	+41
Window Cleaning	**23602**	**100**	**27989**	**100**	**+19**
White	23012	98	27076	97	+18
Non White	590	2	913	3	+55

Source: *UK LFS 1992, 1998*

Table 19: *Employees in Gardening in Great Britain: 1992 and 1998 by occupation and by permanent and non permanent employment Status*

	1992	**%**	**1998**	**%**	**1992-1998 % change**
	Estimated numbers		*Estimated numbers*		
Gardeners and Gardening	**78950**	**100**	**91091**	**100**	**+15**
Permanent	70750	90	82790	91	+17
Non Permanent	8200	10	8301	9	+1

Source: *UK LFS 1992, 1998*
Note: *Data for Window Cleaners is not available*

Table 20: *Number of businesses in catering and allied trades, 1992 - 1996, Great Britain*

Year	**1992**	**1993**	**1994**	**1995**	**1996**
000's	112	110	109	111	110

Source: *Business Monitor Report catering and allied trades 1991, Table 1, p8. Sector Review, Services Trades, 1996, Table 55.00, p8. (HMSO, 1991, 1996)*

Table 21: *Total Turnover in catering and allied trades from 1982 to 1996, Great Britain*

Year	**1982**	**1984**	**1986**	**1988**	**1990**	**1992**	**1994**	**1996**
£'000m	15	17	21	25.5	30.5	34	38	43

Source: Business Monitor Report catering and allied trades 1991, Table 1, p8. Sector Review, Services Trades, 1996, Table 55.00, p8 (HMSO, 1991, 1996)

Table 22: *Number of businesses in Canteens and Catering - 1992-1996, Great Britain*

Year	**1992**	**1993**	**1994**	**1995**	**1996**
000's	2765	2830	2910	3580	4130

Source: Business Monitor Report catering and allied trades 1991, Table 1, p8. Sector Review, Services Trades, 1996, Table 55.51, 8 (HMSO, 1991, 1996)

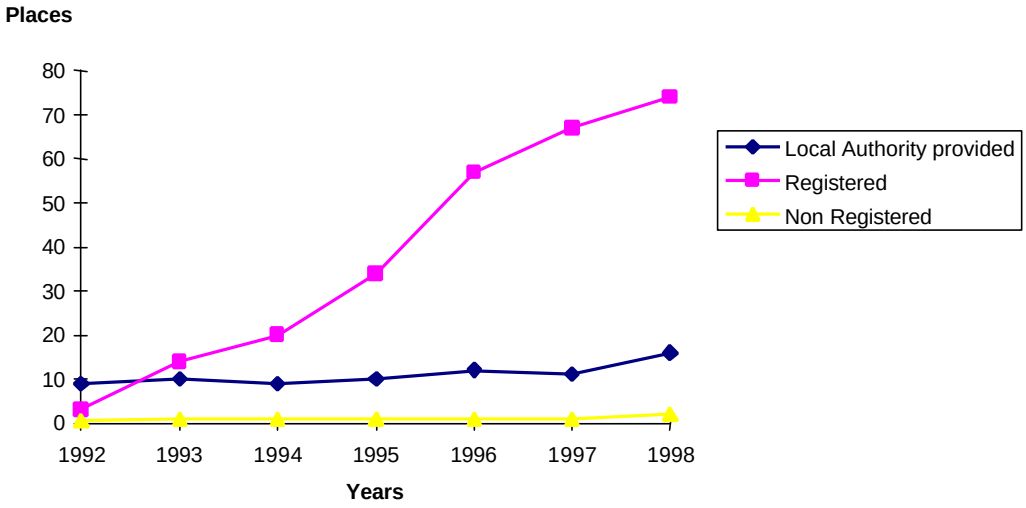
Table 23: *Average Hourly Pay of Employees in all sub sectors in Great Britain: 1993-1998*

Average Hourly Wage Rates, 1993-1998 (£.p)

	1993	1994	1996	1998	1993-1998 % change
Elderly Care Occupations					
Matrons, houseparents	4.67	6.50	7.05	7.25	55.2
Assistant nurses & auxiliaries	5.09	5.26	4.88	5.42	6.5
Care assistants & attendants	4.56	4.04	4.44	4.54	-0.4
Child Care Occupations					
Nursery nurses	5.73	5.61	5.04	4.88	-14.8
Playgroup leaders	3.47	3.77	2.89	3.31	-4.6
Other childcare occupations	3.70	3.44	3.67	4.14	11.9
Cleaning Occupations					
Domestic housekeepers etc	4.00	3.86	3.78	4.64	16.0
Launderers, dry cleaners etc	3.76	3.19	4.61	4.15	10.4
Cleaners, domestics	3.72	3.87	3.71	4.07	9.4
Catering Occupations					
Restaurant & catering managers	5.31	5.74	10.05	6.32	19.0
Publicans, club stewards etc	3.88	4.12	4.18	4.70	21.1
Chefs, cooks	4.20	4.39	4.79	4.59	9.3
Waiters, waitresses	3.66	4.25	3.41	3.68	0.5
Bar staff	3.71	3.88	3.50	3.65	-1.6
Kitchen porters	3.44	3.51	3.27	4.19	21.8
Catering assistants	3.72	3.91	3.61	3.84	3.2
Maintenance Occupations					
Gardeners, groundspersons	4.12	4.31	4.74	5.47	32.8
Window cleaners	3.77	1.44	3.31	2.66	-29.4
All Household Services	3.92	3.89	3.85	4.13	5.4
All Occupations	6.73	6.82	7.42	7.80	15.9

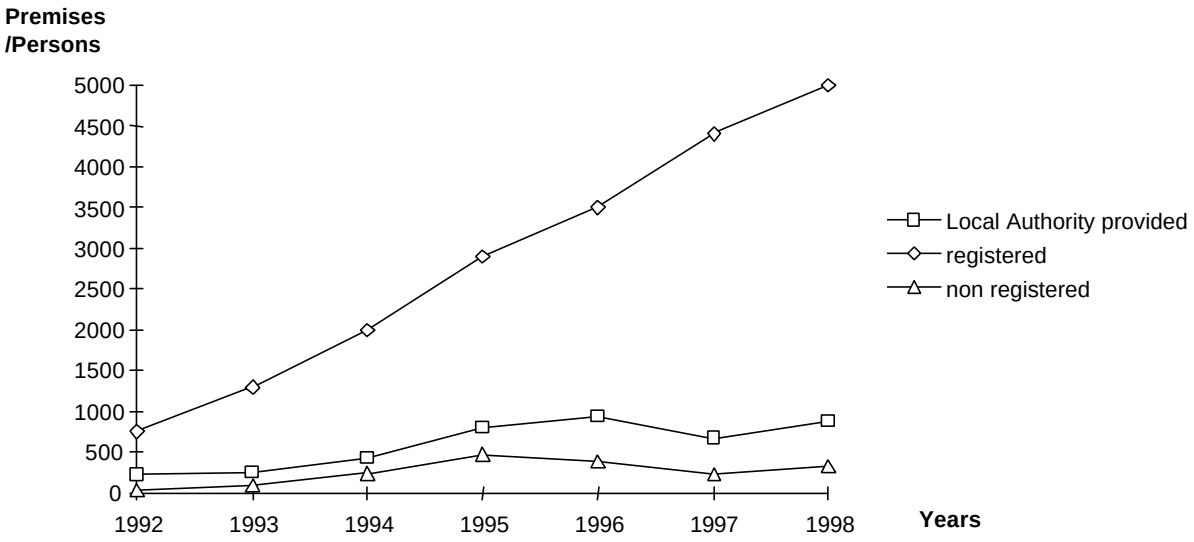
Source: *UK LFS 1993, 1998*

Chart 1: *Places for five to seven year olds; out of school clubs, 1992-1998, England*



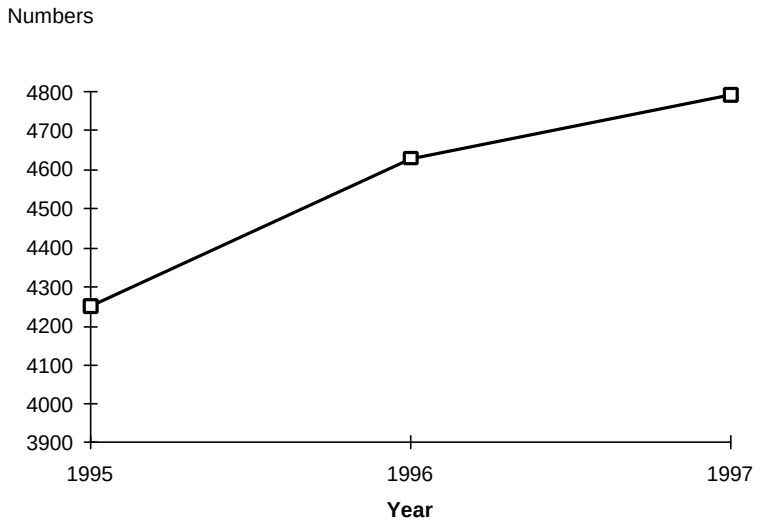
Source: *1992 - 1997: Children's Day Care Facilities 1997- p.16 Table 5, 1998: Statistics of Education: Child day care facilities at 31st March 1998, England, DfEE, London: Children's day care facilities 1998 p.19, table 6.*

Chart 2: *Holiday Schemes providing day care for five to seven year olds: by number of premises or persons providing care, 1992-1998, England*



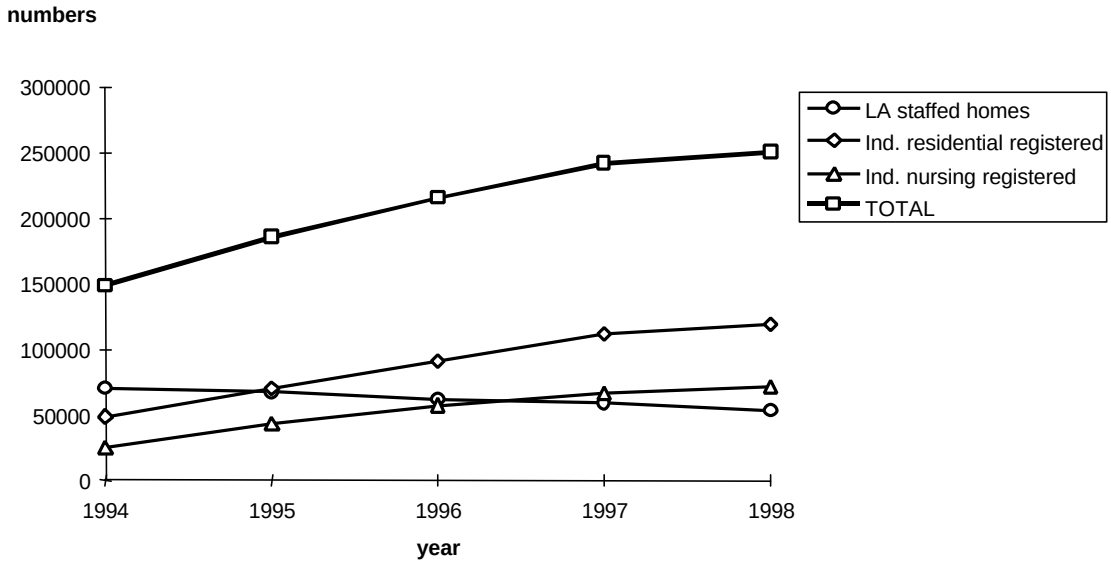
Source: *1992 - 1997: Children's Day Care Facilities 1997- p.16 Table 5, 1998: Statistics of Education: Child day care facilities at 31st March 1998, England, DfEE, London: Children's day care facilities 1998 p.19, table 6.*

Chart 3: *Day centres providing care services purchased or provided by local authorities (number of centres), 1995-1997, England*



Source: *Community Care Statistics-Day and Domiciliary Personal Social Services for Adults, England, Table A3.1, (Department of Health, 1997).*

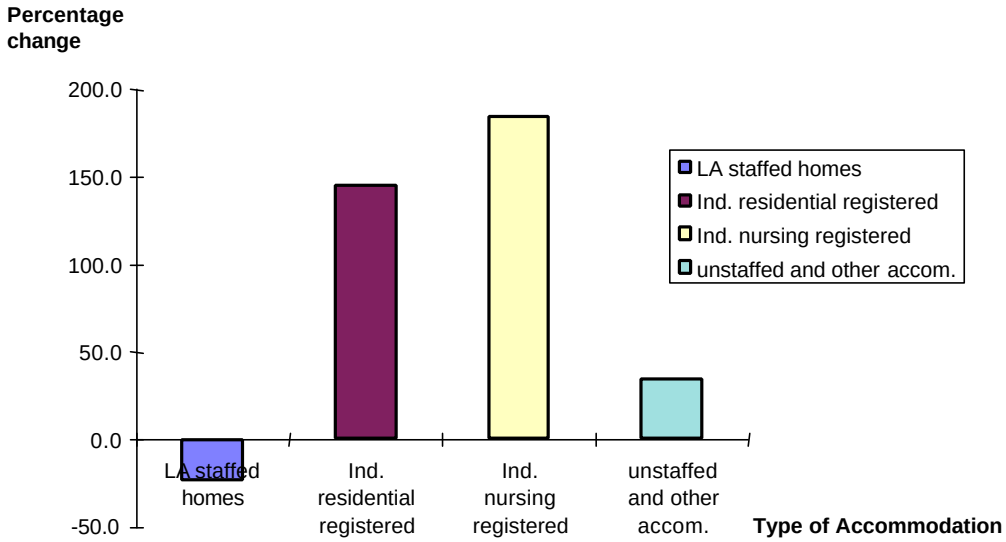
Chart 4: *Local Authority supported residents by type of accommodation 1994-1998, England*



Source: *Community Care Statistics 1998: Residential personal social services for Adults, England, December 1998, Department of Health, http://www.doh.gov.uk, Table S1, Local Authority supported residents by type of accommodation and client group, 1994 to 1998.*

Note: *Local Authority supported residents excludes residents in unstaffed or other non-registered accommodation. For 1994 to 1997 figures include people aged under 95 in homes for elderly people.*

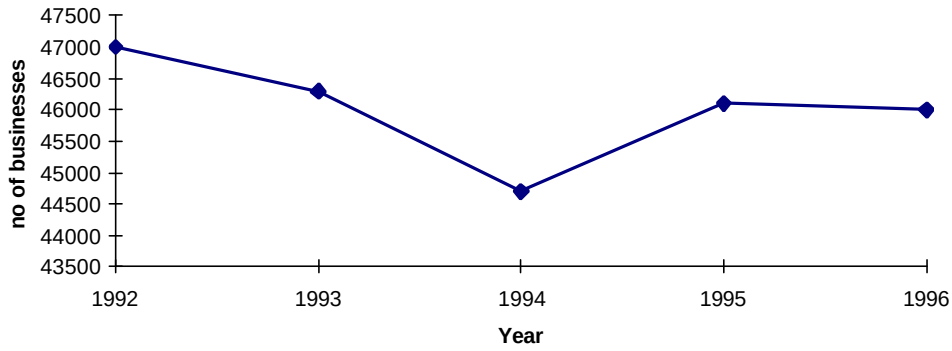
Chart 5: *The percentage change in Local Authority supported residents by type of accommodation 1994-1998, England*



Source: *Community Care Statistics 1998: Residential personal social services for Adults, England, December 1998, Department of Health, http://www.doh.gov.uk, Table S1, Local Authority supported residents by type of accommodation and client group, 1994 to 1998.*

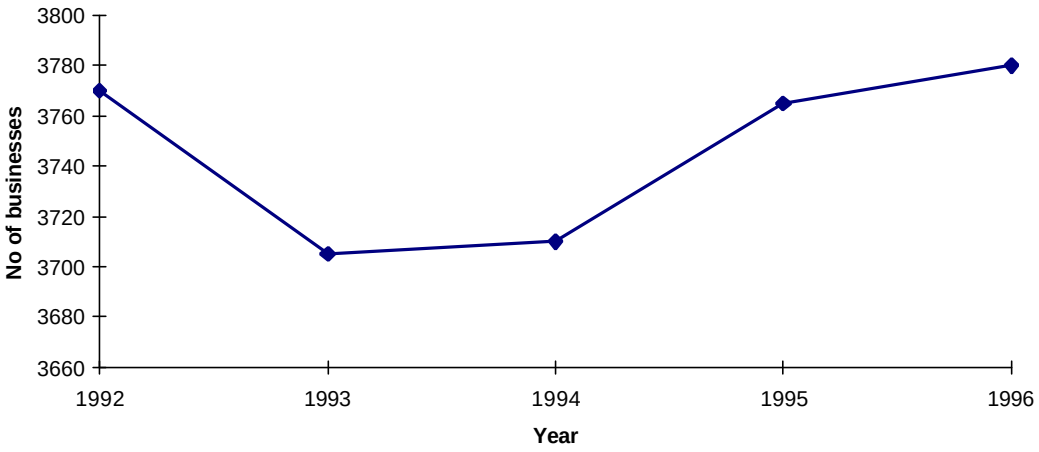
Note: *Local Authority supported residents excludes residents in unstaffed or other non-registered accommodation. For 1994 to 1997 figures include people aged under 95 in homes for elderly people.*

Chart 6: *Restaurants and take away shops, showing number of businesses , 1992-1998, Great Britain*



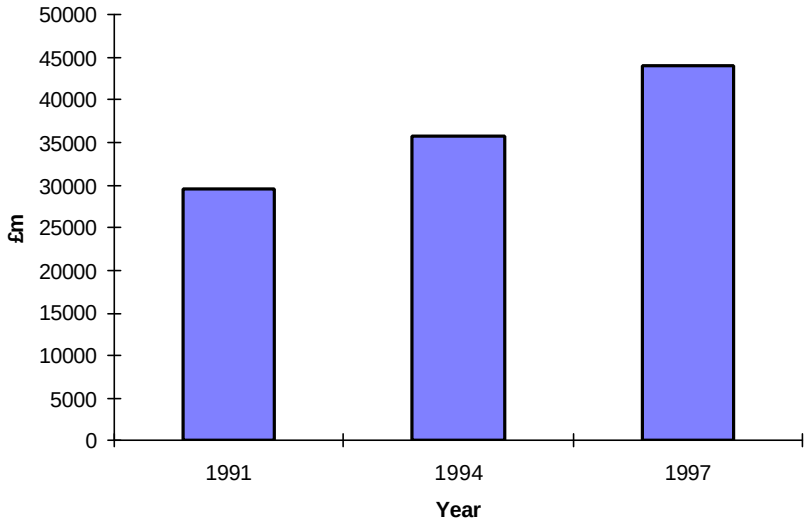
Source: *Sector Review, Services Trades, 1996, Table 55.30, p14. (HMSO, 1996)*

Chart 7: Canteen and Catering, showing number of businesses, 1992-1996, Great Britain



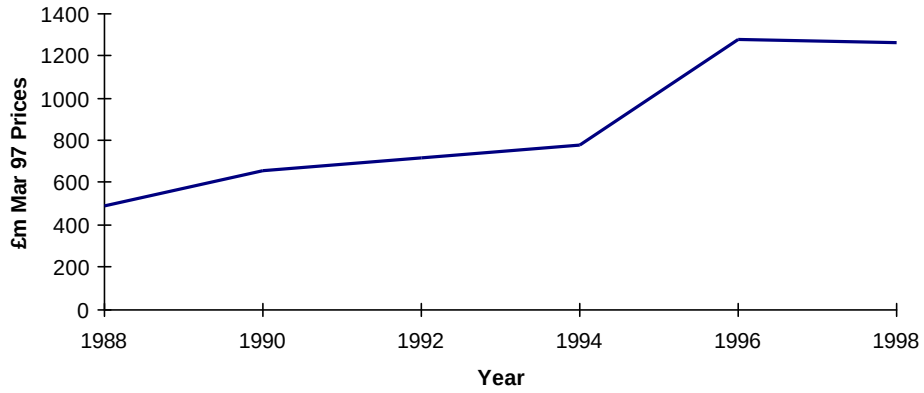
Source: *Sector Review, Services Trades, 1996, Table 55.51 and 55.52, p18. (HMSO 1996)*

Chart 8: *Consumers' Expenditure on catering services-meals and accommodation, 1991-1997 (at current prices), United Kingdom*



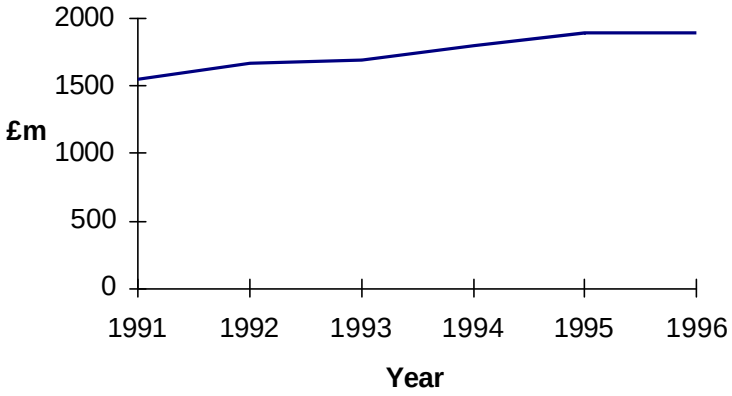
Source: *Consumer Trends 1996/98, Table 12.2. (HMSO Q2 1998)*

Chart 9: *Amount spent on Ready Meals (£m) March 97 prices, 1988-1998, Great Britain*



Source: *Food and drink statistics, p190, Fig. 9.2 (Euro PA and Associates 1998)*

Chart 10: *The growth in the UK Pre packed sandwich market 1991-1996, Great Britain*



Source: *Food and drink statistics, p196, Fig. 9.11 (Euro PA and Associates 1998)*

Appendix 2: Key informants contacted in the preparation of the report

General

Carers National Association, Policy and Information Officer

Department of Trade and Industry, Employment Agency Standards Office

Department of Health, Social Services Inspectorate (SSI)

Federation of Recruitment and Employment Services

Institute of Volunteering Research

Low Pay Unit, Researcher

Qualifications and Curriculum Authority

Sheffield Community Enterprise Development Unit, Development Worker

Childcare

Department for Employment and Education Childcare Unit, Head of Recruitment and Training Strategy in Childcare

Department for Employment and Education Family Friendly Policies Team, Supporting Families

Early Years National Training Organisation, Director

HERA 2 Project, National Children's Bureau/Suffolk County Council

Kids' Clubs Network, and SPRITO, Director

UNISON, National Officer for Childcare

Leeds City Council, Under 8's Unit, Manager

Leeds Training and Enterprise Council, Programme Adviser, Childcare Co-ordinator

Sheffield Children's Information Service

Sheffield Out-of-School Network, Development Worker

Sheffield Training and Enterprise Council, Equal Opportunities Manager

Sheffield Young Children's Service, External Funding Manager

Elder Care

Carers' National Association

Age Concern, England, Staff Officer to Operations Director

UNISON, National Officer for Social Services

Leeds Black Elders Association, Neighbourhood Worker

Leeds City Council Social Services, Project Officer for HomeCare

Cleaning

National Federation of Master Window and General Cleaners

Molly Maid UK, Operations Manager

Food

Leeds Age Concern

Leeds City Council Social Services, Meals on Wheels Service, Catering Adviser

Sheffield Age Concern

Sheffield City Council, Frozen Meals Delivery Service, Frozen Meals Manager

Sheffield Direct Catering Service

Home Maintenance

Care and Repair, England, Assistant Regional Officer for the North

Caring Together in Woodhouse & Little London, Project Co-ordinator

Woodhouse Community Centre, Leeds

Sheffield City Council Gardening Scheme: 'Garden Pledge', Estate Services/Housing Department

Sheffield Stay Put, Project Officer

Note: *To protect the identity of those who gave confidential interviews, some organisations and businesses consulted have been omitted from this list.*

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