



Exploring parents' views and use of Early Learning and Childcare in Scotland



CHILDREN, EDUCATION AND SKILLS

Exploring parents' views and use of Early Learning and Childcare in Scotland

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Contents

| | |
|--|-----------|
| Executive summary | 4 |
| Background and study objectives..... | 4 |
| Key findings and conclusions | 4 |
| Introduction | 8 |
| Background and study objectives..... | 8 |
| Fieldwork and response rate | 9 |
| This report..... | 12 |
| Use of Early Learning and Childcare | 13 |
| Key drivers of parents' use of ELC | 15 |
| Choosing a provider | 16 |
| Hours of ELC used | 17 |
| Views and experiences across parent groups..... | 19 |
| Flexibility of Early Learning and Childcare | 21 |
| Flexibility in current provision | 21 |
| Flexibility and the expanded entitlement | 23 |
| Flexibility in the type of provider | 24 |
| Views and experiences across parent groups..... | 27 |
| Accessibility of Early Learning and Childcare | 28 |
| Travel times and geographical accessibility | 28 |
| Awareness and other barriers to use of entitlement..... | 29 |
| Accessibility for children with Additional Support Needs | 31 |
| Views and experiences across parent groups..... | 34 |
| Affordability of Early Learning and Childcare | 36 |
| Paying for early learning and childcare | 36 |
| Topping up funded provision | 37 |
| Affordability difficulties | 38 |
| Views and experiences across parent groups..... | 40 |
| Likely future use of 1140 hours | 41 |
| Motivations for using expanded entitlement | 41 |
| Views and experiences across parent groups..... | 43 |
| Quality of early learning and childcare | 44 |
| Key aspects of early learning and childcare | 44 |
| Rating the quality of ELC provision | 47 |
| Views and experiences across parent groups..... | 47 |
| Perceived outcomes and benefits | 49 |

| | |
|---|-----------|
| Views and experiences across parent groups..... | 51 |
| Conclusions and key messages | 53 |
| Uptake of funded hours | 53 |
| Delivering flexibility, accessibility and quality | 53 |
| Flexibility | 53 |
| Accessibility and quality | 54 |
| Expanding the funded entitlement | 54 |
| Take-up..... | 54 |
| Flexibility | 55 |
| Affordability and financial impact | 55 |
| Impact and inequality..... | 55 |

Executive summary

This report presents an overview of findings from a large-scale study to explore the views of parents and carers with children under the age of six across Scotland, to inform the expansion of the Early Learning and Childcare (ELC) programme.

Background and study objectives

By August 2020, the Scottish Government, in close partnership with Local Authorities, will increase the hours of funded Early Learning and Childcare from 600 to 1140 hours per year. *A Blueprint for 2020: The Expansion of Early Learning and Childcare in Scotland* sets out a vision for this expansion, which includes delivering a flexible and high quality ELC system that is accessible and affordable for all. The primary aim of the expansion programme is to help improve outcomes for all children, especially those who may be more vulnerable or disadvantaged, and to help to close the attainment gap. A secondary aim is to support parents into work, training or study.

In 2017, the Scottish Government commissioned a nationally representative survey and follow up discussions with parents of children under the age of six. The overall aim of the research was to provide a greater understanding of parents' current use of, and experiences of, early learning and childcare and how these differed between parent groups.

The study involved two main fieldwork strands: (i) a survey of parents, incorporating a public web-survey and a telephone survey of parents drawn from the re-contacts database of the Scottish Household Survey, and (ii) follow-up discussion groups and telephone interviews with a subset of survey respondents.

Key findings and conclusions

Below we summarise key findings across the principal themes of the ELC Expansion.

Use of early learning and childcare

Survey data showed that the great majority (95%) of parents with eligible children use some form of ELC. Nearly 9 in 10 use some form of funded provision, but most combine this with paid and/or informal provision; 16% use only funded provision, and 73% used funded hours alongside paid and/or informal ELC.

Parents' choice of ELC provider was influenced by a range of factors, with convenience of location and the provider's reputation the most common. In terms of the mix of ELC used by parents, those using in excess of 16 hours of ELC per week and with above average ELC costs were more likely to use paid and/or informal provision.

Survey data indicated that parents on average use 29 hours of ELC per week for an eligible 3 or 4-year-old, and 24 hours per week for an eligible 2-year-old. There was little difference in the number of funded hours used, but parents typically use more than twice as many paid hours for 3/4-year-olds, while eligible 2-year olds are more reliant on informal hours.

Flexibility of early learning and childcare

A substantial number of parents taking part in the qualitative study felt there is not enough flexibility in current ELC provision, particularly for local authority provision. This perceived lack of flexibility was of most concern to particular groups, including parents who are unable to afford private provision, single working parents, and those without access to informal childcare through family or friends. Some parents indicated they have to use multiple providers to achieve the flexibility they require, most commonly private providers alongside funded local authority provision. Others have been unable to access the provision they required due to a lack of flexibility in hours and days available, or felt that a lack of available places and/or lack of flexibility had effectively removed any choice of provider.

In terms of how parents might hypothetically use the expanded entitlement (1140 hours per year) if it were available to them now, most indicated they would prefer the flexibility to use funded hours all year round (70%), and for longer sessions on fewer days per week (65%). These were the most commonly preferred options across all parent groups.

Most parents (63%) identified more than one type of childcare provider they would wish to use for the 1140 hours. Local authority nurseries were the most common preference, although there was some variation linked to the child's age, with parents more likely to wish to use private providers, playgroups and/or childminders for 2-year olds. Survey data also showed some correlation with parents' current use of ELC: most of those who wished to use the 1140 hours with local authority or private nurseries were already using these types of provision.

Accessibility of early learning and childcare

Relatively few parents indicated travel time was a significant barrier to their being able to make use of the funded entitlement. Similarly, a lack of awareness of the funded entitlement did not appear to be a significant barrier. However, some parents felt their use of funded hours can be constrained by a lack of information on available providers, and, in some areas, a lack of available places.

The majority of parents (74%) were aware of the planned expansion in funded entitlement, although only half were "definitely" aware of the planned changes. Household income and parent age showed the closest correlation with parents' awareness: lower income households and under 35s were less likely to be aware.

Around 1 in 20 of those taking part in the survey had one or more children aged under 6 with Additional Support Needs (ASN). Most of these parents indicated they are satisfied with their access to ELC that suits their child's needs, but nearly half

responding to a separate survey question mentioned having experienced one or more difficulties accessing suitable provision (48%). Difficulties were most commonly related to a lack of information on how providers support children with ASN, and concern that staff do not have the time required to meet their child's needs. Staff time and experience were also typically seen as key factors in choice of provider for parents of children with ASN.

Affordability of early learning and childcare

A little more than half (54%) of parents with children eligible for the funded entitlement pay for at least some of the ELC they use. These parents spend an average of £494 per month for all children aged under 6. However, this average covers a broad range of costs reported by parents; more than a third of those who pay spend less than £300 per month and around a quarter spend £700 or more.

The majority (69%) of those who pay for ELC for eligible children indicated they have experienced affordability problems in the last 12 months. Nearly all of these parents mentioned the high cost of childcare (97%). Around a quarter (26%) also mentioned difficulties paying childcare fees upfront.

Around 2 in 5 (42%) of all parents with children aged under 6 felt that they would want or may need to top up the 1140 funded hours. A further quarter were unsure.

Likely future use of 1140 hours

A large majority (90%) of those with an eligible child said they would use at least some of the additional hours if the expanded entitlement were available now (and offered the flexibility required). Most would use all or almost all of the 1140 hours: 75% for a 3 or 4-year-old and 67% for a 2-year-old. Those most likely to say they would hypothetically use the full 1140 hours if it were available now included parents currently using more hours of ELC per week, currently using paid and/or informal ELC, and currently spending £100 or more per month on ELC.

Quality of early learning and childcare

Parents indicated that staff are the most important factor for their judgement on the quality of ELC providers. The extent to which their child is learning, how providers keep parents informed and engaged, and the range of different experiences that their child gets were also rated as important factors. However, some found it difficult to judge the quality of providers prior to their child taking up a place, and highlighted parents' access to word of mouth recommendations as being important for these judgements.

Parents were very positive about the quality of ELC they use. Satisfaction was strongest for how staff interact with their child - also the aspect of provision rated as most important. Parents were also particularly positive about staff qualifications and knowledge, and the quality of facilities.

Outcomes and benefits

Parents' reasons for using ELC were most commonly related to supporting their child's learning and development. A substantial proportion also mentioned ELC helping them to support their child's learning and development at home. Enabling parents to look for work or increase their working hours were also commonly associated with use of ELC.

For parents who would expect to use all or almost all of the expanded 1140 hours, more than three quarters (79%) would do so to work or look for work, and around a third to increase the hours they or their partner work (32%)

Conclusions

The key learning points for the future expansion in funded entitlement are:

- The great majority of parents with eligible children use funded hours, but parents referred to barriers to their use of funded ELC such as a lack of flexibility or choice. This was reflected in a large proportion of parents combining funded ELC with paid and/or informal provision to secure the hours they require.
- Travel time and awareness of the funded entitlement do not appear to be significant barriers to access to ELC. However, parents indicated that a lack of information on available providers can limit their ability to make best use of the entitlement, and that there is room for improvement in access to suitable ELC for children with ASN.
- Parents on average use 29 hours of ELC per week for a 3 or 4-year-old, and 24 hours for an eligible 2-year-old. This is broadly similar to the expanded entitlement and suggests a substantial proportion of parents could be willing to use the additional hours. Feedback from parents was consistent with this: 90% would use some of the additional hours, 75% would use all or almost all.
- Findings suggested that greater flexibility of ELC provision could have a positive impact on take up of the expanded entitlement, including greater flexibility to use funded hours all year round and on longer sessions each day.
- The proportion of parents paying for ELC and prevalence of affordability difficulties suggests potential for the expanded entitlement to deliver direct financial impacts for the affordability of ELC. The study also highlighted potential for financial benefits associated with the expanded entitlement enabling parents to move into work or study or to increase their working hours.
- The study suggests that the expanded entitlement is likely to have a more significant financial impact for some parent groups, including two-earner households, those currently using in excess of 30 hours per week of ELC, those with above average ELC costs, and parents with experience of affordability problems. The study also suggests potential for the planned expansion to have a positive financial impact for lower income households, who are more likely to find it difficult to afford childcare and more likely to use the expanded entitlement to enable them to work.

Introduction

This report presents an overview of key findings from a recent study to explore the views and experiences of parents and carers¹ with children under the age of six across Scotland, to inform the expansion of the Early Learning and Childcare (ELC) programme. This section provides a summary of the background to the study, and the level and profile of response. The remainder of this report sets out findings against key indicators under each of the key themes of the expansion programme including:

- Use of early learning and childcare;
- Flexibility of early learning and childcare;
- Accessibility of early learning and childcare;
- Affordability of early learning and childcare;
- Likely future use of the 1140 hours;
- Quality of early learning and childcare; and
- Outcomes and benefits.

Background and study objectives

In October 2016 the Government launched *A Blueprint for 2020: The Expansion of Early Learning and Childcare in Scotland*. This set out its vision for an expansion that will almost double entitlement to free early learning and childcare (ELC) to 1140 hours per year by 2020. Eligibility will remain unchanged with funded hours offered to all 3 and 4-year olds in Scotland, and to eligible 2-year olds. A 2-year-old is eligible if their parents are in receipt of qualifying benefits.²

In 2017, the Scottish Government appointed independent researchers, Craigforth, to undertake a nationally representative survey and follow up qualitative research with parents and carers of children under the age of six. The overall aim of the study was to provide up to date information on parents' and carers' current use of, views and experiences of early learning and childcare. This included gathering views across the following key areas:

- Use of ELC for eligible children;
- Motivations that influence parents' use of ELC and choice of provider;

¹ The research was open to all parents or primary carers of children under 6, but for reporting purposes we refer to participants collectively as "parents".

² 2-year olds are also eligible if they have been looked after by a local authority, the subject of a kinship care order, or have a parent-appointed guardian.

- Attitudes towards and hypothetical future uptake of the expanded 1140 hours entitlement, and the factors that may influence these choices;
- Experience and views on accessibility of ELC, including for parents of children with Additional Support Needs (ASN);
- How much parents pay for ELC, and any experience of affordability difficulties;
- Views on the flexibility of ELC provision; and
- Views on the quality of ELC provision.

The study was also required to provide information on the experiences, views, needs and expectations of different parent groups. This included those living in the most deprived communities, those in rural areas, and parents/carers of children with Additional Support Needs.

Fieldwork and response rate

The study sought the views of any parents or carers of children aged under 6, irrespective of their experience of ELC and involved two main fieldwork strands:

1. A survey of parents and carers from late August to the end of September 2017. This included a public websurvey promoted via ELC providers and other non-childcare related networks, and a telephone survey of parents and carers drawn from the re-contacts database of the Scottish Household Survey.³
2. Follow-up discussion groups and telephone interviews with 63 survey respondents expressing an interest in discussing their views and experiences in more detail. This strand focused on a number of parent groups including low income households and those in the most deprived areas, those in remote rural areas, single parents, those not using funded ELC, parents with eligible 2-year olds, and parents of children with Additional Support Needs (ASN).

A total of 10,526 valid survey responses were received by survey close.⁴ This very positive response means that the survey dataset can provide highly reliable results which are representative of the general population of parents with children under six in Scotland. Confidence intervals are the standard way of describing the robustness of survey results; the survey response was sufficient to produce a 95% confidence interval of $\pm 1.0\%$. This means that if 50% of respondents said they

³ The re-contacts database comprises Scottish Household Survey participants who have given permission to be contacted about other research projects.

⁴ A further 971 responses were received from parents/carers who do not have children aged under 6, or where responses were insufficiently complete to permit analysis.

would make use of the expanded ELC entitlement, we can be 95% confident that the true result for the wider population is between 49% and 51%.

In addition to the level of response, the robustness of results also depends on the extent to which the profile of respondents is representative of that of the wider population – in this case, parents/carers with children aged under 6. Figure 1 provides a summary profile of survey respondents. As this indicates, responses included a good cross-section in terms of use of funded/paid/informal provision, household income, and location. However, several rural areas were over-represented and a small number of urban areas under-represented, such that the balance between urban and rural areas was not representative. The distribution across more and less deprived areas also showed some element of response bias, with more responses from the least deprived areas (4th and 5th quintile) and fewer from the most deprived areas (1st and 2nd quintile). Survey weighting was used to adjust for this bias in relation to deprivation and urban/rural areas.

Figure 1: Profile of survey respondents (unweighted)

| Respondent Type | Survey respondents | Population ⁵ |
|---|--------------------|-------------------------|
| Eligible children | | |
| 1 or more eligible children | 61% | - |
| Eligible 3 or 4-year-old | 59% | - |
| Eligible 2-year-old ⁶ | 3% | - |
| No eligible children ⁷ | 39% | - |
| Use of Early Learning & Childcare (with eligible children) | | |
| Funded ELC | 89% | 91% |
| Unfunded ELC | 7% | 10% |
| No ELC | 4% | 3% |
| SIMD Quintile | | |
| 1st quintile (most deprived) | 12% | 24% |
| 2nd quintile | 15% | 20% |
| 3rd quintile | 19% | 18% |
| 4th quintile | 26% | 19% |
| 5th quintile (least deprived) | 28% | 19% |

⁵ Population profile draws on a range of sources to provide the most comparable benchmark. Sources: Use of ELC, Growing Up in Scotland: Birth Cohort 2; SIMD Quintile, Scottish Index of Multiple Deprivation 2016; Urban/Rural classification, Scottish Government Urban Rural Classification 2016; Household income, Family Resources Survey 2013/14 to 2015/16.

⁶ The survey identified parents with eligible 2-year olds by asking parents directly whether their 2-year-old was eligible, and comparing this against income (e.g. we assume that a 2-year-old is eligible where household income was below the main threshold for qualifying benefits, even if parents were unsure of their eligibility).

⁷ Note that the survey was open to all parents and carers of children aged under 6, irrespective of their child's eligibility or use of funded ELC.

| Respondent Type | Survey respondents | Population |
|------------------------------------|--------------------|------------|
| Urban/Rural classification | | |
| Urban | 63% | 72% |
| <i>Large Urban</i> | 34% | 35% |
| <i>Other Urban</i> | 28% | 36% |
| Small town | 14% | 13% |
| <i>Accessible Small Towns</i> | 10% | 9% |
| <i>Remote Small Towns</i> | 4% | 3% |
| Rural | 23% | 16% |
| <i>Accessible Rural</i> | 17% | 11% |
| <i>Remote Rural</i> | 7% | 5% |
| Household income | | |
| Less than £16,000 | 9% | 10% |
| £16,000 to £29,999 | 17% | 27% |
| £30,000 to £44,999 | 25% | 22% |
| £45,000 to £59,999 | 21% | 15% |
| £60,000 and over | 28% | 26% |
| Gender of parent respondent | | |
| Female | 90% | - |
| Male | 8% | - |
| Other | 2% | - |
| Age of parent respondent | | |
| Under 25 | 3% | - |
| 25-29 | 14% | - |
| 30-34 | 33% | - |
| 35-39 | 33% | - |
| 40-44 | 14% | - |
| 45+ | 3% | - |

Figure 2: Qualitative participants by parent group (total 65 households)

| Parent group | Participants |
|--|--------------|
| Low income households/20% most deprived areas | 29 |
| Parents in remote rural areas | 15 |
| Parents not using funded ELC/expect to use less than half of 1140hrs | 15 |
| Parents of eligible 2-year olds | 11 |
| Parents of children with Additional Support Needs | 11 |
| Single parents | 24 |

This report

The remainder of this report sets out key survey and qualitative findings in relation to the key principles of the ELC Expansion programme.

All survey questions have been cross-tabulated across a range of respondent subgroups. We highlight significant variation (based on 95% confidence intervals) across key parent groups at the end of each section. A technical report is provided under separate cover, including full frequency results across key parent groups. We round percentages up or down to the nearest whole number; for some questions this means that percentages may not sum to 100%. Similarly, aggregate figures presented in the text (e.g. the percentage of “very satisfied” or “satisfied” responses) may not sum to results presented in figures and tables.

The research was open to all parents or primary carers of children under 6, but for reporting purposes we refer to participants collectively as “parents”.

Use of Early Learning and Childcare

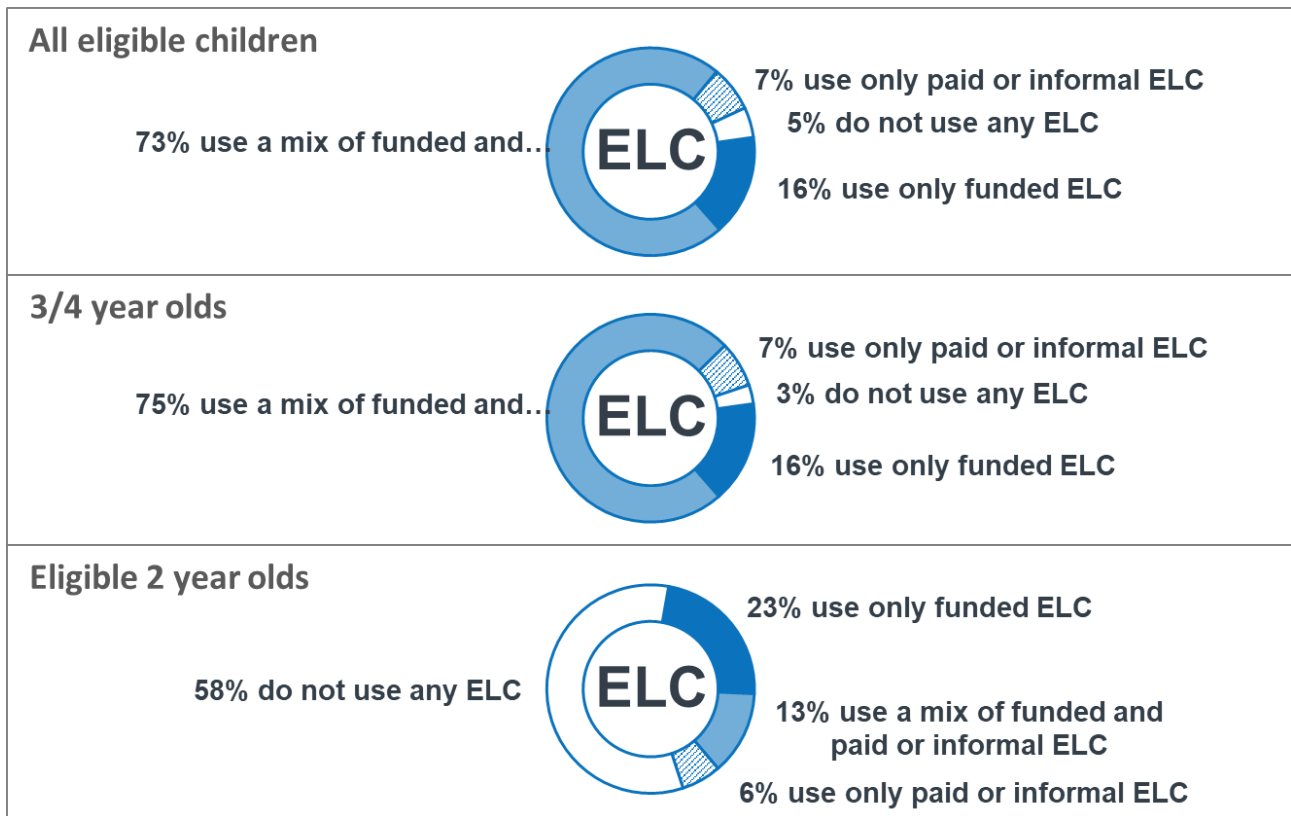
Uptake of the funded entitlement will be a key factor in the ELC expansion policy achieving its long-term aims. Funded hours are offered to all 3 and 4-year olds in Scotland, and to eligible 2-year olds. This section considers parents' current use of ELC, and factors that influence their use of ELC.

Survey data indicated that the great majority (95%) of parents with eligible children use some form of ELC. This overall level of uptake was consistent across most parent groups.

Parents with eligible children are diverse in the mix of funded, paid and/or informal ELC they use. Nearly 9 in 10 (88%) use some form of funded provision, but most combine this with paid and/or informal provision; 16% use only funded provision, and 73% used funded hours with paid and/or informal ELC. In terms of how this 73% of parents mix their funded hours with other options, 31% combine this with paid and informal provision, 21% with paid provision only, and 21% with informal provision only.

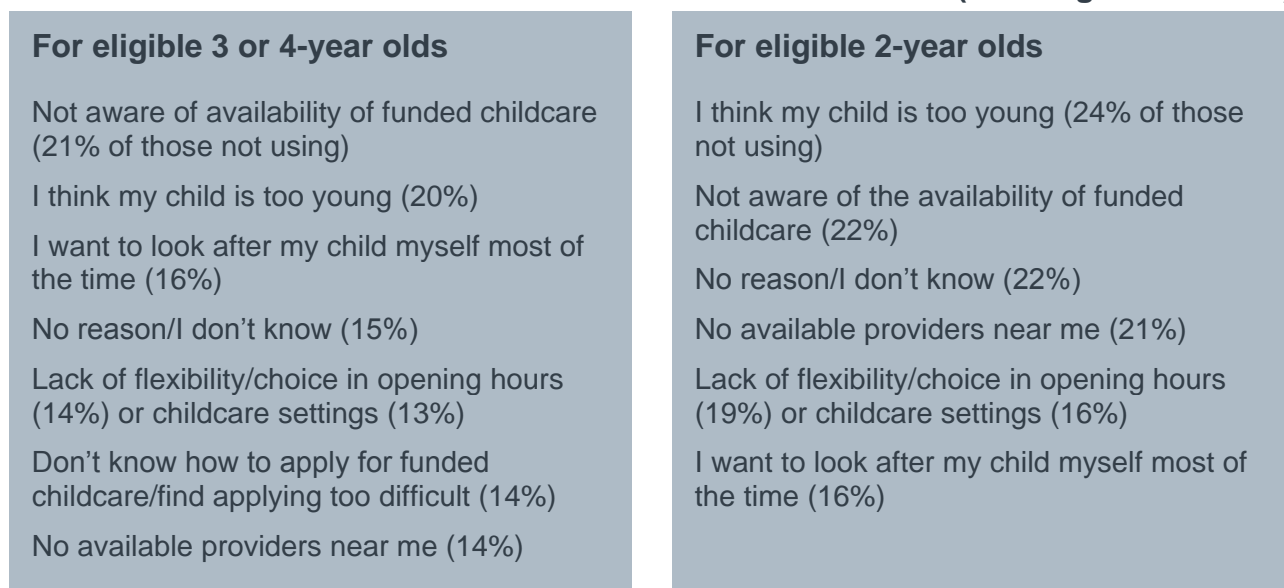
There was some variation in use of ELC linked to the age of the eligible child. Parents with an eligible 3 or 4-year-old are more likely to use funded or unfunded ELC (97% compared to 42% of those with an eligible 2-year-old), and are also more likely to use paid and/or informal provision. In contrast, where parents with an eligible 2-year-old are using ELC, they are more likely to use only funded hours.

Figure 3: Parents use of ELC (those with eligible children)



Around 1 in 10 (12%) parents with eligible children indicated that they do not use any of their funded entitlement. Some parents indicated they had made a choice not to use their entitlement, most commonly because they felt their child is too young or they preferred to look after their child themselves. Others mentioned barriers that had prevented them from using their entitlement, the most common being a lack of awareness of funded childcare and a lack of flexibility or choice in opening hours or childcare settings.

Figure 4: Most frequently mentioned reasons for not using any funded ELC (with eligible children)



Note: Parents could select multiple options.

As noted in the next section of this report, a lack of flexibility in the hours and days of ELC available was highlighted as a key factor for parents being able to make full use of their funded entitlement. This included examples of parents being unable to use local authority nurseries unless they have access to informal childcare or are able to pay for private provision as wraparound.

Parents also highlighted some difficulties using their funded entitlement with private providers, primarily related to a lack of information on which private providers accept funded hours. This included a small number of parents who were unaware that this was an option. Parents also noted a lack of information on how different providers deal with funded hours, and for example whether parents are required to pay the full ELC cost in advance. Several parents highlighted this as a key factor in whether they can afford to use their funded entitlement with a private provider.

Parent G has a 4-year-old and a 2-year-old. The 4-year-old has been offered 30 hours per week of funded provision with a local authority nursery (Parent G lives in an area where the expanded entitlement is being piloted), but a lack of flexibility in the length of session each day means that this cannot cover Parent G's working day without access to informal or private ELC. Access to suitable ELC for the 2-year-old has been much easier – Parent G uses a childminder who provides high quality ELC, can cover working hours and offers additional flexibility.

Parents also referred to a lack of information on which funded providers have places available. Several parents suggested a need for centralised information to help parents find and access a suitable provider that accepts funding, including detail on the registration process and how parents can maximise the likelihood of securing a suitable place.

Key drivers of parents' use of ELC

Survey data indicated that use of funded, paid and informal ELC varies across key parent groups. Regression analysis has been used to identify the factors that have the greatest impact on the mix of funded, paid and/or informal ELC currently used by parents.

Results for all parents show that the number of hours used and the amount spent on ELC have the closest correlation with parents' use of funded, paid and/or informal ELC. Those who use less than 16 hours per week are more likely to use only funded hours, and those who pay less are more likely to use some form of funded provision. Other key points of note are:

- Those with eligible children are more likely to use funded provision, and those without eligible children are more likely not to use any ELC.
- Two earner households are more likely to use paid provision, and those with fewer than 2 adults in employment are more likely to use only funded provision.
- Those with additional children aged 6+ in the household are more likely to use only funded provision.

Figure 5: Factors having a significant impact on mix of funded, paid, informal ELC

Most significant drivers

Number of hours of ELC currently used

Current spend on ELC

Other factors showing a significant correlation

Whether parents have eligible children

Number of adults in employment

Number of children in household/whether includes children aged 6+

Household income

Whether living in deprived area

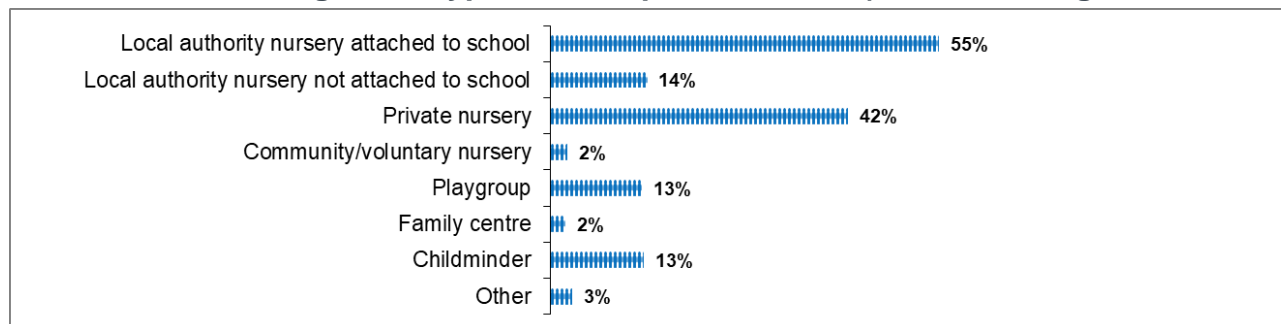
Age of parent

Choosing a provider

The survey also asked about the type(s) of ELC provider that parents currently use.

Local authority nurseries were identified as the most commonly used type of provider; 67% of those with an eligible child use this type of provision, most of these being linked to a primary school (55%). Private nurseries are also used by a substantial proportion of those with an eligible child (42%). In addition, 13% use a playgroup, and 13% a childminder.

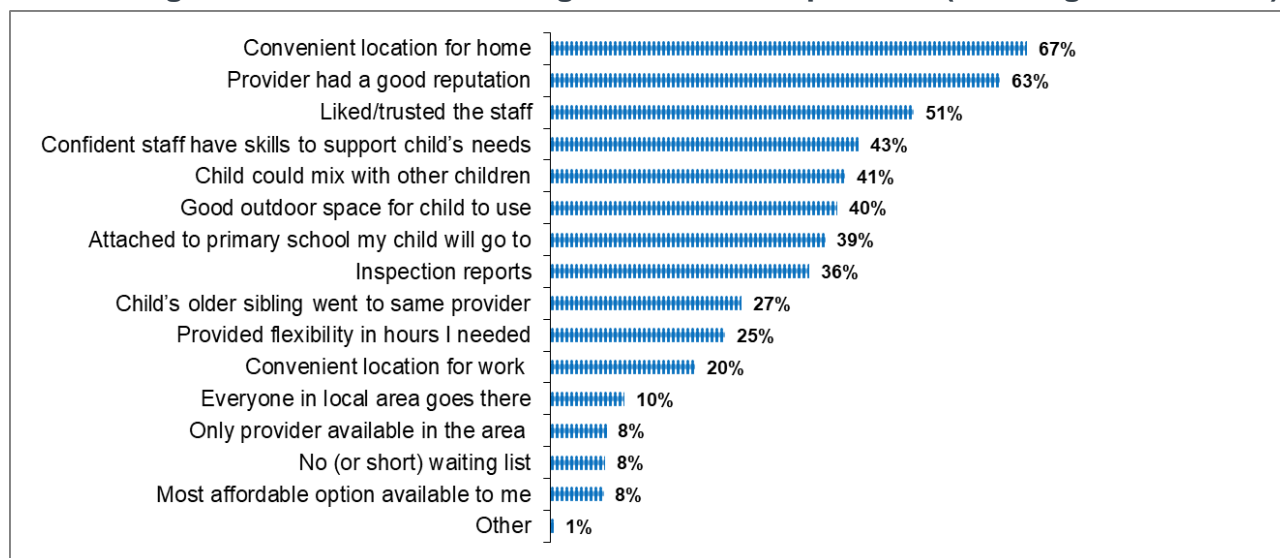
Figure 6: Types of ELC provider used (those with eligible children)



Note: Parents could select multiple options.

Parents’ choice of ELC provider was influenced by a range of factors, with convenience of location and the provider’s reputation the most common (each were mentioned by around two thirds of parents with eligible children). Providers’ staff were also a common factor, including whether parents like and trust staff (51%) and staff having the skills to support their child’s needs (43%). Other common factors included children being able to mix with others (41%), good outdoor space (40%), links to the primary school that the child is expected to use (39%), and the content of inspection reports (36%).

Figure 7: Factors influencing choice of ELC provider (with eligible children)⁸



Note: Parents could select multiple options.

Hours of ELC used

The survey asked about the number of hours of ELC that parents use for each of their eligible children. Responses indicated that **parents on average use 29 hours of ELC per week for an eligible 3 or 4-year-old, and 24 hours per week for an eligible 2-year-old.** This suggests that parents on average use around 20% fewer hours (funded and non-funded) for an eligible 2-year-old, than for an eligible 3 or 4-year-old.⁹

In terms of the types of ELC used, the survey indicated that for 3 or 4-year olds, parents use an average of 14 funded hours of ELC per week, 7 paid hours and 8 informal hours. For eligible 2-year olds, parents use an average of 13 funded hours, 3 paid hours and 9 informal hours. This indicates that there is little difference in the number of funded hours used for 3/4-year olds and eligible 2-year olds. However, parents typically use more than twice as many paid hours for 3/4-

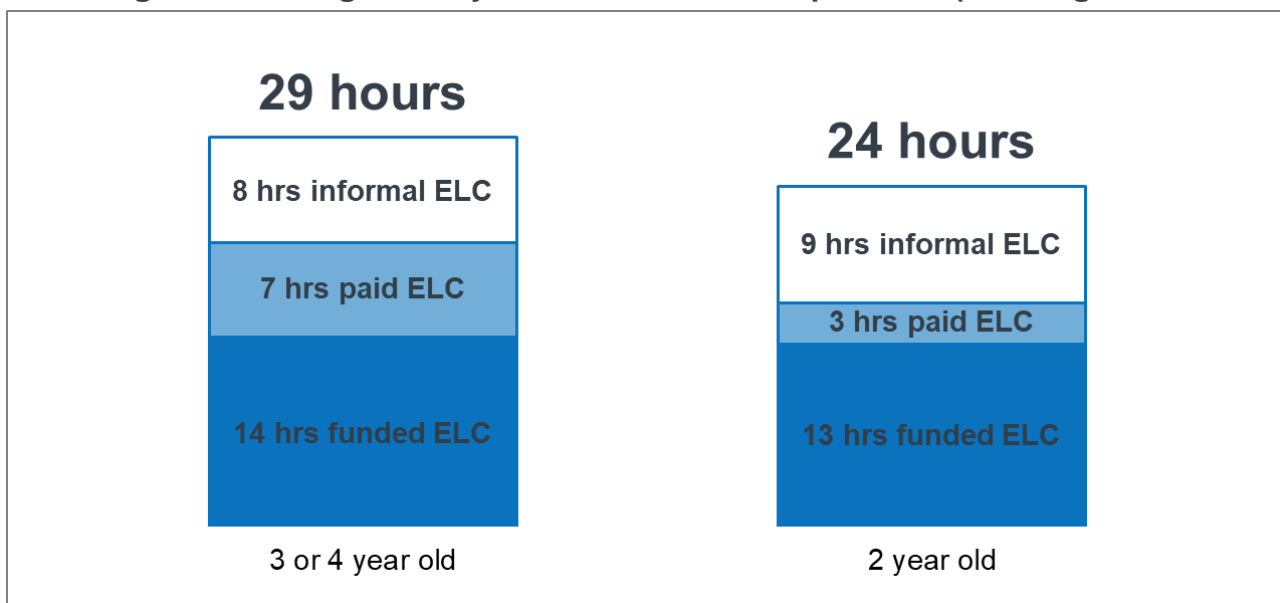
⁸ Parents were asked to select as many options as they wished from a pre-coded list.

⁹ Parents were asked to indicate the number of hours of funded, paid and informal early learning and childcare they use, but it was not possible within a self-completion survey to assess any differences in hours used during school term time and holidays. As such, findings presented here are likely to include a combination of those reporting an average over year, and those reporting a “typical” week which may relate only to term-time.

year olds than for eligible 2-year olds, while eligible 2-year olds are more reliant than 3/4-year olds on informal hours as a proportion of the total hours used (38% of the average hours for 2-year olds, compared to 28% for 3/4-year olds).

These results also indicate that most of those using funded provision are making use of their full entitlement, with around 4 in 5 (79%) using 15 or more funded hours per child per week. Nevertheless, there remained 13% who use less than 10 funded hours per child per week.

Figure 8: Average weekly mix of hours of ELC per child (with eligible children)



Survey data indicated that the number of hours of ELC currently used varies across key parent groups, and regression analysis has been used to identify the factors that have the greatest impact.

Results show that the mix of funded/paid/informal ELC used, whether parents pay for ELC, whether the household includes additional children aged 6+, and parents' current spend on ELC have the closest correlation with the number of hours of ELC used. In particular, those using paid ELC typically use more hours per week while those using only funded provision typically use fewer hours. Those paying a total of £500 or more a month typically use more hours of ELC, and those with children aged 6+ typically use fewer hours per week.

Figure 9: Key drivers of number of hours of ELC currently used (3/4-year olds)

Most significant drivers

Whether parents use funded, paid and/or informal provision

Whether parents currently pay for ELC

Number of children in household/whether includes children aged 6+

Current spend on ELC

Other factors showing a significant correlation

Number of adults in employment

Household income

Views and experiences across parent groups

The research identified some significant variation across parent groups in use of ELC and factors influencing use of ELC.

This variation primarily related to income, deprivation and whether parents pay for ELC. For example, lower income households, single earners and those in the most deprived areas use less hours of ELC on average, were more likely to use funded hours and less likely to pay for ELC. In contrast, those who pay for ELC use more hours of ELC on average, and were more likely to use private nurseries or childminders.

Below we summarise the main variations across parent groups, highlighting where parents were significantly more or less likely than those in other parent groups to give a specific response.

Low incomes/Most deprived areas

Less likely to use ELC. Those that do use ELC are more likely to use funded hours, less likely to pay, less likely to use a private nursery, and use fewer hours on average.

Less likely to base their choice of ELC provider on inspection reports, good outdoor space, convenient location for work, and flexibility of hours.

Rural areas

More likely to use a local authority nursery or playgroup.

Single earner households

More likely to use only funded ELC and local authority nurseries, and less likely to pay for ELC or to use private nurseries.

Use fewer hours of ELC on average.

Parents of children with ASN

More likely to use funded ELC, less likely to pay for ELC and less likely to use private nurseries.

Use fewer hours of ELC on average.

Currently pay for ELC

Less likely to use funded ELC and local authority nurseries, more likely to use private nurseries and childminders. Use more hours of ELC on average.

More likely to base their choice of ELC provider on reputation, flexibility of hours, convenient location, good outdoor space, and inspection reports.

Do not currently use funded ELC

More likely to use private nurseries or childminders.

Other significant differences

Parent age: Under 30s are less likely to use ELC. Those that do use ELC are less likely to pay or to use private nurseries, are more likely to use local authority nurseries, and use fewer hours on average.

Parent gender: No significant variation.

Parents who also have school-age children are less likely to use private nurseries.

Parents who do not pay for ELC are more likely to base their choice of ELC provider on the setting being linked to the primary school they expect to use.

Flexibility of Early Learning and Childcare

The Children and Young People (Scotland) Act 2014 placed a statutory duty on local authorities to increase choice and flexibility of hours of provision within their area, alongside the expansion of entitlement to 600 hours per year. To inform this, local authorities are required to consult with parents and carers every two years about how they would like to see this provision being delivered.

The expansion to 1140 hours per year is intended to further develop available flexibility options for parents and carers within local authority areas. This could include flexibility in opening hours, year-round or term-time provision, the length of an ELC session and being able to choose a provider that best meets the needs of the child, from a range of provider types.

This section considers parents' views and experiences on flexibility of current ELC provision, and in relation to how they might use the expanded entitlement of 1140 hours.

Flexibility in current provision

Parents raised a range of issues or concerns around the extent to which current provision is sufficiently flexible, and the impact this can have on their choice of provider(s) and working arrangements:

A substantial number of parents taking part in the qualitative work felt there is not enough flexibility in current ELC provision. This was particularly the case for local authority provision. Several participants suggested that half-day nursery sessions are insufficient to enable parents to work, and some felt that only a small proportion of local authority nurseries offer flexibility in terms of longer sessions or places outside term time.

“Half day sessions don't work for working parents...I'm lucky if I get 2 hours [out of the half-day session] to work.”

“I prefer to pay for private nursery because the school attached nurseries don't seem to cover the hours required...Funded nursery hours need to allow for a full working day plus travel time.”

While parents generally saw private providers as giving greater flexibility of hours and days, some had experienced difficulty accessing sufficiently flexible private provision. This includes parents who had difficulty identifying and/or accessing private nurseries where they are able to use their funded entitlement. Several parents also referred to private providers setting a minimum number of days or hours, such that parents had to pay for more hours than they needed; there was concern that this may not always suit the child's needs, and that these providers are effectively setting a minimum cost for parents.

A lack of flexibility in current provision was of most concern to particular parent groups. Flexibility of hours provided was a particular concern for parents who are unable to afford private provision, single working parents, and those without access to informal childcare through family or friends. A lack of flexibility in hours and choice of provider was also highlighted by parents in rural areas with access to a limited number of providers, and in some urban areas where parents felt that limited supply of available places meant that they did not have sufficient choice to consider the relative flexibility or quality of providers.

"I live relatively rurally and although there is a choice of providers only one offers the hours that fit my work pattern, and local public transport options. That provider does not offer funded places. Therefore I either have to reduce my work hours (potentially risking my job) in order to use a less favourable provider, or use a provider which fits my needs but has to be personally funded in whole. An extension of free hours would be fantastic but...the options offered need to fit with non-traditional requirements."

In contrast, households with at least one parent not in work and those using private provision were most likely to be happy with the flexibility of their provision.

A range of parents indicated they have to use multiple providers to achieve the flexibility they require. Finding the right mix of providers has been a challenge for many parents, especially where they are seeking to use a childminder or other private provider as "wraparound" alongside a funded local authority nursery. This included difficulties accessing up-to-date information on available private providers, and some parents being required to pay a full-day rate to retain wraparound provision (and concern that this cost undermines the benefit of funded hours). Accessing a mix of providers was also a particular concern for parents of children with Additional Support Needs. This reflects a perceived lack of provision suitable for their child's needs, and also the potential for changing providers or handover between providers to have a negative impact on children with ASN.

Parent A secured a place at a local authority nursery for their 3-year-old, but was only able to take up the place by using informal care from grandparents to cover the "shortfall" in hours between working hours and the 3-hour sessions offered by the nursery. The nursery was not able to offer longer sessions, and private childcare was not affordable.

"As well as more hours of funded places there needs to be more flexibility in how and when you can use them. My husband and I work in flexible 9-5pm Mon-Fri jobs but still find it very complicated...and use three different nurseries for just two children."

Several participants had been **unable to access the provision they wished to use due to a lack of flexibility in hours and days available**, or felt that a lack of available places and/or lack of flexibility had effectively removed any choice of provider. Several parents had been required to make significant adjustments to

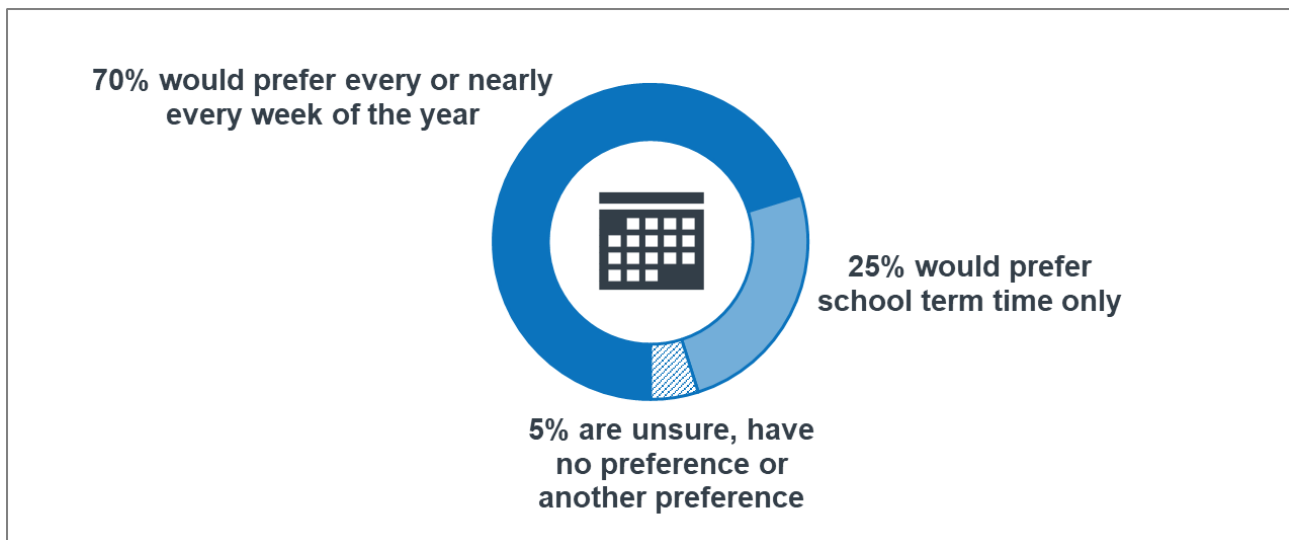
their working and home arrangements to better fit with available ELC provision. This included reducing working hours, changing employer, and (for two-parent households) one parent choosing to stop working.

Flexibility and the expanded entitlement

Parents were asked to consider (hypothetically) how they might use the expanded entitlement of 1140 hours if they had an eligible child. This included preferences for using the 1140 hours across the year (e.g. term-time or all year round) and during the week (e.g. longer sessions on fewer days, or shorter sessions on more days).

The majority of parents (70%) would prefer the flexibility to use funded hours all year round. A minority of parents (25%) would prefer to use funded hours during school term-time only, and this is the case across all key parent groups.

Figure 10: How parents would prefer to use 1140 hours across the year



In terms of how parents would use the 1140 hours across the year, qualitative feedback from parents highlighted their diversity of requirements. This included individuals across a number of parent groups who wished to use funded hours throughout the year to better fit with their working patterns, and others who preferred to use hours during term-time only (including some with older children in school). Parents also referred to working patterns that vary during the year, and to other factors that can lead to parents' requirements changing over time (for example changing work demands, older siblings starting school).

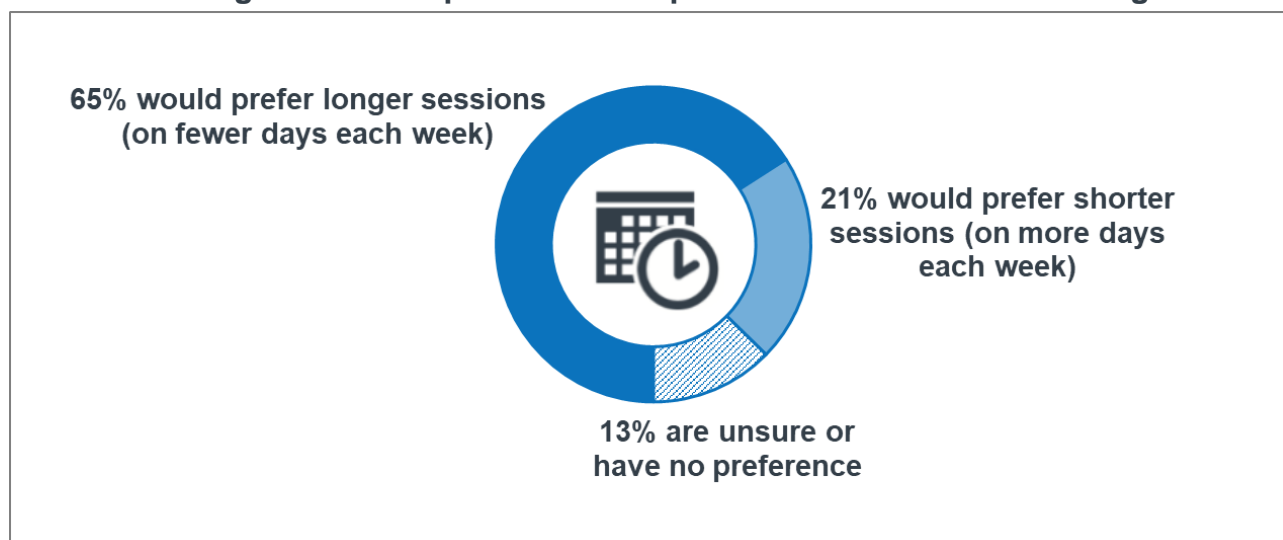
"I don't need [more hours]...I just want more flexibility around what already exists. The only nursery session available is 12.05-3.15, that is it. There [is] only one childminder in the area, although another is just starting. There is no holiday provision except the childminder, and no before or after school clubs at all. It is a nightmare for working parents or anyone who starts work before 9 or finishes after 5, or who has to commute to work."

In terms of using the expanded hours during the week, most parents (65%) would prefer longer funded sessions on fewer days per week. This compared to 21% who would prefer shorter sessions on more days. Survey results were consistent with qualitative feedback from parents highlighting the importance of longer sessions to include early mornings (before 9am or before 8am) and evenings to fit with working patterns.

Longer sessions were the preferred option across all parent groups, and particularly for higher income households, those in the least deprived areas, and those who currently pay for ELC. Again this was consistent with qualitative feedback which linked a preference for longer sessions with full-time working requirements.

“We would not be able to take our child to and from a specific school nursery if they were in less than a normal working day for full time employees (8 hours).”

Figure 11: How parents would prefer to use 1140 hours during the week



In addition to the above mix of preferences for use of the 1140 funded hours during the week, **17% of parents would also like to have the flexibility to use the expanded funded hours outside normal working hours and/or at weekends.** This also appeared to be consistent with qualitative feedback on the importance of access to childcare for earlier mornings and/or later evenings – it is notable that most of those wishing to use funded hours outside normal working hours also wished to use longer funded sessions.

Flexibility in the type of provider

In addition to how parents might use the 1140 hours across the year and during the week, feedback also highlighted the value of flexibility in enabling parents to use the expanded 1140 funded hours with different types of provider. For a substantial proportion of parents, this reflected a preference to use funded hours across multiple providers.

Most of those with an eligible child identified more than one type of childcare provider they would wish to use for the 1140 hours (63%), and around a third identified three or more types of provider (34%). Figure 12 provides further detail. This is consistent with examples noted earlier where parents had to use multiple ELC providers to meet their needs.

“No childcare provider in my area has long enough hours to cover a single day. Because of this, we have to use multiple providers.”

In terms of the type of provider, local authority nurseries were the most common preference for parents. However, survey results show some variation in preferences for 3 or 4-year olds, and for 2-year olds:

- Around three quarters of parents with 3 or 4-year olds wish to use a local authority nursery linked to a primary school (76%), and nearly half would prefer to use a private nursery (46%).¹⁰ More than a fifth would prefer to use a childminder (22%), and qualitative feedback suggested that this includes some who would wish to use a childminder alongside a local authority nursery to provide additional flexibility.

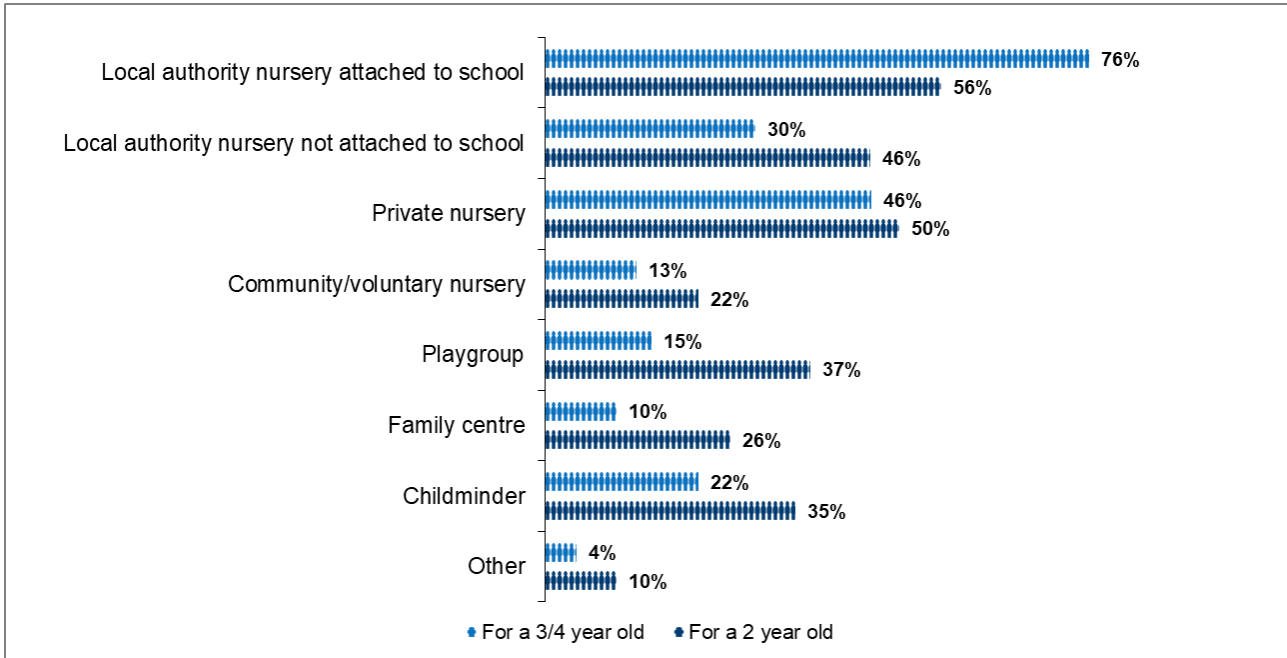
“[The] biggest problem is timings. Unless you work from home or have a 3hr job next door you must have a childminder or someone else to pick up/drop off - or not work. It’s great to help with costs but not with helping working parents with childcare.”

- For parents of 2-year olds in low income households (those most likely to be eligible for the 1140 hours), local authority nurseries were also the most common preference. However, these parents were more likely than parents of 3 or 4-year olds to wish to use the 1140 hours with a private nursery, playgroup and/or childminder. This is consistent with qualitative feedback which suggested that parents may place a greater emphasis on smaller or more home-like settings when choosing a provider for their 2-year-old. This included for example reference to facilities such as sleep rooms or sensory/quiet rooms when choosing a nursery for a younger child.

¹⁰ Parents could select more than one type of provider they would prefer to use for the 1140 hours.

“I would hate to be in the position to uproot my children to make us financially better off...I much prefer the intimate setting of a childminder where my [2-year-old] can grow and develop in a homely environment with people she has strong bonds with.”

Figure 12: Type of provider preferred for 1140hrs



Note: Parents could select multiple options. Result for a 2-year-old are based only on low income households as an indicator of those likely to be eligible for the 1140 hours when they are made available.

Survey data showed some correlation between the types of provider that parents would like to use for the 1140 hours (for children of all ages), and their current use of ELC. For example, most of those who would prefer to use a local authority and/or private nursery were already using these types of provision. This correlation was weaker for other types of provider; for example less than half of those who would prefer to use a childminder were currently doing so.

Views and experiences across parent groups

The research identified some significant variation across parent groups in terms of views and preferences on the flexibility of ELC.

This variation primarily related to income, deprivation and whether parents pay for ELC. For example lower income, single earners and those in the most deprived areas were more likely than others to wish to use the expanded funded entitlement during term-time only, in shorter sessions each day, and with a local authority nursery. In contrast, those who pay for ELC were more likely to prefer using their entitlement all year round, for longer sessions each day, and with a private nursery.

Below we summarise the main variations across parent groups, highlighting where parents were significantly more or less likely than those in other parent groups to give a specific response.

Low incomes/Most deprived areas

More likely than others to prefer to use the 1140 funded hours with a local authority nursery, playgroup, family centre or childminder.

Rural areas

Less likely than others to prefer to use the 1140 hours with a local authority nursery linked to a primary school.

Single earner households

More likely to prefer to use the 1140 funded hours with a local authority nursery, playgroup or family centre.

Parents of children with ASN

Less likely to prefer to use the 1140 funded hours with a private nursery, and more likely to prefer a community/voluntary nursery.

Currently pay for ELC

More likely to prefer to use the 1140 funded hours with a private nursery.

Do not currently use funded ELC

No significant variation

Other significant differences

Parent age: under 35s are more likely to prefer to use the 1140 funded hours with multiple types of provider.

Parent gender: Males are more likely than females to prefer to use the 1140 funded hours on shorter sessions each day. Females are more likely than males to prefer provision outside of normal working hours and to wish to use multiple types of provider.

Accessibility of Early Learning and Childcare

In addition to ELC provision being flexible enough to meet parents' needs, accessibility of provision is also identified as one of the key principles for the planned expansion in entitlement. 'Accessibility' in this context has three specific aspects:

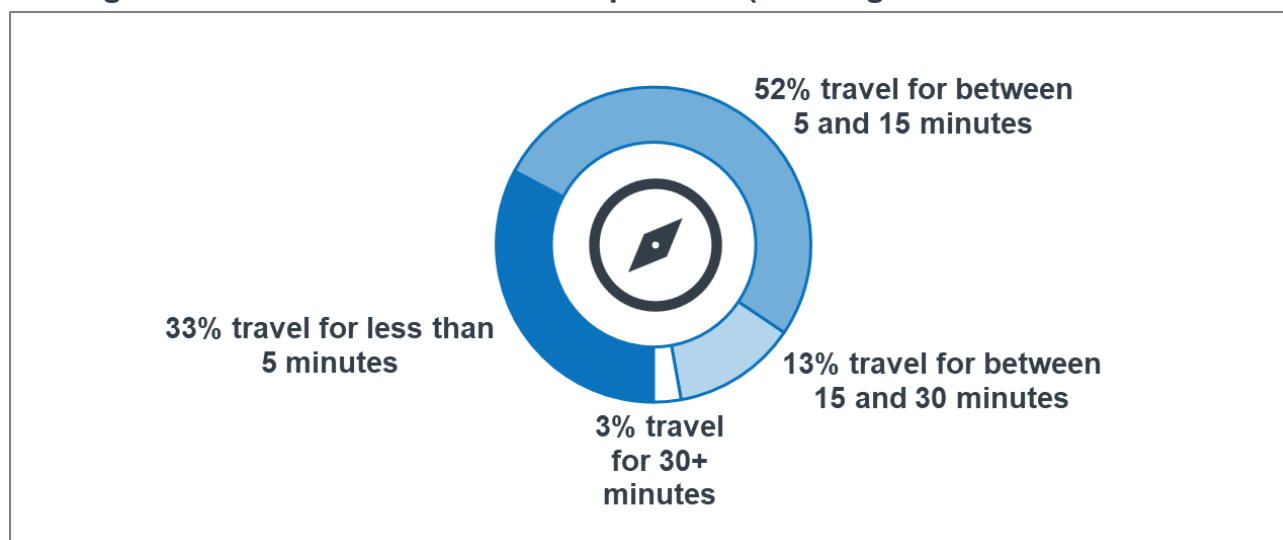
- Geographical accessibility, ensuring all parents across Scotland can reach suitable providers without long travel times or high travel costs.
- Awareness of the funded entitlement and understanding how to access this.
- Access to ELC provision that meets the needs of children with Additional Support Needs (ASN).

This section considers parent's views and experiences in relation to each of these aspects of accessibility, and identifies other potential barriers.

Travel times and geographical accessibility

Survey results showed that 85% of parents of eligible children live within 15 minutes of their current main ELC provider. A third of all those with eligible children reported a journey of less than 5 minutes (33%). A travel time of 5-15 minutes was most common, reported by just over half of parents of eligible children (52%) and 13% travel for 15-30 minutes. Fewer than 1 in 20 (3%) travel for 30 minutes or more to get to their main provider. This profile of travel times was consistent across most parent groups.

Figure 13: Travel time to main ELC provider (with eligible children who use ELC)



The survey was not able to distinguish travel times by mode of transport, and so for example, the large group of parents who reported a journey time of less than 15 minutes is likely to include some travelling by car, and some with a 15-minute journey on foot. The latter group may see their provider as less accessible than those travelling by car.

However, qualitative feedback suggested that while convenience of location is a factor in parents' choice of provider, relatively few see travel time as a significant barrier to their being able to make use of funded entitlement. To some extent this appeared to reflect parents being able to consider locations within a reasonable travel time of their workplace(s), in addition to their home. Some also referred to having chosen a provider based on travel time for grandparents or others who may be providing informal "wraparound" provision.

Parent B relies on grandparents as emergency contacts for their child's ELC provider. The grandparents' limited mobility and lack of transport options was an important factor in Parent B setting a relatively small search area for ELC providers – "thankfully I found a nursery I'm really happy with within walking distance".

This feedback is also reflected in survey results, which found that travel time is rarely a contributing factor for those who are not using any of their funded entitlement (mentioned by only around 1 in 20 of these parents). In addition, around 1 in 6 of the small number of parents who do not use their entitlement indicated that there are no available providers near them; although this is equivalent to just 0.3% of all parents with eligible children.

Qualitative feedback did identify a number of parents without access to a car or regular public transport, who saw location as a significant constraint on the range of providers they were able to consider. While these parents had been able to secure suitable provision, some felt that this had been "just down to luck" where travel time had limited their choice of providers. This included examples of parents in more rural areas with limited access to transport, and who felt that their local authority nursery was the only provider available to them.

"We're in a village and there isn't really any choice for nurseries. Luckily [the local authority nursery] is great, he absolutely loves it. I spoke to people to see what they thought of it, we were getting good reviews...but if we found out it wasn't very nice it would have been a really difficult situation."

Awareness and other barriers to use of entitlement

As is discussed earlier in this report (see "Use of early learning and childcare"), a large majority of parents of eligible children were using at least part of their funded entitlement. For the small minority of parents not currently using any of their funded hours, around a fifth identified that this was down to a lack of awareness – although this is equivalent to just 0.4% of all parents with eligible children.

A proportion of parents not using their funded hours also indicated this was due to not being aware of how to apply or concern that applying is too difficult. This was mentioned by around 1 in 7 of those not using funded hours for 3 or 4-year olds, and around 1 in 10 for 2-year olds – although this equates to only around 0.2% of parents with eligible children.

In addition to the limited impact of travel and awareness on parents' access to ELC (as noted above), qualitative feedback also suggested that **parents' use of funded hours can be constrained by a lack of information on available providers and in some areas a lack of available places.**

Feedback indicated that a lack of access to information on available providers has been an issue for parents in securing a suitable package of ELC. This was highlighted as an issue by a diverse range of parents, including those across urban and rural location, different household types, and higher and lower income groups. A lack of access to information was mentioned by these parents as leading to specific difficulties such as finding local authority nurseries with available places, identifying partnership nurseries where funded hours can be used, and locating up-to-date information on active childminders.

When seeking ELC for their first child, Parent C approached the Council and others for information on available providers but was unable to find a single source of information on different types of provider.

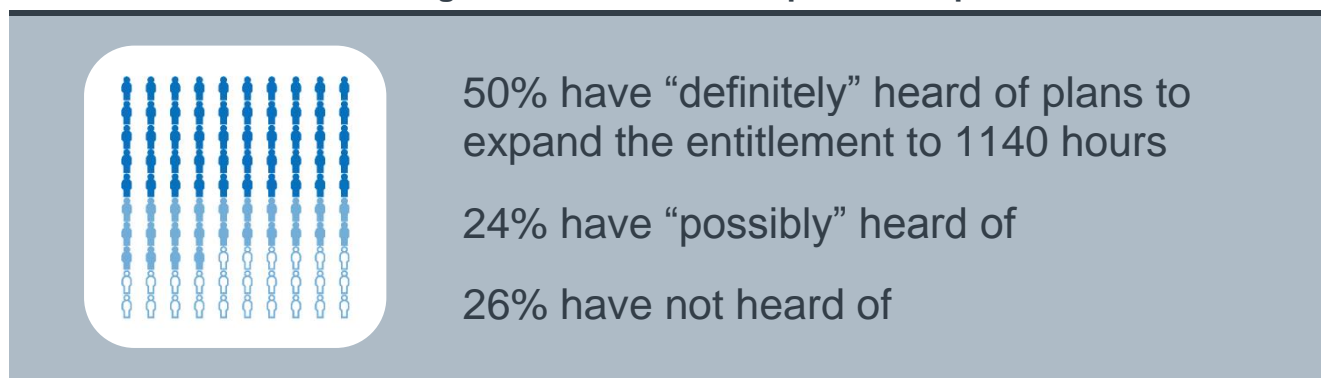
Some parents suggested that advice from health visitors or support workers, and word of mouth from family and friends had been the most effective sources of information on available providers – but noted that not all parents will have access to this.

“I just had to keep phoning to find somewhere with places available – I have absolutely no idea of how the system works...but that’s what my friends advised me to do.”

Some parents also raised concerns around the availability of ELC places in their local area, and felt that supply of places is insufficient to meet demand. This appeared to be a particular issue in highly populated urban areas. These parents cited examples of being required to approach multiple providers (10 or more) to find an available place, and of parents being unable to use their funded entitlement due to a lack of available places. Again, these parents felt there is a need for better information on providers with available funded places, and on how parents can maximise their chances of accessing a place.

The majority of parents (74%) indicated that they were aware of the planned expansion in funded entitlement. However, only half were “definitely” aware of the planned changes (50%).

Figure 14: Awareness of planned expansion in entitlement



There remained around a quarter of survey respondents (26%) who were not aware of the planned expansion. This level of awareness was similar for parents with children who are eligible for the current entitlement and other parents, but awareness varied across a number of parent groups – further detail is provided later in this section. Regression analysis was undertaken to control for any inter-relatedness between parent groups, and showed that household income and age have the greatest impact on parents' awareness of the ELC expansion (lower income households and under 35s less likely to be aware).

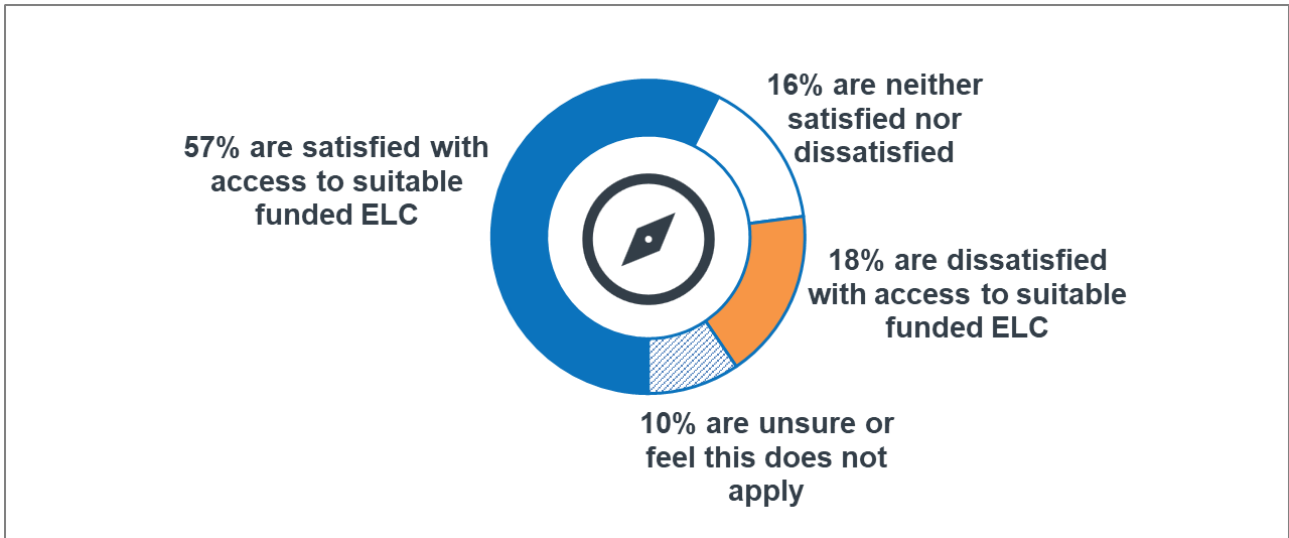
Accessibility for children with Additional Support Needs

The third aspect of accessibility for the planned expansion in entitlement is ensuring access to suitable provision for children with Additional Support Needs. Around 1 in 20 of those taking part in the survey had one or more children aged under 6 with ASN (5%).¹¹ Language and/or cognitive needs were most common including reference to language, speech or communication issues, children on the autism spectrum, and social, emotional and/or behavioural difficulties. A fifth of parents of a child with ASN indicated that this related to a physical and/or mental health problem.

Most parents of children with ASN (57%) were satisfied with their access to ELC that suits their child's needs. However, there remained nearly a fifth of these parents (18%) who were dissatisfied with their access to suitable provision. This balance of views was broadly consistent across different types of ASN; for example, there was no significant difference in satisfaction levels between parents mentioning cognitive or physical needs.

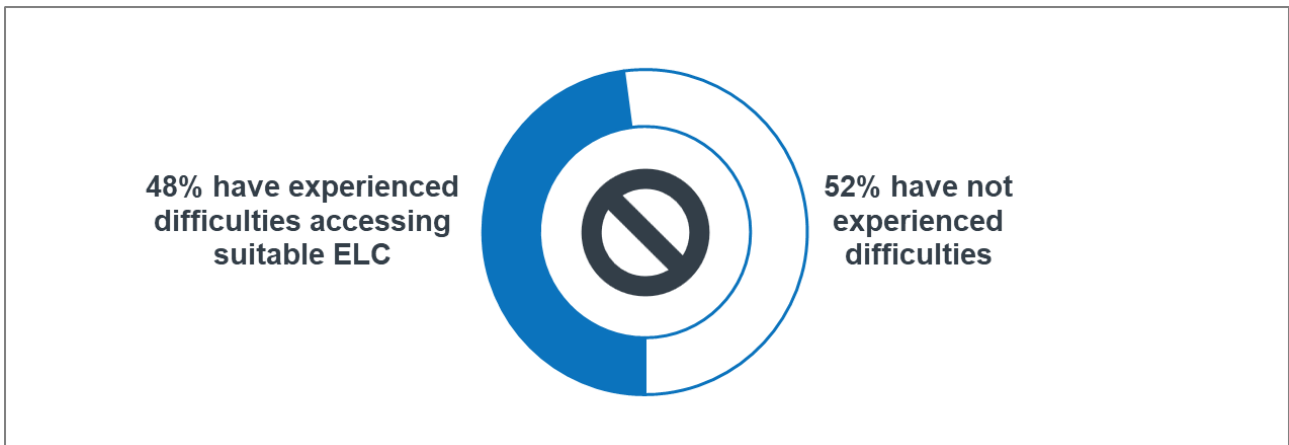
¹¹ This finding is based on parents' self-reporting.

Figure 15: Satisfaction with access to ELC to meet additional support needs



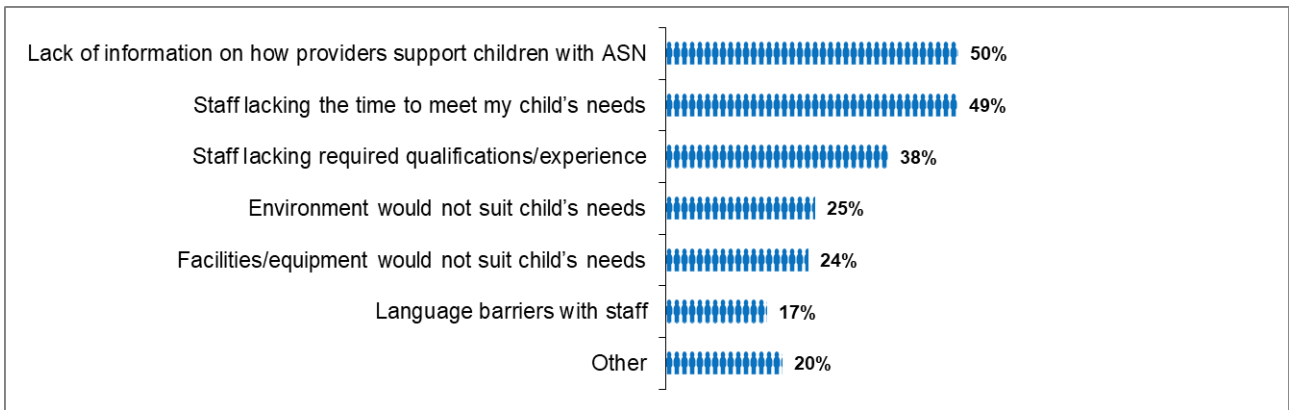
Although a relatively small minority are dissatisfied with their access to suitable ELC, **nearly half (48%) of parents of children with ASN mentioned having experienced one or more difficulties accessing suitable provision.** This was consistent across key parent groups and types of ASN.

Figure 16: Whether experienced difficulties accessing provision to meet ASN needs



Feedback from these parents indicated that difficulties are most commonly related to a lack of information on how providers support children with ASN, and concern that staff do not have the time required to meet their child's needs. Parents also mentioned concern that staff may lack the required qualifications, skills and experience to support their child's needs.

Figure 17: Type of difficulties encountered accessing provision to meet ASN needs



Note: Parents could select multiple options.

Qualitative feedback highlighted a similar range of concerns and difficulties in meeting the needs of children with ASN. For example, several parents had difficulty judging the ability of providers to meet their child's needs – including some who felt unable to judge the overall quality of providers. Some parents also felt that a lack of choice of provision negated their ability to compare the relative suitability of providers.

“I didn’t have much information to go on [on how providers meet ASN], just word of mouth really.”

Staff time and experience was also highlighted as a particular focus in parents’ judging the suitability of providers. This included examples where children had benefitted from new staff with experience in meeting their specific needs. Some parents felt that visits to providers had been useful in assessing staff attitude and levels, but they felt less able to judge staff skills and experience. In addition, several parents had chosen local authority nurseries linked to a primary school as they felt staff were more likely to have relevant experience, or could draw on the wider experience of school staff.

Parent D has a pre-school age child with a diagnosis of autism who qualified for a funded place from 2 years old. Parent D felt they had no real choice of ELC providers able to meet their child’s needs at that age, and that “it’s just pot luck” that the only suitable provider was accessible in terms of location and cost.

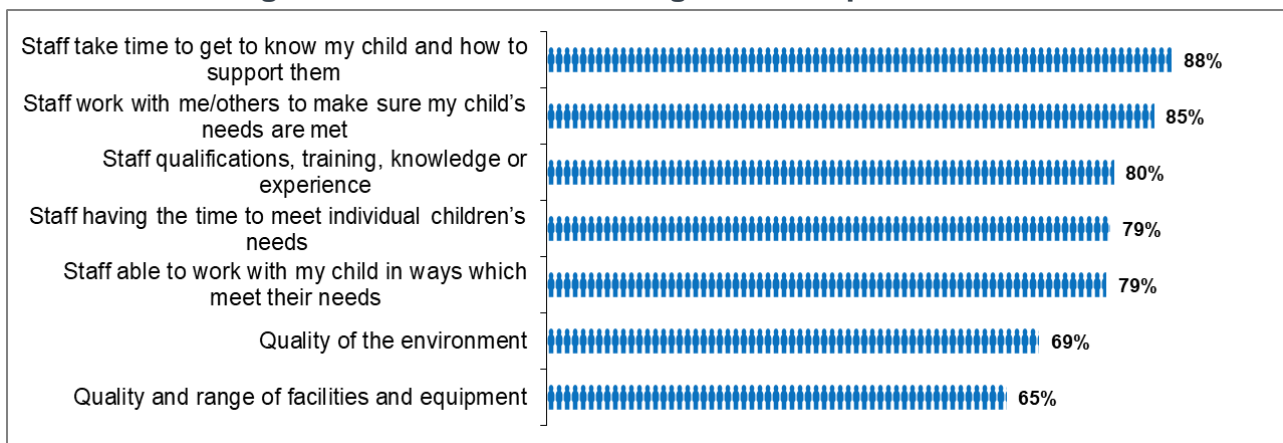
Parents also highlighted the importance of stability in ELC provision for children with ASN. Difficulties were noted where parents are required to use multiple providers, and where handovers between multiple providers have a negative impact on their child’s needs. Feedback also provided examples where use of the same childminder had provided valuable consistency through their child’s movement between nurseries, and ultimately into primary school.

Parents of children with ASN were also asked about the key factors that they would consider when choosing a provider that meets their child’s needs.

Staff were typically seen as the key factor in parents’ choice of provider. This included staff having the time to tailor their approach to their child’s needs (88% would take this into account), staff working with parents and others to meet the child’s needs (85%), and staff qualifications, training, knowledge and experience (80%). Parents of a child with ASN were also more likely than others to mention staff skills and experience as a factor in their choice of current provider.

Parent E’s child received an ASN diagnosis while attending a local authority nursery. Parent E was generally happy with the level of support provided, but saw a significant improvement in the quality of support when a staff change brought specific experience of their child’s condition.

Figure 18: Factors influencing choice of provision to meet ASN needs



Note: Parents could select multiple options.

In terms of likely future uptake of the expanded entitlement, there was no significant variation between parents of children with ASN and others; 75% expect to take up all or almost all of the expanded hours for a 3/4-year-old (identical to other parents), and 57% for a 2-year-old (compared to 61% of others). We discuss this in more detail under “Likely future use of 1140 hours”.

Views and experiences across parent groups

The research identified some significant variation across parent groups in views and preferences on geographical accessibility, awareness of the funded entitlement, and access to provision suitable for children with ASN.

This variation primarily related to income, deprivation and whether parents pay for ELC. For example, lower income households, single earners and those in the most deprived areas were less likely than others to be aware of the planned expansion in funded hours. In contrast, those who pay for ELC were more likely to be aware of the planned expansion.

Below we summarise the main variations across parent groups, highlighting where parents were significantly more or less likely than those in other parent groups to give a specific response.

Low incomes/Most deprived areas

Less likely to be aware of the planned expansion in funded hours.

More satisfied with access to provision for children with ASN.

Rural areas

More likely to travel for less than 5 minutes to their main ELC provider.

Single earner households

Less likely to be aware of the planned expansion in funded hours.

Parents of children with ASN

No significant variation.

Currently pay for ELC

More likely to travel for 15 minutes or more to their main provider.

More likely to be aware of the planned expansion in funded hours.

Less satisfied with access to provision for children with ASN.

Do not currently use funded ELC

No significant variation.

Other significant differences

Parent age: Under 35s are more likely to travel for less than 5 minutes to their main ELC provider. Over 35s are more likely to be aware of the planned expansion in funded hours.

Parent gender: Males are more likely to travel for less than 5 minutes to their main ELC provider. Females are more likely to be aware of the planned expansion in funded hours.

Parents not currently using ELC and those not in employment are less likely to be aware of the planned expansion in funded hours.

Affordability of Early Learning and Childcare

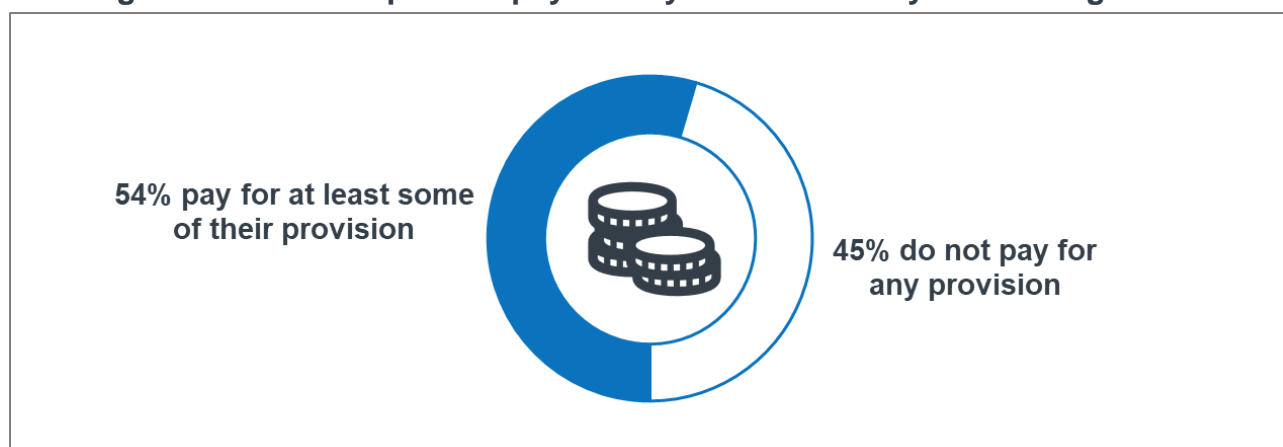
Making ELC more affordable is also identified as one of the key principles for the planned expansion. The Blueprint 2020 document notes that the expansion in entitlement is expected to increase access to affordable childcare, and in this way help to create the opportunity for parents to move into work or study or to increase their working hours, which would be expected to bring financial benefits to these families.

This section considers parents' views and experiences in relation to paying for ELC and affordability issues.

Paying for early learning and childcare

A little more than half (54%) of parents with children eligible for funded ELC indicated that they pay for at least some of the ELC they use for children aged under 6.

Figure 19: Whether parents pay for any of the ELC they use for eligible children



Those who pay for ELC on average spend a total of £494 per month.¹²

However, this average covers a broad range of costs reported by parents. For example, more than a third of those who pay for ELC indicated that they spend less than £300 per month, and around 1 in 10 spend less than £100. In contrast, around a quarter of those who pay indicated that they spend £700 or more per month on ELC for children aged under 6.

Parents' spend on ELC varied significantly across parent groups. For example, higher income households and those in the least deprived areas spend more on average than other households. Further detail on variation in spend on ELC across parent groups is provided later in this section.

¹² Note this is a total monthly cost for all children aged under 6.

Figure 20: Average monthly spend for all pre-school children (those who pay)

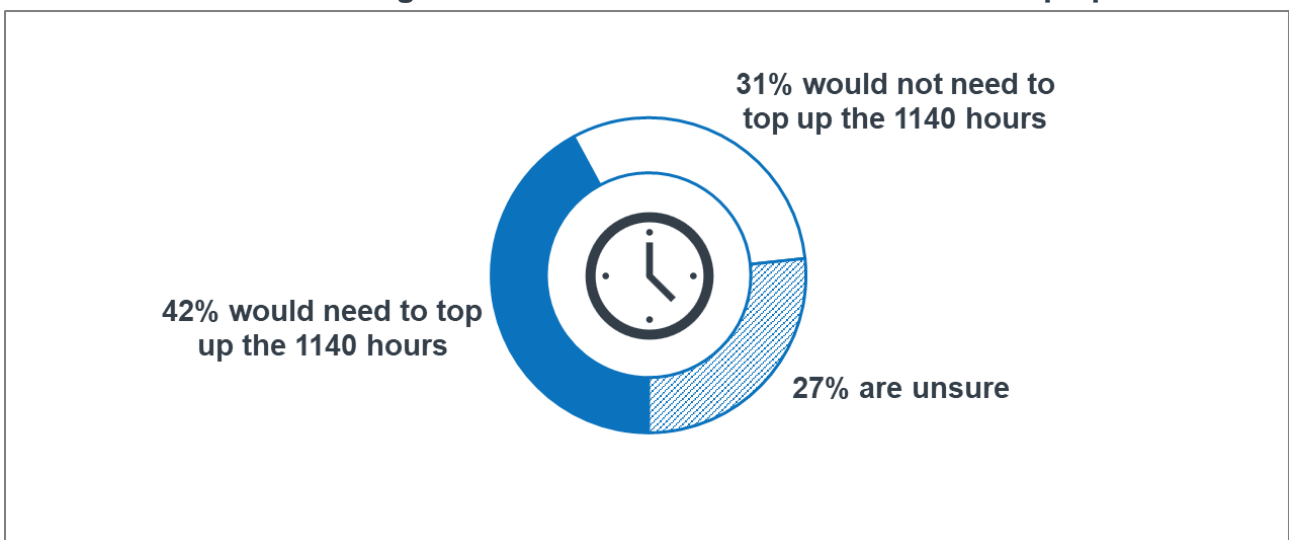


Topping up funded provision

Parents who said they would (hypothetically) use all or almost all of the 1140 hours of funded ELC when it becomes available were also asked if they felt that they would want or need to top up the funded hours with childcare they pay for themselves.

Around 2 in 5 (42%) of all parents with children aged under 6 felt that they would want or need to top up the 1140 funded hours. A further quarter of parents were unsure, and less than a third felt that they would not need to top up the 1140 hours.

Figure 21: Whether would want or need to top up 1140 hours

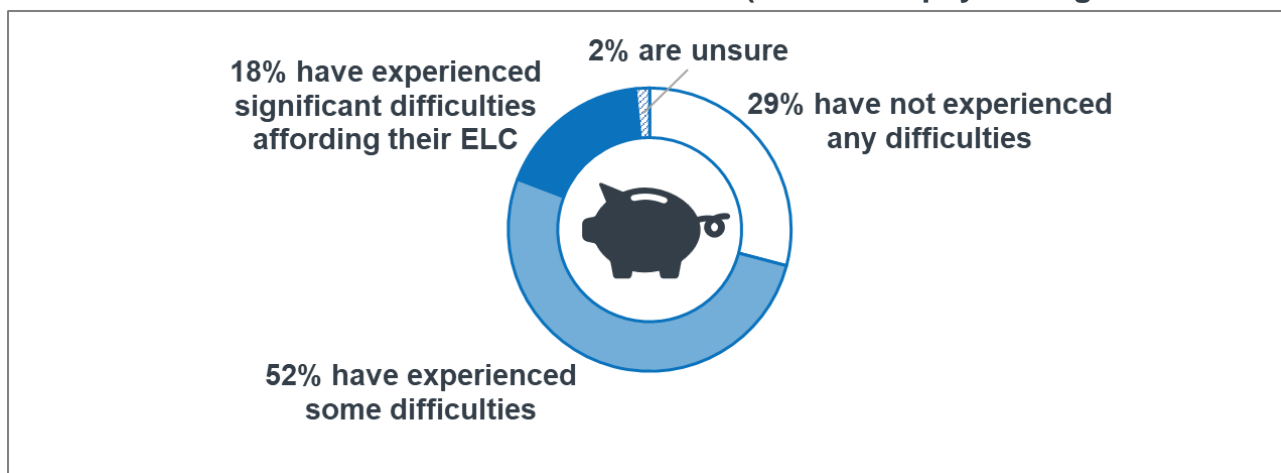


Affordability difficulties

Survey data indicated that most parents who pay for ELC have experienced some level of affordability difficulties.

The majority (69%) of those who pay for ELC for eligible children aged under 6 stated they have experienced affordability problems in the last 12 months. This included 18% of those who pay for eligible children who have experienced significant affordability problems.

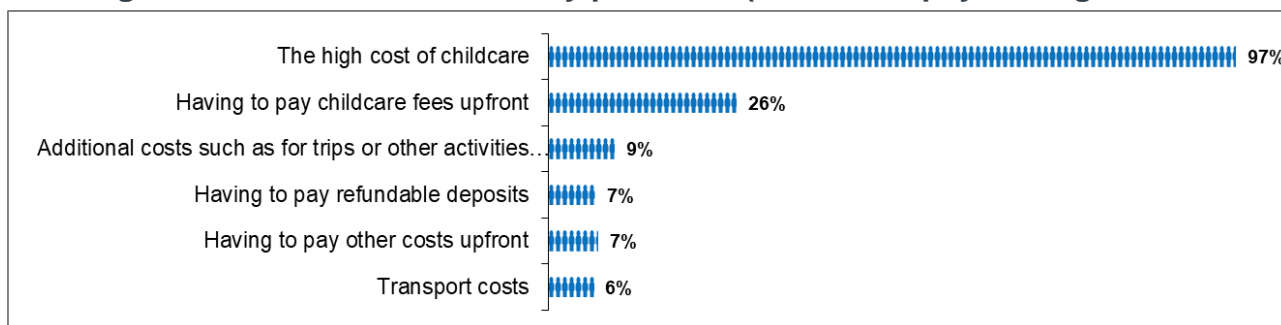
Figure 22: Whether experienced difficulties affording ELC costs in the last year (those who pay for eligible children)



Survey data also suggested that experience of affordability problems is linked to monthly spend on ELC. For example, parents who pay £500 or more per month for their provision were nearly twice as likely to have experienced significant affordability difficulties than those who pay less than £500 per month (25% and 13% respectively).

When asked about the nature of affordability difficulties, nearly all of those with experience of affordability problems mentioned the high cost of childcare (97%). Parents have also experienced other difficulties such as paying childcare fees upfront (26%), costs of trips or other activities (9%), paying refundable deposits (7%), and having to pay other upfront costs such as registration fees (7%).

Figure 23: Nature of affordability problems (those who pay for eligible children)



Note: Parents could select multiple options.

Qualitative participants also highlighted specific costs associated with ELC, such as small weekly charges for snacks and/or a “toy fund”, uniforms for children, trips or activities, and indirect costs such as travel. Although these costs are usually relatively low, some felt that these can cause affordability difficulties for those on low incomes. More widely, it was also noted that parents are often unaware of these costs until their child starts attending ELC, and so are unable to plan for these as part of their choice of provider.

“I have to pay lunch and snack charges...and on top of that a toy fund. It is voluntary, but you can't really [not pay]. If I go back onto benefits, £2.50 a week would make a difference.”

While a substantial proportion of those paying for ELC have experienced affordability problems, survey data indicated that affordability was rarely a factor in parents' choice of current provider (mentioned by only 8%). It is also notable that very few parents indicated that affordability is a reason for their choosing not to use funded hours for their eligible child; only 2% of these parents mentioned costs associated with ELC, and 4% mentioned travel costs.

Qualitative feedback suggested that, while few see the relative affordability of different providers as a key factor in their choice, cost does play a significant part in parents' decisions on the types of ELC provider they wish to use. This was primarily related to whether parents chose to make use of private providers, but also the number of hours they wish to use.

For example, several parents had made decisions on their working hours (including when returning to work) based on a detailed assessment of the balance between their net income and expected ELC costs. Some also cited “hidden” costs as influencing their decisions, such as having to pay for a full day of private provision to retain a wraparound place, or the addition of an “admin fee” by private providers where parents use their funded entitlement.

Parent F and their partner both work, and use a private nursery for their children to support this. Their 3-year-old receives funding towards the cost of 4 days per week, and they pay the full cost of 3 days per week for their youngest child. Choosing how they use ELC involved considering their relative salaries, and negotiating with both employers to find the most “family friendly” option. Parent F's partner now works part-time with flexible hours to make the cost of ELC sustainable.

“Unable to secure a local authority nursery place at 3 years old [we had] to pay privately for a nursery place, and for us both to submit change of hour requests which were, in part, authorised by our employers. We are of course, grateful to receive [funded hours] however as...the childminder charges a retainer whilst my child is in nursery, it is of little financial benefit to us.”

Views and experiences across parent groups

The research identified some significant variation across parent groups in views and preferences on paying for ELC, and experience of affordability difficulties.

This variation primarily related to income, deprivation and whether parents currently use funded hours. For example lower income households and single earners were less likely to pay for ELC, and those that do so typically pay less than others.

These parents were also less likely to expect to have to top up the 1140 hours, and more likely to have experienced affordability difficulties. In contrast, those who do not use funded ELC were more likely to pay for their provision, more likely to expect to have to top up the 1140 hours, and more likely to have experienced affordability difficulties. Below we summarise the main variations across parent groups, highlighting where parents were significantly more or less likely than those in other parent groups to give a specific response.

Low incomes/Most deprived areas

Less likely to pay for ELC – and those that do so pay less on average than others.

Less likely to expect to have to top up the 1140 funded hours.

More likely to have experienced affordability difficulties.

Rural areas

No significant variation.

Single earner households

Less likely to pay for ELC – and those that do so pay less on average than others.

Less likely to expect to have to top up the 1140 funded hours.

More likely to have experienced affordability difficulties.

Parents of children with ASN

Less likely to pay for ELC – and those that do so pay less on average than others.

Less likely to expect to have to top up the 1140 funded hours.

Currently pay for ELC

More likely to expect to have to top up the 1140 funded hours.

Do not currently use funded ELC

More likely to pay for ELC.

More likely to expect to have to top up the 1140 funded hours.

More likely to have experienced affordability difficulties.

Other significant differences

Parent age: Under 35s are less likely to pay for ELC, and those that do pay less on average than others, but are more likely to have experienced affordability difficulties. They are also less likely to expect to have to top up the 1140 funded hours.

Parent gender: No significant variation.

Likely future use of 1140 hours

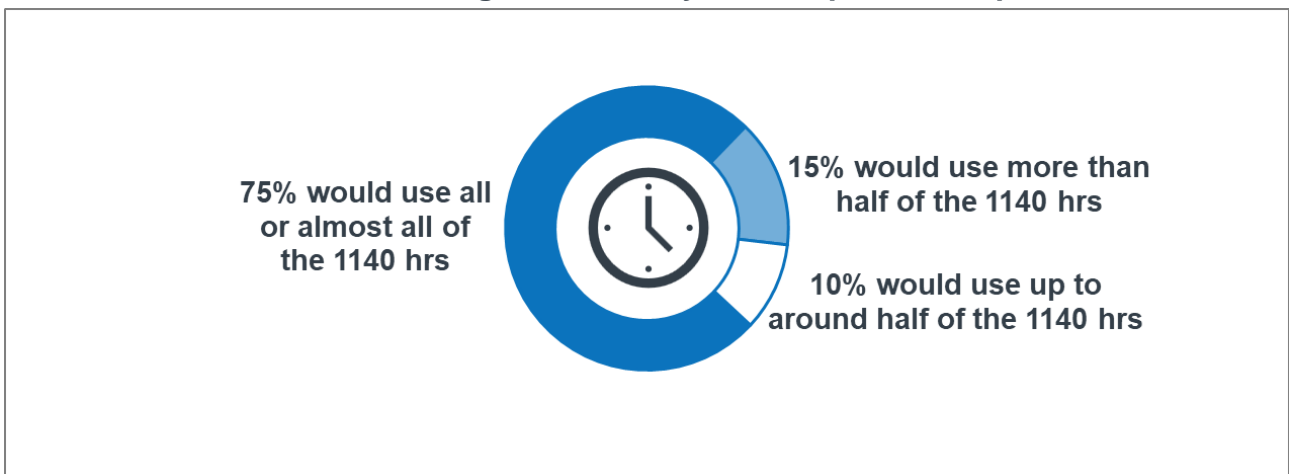
This section considers whether parents would hypothetically use the 1140 hours expanded entitlement.

As discussed earlier (see “Accessibility of ELC”), the majority of parents with eligible children were aware of the planned expansion in entitlement. Around three quarters had heard of the expansion, although only around half of those with eligible children were “definitely” aware.

A large majority (90%) of those with an eligible child said they would use at least some of the additional hours if the expanded entitlement were available now (and offered the flexibility required). Most would use all or almost all of the 1140 hours (75% of those with eligible children); 75% of parents stated they would use the full entitlement for a 3 or 4-year-old, compared to 67% for a 2-year-old.

There remained 10% of parents with eligible children who would not expect to use any additional hours over the current 600 entitlement, even if the full 1140 were available and they were able to find suitable provision. Parents were more likely to indicate this for a 2-year-old (18%).

Figure 24: Likely future uptake of expanded entitlement



Motivations for using expanded entitlement

Survey data showed some variation in the extent to which parents would use the expanded entitlement – although the majority across all key groups would use at least some of the additional hours. Regression analysis has been used to identify the factors that have the greatest impact on parents’ likely future uptake of the 1140 hours.

Results showed that the number of hours used, whether and how much parents pay for ELC, and the mix of funded/paid/informal ELC used have the closest correlation with parents’ expected uptake of the 1140 hours. In particular, the groups most likely to intend to use the full expanded entitlement were those

currently using more hours of ELC per week, those currently spending £100 or more per month on ELC, and those currently using paid and/or informal ELC. These findings and other key drivers are displayed at Figure 25.

Figure 25: Key drivers of future uptake of expanded hours (all parents)

| |
|---|
| <p>Most significant drivers</p> <ul style="list-style-type: none"> Number of hours of ELC currently used Current spend on ELC Whether parents currently pay for ELC Whether parents use funded, paid and/or informal provision |
| <p>Other factors showing a significant correlation</p> <ul style="list-style-type: none"> Experience of any affordability difficulties Number of adults in employment Whether parents have eligible children Number of children in household/whether includes children aged 6+ |

The minority of parents who would not expect to use all or almost all of the 1140 hours were also asked about any factors that might prevent them from making use of the full entitlement. The most common reasons selected are that their child would not be ready for additional hours, a preference to look after their child at home, a view that additional hours would not be good for their child’s wellbeing and development, and not having any need for additional hours of ELC.

Figure 26: Reasons for not planning to use additional hours (parent with eligible children who do not expect to use any additional hours)

| | |
|---|---|
| <p>Would use only part of additional hours (n=649)</p> <ul style="list-style-type: none"> Children should not be in nursery so long (70%) Do not need so many hours (67%) Not good for relationship with child (46%) Not good for child’s wellbeing (43%) Child would not like to be separated from parents (36%) | <p>Would not use any additional hours (n=227)</p> <ul style="list-style-type: none"> Prefer to look after child myself (61%) Not good for child’s wellbeing (38%) Not good for relationship with child (35%) Not good for child’s development (31%) Child would not like to be separated from parents (22%) |
|---|---|

Note: Parents could select multiple options.

Views and experiences across parent groups

The research identified some significant variation across parent groups in whether parents would use the 1140 hours expanded entitlement.

This variation primarily related to income, deprivation and whether parents pay for ELC. For example single earners were less likely to expect to use the full 1140 expanded hours, and those who pay for ELC were more likely to expect to use the full expanded entitlement.

Below we summarise the main variations across parent groups, highlighting where parents were significantly more or less likely than those in other parent groups to give a specific response.

Low incomes/Most deprived areas

No significant variation

Rural areas

Less likely to expect to use the full 1140 expanded hours.

Single earner households

Less likely to expect to use the full 1140 expanded hours.

Parents of children with ASN

No significant variation

Currently pay for ELC

More likely to expect to use the full 1140 expanded hours.

Do not currently use funded ELC

More likely to expect to use the full 1140 expanded hours.

Other significant differences

Parent age: Under 25s are less likely to expect to use the full 1140 expanded hours.

Parent gender: No significant variation.

Quality of early learning and childcare

Ensuring available ELC is of high quality is also a primary objective of the planned expansion. This reflects the wider research literature which demonstrates that higher quality ELC can contribute to better social, emotional and cognitive development for children.

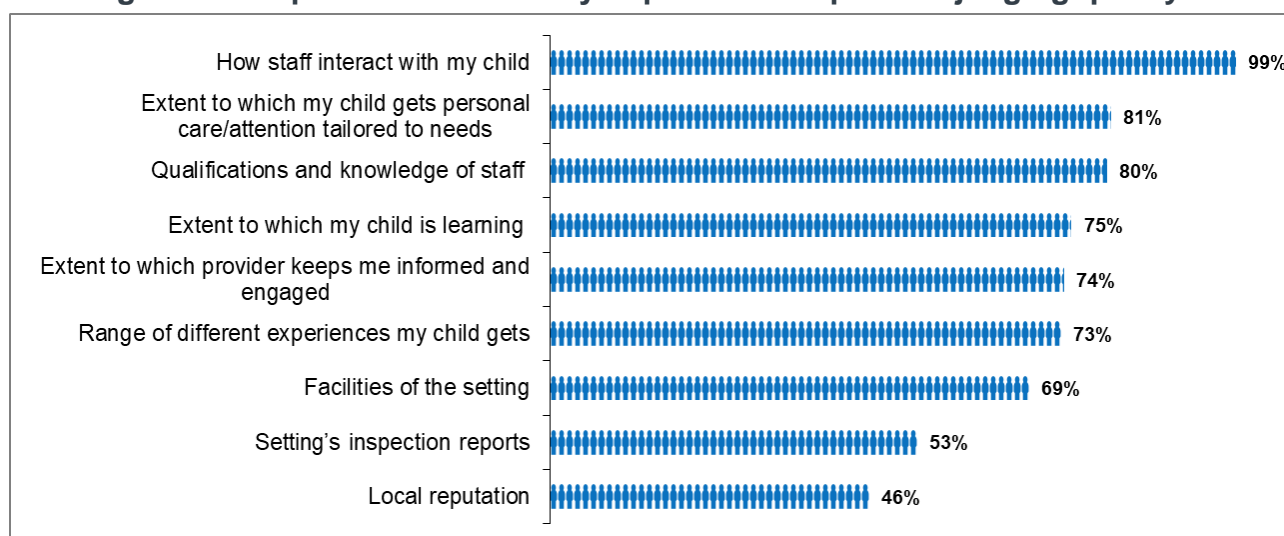
This section considers parent views on the factors that are most important to parents' judgement of the quality of ELC, and on the quality of their current provider against these factors.

Key aspects of early learning and childcare

Staff were rated as the most important factor for parents' judgement on the quality of ELC providers. This included how staff interact with their child (99% see this as "very important"), the extent to which their child gets personal care and attention (81%), and staff qualifications and knowledge (80%).

The extent to which their child is learning, how providers keep parents informed and engaged, and the range of different experiences that their child gets were also important factors for parents. In contrast, parents were less likely to rate the provider's reputation and inspection reports as "very important", despite reputation being the second most common motivation for parents' choice of their current provider (see Figure 7). This may reflect comments noted later from some qualitative participants, that parents can find it difficult to judge quality of ELC in advance of choosing a provider, and that reputation and word of mouth are important aspects of this decision.

Figure 27: Aspects rated as "very important" for parents judging quality of ELC



Qualitative feedback suggested that parents are varied in their views and experiences of judging the quality of ELC provision. All agreed that quality is a vital element in their choice of provider, but there was a mix of views on how well parents felt able to judge this. For example some parents, particularly those without prior experience of using ELC, found it difficult to judge the quality of providers prior to their child taking up a place.

These parents highlighted word of mouth from other parents as particularly important to their judging the relative quality of providers – including as a means of helping them to identify the key aspects of provision that make for a good quality service. Some of those who found it difficult to judge quality indicated that they had chosen to use a local authority nursery as they felt more comfortable that a minimum quality standard would be provided. This appeared to reflect a perception that there is greater variation in the quality of private ELC providers, than local authority providers.

Other information used by parents to judge the quality of ELC included inspection reports and visits to providers. Parent visits were highlighted by most participants as a vital part of their assessing the quality of provision. This was seen as a means of judging staff experience/attitude and other factors listed at Figure 27 above, but also to get a sense of the “atmosphere” created by the provider. This included reference to less tangible aspects of provision such as the extent to which providers create a friendly and welcoming environment for children. Parents also emphasised the importance of their child’s response to the provider during the visit, including examples where a child’s positive reaction had influenced the choice of provider even where this was not the parent’s first choice (e.g. based on reputation or inspection reports).

Parent H has two children aged 2 and 3 years. Both are currently in private nursery. Parent H felt that available reports and information on ELC providers did not give a real sense of the quality of provision – particularly staff experience and manner, which they feel is a key factor. Canvassing opinion from friends and neighbours was important for their choice of provider – although they were concerned that word of mouth could be out of date due to high turnover of staff in some providers.

“It was my first child, I didn’t know anything about childcare or how to judge it.”

“[Choosing] was really daunting the first time. We visited once by arrangement and once unannounced – a recommendation from a friend to get a feel for the atmosphere. But I remember being terrified turning up, I’d never been in a nursery before, I’d never done this before...But [the visit] and chatting to other parents was a big help.”

As noted earlier, the accessibility of ELC also had an impact on how some parents consider the quality of provision. This included some who felt that they did not have the “luxury” of comparing the quality of alternative providers, as there was insufficient choice or flexibility in terms of the days/hours they required.

“Thankfully it has worked out well, but we didn’t really have a choice [to compare the quality] – people were refused entry this year as they were over-full.”

In terms of the specific aspects of ELC that inform quality judgements, parents were diverse in their priorities. This included a mix of views on the balance between their child’s learning, social development and wider experiences. To some extent this appeared to be linked to the child’s age; parents of younger children (e.g. under 3) appeared more likely to focus on staff attitude, social interaction and stimulating experiences, while parents of older children (particularly 4-year olds) focused more on the quality of learning and preparation for school.

However, on the topic of judging the quality of ELC, the following common points were raised:

- Where parents have knowledge of providers based on previous experience, this is particularly important for their quality judgements.
- Staff qualifications and experience are important, with some parents noting concern regarding the potential for variation across providers, and a lack of clarity on how staff qualifications may compare between local authority and private providers.
- One-to-one contact with staff, and the amount of time that staff can dedicate to their child, appeared to be a particular priority for parents of children with ASN. Some preferred a childminder to a nursery as a means of providing more individual support.
- Feedback from their child is also important for parents’ quality judgements, including parents listening to their child’s explicit views, and looking for evidence of their child’s development. Parents expressed a mix of views on the relative benefits of local authority and private providers; some felt that local authority providers offer more structured learning in preparation for school, while others felt that private providers can offer more personalised learning.

Parent J has a 4-year-old with ASN who is non-verbal. A single parent in a remote rural area, Parent J started using their private provider to enable a return to work when their child turned 1. Following a diagnosis of ASN at the age of 3, the quality of provision became even more important. The provider’s willingness to work with Parent J to develop strategies to support their child’s needs, and to provide a nurturing environment have been key factors for their child’s experience, and Parent J’s sense of the quality of provision.

- Flexibility of the provider to accommodate parents' needs in terms of days and hours was another indicator of quality for parents.

Rating the quality of ELC provision

Parents were asked to rate the quality of their main ELC provider against the same set of factors (see Figure 28 below).

A large majority of parents were satisfied with their current provider; at least 80% of parents were satisfied with each of the aspects listed in Figure 28.

Satisfaction was strongest for how staff interact with their child (96% satisfied), staff qualifications and knowledge (94%) and facilities at the setting (94%). This indicates that parent satisfaction is strong for the aspects of their provision that parents see as most important.

Figure 28: Rating the quality of main ELC provider



Views and experiences across parent groups

The research identified some significant variation across parent groups in views and preferences on the factors that are most important to parents' judgement of the quality of ELC, and on the quality of their current provider against these.

This variation primarily related to income, deprivation, whether parents pay for ELC and parents of children with ASN. For example lower income households and those in the most deprived areas were more likely to rate a range of factors as very important to the quality of ELC, and more satisfied across all aspects of their current provider. In contrast, those who pay for ELC and parents of children with ASN were less likely to rate a range of factors as very important, and the latter group were also less satisfied with several aspects of their current provider.

Below we summarise the main variations across parent groups, highlighting where parents were significantly more or less likely than those in other parent groups to give a specific response.

Low incomes/Most deprived areas

More likely to rate staff qualifications/ knowledge, facilities, whether their child is learning, the provider keeping parents informed and inspection reports as very important.

More likely than others to be very satisfied across all aspects of their main provider.

Rural areas

No significant variation.

Single earner households

No significant variation.

Parents of children with ASN

Less likely than others to rate staff qualifications/ knowledge, facilities and inspection reports as very important.

Less likely to be very satisfied with staff qualifications/ knowledge, how staff interact with their child, facilities and their child's learning.

Currently pay for ELC

Less likely to be very satisfied with staff qualifications/ knowledge, how staff interact with their child, their child getting personal care and attention, their child's learning, and the provider keeping parents informed.

Do not currently use funded ELC

No significant variation.

Other significant differences

Parent age: Under 35s are more likely to rate facilities, whether their child is learning, the provider keeping parents informed and inspection reports as very important. They are also more likely to be very satisfied with their child's learning.

Parent gender: Females are more likely to rate staff qualifications/ knowledge, their child getting personal care and attention, the provider keeping parents informed and inspection reports as very important.

Perceived outcomes and benefits

Improving outcomes for children and parents are identified as key aims for the expansion in ELC entitlement. This includes supporting children’s cognitive, social and emotional development, and enabling more parents to access work, training or study. The current study was limited in its scope to explore long-term child and parent outcomes in detail. However, the research did explore whether parents choose to use ELC for the purposes of improving the aforementioned outcomes, and whether these views are related to current ELC use.

A large majority of parents identified **supporting their child’s learning and development** as a reason for using ELC for 3/4-year olds (78%) and 2-year olds (84%). A substantial proportion of parents also mentioned that **ELC is good for their ability to help their child’s learning and development at home** (38% for 3/4-year olds, 45% for 2-year olds).

Enabling parents to work or look for work were also common outcomes associated with use of ELC. Two thirds (66%) of parents using ELC for a 3 or 4-year-old mentioned working or looking for work, and 16% mentioned increasing the hours they and/or their partner work. Parents were less likely to mention work as a reason for using ELC for an eligible 2-year-old; 47% of these parents mentioned working or looking for work. In contrast, those with an eligible 2-year-old were more likely than those with a 3 or 4-year-old to use ELC to provide more time for household tasks (44%) or for more time for themselves (24%).

Figure 29: Reasons for using ELC for 3 or 4-year-old

| Child outcomes | Parent outcomes |
|--|--|
| Good for child’s development (78%) | To work or look for work (66%) |
| Good for child’s learning (73%) | Increase hours I/my partner works (16%) |
| Good for my ability to help child’s learning and development at home (38%) | More time for household tasks (15%) |
| | More time to look after other children (13%) |
| | Study or improve work skills (10%) |
| | More time for ourselves (8%) |
| | Care for another relative or friend (2%) |

Figure 30: Reasons for using ELC for eligible 2-year-old

| Child outcomes | Parent outcomes |
|--|--|
| Good for child’s learning (84%) | To work or look for work (47%) |
| Good for child’s development (79%) | More time for household tasks (44%) |
| Good for my ability to help child’s learning and development at home (45%) | Study or improve work skills (26%) |
| | More time for ourselves (24%) |
| | More time to look after other children (14%) |
| | Increase hours I/my partner works (11%) |
| | Care for another relative or friend (10%) |

Qualitative feedback also highlighted a range of perceived benefits to parents and children associated with the use of ELC.

Enabling parents to work appeared to be a key factor for most interview participants. It was notable that many of the difficulties or concerns experienced by parents – for example flexibility of hours, accessibility – were raised in the context of using ELC to enable them to work.

In addition to work, parents also emphasised the extent to which ELC provides them with more time for other parts of their lives – including caring for other children, household tasks and time for themselves. These parents felt that use of ELC has in this way improved quality of life for their family, and in some cases had a positive impact on their own mental health. This included examples where parents had felt under significant pressure balancing work and childcare before their child was eligible for funded ELC.

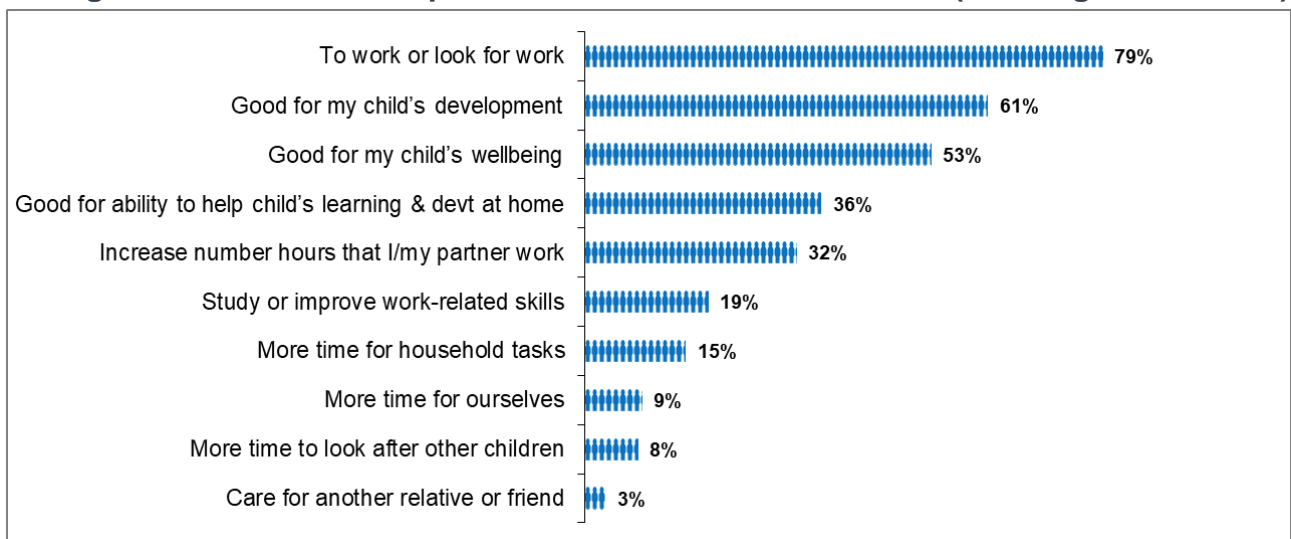
Parents were clear in their view that ELC had a positive impact on their child’s development – both social and cognitive. Contact with peers was highlighted as a significant positive in their social development, and in preparing children for school. This aspect of ELC was identified as a particular positive for some parents of children with ASN (for example through contact with their peers and their key worker) and for siblings at home who gain time and space for themselves.

Parent K lives in a remote rural area, with an eligible 2-year-old and 10-month-old twins. ELC has provided significant benefits for the 2-year old’s social and cognitive development – an experience that would not have been available without funding. The opportunity to interact with peers has been vital – “she has come on leaps and bounds, and [the nursery] has helped her at home too with interacting with other kids.”

Parents also referred to positives around communication from providers. This included online diaries and other examples of providers keeping parents informed, and examples of parents using feedback from providers to support their child’s learning and development at home. Some parents did not have access to these facilities, but nevertheless highlighted the importance of relationships with staff and feeling able to raise issues or queries.

As mentioned previously, parents identified the ability to work/look for work and support for their child’s learning and development as the most common reasons for current and likely future use of ELC. For parents who would expect to use all or almost all of the expanded 1140 hours, more than three quarters (79%) would do so to work or look for work, and around a third to increase the hours they or their partner work (32%). More than half would use the expanded entitlement for their child’s development (61%) or wellbeing (53%).

Figure 31: Reasons that parents would use full 1140 hours (with eligible children)



Note: Parents could select multiple options.

Views and experiences across parent groups

The research identified some significant variation across parent groups in the reasons that influence parents use of ELC.

This variation primarily related to income, deprivation, whether parents pay for ELC and whether parents use funded ELC. For example lower income households, those in the most deprived areas and single earners were more likely to mention studying or improving work skills, and having more time to look after other children or household tasks as reasons for using ELC. In contrast, those who pay for ELC and parents who do not use funded ELC were more likely to use ELC to work or increase their hours of work.

Below we summarise the main variations across parent groups, highlighting where parents were significantly more or less likely than those in other parent groups to give a specific response.

Low incomes/Most deprived areas

More likely to use ELC to study or improve work skills, and to provide more time to look after other children or household tasks.

Less likely to use ELC to work.

Rural areas

No significant variation.

Single earner households

More likely to use ELC to study or improve work skills, and to provide more time to look after other children or household tasks.

Less likely to use ELC to work.

Parents of children with ASN

More likely to use ELC for their child's learning and development.

Less likely to use ELC to work.

Currently pay for ELC

More likely than others to use ELC to work or to increase their hours of work.

Less likely to use ELC to have more time for household tasks or for their child's learning and development.

Do not currently use funded ELC

More likely than others to use ELC to work or to increase their hours of work.

Less likely to use ELC to have more time for household tasks or for their child's learning and development.

Other significant differences

Parent age: Under 35s are more likely to use ELC to study/improve work skills and to have more time to look after other children. They are less likely to use ELC to work.

Parent gender: No significant variation.

Conclusions and key messages

This report has presented research findings on parents' use of and views on early learning and childcare (ELC), to inform the development and delivery of the ELC expansion programme. This section provides an overview of key research findings across the themes considered by the research, and learning points for the future expansion to 1140 hours.

Uptake of funded hours

The research indicates that the great majority of parents with eligible children use some form of ELC, and nearly 9 in 10 use funded hours. Most of those using their funded entitlement combine this with paid and/or informal provision, and research findings suggest that this mix of providers is vital in enabling parents to secure the days and hours of ELC they require.

Uptake of the funded entitlement is significantly higher for 3 and 4-year olds than for 2-year olds – nearly all parents with a 3 or 4-year-old use some form of ELC, compared to less than half of those with an eligible 2-year-old.

Variation in uptake of the funded entitlement is due in part to parental choice, most commonly because they feel their child is too young. However, parents also referred to barriers to their using the entitlement such as not being aware that funded hours are available, or a lack of flexibility or choice in opening hours and childcare settings in their area.

Delivering flexibility, accessibility and quality

Flexibility, accessibility and quality of ELC are three of the key principles on which the planned expansion in entitlement is based. Key findings in relation to each of these principles are summarised below.

Flexibility

A substantial number of parents feel there is not enough flexibility in current ELC provision (i.e. 600 funded hours per annum), and this has an impact on whether and how parents use ELC. A lack of flexibility in current provision is of most concern for those who are unable to afford private provision, single working parents, and those without access to informal ELC. Parents also experience a lack of flexibility and choice linked to their location – in rural areas due to a limited number of providers, and in urban areas due to limited availability of places.

Parents feel that private providers currently offer significantly better flexibility than local authority nurseries, and suggested that inflexibility in the hours offered by local authority providers are a significant barrier to these settings enabling parents to work. This is reflected in the number of parents using multiple ELC providers to secure the hours they require. However, some are unable to secure the required

pattern of provision due to a lack of available places, affordability pressures, and/or lack of access to informal ELC.

Accessibility and quality

Study findings suggest that travel time is not a significant barrier to parents accessing suitable ELC, although parents in rural areas and those without access to transport are more likely to find location a constraint on their access to ELC. The majority of parents are aware of the funded entitlement, but a lack of information on available providers can limit parents' ability to make best use of the entitlement.

Parents are very positive about the quality of ELC they use. Satisfaction is strongest for how staff interact with their child (also the aspect of provision that parents rate as most important), staff qualifications and knowledge, and the quality of facilities.

The experience of parents of children with ASN suggests some room for improvement. Most are satisfied with their access to suitable ELC and are satisfied with the quality of their provider, although ratings are somewhat lower than for other groups. However, around half have experienced some barriers to accessing ELC. These difficulties most commonly relate to a lack of information on how providers support children with ASN, and the time that staff have available to meet children's needs.

Expanding the funded entitlement

In addition to assessing parents' current use of and views on ELC, the study also sought to gather feedback to inform the planned expansion in the funded entitlement by asking parents about their hypothetical use of 1140 hours per year, if it was available to them now.

Take-up

Findings suggest that on average parents use 29 hours per week for a 3 or 4-year-old, and 24 hours for an eligible 2-year-old. This is broadly similar to the funded hours that the expansion would give parents; around 30 hours per week if used only during term-time, and 20-25 hours per week if used year-round. This suggests that many parents could be willing to use the additional hours when the expanded entitlement is introduced. This is reflected in feedback from parents with eligible children, 90% of whom would use some of the additional hours, and 75% of whom would use all or almost all of the 1140 hours.

However, research findings suggest that awareness of the entitlement may be a barrier to take up of the planned expansion. Around a quarter of parents have not heard of the planned expansion, and awareness is lowest for lower income and younger (under 35) parents. Moreover, around a fifth of those who are not currently using funded hours said that this is because they were not aware of the entitlement, or did not know how to use it. This suggests that raising awareness of the ELC entitlement could have a positive impact on uptake of the expanded hours.

Flexibility

The study suggests that there remains room for improvement in the flexibility of ELC provision, particularly for local authority nurseries. In terms of how parents would wish to use the expanded entitlement, this includes greater flexibility to use funded hours all year round, and in longer sessions each day. There is some variation in preferences, but year-round use and longer sessions are the most common preferences across all parent groups.

Qualitative feedback also suggests that a lack of flexibility in how funded hours can be used is a barrier to some parents using local authority provision. However, this feedback also suggests that parents are highly diverse in their specific requirements, and the patterns of days and hours over which they would wish to use the 1140 hours.

Affordability and financial impact

Making childcare more affordable to parents is also a key principle for the planned expansion. Study findings confirm that this is a priority for parents, and suggest the potential for positive financial impacts associated with reduced ELC costs and improved access to employment.

A little more than half of parents pay for ELC for children below primary school age, and those that do pay on average spend a total of almost £500 per month. More than two thirds of those parents who pay for eligible children say they have experienced affordability difficulties in the past year – including a fifth of those who pay with experience of significant difficulties.

In terms of financial impact, the proportion of parents paying for ELC and the prevalence of affordability difficulties suggests potential for the expanded entitlement to deliver direct financial impacts for the affordability of ELC. The study also highlights potential for the expansion to create opportunities for parents to move into work or study or to increase their working hours, which would also be expected to bring financial benefits. For example, for parents who would expect to use all or almost all of the expanded hours, nearly 80% would do so to work or look for work and around a third would expect to increase their working hours.

Impact and inequality

Supporting disadvantaged families, and reducing the attainment gap between the most and least deprived households, is a particular focus for the planned expansion. In this context, the report has highlighted significant variation across key parent groups under each theme.

In terms of financial impact, the study suggests that the expanded entitlement is likely to have a more significant impact for some parent groups. This reflects variation in the proportion of parents paying for ELC, how much of their income is spent on ELC, and experience of affordability difficulties. Those likely to see the most significant impact include two-earner households, parents who currently use

30 hours or more per week ELC, those who currently pay more for their ELC, and parents with experience of affordability difficulties. Each of these groups are more likely to expect to use the full 1140 hours.

Lower income households are less likely to pay for their ELC, and those that do typically pay less. However, the study also suggests that lower income households are more likely to report that they find it difficult to afford childcare, and a substantial proportion expect to use the 1140 hours to enable them to work. This suggests potential for the planned expansion to have a positive financial impact for lower income groups.

In terms of other significant variation in parents' views and experiences, these typically relate to income, deprivation, and how parents use ELC (particularly whether they pay for their provision). Key points of note are:

- Flexibility. Lower income households, single earners and those in the most deprived areas are more likely than others to prefer to use their entitlement during term-time only, in shorter sessions each day, and with a local authority nursery. Those who pay for ELC are more likely to prefer to use their entitlement all year round, for longer sessions, and with a private nursery.
- Accessibility. Lower income households, single earners and those in the most deprived areas are less likely than others to be aware of the planned expansion. Those who pay for ELC are more likely to be aware.
- Affordability. Lower income households and single earners are less likely to pay for ELC, and those that do so typically pay less than others. These parents are also less likely to expect to have to top up the 1140 hours, and are more likely to have experienced affordability difficulties. In contrast, those who do not use funded ELC are more likely to pay for their provision, more likely to expect to have to top up the 1140 hours, and more likely to have experienced affordability difficulties.
- Likely future use of 1140 hours. Lower income households, single earners and those in the most deprived areas use less hours of ELC on average, are more likely to use funded hours and less likely to pay for ELC. Those who pay for ELC use more hours on average, more likely to use private nurseries or childminders, and more likely to expect to use the full 1140 hours.
- Quality. Lower income households and those in the most deprived areas are more likely to rate a range of factors as very important to the quality of ELC, and are more satisfied across all aspects of their current provider. In contrast, those who pay for ELC and parents of children with ASN are less likely to rate a range of factors as very important, and the latter group are also less satisfied with several aspects of their current provider.
- Outcomes and benefits. Lower income households, those in the most deprived areas and single earners are more likely to use ELC to study or improve their work skills, and for more time to look after other children or household tasks. Those who pay for ELC and who do not use any funded hours are more likely to use ELC to work or increase their hours of work.



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