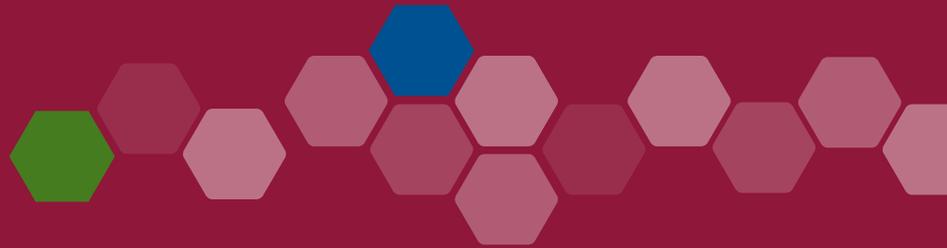


Parents views and use of early learning and childcare in Scotland, 2022



CHILDREN, EDUCATION AND SKILLS

Contents

Executive summary	4
Acknowledgements	10
Introduction	11
Background and study objectives.....	11
Study approach	12
Profile of the response to the survey.....	13
Profile of the survey respondents	15
Analysis and reporting	15
Comparisons with previous study.....	16
Limitations to the research.....	16
Key definitions used in the survey.....	17
Structure of the report	17
Research findings	19
Use of early learning and childcare	19
Use of childcare.....	19
Use of childcare for under two year olds.....	20
Use of childcare for two year olds	21
Three to five year olds.....	21
Levels of childcare use	22
Use of funded ELC.....	24
Reasons for not using funded ELC	27
Comparison with 2018	29
Flexibility of funded ELC	30
Profile of use.....	30
Flexibility of ELC.....	32
Comparison with 2018	34
Accessibility of funded ELC	36
Ease of transport	36
Children with additional support needs	36
Difficulties experienced by parents of children with ASN	38
Comparisons with 2018	39
Choosing a service provider for a child with ASN.....	39
Choosing a funded ELC provider and quality of funded ELC.....	41
Choosing a funded ELC provider	41

Quality of funded ELC provision	42
Impacts and benefits of funded ELC	43
Effect of Covid-19 on use of funded ELC	47
Direction of change	47
Reasons for reduction in hours.....	47
Reasons for increase in hours	49
Other impacts of Covid-19	50
Affordability of childcare	52
Amount spent by age	52
Difficulties affording childcare	53
Sources of difficulties	54
Provision for younger children (one and two olds).....	57
Profile of use of childcare.....	57
Reasons for not using paid-for childcare.....	58
Interest in expansion of funded ELC to one and two year olds	58
Factors considered when choosing childcare	59
Summary and conclusions	61
Use of childcare.....	61
Uptake of funded ELC	61
Reasons for not using funded ELC	62
Experience of funded ELC: quality and accessibility	62
Experience of funded ELC: flexibility	62
Experience of funded ELC: Additional Support Needs.....	63
The impact of funded ELC	63
The impact of Covid-19.....	63
Affordability of childcare	64
Expanding provision.....	64
Summary of sub-group analysis	66
Appendix A: Methodology	69
Appendix B: Data Tables.....	77

Executive summary

This report presents the findings from a survey undertaken to explore use of, and views on, early learning and childcare (ELC) services among parents and other primary carers of children in Scotland who have not yet started school.

Background and study objectives

From August 2021 the funded entitlement to ELC in Scotland increased from 600 to 1,140 hours per year for all three and four year olds, as well as for eligible two year olds¹. This is a significant increase in funded hours for eligible children and aims to deliver three main benefits for children and families: that children's development improves and the poverty-related outcomes gap narrows; parents' and carers' opportunities to take up or sustain work, training, or study increase; and family wellbeing improves.

As part of the programme of evaluation and research on this increase in funded hours, Scottish Government appointed independent researchers, Progressive Partnership, to undertake a survey of parents. The study sought the views of parents in Scotland with children aged under six years who were not yet in school. It involved an online survey, primarily promoted to parents through ELC providers, and telephone interviews with parents who have pre-school children drawn from the re-contacts database of the Scottish Household Survey. Efforts were also made to include parents whose children were cared for by childminders and those not in ELC. It should be noted that the respondents to the online survey were self-selecting. The main fieldwork took place in April and May 2022.

The survey provides up-to-date information on parents' use of and views about ELC, particularly accessibility, flexibility, affordability and quality, with a focus on funded ELC. This builds on a previous survey undertaken in 2017 which also explored parents' views on use and experience of ELC prior to the expansion. It should be noted that the vast majority (95%) of survey respondents were women.

Key findings and conclusions

Use of childcare

The majority (98%) of parents who responded to the survey reported that they use some form of childcare² for their children. The likelihood of using childcare increases with a child's age, rising from 67% for under twos to just under 100% for three to fives. Parents from more disadvantaged households were less likely to use childcare generally and tended to use fewer hours.

The type and mix of childcare used also varies by the child's age, not least because most of the three to five year olds in the sample were entitled to funded ELC.

¹ That is, those with experience of care, children of care-experienced parents, and those who have a parent(s) on qualifying benefits: [Funded early learning and childcare - mygov.scot](https://www.mygov.scot/government/early-learning-and-childcare).

² Including their entitlement to funded ELC, paid for childcare/ELC and informal childcare provided by friends or family.

Around 60% of parents of two year olds use *paid-for* childcare, compared to around 41% of under twos and 22% of those with children aged three to five years.

The average number of hours of *paid-for* childcare used per week during term time – including for children not entitled to funded ELC and in addition to funded ELC for those eligible – was similar across all child age groups at around 20 hours per week. Parents used slightly less paid-for childcare during school holidays, especially for children aged three to five. Generally, households with two working parents used more paid-for childcare hours than other households, and the amount of paid childcare used increased with income.

Use of funded ELC

Most of the survey focused on views relating to funded ELC. Almost all (97%) of the parents with a three to five year old and most (86%) with an eligible two year old had used funded ELC for their child since August 2021.

Since August 2021, all parents of eligible children have been entitled to 1,140 hours of funded ELC. Around three-quarters (73%) of parents with a three to five year old and around half (52%) of those with a two year old used all the entitlement. Households with a working parent were more likely than others to be using their full entitlement. Of those not using their full entitlement, most were doing so through choice: typically, they did not need or want the full entitlement or did not want their child in nursery for so many hours. However, around a quarter (23%) of those not using the full 1,140 hours could not get the sessions that they wanted at their preferred setting. This was a particular issue for households with two parents in work.

Only 3% of parents with a three to five year old surveyed said they had not used funded ELC. Most of these children had recently turned three and had to wait until August 2022 to take up their place. Generally, parents of two year olds who did not take up their entitlement felt they did not need it because their child was still too young, or because they preferred to look after their child themselves. However, a few mentioned being unaware of funded ELC and how to access it.

Flexibility of funded ELC

The majority of parents used their funded ELC in a local authority nursery class (72% of parents with children aged three to five; 61% of parents of two year olds), with almost all of the others using private nurseries. Three per cent used a childminder. Around a tenth (11%) of parents of two year olds used a family centre.

Overall parents were roughly split between using their funded hours all-year round and during term time. Parents of children aged three to five were more likely to use their hours during term time only (57% vs 41%), while parents of eligible two year olds were more evenly divided (49% vs 47%).

On average, the three to five year old children tended to spend 24.9 hours per week in funded ELC during term time, and 21.4 hours per during holidays. This is slightly longer than the eligible two years olds, who spent 21.0 hours and 17.6

hours respectively. For both age groups, households with two working parents used more hours throughout the year than those with no working parents.

Parents, on the whole, said they were satisfied with the flexibility they have been offered to use their funded hours in a way that meets their family's needs: 88% of those with a three to five year old and 92% of those with a two year old were satisfied, with 58% and 74% respectively very satisfied. Those who were dissatisfied would prefer the option of being able to have longer sessions on fewer days each week, shorter sessions on more days each week, and sessions throughout the school holidays. Many of these parents wanted flexibility to match their funded hours more closely to their work patterns, so they could minimise the amount of top-up care they had to purchase.

Accessibility of funded ELC

Nearly all eligible parents found it easy to travel to their main provider of funded ELC, with 97% of parents of three to five year olds and 95% of parents of eligible two year olds saying they found it easy to travel to their funded ELC provider, and around three-quarters saying they found it very easy.

Use of ELC for children with additional support needs

Fifteen per cent of parents said at least one of their eligible children has additional support needs (ASN). The most commonly mentioned were language, speech and communication difficulties; social, emotional or behavioural difficulties; and autistic spectrum disorder.

Parents were generally satisfied that funded ELC meets their child's additional support needs: 85% said they were satisfied, this includes 53% who said they were very satisfied. One in 10 were dissatisfied. The majority of parents of children with ASN also said they had not experienced any specific difficulties with their provider (69%). In 2018, around half (48%) of parents with a child with ASN had experienced difficulties accessing suitable provision, compared with 31% in 2022. Those who had experienced difficulties most commonly cited staff not having enough time available to meet the needs of their child (14%) and a lack of information on how providers support children with ASN (14%). Some mentioned a lack of confidence in the staff's qualifications, knowledge and experience (10%).

Choosing a funded ELC provider and quality of funded ELC

Parents indicated that the location of the setting, the staff and the provider's reputation were the most important factors in choosing where to send their children. Other factors such as continuity (being attached to the same school their child will go to or the setting attended prior to funding), the opportunities open to the child (for example, outdoor activities, Gaelic), siblings currently/previously attended; and reliability were also considerations.

Parents were very positive about the quality of the provision from their main funded ELC provider. Almost all parents (97%) were satisfied with the quality of their provider, including 70% of parents who were very satisfied. While levels of satisfaction were high, a few sub-groups of parents were more likely than others to

be very satisfied: those with eligible two year olds compared with three to five year olds; households with no earners in the household compared with households with one or two earners; and parents whose children do not have ASN compared with those who have a child with ASN.

Effect of Covid-19 on the use of funded ELC

The pandemic delayed the increase in funded ELC by a year to August 2021. Most (74%) parents said that the pandemic had not influenced their use of ELC since August 2021. The biggest impact for those who had been affected was a reduction in their use of funded ELC (18%). Often this was because their provider reduced the setting's hours or closed completely. In some other cases the parent had to withdraw their child (for example, having to self-isolate). A minority (4%) experienced an increase in use of ELC, for example to accommodate their own increased work commitments. Other impacts (noted by around 3%) included providers being less flexible with the hours/days they offered, limiting or restricting access to the setting, and concerns about their child's development.

Impacts and benefits of funded ELC

The main reasons for using funded ELC were to benefit their child's development, confidence/independence and learning (all mentioned by around four-fifths of parents). Around three-fifths (61%) of parents of three to five year olds also said they used funded ELC so they could work/look for work; this was especially important to working parents of three to five year olds (mentioned by 84%).

The survey also asked about the impact that funded ELC has had on parents' lives, the activities they have been able to undertake because of access to funded hours, and the contribution to their health and wellbeing. The most commonly mentioned impacts of the funded hours were to enable parents to work or look for work (74%) and to have time to think about what they may do in the future (mentioned by 71%).

Wellbeing impacts were next most commonly mentioned, although substantially less frequently: just under half had been feeling happier (47%), less stressed (46%) and had had time to look after themselves more (44%).

Affordability of childcare

Thirty six per cent of the survey respondents said they paid for some of their childcare. For this group, the average household spend per month on childcare is higher for households with children aged under three years, at £533, than for those with children aged three to five years, at £306. It seems likely this reflects, at least in part, the impact that funded ELC has on reducing costs for families once their children are old enough to benefit from the entitlement. Forty-four per cent of parents of children under three are paying more than £500 per month on their childcare, compared to just 13% of parents of children aged three to five years.

The majority (62%) of those who pay for childcare indicated they have experienced affordability problems in the last 12 months. Perhaps not surprisingly, given their access to funded ELC, parents of three to five year olds were much less likely to have had difficulties than parents of children aged under three (58% vs 69%). A

number of other key sub-groups were especially likely to report significant difficulties affording childcare, including lone parents, households with no/single earner, and parents of a child with ASN. Most (four-fifths) of the parents who experienced difficulties mentioned the high cost of childcare (97%). Around a fifth also mentioned difficulties paying childcare fees upfront.

Extension of funded ELC to younger children

The Scottish Government has committed to build the evidence base required to inform the development of a high quality offer of ELC for one and two year olds, as well as developing wraparound care for school-age children. Currently around 64% of parents of children aged under three years (and not eligible for funded ELC) use some form of paid-for childcare. Most commonly mentioned was private nurseries (46%), with others using childminders, playgroups, community nurseries and family centres. Those not using paid-for care gave two main reasons: 53% said they could not afford to pay for childcare and 47% preferred to look after their child themselves.

However, when asked how interested they would be in using funded childcare or early learning for their child under three years, almost all (91%) of these parents said they would be interested, with most (80%) saying they would be very interested. Just 7% said they would not be interested. Households with working parents would be especially interested. If funded ELC were to be extended, parents would be looking for a setting where they could have confidence in the staff (100% agreed with this), where their child can meet/play with other children (99%), that provide good outdoor experiences (98%), in a convenient location for home (93%) and that offers flexible hours/sessions (90%).

Conclusions

The majority of parents are very positive about funded ELC. The benefits to their child's social, emotional and educational development were regarded as the main reasons for using the entitlement by almost all parents. Most parents also valued the opportunities offered to work, look for work, or undertake education and training to improve employment prospects in the future. Linked to these, many parents also mentioned feeling less stressed, with more time for themselves and their family.

However, some challenges remain. There is a need to go further to improve the flexibility of provision so that it meets the needs of more families. Also to continue to address affordability as the cost of childcare for those not entitled to funded ELC or who need to purchase additional hours to meet their childcare needs remains high, with affordability for less advantaged households a particular concern. More advantaged households (higher incomes, two parents in work) are most likely to use funded their full entitlement and use more funded ELC hours. Further work is needed to maximise take up of funded ELC among those who may benefit most. In addition, there is a need to continue to ensure provision meets the needs of all children with ASN.

The survey clearly indicates that the increased entitlement to 1,140 hours of funded ELC is making a real difference to parents. Not surprisingly, there was also a very

high level of support for an extension of age-appropriate, funded ELC provision to children aged one and two years.

Acknowledgements

The authors would like to thank the project advisory group and all the local authorities, settings and stakeholders who helped input to and distribute the survey. We are very grateful to all the parents and carers who took the time to share their views and experiences by completing the survey.

Introduction

This report presents the findings from a survey undertaken to explore use of, and views on, early learning and childcare (ELC) services among parents and other primary carers³ of children who have not yet started school.

Background and study objectives

From August 2021 the funded ELC entitlement in Scotland increased from 600 to 1,140 hours per year for all three and four year olds, as well as for eligible two year olds (that is, those with experience of care, children of care-experienced parents, and those from those who have a parent(s) on qualifying benefits)⁴. This is equivalent to 30 hours per week over a 38-week term, but can be used as wished across the whole year. Families are able to access their funded ELC entitlement through local authority settings as well as providers in the private and third sector, including childminders; and are not restricted to using a single supplier. For example, they may use a both a local authority nursery and a childminder⁵.

This is a significant increase in funded hours for eligible children and aims to deliver three main benefits for children and families:

- children's development improves and the poverty-related outcomes gap narrows
- parents' and carers' opportunities to take up or sustain work, training, or study increase
- family wellbeing improves⁶

A programme of evaluation and research on the increase to 1,140 hours is being undertaken. This will inform work both to realise the benefits of 1,140 hours of funded ELC for children and families, and to progress the expansion of the Scottish Government's childcare offer, including a new ELC offer for one and two year olds. As part of this work, Scottish Government appointed independent researchers, Progressive Partnership, to undertake a survey of parents in Scotland to provide up-to-date information on parents' use of and views about ELC, particularly accessibility, flexibility, affordability and quality, with a focus on funded ELC. This builds on a previous survey undertaken in 2017 (and published in 2018)⁷ which explored parents' views, use and experiences of ELC prior to the expansion.

³ The survey was open to all primary care givers of children who have not yet started school. For brevity within the report, we shall use the term 'parents'.

⁴ [Funded early learning and childcare - mygov.scot](https://www.mygov.scot)

⁵ [Funding follows the child and the national standard for early learning and childcare providers: interim guidance - update March 2021 - gov.scot \(www.gov.scot\)](https://www.gov.scot)

⁶ Set out in Scottish Government's, '[Early learning and childcare expansion programme: evaluation strategy](#)', published in 2022.

⁷ [Parents' views and use of early learning and childcare: report - gov.scot \(www.gov.scot\)](https://www.gov.scot)

The key requirements of the study were to provide:

- up-to-date information on parents' use and experiences of the 1,140 hours entitlement across Scotland, including: drivers of and barriers to use of 1,140 hours, views on accessibility, flexibility and quality of funded ELC, affordability/costs of childcare
- analysis of differences in use and views of both funded ELC and paid-for childcare for different groups of parents
- comparisons with the [2017 ELC parents' survey](#) where appropriate

Study approach

The study sought the views of parents in Scotland with children aged under six years who were not yet in school (referred to as 'pre-school children' in this report). A number of possible options for sampling this population were considered but our scoping concluded none was possible, or possible within the timeframe or budget, of the study.⁸ However, information from the Scottish Household Survey indicated that 79% of households with a child aged two to five years used some form of childcare (including a relative or friend) in 2019, rising to 88% for those with a three year old⁹. Data on registrations for funded ELC for children aged three to four years old indicate that around 97% are registered¹⁰.

It was therefore concluded that accessing parents of pre-school children via the range of ELC settings was a reasonable approach. It was important, however, to ensure that parents who were not accessing ELC or were using a childminder were recruited, so parents were also contacted via a range of intermediaries and using Scottish Household Survey re-contact data as follows:

- Online survey with parents who have pre-school children. The survey link was primarily promoted to parents through ELC providers. Further promotion of the survey was undertaken by local authority early years leads and other key stakeholders with a focus on reaching parents who were not using ELC or were using childminders.
- Telephone interviews with parents who have pre-school children drawn from the re-contacts database of the 2020 Scottish Household Survey¹¹.

⁸ Possible options included using data from the Universal Health Visiting Pathway - as this includes all families - or using National Records of Scotland (NRS) birth records as a sample frame, or using re-contact details for families with children under six who had taken part in existing Scottish Government surveys. We were advised that due to pressures on NHS Scotland following the Covid-19 pandemic it would not be appropriate to ask Health Boards to undertake the sampling of parents, while there are disadvantages with using birth records such as the proportion of addresses that may be out of date.

⁹ [Scottish Household Survey: childcare topic report - gov.scot \(www.gov.scot\)](#)

¹⁰ [Summary Statistics For Schools In Scotland 2021 - gov.scot \(www.gov.scot\)](#)

¹¹ These are respondents who had participated in the 2020 Scottish Household Survey, had a child under six at the time of the 2020 survey, and had given permission to be contacted to take part in further research. Progressive was given access to the contact information for 289 respondents for the purpose of this research study. See the method appendix for further details.

The survey data was collected using a questionnaire based on that used in the 2017 survey and further developed drawing on the insights of a dedicated stakeholder workshop. The questionnaire contained sixty questions, including sixteen classification questions (e.g. participant’s gender, age etc.). The general survey questions were mainly closed, a mix of categorical and interval questions. The multiple choice questions typically included an ‘other, please specify’ option; and there was a small number of open questions.

The main fieldwork took place between 25 April and 29 May 2022. Further detail on the survey approach and a copy of the questionnaire are provided in the methods appendix or as a supplementary document respectively (note the same questionnaire was used for the online and telephone versions of the survey).

Profile of the response to the survey

A total of 8,181 valid responses were received to the main survey: 8,103 online responses and 78 telephone responses¹². This is a good response and is large enough to provide the opportunity to examine sub-samples of respondents. It should be noted that respondents to the online survey were self-selecting. We cannot therefore provide statistically precise margins of error or significance testing as the sampling type is non-probability. The margins of error outlined below should therefore be treated as indicative, based on an equivalent probability sample. The survey dataset has a margin of error $\pm 1.1\%$, calculated at the 95% confidence level (market research industry standard). This means that if 50% said they were satisfied with their provider, we can be 95% confident that the result lies between 48.9% and 51.1%.

The age distribution of children within the sample will reflect the survey sample distribution approach. Most commonly the parents in the survey had children aged three or four years old (33% and 41% respectively). As the table shows, a broad coverage of parents with younger children was also achieved.

Table 1: Profile of survey response, by child’s age (unweighted)

Child’s age	Survey respondents
Under 1	11%
1	14%
2	19%
3	33%
4	41%
5 (not at school)	13%
Base: All Respondents, 8181 (multiple responses possible)	

¹² A larger telephone sample would have been ideal, but numbers were constrained by the sample available from the SHS.

Table 2: Profile of survey response (unweighted)

	Survey respondents	Scottish Population ¹³
Children in funded ELC		
2 year olds	15%	13%
3-5 year olds	97%	97%
SIMD*		
1 st Quintile	16%	20%
2 nd Quintile	17%	20%
3 rd Quintile	18%	20%
4 th Quintile	22%	20%
5 th Quintile	20%	20%
Urban rural classification*		
Urban	61%	69%
Large town	28%	36%
Other urban	33%	33%
Small town	14%	13%
Accessible small towns	11%	9%
Remote small towns	4%	4%
Rural	21%	18%
Accessible rural	14%	12%
Remote rural	7%	6%
Base: All respondents: 8181		
Note * Some postcodes, used for determining SIMD and rural areas, were unclassified/not known		

Table 2 above compares the sample with the broader population. It shows that almost all of the three to five year olds, and around 15% of two year olds included in the survey, used funded ELC. This is in line with national data¹⁴. The Scottish

¹³ Population data sourced as follows: ELC - Summary Statistics for Schools in Scotland 2021; SIMD – Scottish Government SIMD 2020v2 (two year olds and 3-4 year olds); Urban Rural Classification 2020 Scottish Government

¹⁴ [Summary Statistics For Schools In Scotland 2021 - gov.scot \(www.gov.scot\)](https://www.gov.scot/summary-statistics-for-schools-in-scotland-2021)

Government Census of funded ELC¹⁵, carried out by local authorities and their partner ELC providers in September 2021, indicated that 97% of eligible 3-4 year olds had registered for their place. Scottish Government estimate that around a quarter of two year olds are eligible for funded ELC, and the ELC Census suggests that around 13% of all two year olds are registered for funded ELC.

Table 2 also shows that the sample broadly reflected the relevant age and geography profile of the population, with some notable deficits in the 'larger towns' (as defined by the 6-fold urban-rural classification¹⁶), especially Edinburgh, Aberdeen, Fife and South Lanarkshire. Survey weighting was therefore used to redress bias in relation to urban rural areas (again using the 6-fold urban-rural classification).

It should be noted that the vast majority (95%) of survey respondents were women.

Profile of the survey respondents

The profile of the survey respondents was reviewed to establish the extent to which core analysis sub-groups (age of parent, working status, income, household type, etc.) were related. This highlighted important relationships between parents' age, work status and deprivation/income level.

- young parents (those aged under 25) were more likely to be on lower incomes, to be single parent households, disproportionately not working, and disproportionately living in the most deprived areas
- older parents (those aged 30-34), were more likely to be earning towards the higher income brackets, and more likely to be in two parent households, to have two working parents, and less likely to live in deprived areas (see Appendix B: Profile of Survey Respondents section for more details)

Analysis and reporting

Throughout this report, any reported differences (between sub-groups of the sample) are statistically significant at the 95% confidence level. Analysis has not been carried out on sub-groups that have a sample size of less than 50. Data have been analysed by the following sub-groups: (1) income and number of household earners (2) household type (3) urban/rural (4) deprived areas (SIMD) (5) number of pre-school children (6) age of pre-school children (7) ethnicity/ English as a first language (8) parent of a child with additional support needs (ASN).

For ease of reading the results, results below 4% have not been included in some of the figures. Where percentages in figures and tables do not total, this is due to rounding.

¹⁵ [Chapter 5: Early Learning and Childcare - Summary Statistics For Schools In Scotland 2021 - gov.scot \(www.gov.scot\)](http://www.gov.scot)

¹⁶ [Urban Rural Classification - Scotland - data.gov.uk](http://data.gov.uk)

Comparisons with previous study

The 2022 questionnaire was designed to facilitate comparison with the 2017 survey as far as possible. However, a number of changes were made. Some questions were changed to reflect changes in the policy context, for example, to reflect the increased entitlement to funded ELC from 600 to 1,140 hours, to explore parents experience and perceptions of improved flexibility of provision, and to explore attitudes to potentially extending funded ELC for children aged one and two years. Some of the pre-coded response options were amended to improve data collection. And a number of additional questions were included, for example those to explore the impact of the Covid-19 pandemic.

It is stressed that any differences noted between the two surveys on parents' use and views on funded ELC cannot be solely attributed to the increase in entitlement. Patterns of work, use of childcare and the childcare offered by settings has changed over the last four years, in large part as a consequence of the Covid-19 pandemic. The survey does attempt to capture information on the impact of Covid-19 on use of ELC, but it is likely that further work on this issue may be required.

Limitations to the research

The online survey link could not be delivered directly by Progressive to parents, but was instead delivered to them via third parties. There were several potential limitations with this approach:

1. The primary route to promote the survey to parents was via ELC providers. The primary sample frame of providers was the Care Inspectorate Datastore. This contained a broad mix of providers, except for childminders, whose contact details are not included in the Datastore.
2. This meant Progressive had no control over the distribution of the survey to parents. However, there was evidence from the 2018 study that this approach was effective, and a high response could be achieved. This was borne out in the 2022 survey, with just over 8,000 online responses received.
3. The respondents to the online survey were self-selecting and completed the survey without the assistance of a trained interviewer. This meant that Progressive could not control sampling and this could lead to findings skewed towards the views of those motivated to respond to the survey.

Efforts were made to include parents whose children were cared for by childminders and those not in ELC by encouraging a wide range of other stakeholders such as Scottish Childminding Association, Care and Learning Alliance, Early Years Scotland, National Parent Forum Scotland, One Parent Families Scotland, Scottish Refugee Council and Scottish Commission for People with Learning Disabilities to circulate the survey link via their networks of parents/parents on their contact databases. The telephone survey, which was based on a sub-sample of parents from the nationally representative SHS sample, also provided an opportunity to include parents of children not in ELC in the research.

Key definitions used in the survey

The definition of ‘early learning and childcare’ (ELC) in the Children and Young People (Scotland) Act 2014¹⁷ is: ‘a service, consisting of education and care, of a kind which is suitable in the ordinary case for children who are under school age, regard being had to the importance of interactions and other experiences which support learning and development in a caring and nurturing setting’.

- **Funded ELC** is used to describe the funded entitlement to up to 1,140 hours of ELC, for all three and four year olds and eligible two year olds, as set out in the 2014 Act. Funded ELC is delivered by a wide range of providers including nurseries and playgroups, from across the public, private and third sectors and by childminders, and is regulated by the Care Inspectorate.
- **Eligible two year olds** refers to those entitled to the 1,140 hours of government funded ELC. A two year old will be eligible if they are (or have been) looked after by a local council, are the subject of a kinship care order or a guardianship order, the parent receives certain benefits, or the parent is care-experienced.
- **Paid-for childcare/ELC** refers to hours of regulated childcare purchased by parents from providers. This could either be *additional* hours of childcare purchased on top of the entitlement to 1,140 hours of funded ELC, or childcare purchased for children who are not yet eligible for funded ELC (e.g. those under three). This could include a nursery, playgroup, or childminder.
- **Informal childcare** is childcare provided by friends or family that is not regulated. It can be regular or ad hoc.
- Additionally, there are other forms of unregulated childcare beyond traditional models of childcare where parents leave children in someone else’s care. These include opportunities for ‘family learning’ – where parents and children learn together for example ‘stay and play’ groups – and are likely to be an important part of an early learning offer for the youngest children (i.e. those under three years old) in terms of their potential to support attachment and family wellbeing.

Structure of the report

The report sets out the key findings from the research in the following chapters:

- Use of childcare
- Use of funded ELC
- Flexibility of funded ELC
- Accessibility of funded ELC
- Quality of funded ELC
- Perceived outcomes and impacts of funded provision
- Effect of Covid-19 on use of funded ELC

¹⁷ [Children and Young People \(Scotland\) Act 2014 \(legislation.gov.uk\)](https://www.legislation.gov.uk/ukpga/2014/12/section/1)

- Affordability of childcare
- Childcare provision for younger children
- Summary and conclusions

Further detail on the study method and study outputs, together with additional tables, is provided in the appendices. This publication is produced together with a suite of data tables in Excel format. These are referred to as 'supporting data tables'. These tables are presented in a file called 'ELC Parent Survey 2022– Supporting data tables' and are available from the [Supporting Documents page](#) of this publication.

Research findings

Use of early learning and childcare

This section starts by profiling childcare use for all children in the sample who have not yet started school (referred to for ease in this report as ‘pre-school children’), considering the type of childcare used and the level of childcare used. It then considers use of funded ELC and explores the extent to which parents are using their full entitlement and the reasons for their choices. The next section goes on to explore the numbers of hours of funded ELC used in more detail.

Use of childcare

Most of the parents (98%) use some form of childcare for their pre-school children. As shown in Table 3 below, propensity to use childcare increases with a child’s age, rising from 67% of under two year olds to just under 100% of three to five year olds.

Table 3: Childcare used - any

Q:SQ3 – Which of the following types of childcare and early learning do you use for your children?¹⁸ Bases All 8,181; under 2s 2,006; 2s, 1535; 3-5 6,875 (respondents could answer in more than one category)

	All	3-5 year olds	2 year olds	Under 2s
Funded early learning and childcare ¹⁹	82%	94%	19%	4%
Childcare or early learning that I pay for myself	36%	22%	60%	41%
Informal childcare: regular or frequent	29%	25%	32%	30%
Informal childcare: occasional or infrequent	12%	10%	10%	15%
Total using childcare	98%	99%	89%	67%
Total not using childcare	2%	1%	11%	33%

The type(s) of childcare used also varies by the child’s age. The three to five year olds in the sample were almost all entitled to funded ELC, so we would expect to see a high proportion of this group using this provision. In addition, around a fifth were using paid-for provision (typically in addition to the funded ELC). In contrast, a much smaller proportion of two year olds were entitled to funded ELC so usage was much lower for this age-group. More than half of two year olds are in paid-for

¹⁸ Note: Responses on use given on this question will differ slightly to those on subsequent questions. In part this is because the standard definition of eligibility for funded ELC is given prior to later questions; and partly because later questions are typically asked only of one child in each age band.

¹⁹ See previous footnote - responses on use given on this question will differ slightly to those on subsequent questions.

provision. Four per cent of the parents of under two year olds said they were using funded ELC²⁰.

There was variation in the use of childcare for three to five year olds linked to the household structure – most notably the number of parents in work. Propensity to use paid-for childcare and regular/occasional informal childcare increased as the number of parents in work increased, as incomes rose, and to some extent, with the age of the parent (up to age 40)²¹. Table 3 shows the profile of childcare use by age group of the child. This allows us to develop a better understanding of how parents use childcare. As detailed below, those with greater resources (higher incomes, greater access to employment) make more use of all forms of childcare, especially paid-for childcare, but notably also informal childcare and, for three to five year olds, funded ELC. Those with lower resources make less use of paid-for childcare; and for younger age-groups, may not use childcare at all.

Use of childcare for under two year olds

Thirty-three per cent of parents with a child under two years old do not use any childcare. The number of working parents in the household is a key influencing factor in whether parents use childcare: just 28% of households with no parents in work use some form of childcare, compared to 46% of those with one working parent and 78% of those with two working parents. Likewise, use of childcare rises as household income rises, with just 46% of those earning less than £16,000 using childcare, rising to 78% for those earning over £60,000.

Similar proportions - around a fifth - of parents use informal childcare, paid childcare or a mix of both. Typically, two parent families, households with two working parents and those on higher incomes are more likely to use both paid and informal childcare.

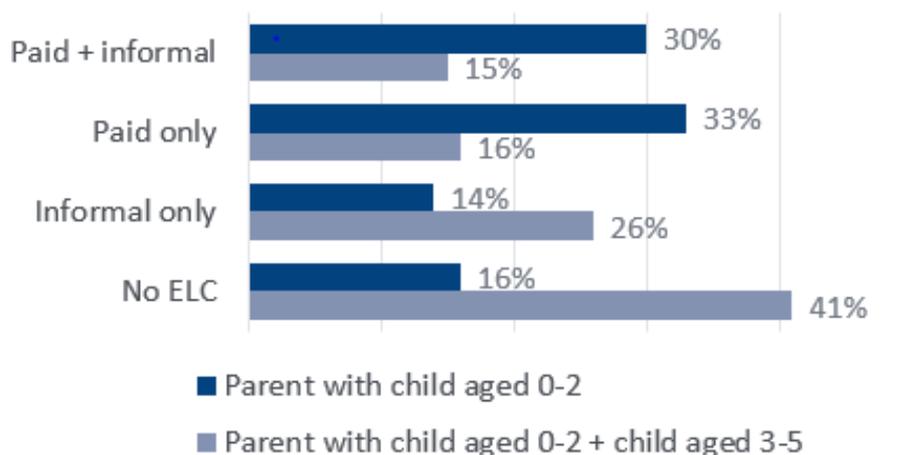
The number of pre-school age children in the household influences the mix of childcare for children under two. As illustrated in the chart below, those who have a single child aged under two are more likely than others to use paid forms of childcare, while parents who also have a child(ren) aged three to five years are more likely than others to either use informal care or not use any childcare for their under two.

²⁰ 4% of under 2s using funded ELC seems a little high: generally, children under 2 are not entitled to funded ELC, although local authorities can exercise their discretion. The ELC Census suggests the actual figure would be in the region of 1%. It is unclear if this question was ambiguous/ parents misunderstood it, or there was a bias in the sample.

²¹ See table A11 in the appendix.

Figure 1: Use of childcare for children aged under two, by age profile of children in the household

Bases: Just children 0-2 yrs = 581; Both 0-2 and 3-5 yrs=1425



Use of childcare for two year olds

Eleven per cent of parents with a two year old do not use any childcare. As noted above, well over half of parents of two year olds use paid-for childcare: around a third use paid-for care only, with a further quarter using a mix of paid-for and informal care. Sixteen per cent use funded ELC only and a further 2% use a mix of funded and informal. Those more likely to say they use paid-for care were households with one child, two parent households, households with two parents in work, households on higher incomes (£30,000+) and those living in non-deprived areas.

Notably only a handful of parents use a mix of funded and paid-for care, which is perhaps not unexpected, given the eligibility criteria for two year olds' funded ELC. Similarly, those more likely to use funded ELC are those in the less advantaged sub-groups i.e. single parents, households with no-one/one parent in work, low income households, under 25s, and those living in deprived areas. This was also the case for parents of a child with Additional Support Needs (ASN).

Three to five year olds

Just 1% of parents do not use any childcare for their three to five year old pre-school children, with over half (53%) only using funded ELC and a further 23% using a mix of funded and informal. That means the vast majority of parents do not bear direct costs for their childcare (they may still have costs associated with trips, travel, etc.). Those most likely to be using only funded ELC were households in the less advantaged group: single parents, households with no-one or just one parent in work; low income households (earning under £16,000); living in a deprived area; as well as those with English as a second or additional language, those with health conditions, and parents of a child with ASN.

Table 4: Profile of childcare used

Q:SQ3 – Which of the following types of childcare and early learning do you use for your children?²² Bases: under 2 yrs 2,006; 2 yrs, 1535; 3-5 yrs 6,875 (respondents could answer in more than one category)

	3-5 yrs	2 yrs	0-1 yrs
Funded only	53%	16%	2%
Funded + informal	23%	2%	1%
Funded + paid	10%	1%	0%
Funded + paid + informal	9%	1%	0%
Paid only	2%	31%	21%
Paid + informal	1%	27%	20%
Informal only	1%	11%	22%
No childcare	1%	11%	33%

Levels of childcare use

Of those using paid-for childcare, the average number of hours used per week during term time was similar across all child age groups - at around 20 hours per week. Use of paid-for childcare was slightly lower during school holidays, especially so for those with children aged three and over. Informal childcare was more common for younger children (under threes) especially during term time.

Table 5: Average number of hours per week of childcare received

Q:SQ4 and SQ5 – You said that you [pay for some childcare for one or more of your children yourself/that one or more of your children receive informal childcare on an informal or regular basis.] On a typical week, on average how many hours of [paid-for/informal] childcare do your children receive? Bases (all those paying for childcare/using informal childcare) 0-1 yrs 808/872; 2 yrs 923/644; 3-5 yrs 1477/2280

	3-5 yrs	2 yrs	0-1 yrs
Paid-for childcare			
Term time	20.1	20.4	21.5
School holidays	17.0	18.0	19.0
Informal childcare			
Term time	12.0	15.1	15.7
School holidays	15.1	13.1	12.7

²² N.B. Responses on use given on this question will differ slightly to those on subsequent questions.

Some differences were noted in the profile of use within each of the age groups²³.

Under twos

- households with two working parents used more paid-for childcare hours than other households in term time (22.1 vs 6.9 hours)
- the amount of paid-for childcare used increases with income (from an average of 13.7 hours for households with incomes up to £16,000 pa rising to 25.4 hours for those with incomes of £60,000+ pa)
- the amount of paid-for childcare used was higher in large urban areas than most other areas (23.5 vs 15.2 - 20 hours)
- use of informal childcare was also higher in households with two working parents and in urban areas

Two year olds

- two-parent families used more informal childcare than lone parents during term-time (15.4 vs 12.2 hours), as did parents without a significant health condition compared to those with a health condition (15.6 vs 7.1 hours)
- households with two parents in work used more hours than those with one parent in work both in term time (15.7 vs 11.9 hours) and during school holidays (13.5 vs 10.6 hours)

Three to five year olds

- households with a child with ASN used more paid-for childcare hours than others (20.5 vs 16 hours)
- those without a health condition used more paid-for childcare than others during term-time (20 vs 15 hours)
- parents in urban areas used more paid-for childcare than those in rural areas (21.6 vs 14.0 hours during term time)
- use of informal childcare was higher in urban than in rural areas (12.5 vs 9.7 hours in term-time); for lone parents versus two parent households (19.8 vs 14.6 hours during the school holidays); and for parents who have one child compared with parents with more than one child (both during term-time 12.9 vs 9.9 hours and during holidays 16.3 vs 11.5 hours)

²³ For brevity, unless otherwise stated, the examples quoted are means for during term-time. Means are quoted as hours per week.

Use of funded ELC

Most of the survey focused on use and views relating to funded ELC. Almost all (97%) of the parents with a three to five year old child and most (86%) with an eligible two year old²⁴ have used funded ELC for their child since August 2021. Given the eligibility criteria for two year olds, it is perhaps not surprising that the following subgroups of parents with two year olds are more likely to use funded ELC: single versus two parent households (93% vs 76%), households with no or one parent in work versus those with two (89% and 88% vs 70%); those living in most deprived areas versus others (92% vs 79%); and parents with a health condition versus others (95% vs 79%). There were no significant subgroup differences for three to five year olds.

Figure 2 below summarises why parents use funded ELC, with benefits to their child's development, confidence/independence and learning the most frequently mentioned reasons by parents regardless of their child's age. Parents of older children were significantly more likely than those with younger children to cite work/looking for work as a reason for using their funded ELC hours, while parents of younger children were more likely to mention having more time to look after themselves.

A number of other sub-group differences were observed. Most related to the three to five year olds group:

- those more likely to mention reasons relating to improving work opportunities were:
 - households with two parents in work compared to those with one or no parents in work (84% vs 62% and 40%)
 - parents with one child under six years versus two or more children under six years (76% vs 70%)
 - two parent households compared to single parents (76% vs 67%); parents without health conditions compared to those who have significant conditions (77% vs 41%)
 - those from non-deprived areas compared to deprived areas (77% vs 65%)
 - parents of children without ASN compared to those with ASN (76% vs 63%)
- those more likely to mention reasons relating to benefits to their child were parents with significant health conditions compared with those without (97% vs 90%) and parents of a child with ASN compared to others (95% vs 90%)

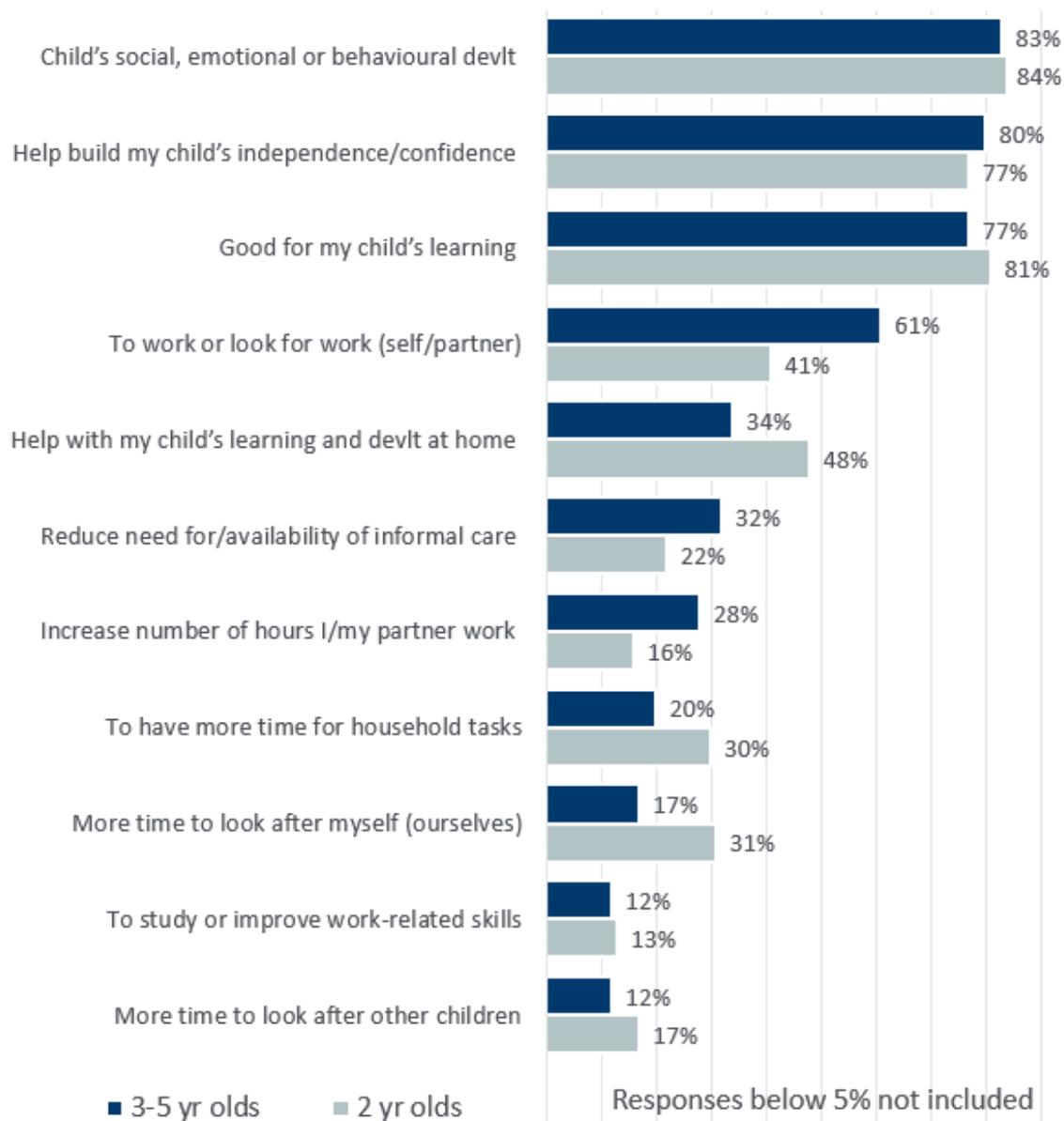
Far fewer significant differences were observed for the eligible two year old group. Those more likely to mention reasons relating to improving work opportunities were households with one or two parents in work compared with no parents in work (61%

²⁴ As noted in the Appendix tables: 19% of parents had a two year old child. Of these 267 (17% equivalent to 17% of two year olds in the sample) of were eligible for funded childcare and 225 (equivalent to 15% of all two year olds in the sample) have used funded since August 2021.

and 68% vs 24%); and parents of children without ASN compared to those with ASN (53% vs 33%).

Figure 2: Main reasons for using funded ELC

Q9 and Q23 What are/were your main reasons for using funded early learning and childcare (for your 2 year old child)? Bases (all eligible): 3-5 years 6698, Eligible 2s 227



<p>Nets: 3-5 year olds²⁵</p> <ul style="list-style-type: none"> • reasons that benefit child: 91% • improve work opportunities: 74% • support home, personal and childcare: 51% 	<p>Nets: eligible 2 year olds</p> <ul style="list-style-type: none"> • reasons that benefit child: 94% • improve work opportunities: 46% • support home, personal and childcare: 57%
--	--

* Respondents could give multiple answers. Parents of 3-5 year olds tended to give 4 or 5 responses (21%/21%). Parents of eligible 2s also tended to give 4 or 5 responses (21%/17%).

²⁵ The Nets 'capture' or summarise all the responses under the relevant heading, including those not shown on the table.

As noted above, since August 2021, all eligible children have been entitled to 1,140 hours of funded ELC. Parents were asked if they used their full entitlement. Table 6 shows that around three-quarters of parents with a three to five year old and around half of those with a two year old used the full entitlement. Notably almost a tenth of those with three to five year olds and around a fifth of those with a two year old said they were unsure. Households with more than one earner were more likely than others (76% vs 69%) to use their full entitlement, as were those on higher incomes (£60,000+) compared to those on lower incomes (less than £16,000) (79% vs 68%). Parents from deprived areas were more likely than others to say they do not use their full entitlement (15% vs 20%).

Table 6: Funded ELC entitlement used

Q4 and Q17 – Do/did you use the full 1140 hours of funded childcare for your child?
Bases 3-5s 6698; Eligible 2s 227

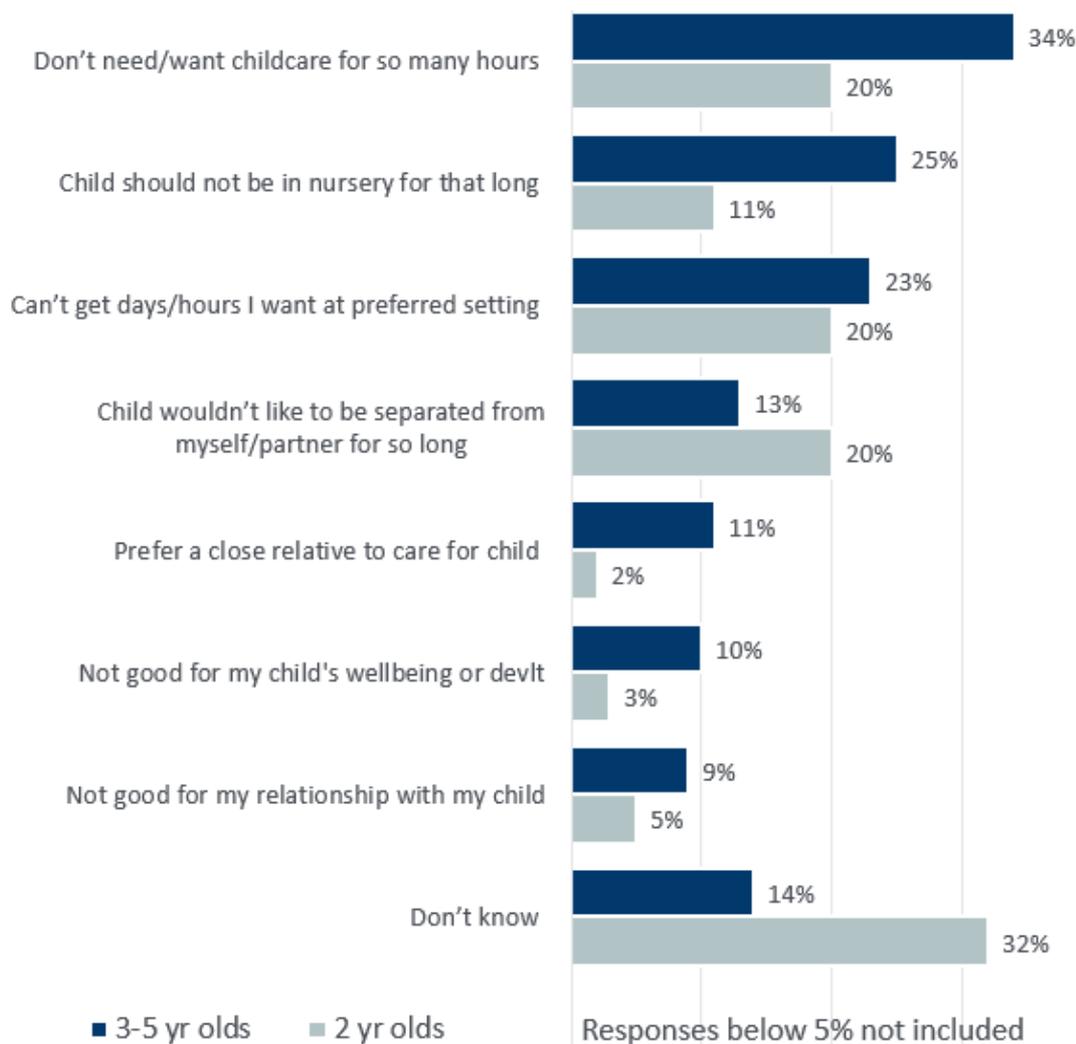
	3-5 year olds	Eligible 2 year olds
Full entitlement used	73%	52%
Full entitlement not used	19%	27%
Don't know ²⁶	8%	21%
Base	6,698	227

Most of those not using their full entitlement reported they were doing so through choice: typically, they did not need or want the full entitlement or did not want their child in nursery for so many hours. However, around a quarter (23%) mentioned that they could not get the sessions that they wanted at their preferred setting. This was a particular issue for households with two parents in work compared with a single earner (24% vs 19%); where English is an additional language compared with other households (27% vs 22%); and in urban areas compared with rural areas (24% vs 18%).

²⁶ Based on responses to the Q6 later on, would suggest that just 80% of this group use at least some of their hours, with just over 50% using at least 20 hours a week.

Figure 3: Main reasons for not using all funded ELC hours

Q10 and Q24 Why is that you do not use all the funded hours of early learning and childcare for your [3-5 year old/2-year old] that you are entitled to? Bases (all eligible not using full entitlement): 3-5 years, 1824 Eligible 2s 106



Nets²⁷: 3-5 year olds

- don't need all the hours: 34%
- don't want child in nursery too long: 31%
- can't get the hours/days I want: 23%
- not good for child: 14%
- prefer relative looks after child: 13%

Nets: eligible 2 year olds

- don't need all the hours: 20%
- don't want child in nursery too long: 25%
- can't get the hours/days I want: 20%
- not good for child: 7%
- prefer relative looks after child: 3%

* Respondents could give multiple answers Parents of 3-5 year olds tended to give 1 response (68%), with around a tenth each giving 2 or 3 responses (15% and 9% respectively); parents of eligible 2s also tended to give 1 response (77%), with 15% giving 2 responses.

Reasons for not using funded ELC

As discussed above, only 3% of parents with a three to five year old surveyed said they had not used funded ELC. The main reason among this group was the child was due to start in ELC next term (August), with some of these children fairly

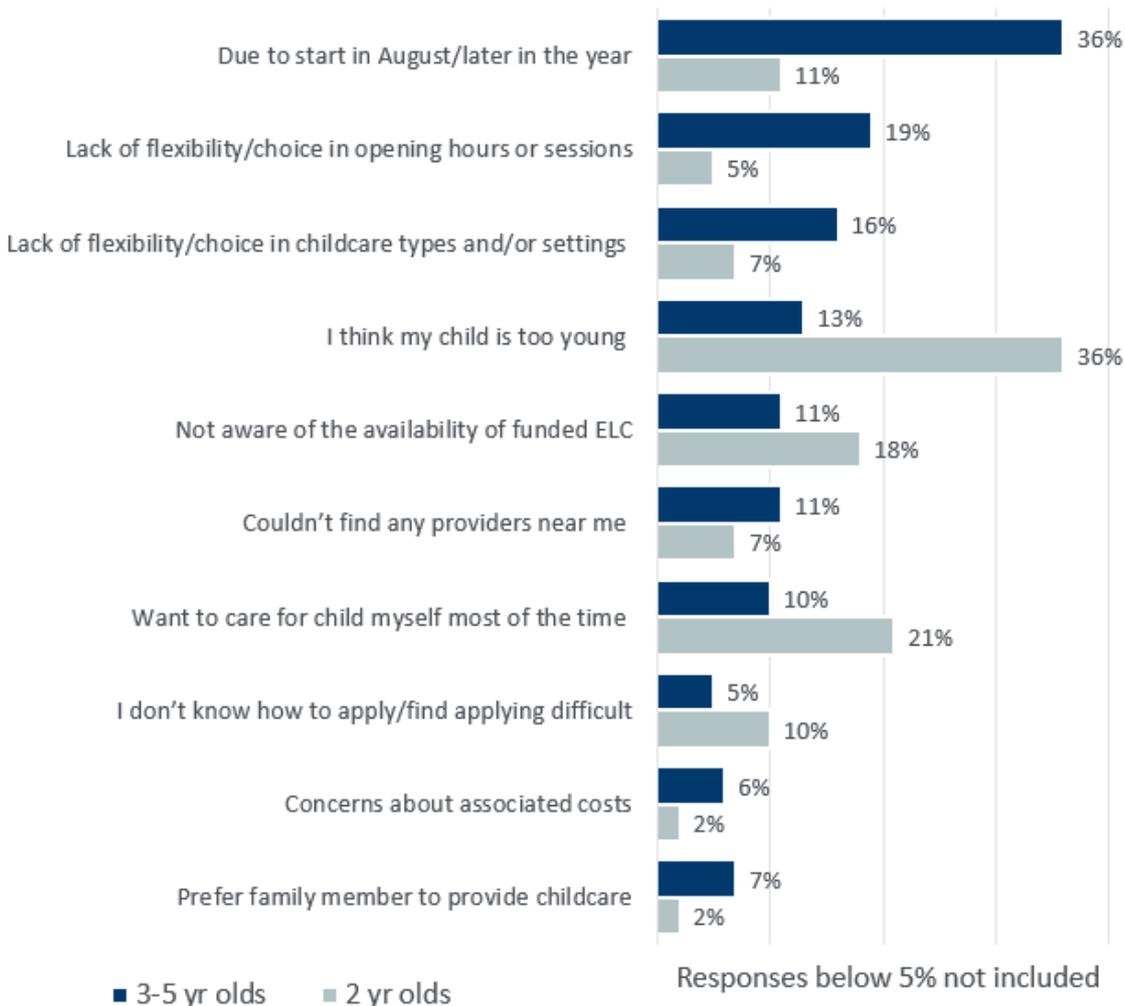
²⁷ The Nets shown 'capture' or summarise all the responses under the listed headings.

recently having turned three. Lack of flexibility was a key barrier for a substantial proportion of the parents of three to five year olds not using funded ELC, in terms of opening hours, sessions and the settings available.

Generally, parents of two year olds did not take up their entitlement because they felt they did not want or need the place, typically because they felt their child was still too young, and because they are able to/preferred to look after their child themselves. A few mentioned being unaware of the availability of funded ELC or that they didn't know how to access it.

Figure 4: Main reasons for not using funded ELC entitlement

Q11, Q25 Why is that you do not use all the funded hours of early learning and childcare for your [3-5 year old/2-year old] that you are entitled to? Bases Q11: 177 (3-5s), Q25: 60 (eligible 2s)



<p>Nets: 3-5 year olds</p> <ul style="list-style-type: none"> • Child not eligible yet: 36% • Don't need/want: 25% • Not aware: 15% • Access issues: 15% • Lack of flexibility: 13% 	<p>Nets: eligible 2 year olds</p> <ul style="list-style-type: none"> • Child not eligible: 11% • Don't need/want: 50% • Not aware: 25% • Access issues: 9% • Lack of flexibility: 7%
---	--

* Respondents could give multiple answers. Parents of 3-5 year olds tended to give 1 response (66%), with a further 17% giving 2 responses, and 9% giving 3 responses; parents of eligible 2s : tended to give 1 response (79%), with a further 11% giving 2 responses.

Comparison with 2018

The proportion of parents with eligible children not using any of their entitlement in 2018, at 12%, was considerably higher than in 2022 (just 3% for three to five year olds). The reasons given for not using funded ELC in 2018 were similar to those given by parents in 2022 for not using their full entitlement: do not want to use ELC, prefer to look after their child themselves, as well barriers to use such as lack of awareness, flexibility and choice of setting/hours.

Summary of sub-group analysis: Use of ELC

Deprived areas/low income households

Were more likely than others to use funded ELC (eligible 2s only).

Less likely than others to say their reason for using funded ELC was to improve their work opportunities.

Single earner/lone parent households

Were more likely than others to use funded childcare (eligible 2s only).

Less likely than others to use all their funded ELC entitlement and less likely to say their reason for using funded ELC is to improve their work opportunities.

Rural areas

Less likely than others to use all their funded ELC.

Parents of children with ASN

Less likely than others to use funded ELC (eligible 2s only).

More likely than others to say their reason for using funded ELC was to benefit their child's learning/development/etc., and less than others likely to give reasons relating to work opportunities.

Other sub-group differences

No other sub-group differences were noted.

Flexibility of funded ELC

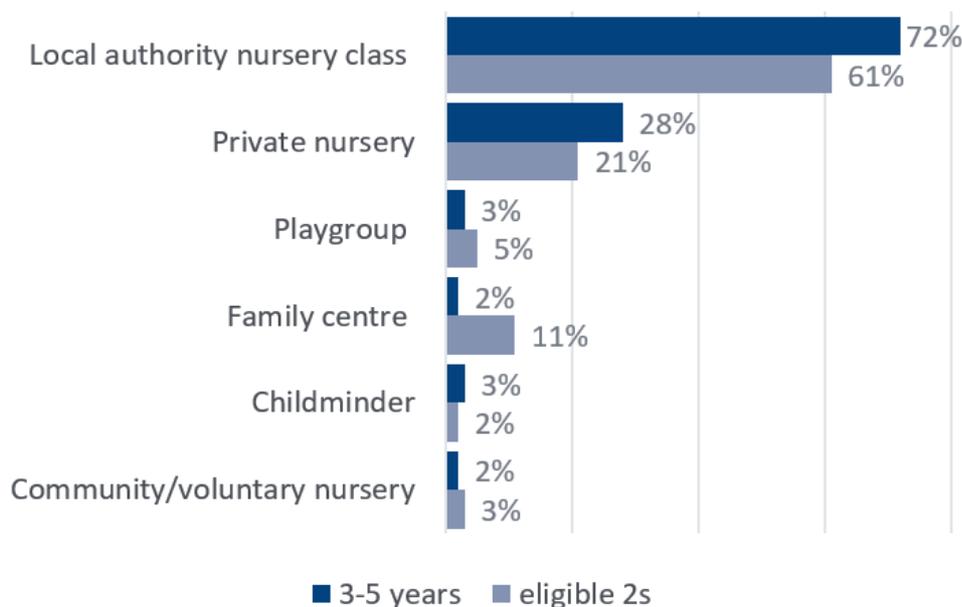
This section considers how well funded ELC meets parents' needs, in terms of the types of settings, the number of hours, and the timing of sessions.

Profile of use

The majority of parents used their funded ELC in a local authority nursery class (72% of three to five year olds, 61% of two year olds), with almost all of the others using private nurseries. Around a tenth (11%) of parents of two year olds used a family centre. Only a small minority used a childminder (3% of three to five year olds, 2% of two year olds). Typically, parents from low income and deprived areas, single earner and lone parent families, parents from rural areas and parents with children with ASN were more likely to use a local authority nursery and were less likely to use a private nursery.

Figure 5: Types of funded ELC used

Q3, Q16 What types of funded early learning and childcare has your child attended since August 2021?
Bases: Q3 (3-5 yrs): 6698, Q16 (2yrs): 227



Overall parents were roughly split between using their funded hours all-year round and during term time only. Parents of children aged three to five were more likely to use their hours during term time only (57% vs 41%), whereas parents with younger children were more evenly divided (49% vs 47%). Parents of children aged three to five in deprived areas and single parent households were less likely to spread their entitlement across the whole year, while those parents with more than one child under the age of six and those in more rural areas were more likely to do so. Notably, when parents were asked in 2018 to consider how they would, hypothetically, prefer to spread a 1,140 hours entitlement across the school year, 70% overall said they would use their hours throughout the year, and just 25% they would use their hours in term-time only.

Figure 6: Use of funded ELC hours across the year

Q5, Q18 Which of the following best describes how the funded ELC you use is spread across the year?
Bases: Q5 (3-5 yrs): 6698, Q18 (2ys): 227

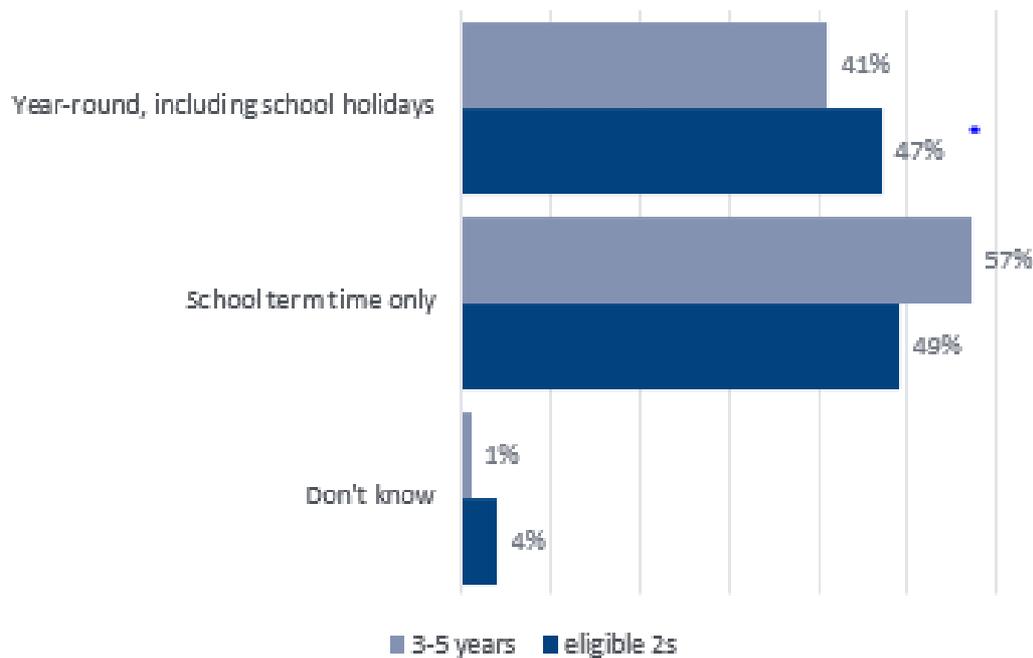
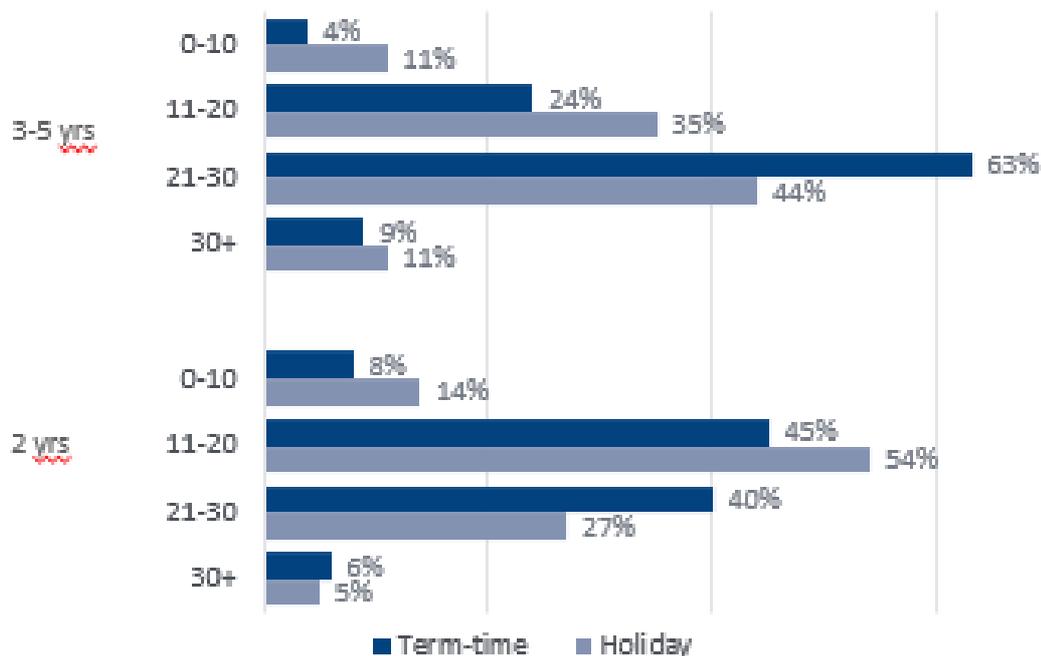


Figure 7 profiles how many hours parents use across the year. Overall, the older children (three to five year olds) tended to spend slightly longer in funded ELC than the younger children (two year olds), and in particular, to spend longer in funded ELC during term time. There were few sub-group differences:

- **three to five year olds** – households with two working parents used more hours than those with no working parents both in term time (25.1 vs 23.9) and during the holidays (22.1 vs 17.0)
- **two year olds** – households with two working parents used more hours than those with no working parents in term time (23.6 vs 20.0) and during the holidays (21.5 vs 14.1)

Figure 7: Number of hours of funded ELC per week (banded) followed by table of means
 Q6 and Q19 – In a typical week, roughly how many hours during [term-time / school holidays] does your child currently spend/ did your child spend at funded early learning and childcare? Base All using funded hours Q6: 3-5 yrs 6,080/2,312; Q19: 2 yrs 165/75



	3-5 year olds	Eligible 2 year olds
Term-time: hrs/week	24.9	21.0
School holidays: hrs/week	21.4	17.6

Flexibility of funded ELC

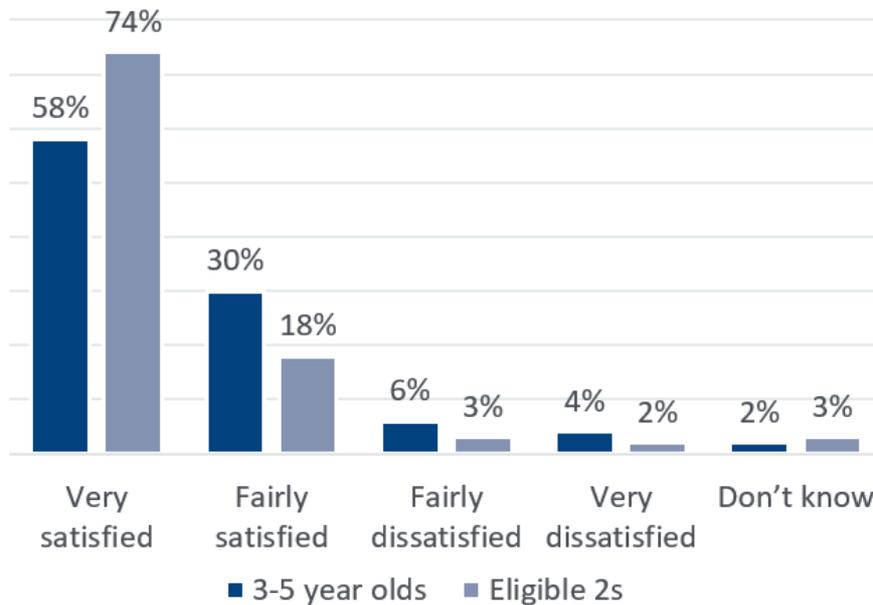
Parents, on the whole, said they were satisfied with the flexibility they have been offered to use their funded hours in a way that meets their family’s needs: 88% of those with a three to five year old and 92% of those with a two year old were satisfied, with 58% and 74% respectively very satisfied. Ten per cent of those with a three to five year old and 5% of those with a two year old were dissatisfied.

There were some sub-group differences among parents of three to five year olds (with no significant differences noted for the parents of the two year olds):

- households with no working parents are more likely than those with two working parents to be very satisfied (68% vs 56%)
- households on low incomes (less than £16,000) were more likely than those on incomes from £16,000-£60,000+ to be very satisfied (64% vs 54%-59%)
- parents in deprived areas were more likely than others to be very satisfied (62% vs 58%)

Figure 8: Satisfaction with flexibility of funded ELC hours

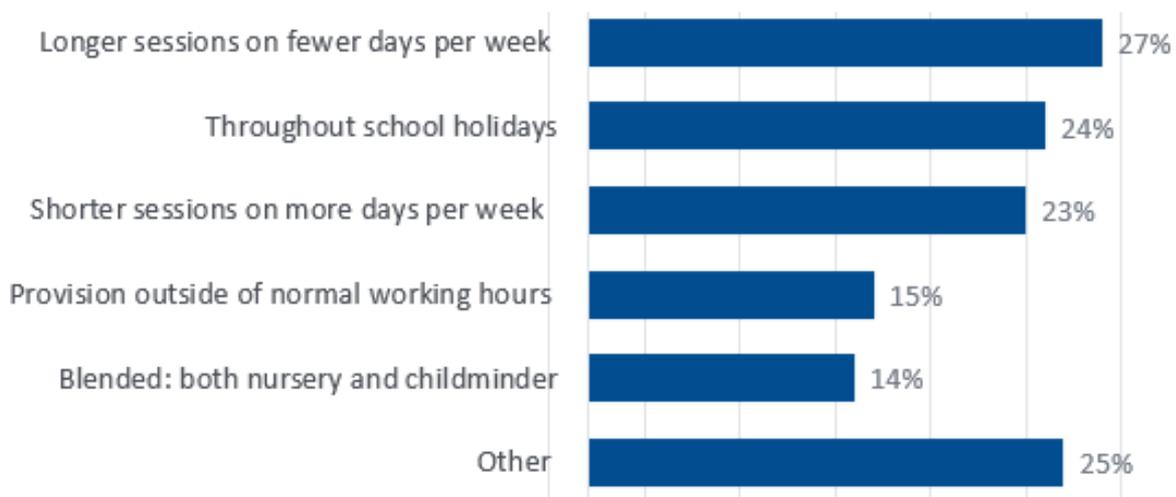
Q7, Q20 How satisfied or dissatisfied are/were you that you have been offered the flexibility to use your funded hours in a way that meets your family's needs? Bases: Q7: 6698, Q20: 227



Parents who were dissatisfied with the way they could use their funded hours were asked what their preference would be. As the figure below shows, parents were fairly evenly split between the top three options of: being able to have longer sessions on fewer days each week, shorter session on more days each week, and sessions throughout the school holidays. This profile differs from 2018, which then found that most (65%) parents would prefer longer funded session on fewer days of the week. The marked reduction in the parents selecting this option is likely a consequence of the increase in funded hours, which has enabled many parents to secure longer sessions for their children.

Figure 9: Preferred use of funded ELC hours (3-5 years only)

Q7a How would you prefer to use your funded hours? Bases: Q7a:632



Note: only 12 parents of eligible two year olds said they would prefer to use their funded hour in a different way. The most common preferences were 'throughout the school holidays' and 'shorter session on more days'.

Respondents were invited to provide more information on the type of sessions they would prefer. The most common suggestions from those wanting longer sessions were the flexibility to start at 8am (39% of this group suggested starting around this time) and later finishes typically 4pm to 5pm (17%) and after 6pm (15%), while 17% simply asked for 'more flexibility'. Those who preferred more, shorter sessions per week suggested variations around the school day: 3pm finish (27% of this group made this suggestion) 9am to 10am start (24%) and match school hours (25%), as well as sessions over five days (26%).

Other respondents gave a range of suggestions, including term-time flexibility (23%), matching with school hours (21% of this group) ability to pay for extra hours (10%) and more general flexibility (23%), while some (5%) specifically mentioned they should only have to pay for what they use.

"I would like to choose hours that suit my working arrangements. Currently I am forced to use hours I don't need 90mins a week of my funded childcare is 'lost' as the placement starts at 8.00am, but my daughter does not attend the setting until 8.45am. This costs me £15 a week as I have to pay for the additional time she is there over and above my allocated hours." (One child not started school, single parent household, one parent in work, child(ren) with ASN)

"I do not need hours during school holidays and therefore miss out on hours that would be funded for my child if it was just term time. This leaves me more out of pocket." (Two children not started school, two parent household, two parents in work, no children with ASN)

"I wasn't aware that I would only be entitled to 22.5 hours a week as the whole 'advertisement' of it all is 30 hours funded. But because I work Mon-Fri throughout the whole year I am cut 7.5 hours a week. Which I don't think is very fair for the working mother as who only works term time but school teachers?!" (One child not started school, single parent household, one parent in work, no children with ASN)

Comparison with 2018

A number of the issues that faced parents in 2018 remained concerns in 2022: in particular local authority nurseries not being open long enough to cover the working day; and private nurseries charging by the half day, even if only part of the session is required. A key concern from 2018 that was rarely mentioned in 2022 was difficulty identifying/accessing private providers where they could use their funded entitlement.

The table below summarises sub-group analysis for 2022. There were some notable similarities with 2018, with parents in rural areas more likely to experience lack of flexibility in finding a provider/choice of hours, while those with at least one parent not in work were most likely to be happy with the flexibility of their provision.

Summary of sub-group analysis: Flexibility of funded ELC (three to fives unless otherwise stated)

Deprived areas/low income households

All more likely to use a LA nursery and less likely to use a private nursery.
Less likely than others to use their funded ELC hours across the whole year.
More likely to be satisfied with the flexibility offered by the funded hours.

Single earner/lone parent households

More likely to use an LA nursery, less likely to use a private nursery, and less likely to spread their funded ELC hours across the whole year than others.
More likely to be satisfied with the flexibility offered by the funded hours.

Rural areas

More likely to use an LA nursery, less likely to use a private nursery, and more likely than others to use their funded ELC hours across the whole year.

Parents of children with ASN

More likely to use an LA nursery, less likely to use a private nursery.

Other sub-group differences

Households with two working parents use more funded ELC hours than those with no working parents throughout the year for both age groups.

Parents with more than one child under 6 more likely to use a LA nursery, less likely to use a private nursery; and less likely to spread their funded ELC hours across the whole year than others.

Accessibility of funded ELC

Ease of transport

Nearly all parents found it easy to travel to their main provider of funded ELC, with 97% of parents of three to five year olds and 95% of parents of eligible two year olds saying they found it easy to travel to their funded ELC provider, and around three-quarters saying they found it very easy.

Those parents of three to five year olds with reduced capacity due to health conditions were more likely than those with no health conditions to find it difficult to travel to their main funded ELC provider (6% vs 2%).

Children with additional support needs

Parents with children eligible for funded ELC were asked if any of their eligible children had additional support needs. In total, 15% of parents said at least one of their eligible children has additional needs, most commonly language, speech and communication difficulties; social, emotional or behavioural difficulties; and autistic spectrum disorder (see table A2 in the appendix).

Parents were generally satisfied that funded ELC meets their child's additional support needs: 85% said they were satisfied, this includes 53% who said they were very satisfied.

Those with one pre-school child with an ASN were more likely to be satisfied than those with two or more children under the age of six (at least one with an ASN) (87% vs 81%). Those living in households with one or two parents in work were less likely to be very satisfied than those living in households where no parents work (49% or 51% vs 63%).

Those with an income of more than £30,000 were less likely to be very satisfied compared to those below £30,000:

Proportion of each income band saying 'very satisfied' that ASN meets their child(ren)s needs:

Less than £16,000:	57%
£16,000 to £29,999:	60%
£30,000 to £44,999:	45%
£45,000 to £59,999:	44%
£60,000+	47%

Nearly one in ten (9%) parents of a child/children with ASN said they were dissatisfied with how funded ELC meets their child's additional support needs. Those with two or more pre-school children were more likely to be dissatisfied than those with one child (12% vs 7%).

Those dissatisfied were asked an open question to explain why they were dissatisfied with their access to funded ELC provision for their child(ren) with additional support needs. An analysis of these responses indicates that the main reasons for dissatisfaction were:

- staff not fully / appropriately trained (33%)
- not enough support given (28%)
- poor communications with provider (18%)
- hours unsuitable (11%)
- slow diagnosis / provision of service delayed (9%)
- no key-worker available / lack of 1-1 support (9%)

[Base 82 responses]

The following quotes are examples of issues raised in responses to the open question.

“They don’t have enough staff although it follows guidelines per adult child ratio but that does not take into account my child’s needs, meltdowns, learning delays, sensory issues and that he needs more adult support than your average child. I was told on my son’s 2nd year deferred year I cannot move him although I was unsatisfied with his overall care at the nursery as the [local authority] don’t have alternative placements. My son lashes out at peers at nursery there is not enough staff to supervise at all times and my son does not receive the extra staff to help him learn at his pace as they have other children to deal with.” (One child not started school, two parent household, one parent in work, child with ASN)

“We did try our oldest child with a split placement with her private nursery and the council nursery attached to the school she will be going to. The hours are not suitable for us at all but as I am self-employed I was willing to sacrifice some time if it was a good thing for my daughter. All we wanted was 2 days at the council nursery and 3 days at the private nursery, which she has attended since she was 6 months old. The private nursery were fine with this as we were already in level 0. The council nursery were informed of our request and agreed to it. They were also informed both in person and in writing about my daughters severe eating issues which we have been struggling with since she started to wean. They said they would make provision for her and support this. However, the day she started I went with her. No one knew about the split placement and no one knew about my daughters eating issues which I was very concerned about. The following day I was told that the split placement was likely not to be possible and I’d more or less have to choose which nursery my daughter would go to. We obviously chose the private nursery as she is happy there and they are great helping her with her eating issues. I had zero faith the council nursery would help. This has cost us tremendous financial difficulty and we struggle every single month to pay our almost £900 a month bill...”²⁸ (Two children not started school, two parent household, two parents in work, child(ren) with ASN)

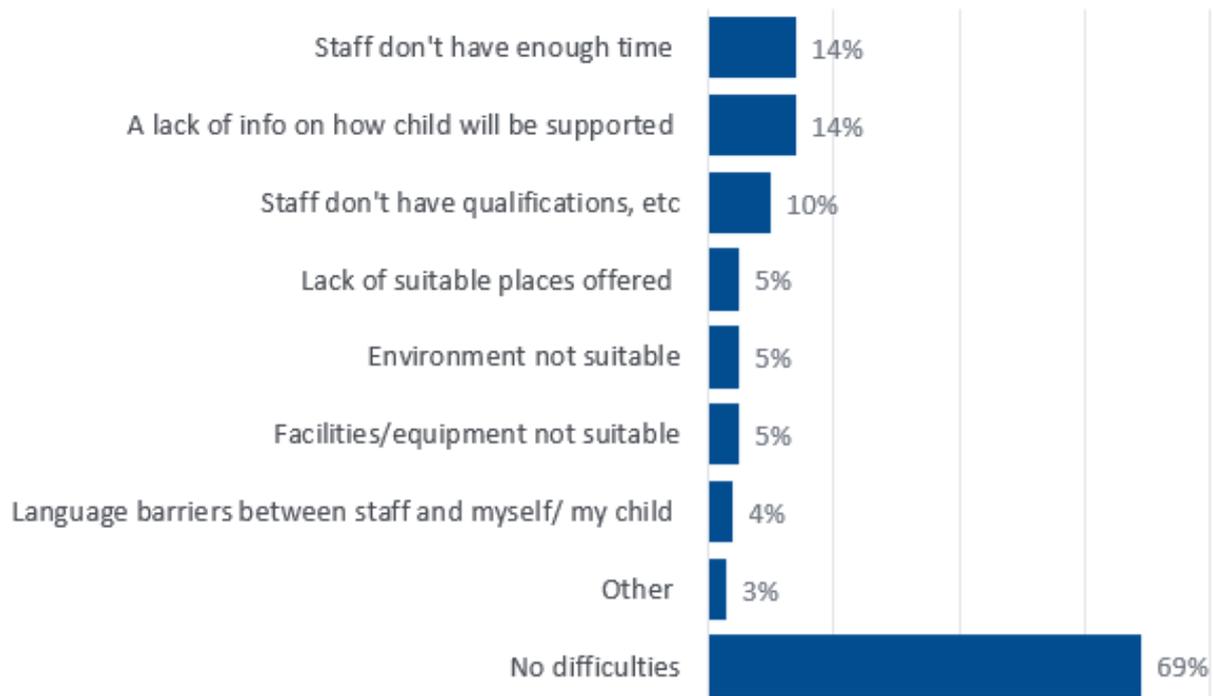
²⁸ Funded ELC does apply to private settings as well as local authority settings. It is unclear why the private nursery in this case was not registered with the scheme.

Difficulties experienced by parents of children with ASN

When asked if they had experienced any of the issues listed on the figure below, the majority of parents of children with ASN said there were no difficulties (69%). Those who did have issues most commonly cited staff not having enough time available to meet the needs of children and a lack of information on how providers support children with ASN. Some were lacking confidence in the staff's qualifications, knowledge and experience.

Figure 10: Difficulties experienced finding funded ELC that meets additional special needs

Q38 Have you experienced any of the following difficulties finding funded early learning and childcare that meets the additional support needs of your child(ren)? Base All parents with a child with ASN, 1008



As with other issues of satisfaction, those with income of more than £30,000 were more likely to report difficulties compared to those below £30,000:

Proportion of each income band reporting no difficulties finding funded ELC for their child with ASN

Less than £16,000:	79%
£16,000 to £29,999:	74%
£30,000 to £44,999:	62%
£45,000 to £59,999:	67%
£60,000+:	60%

Similarly, parents in the most deprived SIMD areas were less likely to report difficulties compared to parents from the least deprived SIMD areas (38% vs 26%).

Numbers were too small in most cases to do detailed analysis by the child's type of additional need. However, we can see that parents of children with social, emotional or behavioural difficulties and Autistic spectrum disorder were most likely to report having experienced difficulties, while parents of children with sensory disabilities (such hearing or visual impairments) were least likely:

Proportion that have experienced some difficulties finding ELC that meets their needs:

Social, emotional, behavioural:	43%
Autistic spectrum disorder:	42%
English as a second language:	38%
Health: physical/mental health:	34%
Language, speech, communication:	32%
Sensory impairment:	21%
All:	31%

Parents of children with autistic spectrum disorder and those with social, emotional or behavioural difficulties were especially likely to mention difficulties with lack of information on how providers will support children with additional needs (23%/ 22% compared with others 9%-16%) and lack of confidence in the staff being able to meet child's needs (21%/23% compared with others 9%-16%)

Comparisons with 2018

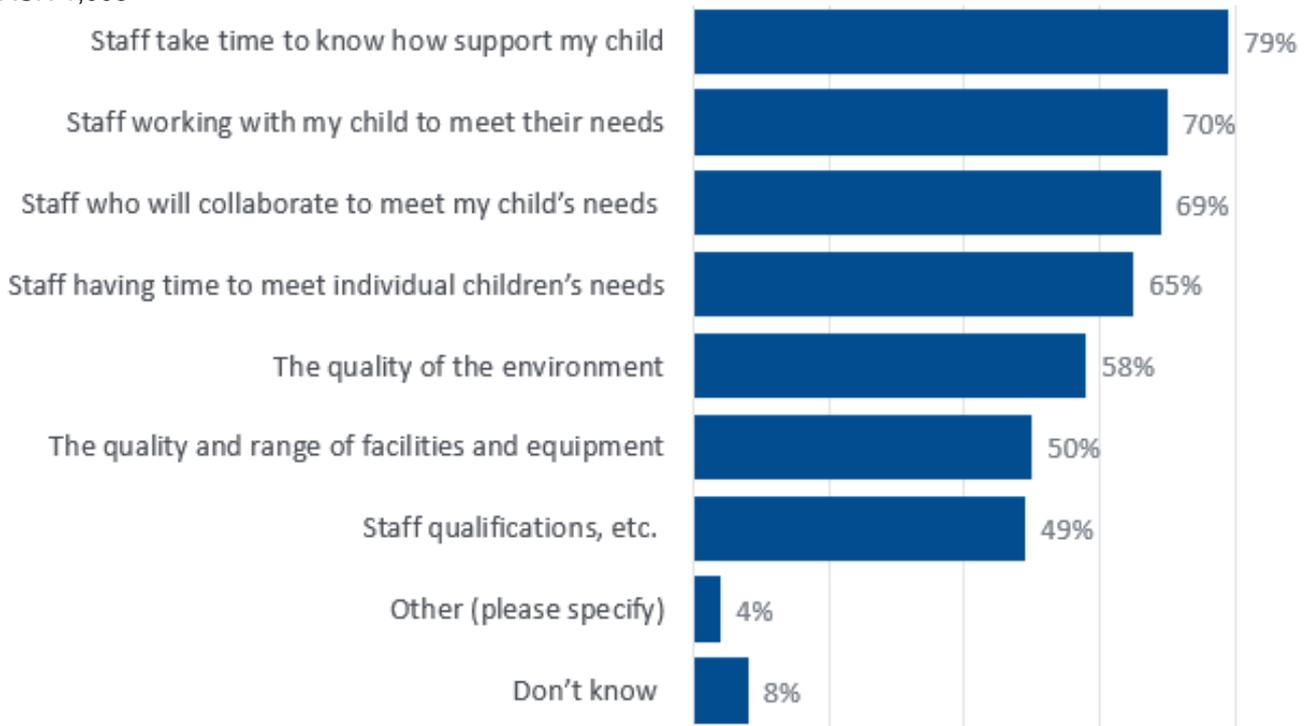
These findings are broadly consistent with the 2018 survey, which found that most (57%) parents were satisfied with their access to ELC that meets their child's needs. However, around half (48%) of parents with a child with ASN had experienced difficulties accessing suitable provision in 2018, compared with 31% in 2022. The types of difficulties experienced were similar to those encountered in 2022: lack of information on how provider will support their child, concerns that staff will not have enough time to support their child, and worries that staff do not have the right qualification, skills and experience to look after their child.

Choosing a service provider for a child with ASN

When parents were asked about the basis on which they chose a funded ELC provider for a child with ASN the most commonly mentioned qualities were connected to staff who get to know how to support the child, who meet the needs of the child, who collaborate and have time to meet the child's needs. It is interesting to note that 'staff not having enough time to know how to support my child' is the most often mentioned difficulty experienced (Q38 above) and the most often mentioned reason for choosing a provider.

Figure 11: Choosing a provider that meets additional support needs

Q39 Which of the following do you base your decision on when choosing a funded early learning and childcare provider to meet the additional support needs of your child(ren)? Base All parents with a child with ASN 1,008



Choosing a funded ELC provider and quality of funded ELC

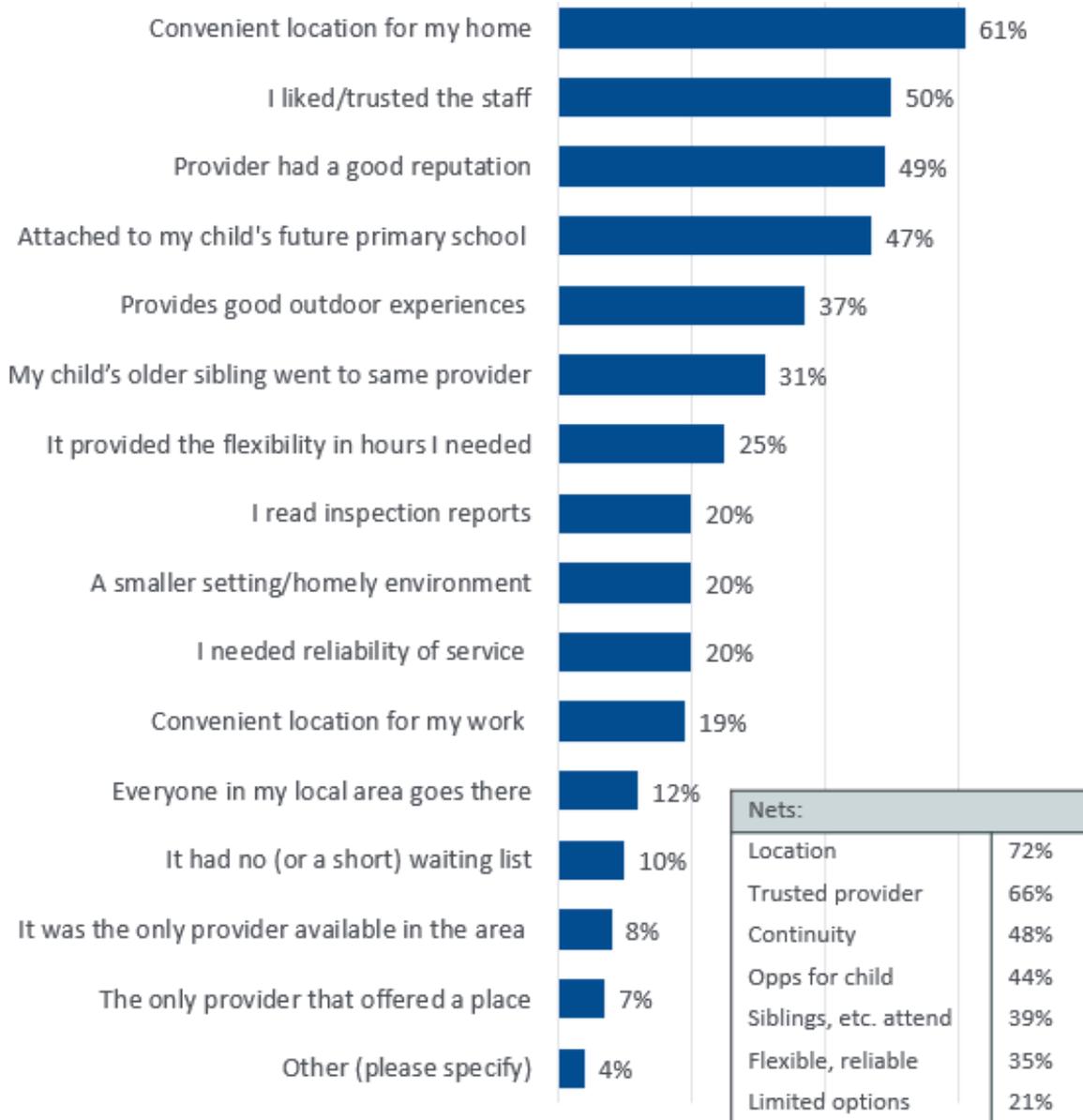
This section considers parents' views on their funded ELC provider and the impact that funded ELC has had on their lives.

Choosing a funded ELC provider

Choosing their ELC provider is a, important decision for many parents. As Figure 12 shows, parents are most likely to consider the provider's location and reputation when selecting the setting. Other factors such as continuity (being attached to the same school their child will go to/attended prior to funding), the opportunities open to the child (for example, outdoor activities, Gaelic), siblings currently/previously attended; and reliability were also considerations.

Figure 12: Choosing a funded ELC provider

Q30 Thinking about the provider you use for your child(ren)'s funded early learning and childcare hours, how did you choose your current provider? Base: All eligible for funded ELC 6762



Responses below 4% not included

Flexibility and reliability were significantly more important to households where both parents were in work than those with no/one parent in work (39% vs 25% and 31%) and for parents on high incomes (over £60,000) compared with those on lower incomes (45% vs 28%-38%).

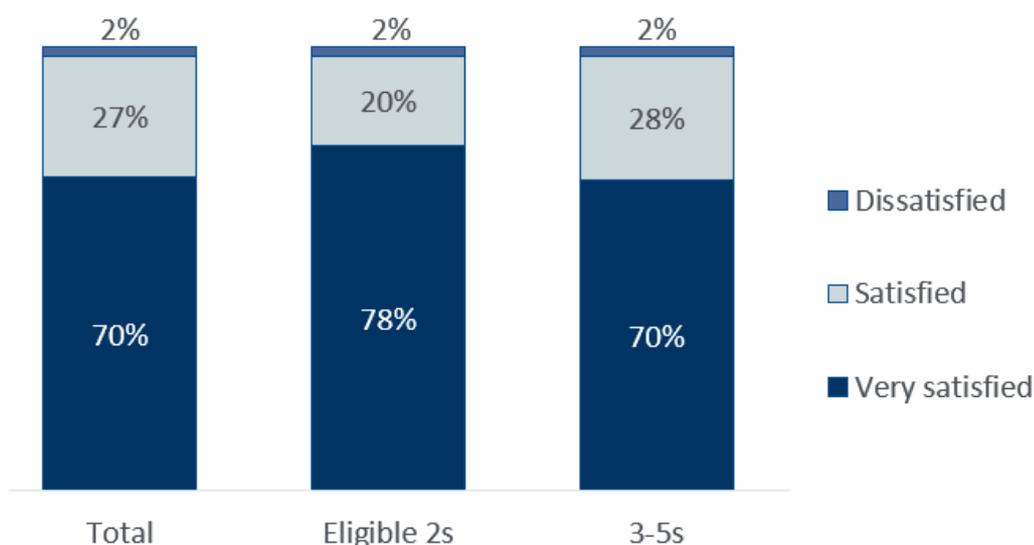
Just over a fifth of parents gave reasons linked to restricted options (such as short/no waiting list, the only option in the local area). Parents in rural areas were more likely than others to give one of these reasons (27% vs 19%), as were parents who had a child with ASN (25% vs 20%).

Quality of funded ELC provision

Overall, parents were satisfied with the quality of the provision from their main funded ELC provider. Figure 13 below shows clearly that 97% of parents were satisfied with the quality of their provider, with 70% very satisfied. While levels of dissatisfaction are extremely low, there are a few sub-groups of parents that are more likely than others to be very satisfied: those with eligible two year olds compared with three to five year olds (78% vs 70%), no earners in the household compared with households with one/two earners (76% vs 71%/69%) and parents whose children do not have ASN compared with others (70% vs 66%).

Figure 13: Satisfaction with the quality of funded ELC provider

Q31 Thinking about the main provider that you use for your funded early learning and childcare hours, how satisfied or dissatisfied are you overall with the quality of the provision? Bases: Total 6762, Those with eligible 2s 247, Those with 3-5s 6608



Impacts and benefits of funded ELC

The survey asked about the impact that funded ELC has had on parents' lives, the activities they have been able to undertake because of access to funded hours, and the contribution to their health and wellbeing.

The most common impacts of the funded hours have been to enable parents to work or look for work (74%) and to have time to think about what they may do in the future (mentioned by 71%). The next most commonly mentioned were wellbeing impacts, although substantially less frequently: just under half have been feeling happier (47%), less stressed (46%) and have had time to look after themselves more (44%).

- Being able to work/look for work was more likely to be mentioned by two parent families (76% vs 65%), those with two earners (84% vs 40% or 62% for those with no or one earner) and those in groups earning more than £16,000+ compared with those earning less than £16,000 (71%-79% vs 64%). These sub-groups were also more likely to say their funded hours enabled them to increase the number of hours they work.
- Having time to think about the future was more likely to have been said by those from deprived areas compared with non-deprived areas (77% vs 70%), lone parents compared with couples (76% vs 70%), people in no or single earner households compared with two-earners households (78% or 75% vs 68%), as well as by younger (under 25s) parents compared to older parents (90% vs 64%-80%). These groups were generally also more likely than others to say that they were using their hours to study/develop skills, to care for others, and to look after themselves better and have been feeling happier and less stressed.

Figure 14: Impact of funded ELC

Q43 And, could you please tell us how much you agree or disagree with the following statements about the impact of funded early learning and childcare on you? Bases: 6,853



Summary of sub-group analysis: Quality and accessibility of funded ELC

Deprived areas/low income households

Were less likely than others to mention issues relating to continuity for child, location, and flexibility and reliability when choosing their funded ELC provider.

Were more likely to have used funded ELC to think about their future, to study, to care for others, and to have had more time to look after themselves. And less likely to have (looked for) work/increased hours worked.

Single earner/one parent households

No-earner households more likely to be satisfied with the quality of their provider.

More likely to have been using funded ELC to think about their future, to study, to care for others and have had more time to look after themselves, feel happier and less stressed.

They were less likely to have used funded ELC to work/look for work, to (look for) work/increased hours worked. Households with no/one earner more likely than others to have taken up voluntary work.

Rural areas

More likely than others to have had restricted choices when choosing their funded ELC provider.

More likely than others to have used their funded ELC hours to increase the hours they are working.

Parents of children with ASN

More likely than others to have had restricted choices when choosing their funded ELC provider, and less likely than others to be satisfied with the quality of their provider.

More likely than others to be using funded ELC to have more time to look after themselves, and to have been feeling happier and less stressed.

Other sub-group differences

Parents with English as a second/additional language were less likely than others to mention continuity for child when choosing their funded ELC provider.

More likely than others to be using funded ELC to think about their future, to study, to care for others, to have undertaken voluntary work, and to have increased hours worked. More likely than others to be using funded ELC to have more time to look after themselves, and to have been feeling happier and less stressed.

Parents with eligible two year olds more likely to be satisfied with the quality of their provider.

Younger parents (under 25) more likely to have used funded ELC to think about their future, to study, to care for others, and have more time to look after themselves. Less likely to have (looked for) work/increased hours worked.

Parents with one child were more likely than others to have used their funded ELC to work/look for work (76% vs 69%) increased hours worked.

Parents with a health condition that reduced their capacity a lot: less likely than those with no health condition to have used their funded ELC hours to work/look for work.

Respondents were asked if they had any further comments about the impact of the expansion of funded ELC to 1,140 hours per year. Two-fifths responded to this question. Most of the comments were positive overall. Many (28%) were straightforward praise, such as “it’s a fantastic thing”, “I think it’s great”, “thank you”, “this is an incredible initiative, thank you”. However, the largest group of comments related to the positive financial impacts of the funded hours, with parents commenting on the huge difference funded ELC has made to them being able to work, study and simply access childcare. Many qualified these comments, noting

that more flexibility, longer hours, extending eligibility to younger children would enhance the scheme's value to them.

"I couldn't work if these hours weren't available as cost of childcare wouldn't cover my income." (Two children not started school, two parent household, two parents in work, no children with ASN)

"I think this is fantastic as childcare can be so expensive and it takes a bit of financial pressure of my partner and I. We will need to pay for some extra hours because we both work full time but this is a great help." (One child not started school, two parent household, two parents in work, no child with ASN)

"It is greatly appreciated and takes a lot of pressure off to find money to cover childcare, the costs of which are huge. Very pleased to hear that this help might be further extended to cover younger children." (Two children not started school, two parent household, two parents in work, no children with ASN)

Respondents stressed the social benefits of the funded ELC, both in terms of helping their child's learning, development and confidence, and supporting the parent's wellbeing and mental health.

"It is fantastic, I am so incredibly grateful for it as it not only allows me to work which helps the family income (and is vital just now) but also is beneficial for my mental health. It is also very beneficial for my child as preparation for school/ socialisation/fun. I could not afford to send her to nursery for more than a day if I had to pay for it and am aware that I just cannot give her the experiences and learning at home that she gets at nursery." (One child not started school, single parent household, one parent in work, no child with ASN)

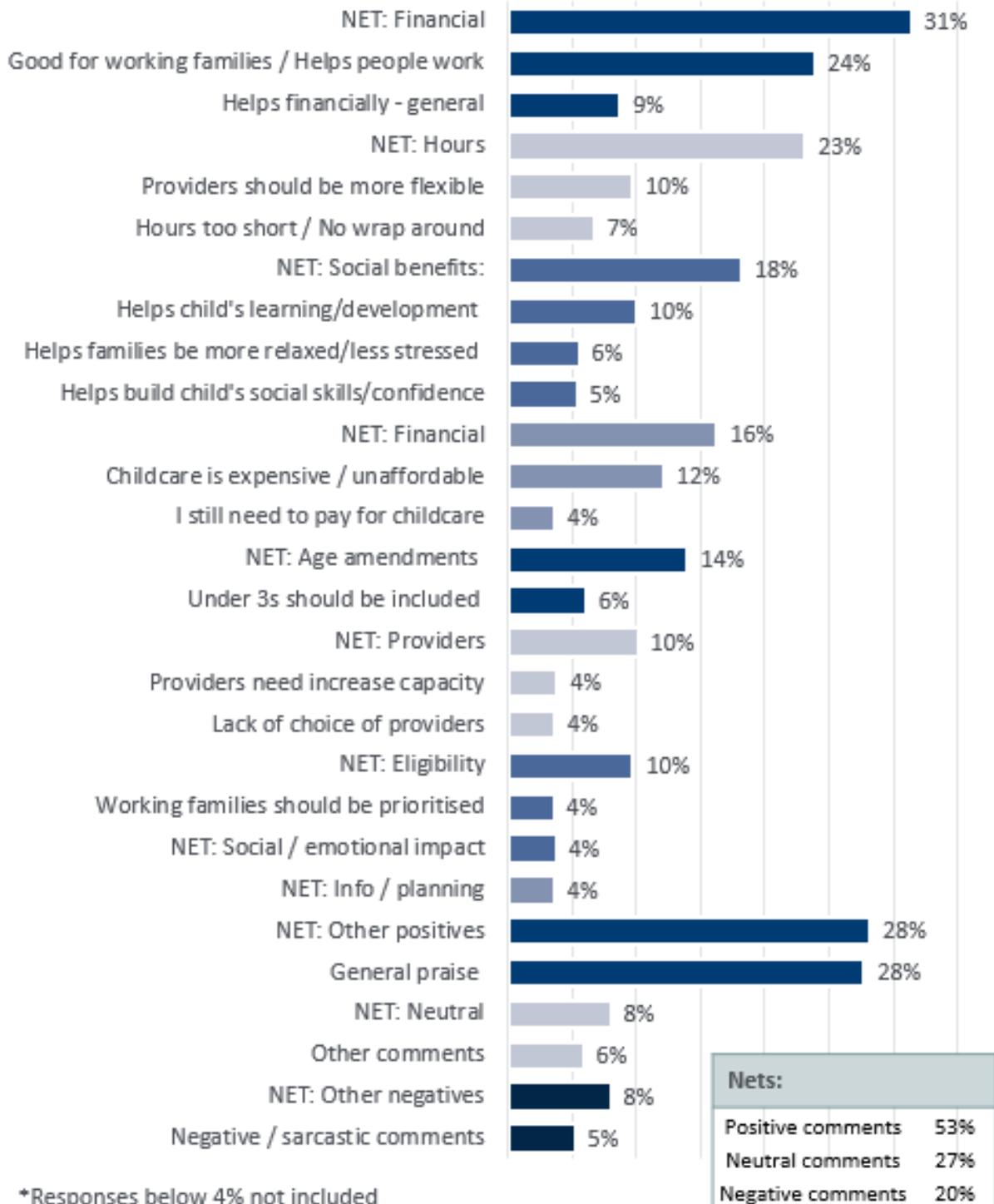
Negative issues within the comments were around not being able to get the hours needed, and the cost /affordability of childcare. The main frustrations raised were around the access and administration of funding by local authorities, flexibility of providers and how they administer the scheme; whether parents could access the hours they wanted, when they wanted; and parents having to pay fees for additional/out-of-hours care. Parents mentioned cases of children turning three in March 2022 but not being eligible for a place until the August term; of having to pay for many more hours than they use as sessions fees are based on a standard day, and the constraints of using local authority provision.

"The discrepancy between when the funding kicks in per local authority is infuriating. Some children benefit from the day they turn 3, others the school term after 3. That is a sheer postcode lottery and date lottery too. For example, we lose out on £1600 of funding by 2 days in [local authority]. An absolute joke." (Two children not started school, two parent household, two parents in work, no children with ASN)

“Infuriating that you cannot top up the funded hours at the local authority nursery i.e., pay for additional hours required.” (One child not started school, two parent household, two parents in work, no children with ASN)

Figure 15: Comments on impact of ELC

Q57 Is there anything else you would like to say about Scottish Government’s expansion of funded ELC to 1,140 hours per year? base: 3510



Effect of Covid-19 on use of funded ELC

The Covid-19 pandemic delayed the statutory duty for the increase in hours of funded ELC by a year to August 2021. This section of the report considers the impact of Covid-19, and in particular, the impact of Covid-19 restrictions on the use made of and experiences of funded ELC since August 2021. It will help establish the extent to which, if any, the pandemic continued to affect parents' access to and experience of funded ELC.

Direction of change

The pandemic had not impacted the use of ELC for the majority (74%). The biggest impact for those who were affected was a reduction of funded ELC (18%). A minority (4%) experienced an increase in use of ELC or other impacts (3%).

Lack of impact increased in line with income. Those with income of more than £45,000 were more likely to have felt no impact compared to those below £30,000:

Proportion of each income band reporting that Covid-19 had not impacted on ELC use since August 2021

Less than £16,000:	70%
£16,000 to 29,999:	71%
£30,000 to 44,999:	73%
£45,000 to £59,000:	76%
£60,000+:	77%

Parents of children with ASN were more likely than other parents to have experienced some impact (increased use, reduced use or other) (32% vs 25%).

Notably, those who find it difficult to get to their provider were more likely than others to **reduce** their use of funded ELC (29% vs 18%).

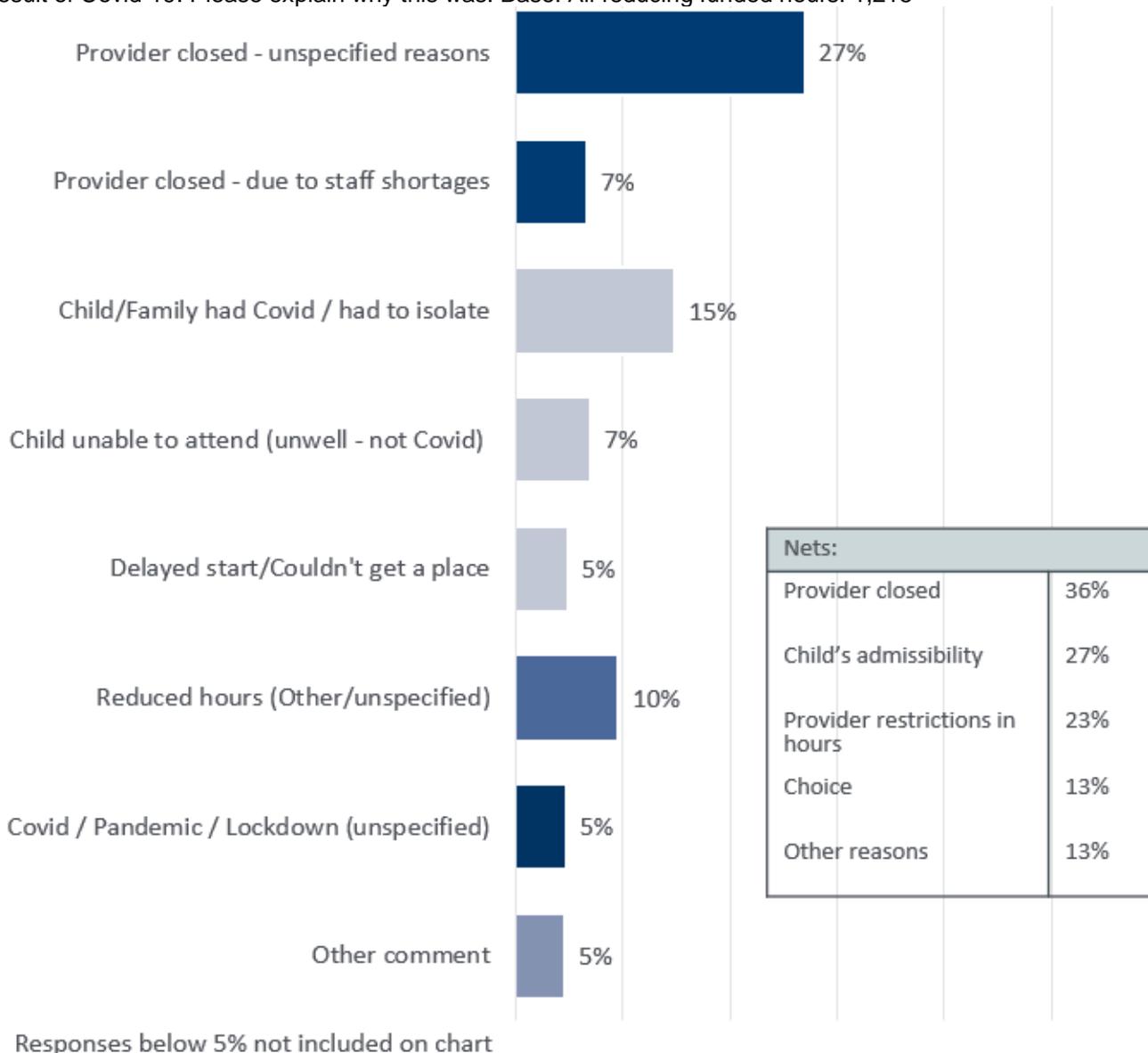
Those whose use of funded ELC was reduced were more likely to be in the most deprived SIMD quintile than the least deprived SIMD (20% vs 17%).

Reasons for reduction in hours

The main reasons given for reducing hours due to the pandemic were linked to providers being closed. There were also issues with admissibility (for example, having to self-isolate) and accessibility. Some providers placed restrictions on the hours they could provide.

Figure 16: Impact of Covid-19, reduction in funded ELC²⁹

Q34a You said you have reduced your use of funded early learning and childcare since August 2021 as a result of Covid-19. Please explain why this was. Base: All reducing funded hours: 1,215



The following quotes illustrate some of the reasons for reduction in hours.

“Staffing issues, staff off with illness throughout November/December 2021 and January 2022 and no cover to be able to open the nursery. Even now there are still staffing issues and the nursery being closed at short notice occasionally. The issue of support staff in [x council] area needs to be addressed.” (One child not started school, two parent household, two parents in work, no children with ASN)

²⁹ The Nets shown in the small box ‘capture’ or summarise all the responses under the listed headings, even those not mentioned on the table because they fall below the 5% threshold.

“Because of Covid-19, nursery and school can't go in and out at the same time (this is still the case although restrictions no longer in place). I can't hang around for an hour at the school gate after P2 child has been let out because nursery won't be out for another hour, therefore I pick up nursery child at lunch time when he would definitely benefit from staying longer. I already stand in the cold and rain most mornings (this is rural Scotland) with my nursery child after dropping my P2 child to school for 20-30 minutes waiting for nursery to open. If nursery were willing to line up their pick-up and drop-off times with school it would be so much more family friendly.” (One child not started school, two parent household, one parent in work, child(ren) with ASN)

“My child attends 2 nurseries and so catches every bug from both schools resulting in not being able to attend due to having a runny nose, slight temperature and other ‘Covid-19 symptoms’ and a lot of absences occurred meaning I also had to present as absent from my college course and yet I am currently having to drop hours at his 2nd nursery and possibly my child's main nursery now before my course ends even though I know full well my child has not used all of his entitled hours due to these absences. My degree course is hinging on my performance in these vital few weeks and I may well not be able to attend due to these lack of funded hours available.” (One child not started school, single parent household, no parents in work, no children with ASN)

Reasons for increase in hours

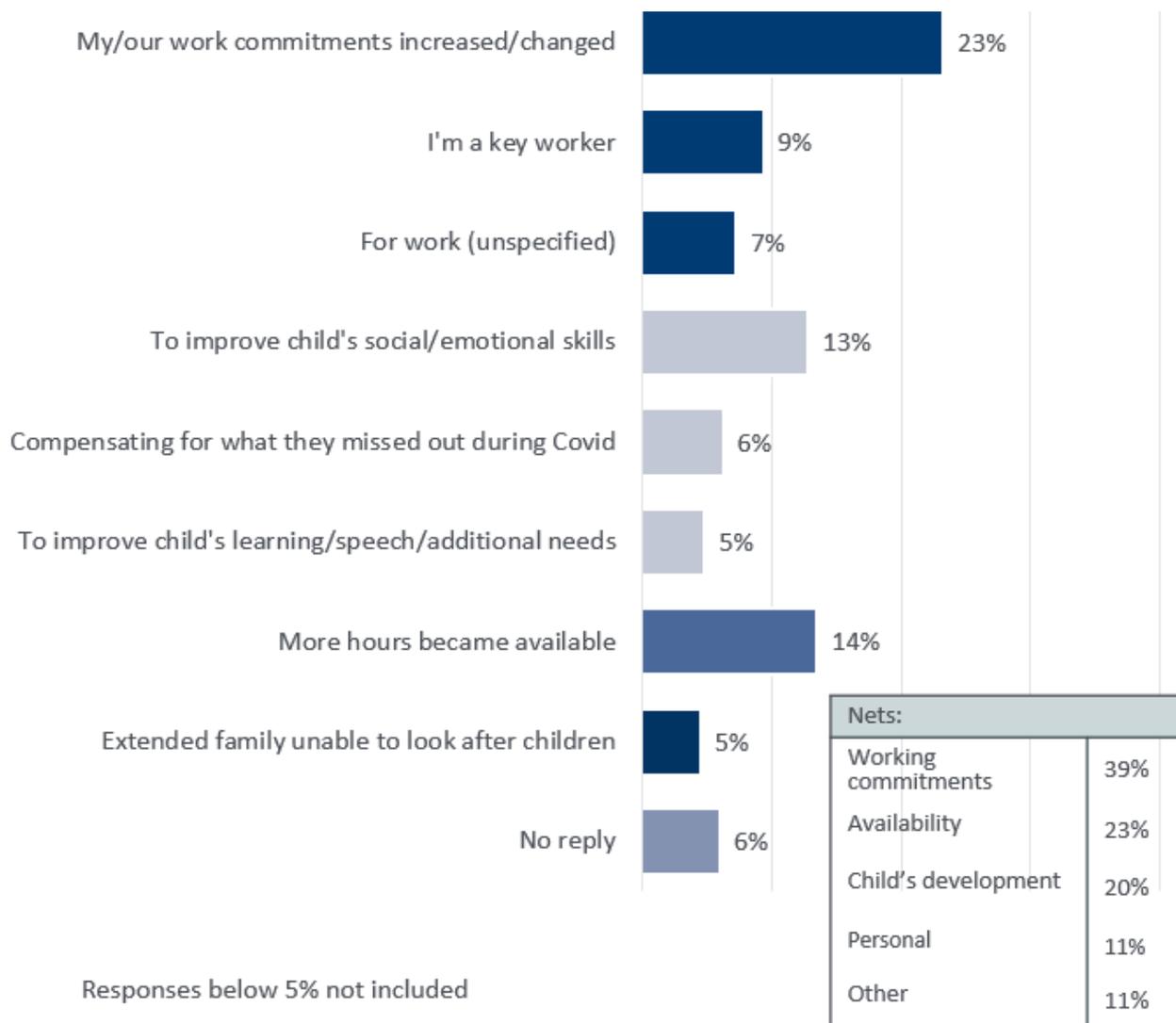
The main reasons for increasing hours were linked to work commitments, hours changing and being a key worker. Parents also cited the need to support their child's development. Some mentioned the increase in availability of funded ELC. The following quotes illustrate some of the reasons for an increase in hours.

“Covid-19 restrictions had a huge impact on my son's ability to socialise with children his own age. Although he had issue with a speech delay before lockdowns, all additional support and therapy was stopped. I felt that it was extremely important to give him the opportunity to use the extended hours to help improve his social skills. Was also very grateful that the extended hours allowed us to do so as we would not have been able to afford private childcare.” (One child not started school, two parent household, one parent in work, child(ren) with ASN)

“As a family staying in a small home, with no informal childcare options, we grew overwhelmed by the constancy of having the kids around with no facilities open, no places to visit, no friends to see, and we needed to get them out the house for our own sanity and to make time for work. If there had been no lockdowns we would have kept going to local playgroups and joined clubs and the rhythm of life would have been much easier. We have very few parent friends now, partly because we weren't attending clubs and playgroups at a crucial age, so we still find it difficult to arrange playdates with our kids' friends.” (Two children not started school, two parent household, two parents in work, no children with ASN)

Figure 17: Impact of Covid-19, increase in funded ELC

Q33 You said you have increased your use of funded early learning and childcare since August 2021 as a result of Covid-19. Please explain why this was. Base All increasing funded hours: 288



Other impacts of Covid-19

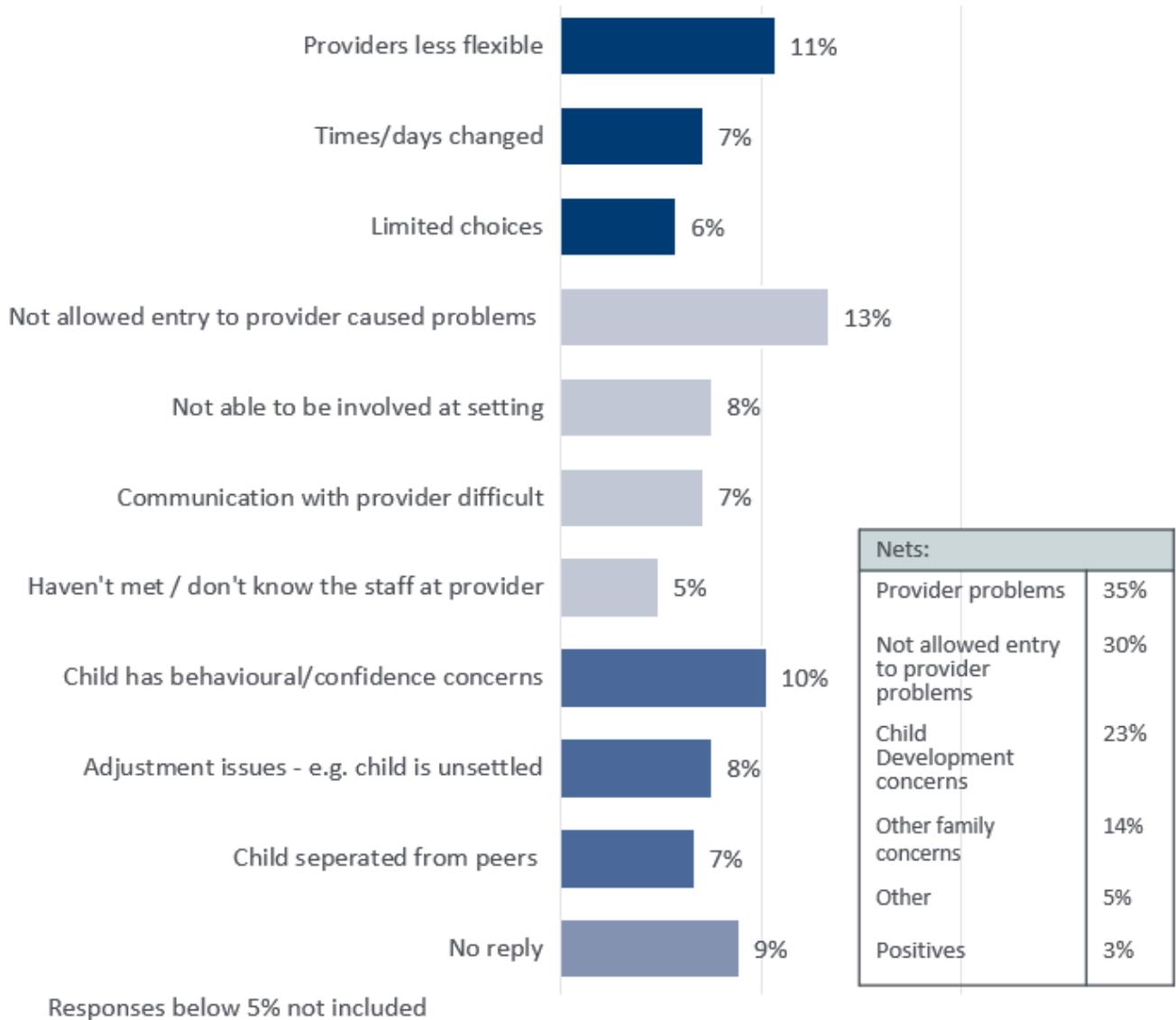
Other impacts of the pandemic included providers being less flexible, changing availability and decrease in accessibility. Some also mentioned concerns they had with their child's development.

“Pre-Covid-19, we were in a nursery within our own local authority. When lockdown kicked in, these obviously shut and when they reopened, they had reduced places and we were no longer able to use a local authority provider and had to seek private providers, initially a childminder and then a private nursery in a different local authority, as none of those within my own local authority could offer the flexibility we needed to use our 1,140 hours the way we wanted i.e. you could only have one session per day and we needed to use the allowance over fewer days but for more than one session each day.” (One child not started school, two parent household, two parents in work, child(ren) with ASN)

“It was stopped for a period (as was everywhere), it made the interaction with the nursery almost non existent which affected the ability to track my child's progress, it was inconsistent and staff changes meant even more inconsistency but you can't help illness from Covid-19. It also reduced the opportunity to meet other Parents as the drop off pick up was so rushed.” (One child not started school, two parent household, two parents in work, no children with ASN)

Figure 18: Other impacts due to Covid-19

Q34b You said your use of funded early learning and childcare since August 2021 had been impacted as a result of Covid-19. Please explain why this was. base: all experiencing other impacts as a consequence of Covid: 223



Affordability of childcare

This section relates to all those with a pre-school child (0-5 years) and paying for childcare. This will include parents who are not yet entitled to funded ELC as well as those who are topping up their funded hours.

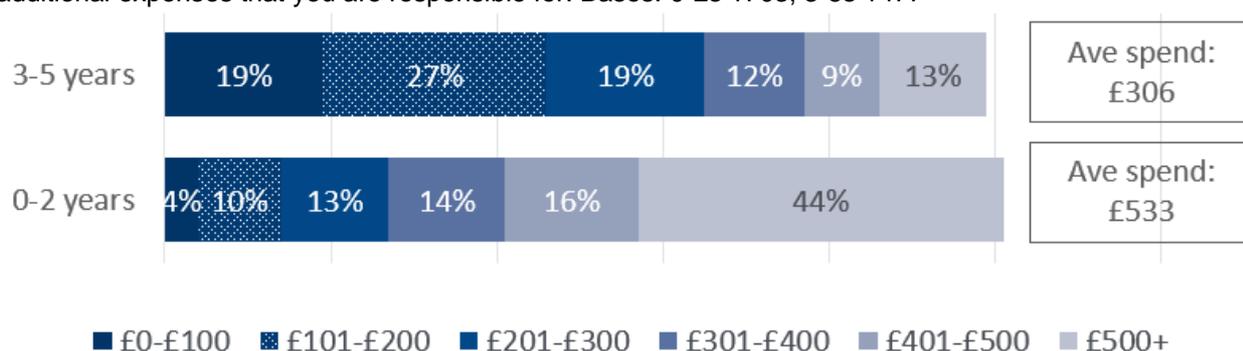
Amount spent by age

The section on use of childcare showed that 36% of parents paid for some of their childcare. Figure 19 shows that the average household spend per month on childcare declines with the age of the child: falling from £533 for children aged under three years, to £306 for those aged three to five years. It seems highly likely this reflects the impact of funded ELC on reducing costs for families once their children are old enough to benefit from the entitlement. Forty-four per cent of parents of children under three are paying more than £500 per month of their childcare, this compares to just 13% for those aged three to five years.

- **under three years:** the amount spent on childcare increases as income rises, from £390 per month for those on incomes of up to £16,000, to £623 for incomes of £60,000+; and spending is higher among households where English is a second language (£640 vs £512)
- **three to five years:** households earning more than £60,000 spend more on childcare than households on lower incomes (£330 vs £251-284); parents with a child with ASN spend more than those whose child does not have ASN (£342 vs £302); and spending is higher among households where English is a second language (£372 vs £275)

Figure 19: Amount spent on childcare for pre-school children, total spend on children in each age-band³⁰

Q40 On average, how much do you currently spend in total per month on childcare for your children who have not yet started primary school? Please include all costs, any fees that you pay, as well as any additional expenses that you are responsible for. Bases: 0-2s 1703, 3-5s 1477



³⁰ The survey asked for total spend on childcare for children in each age-band. Obviously, some families will have more than one child the age band. 'Per child' costs were calculated by assuming costs were spread evenly across all children in each age band. Across the survey as a whole this made only a small difference to the average spend and cost distributions. Therefore, given the 'per child' costs were estimates, the total costs have been used in this report.

Table 7 below compares average costs of childcare according to the mix of care used: quite clearly the cost of childcare is higher on a like for like basis across the age-groups, which is likely related to the higher fees charged for younger children to accommodate higher staffing ratios. For both age-groups paid-only is the most expensive option.

Table 7 Amount spent on childcare for pre-school children: by profile of childcare used, per child

Q40 Bases: 0-2s 1703, 3-5s 1477

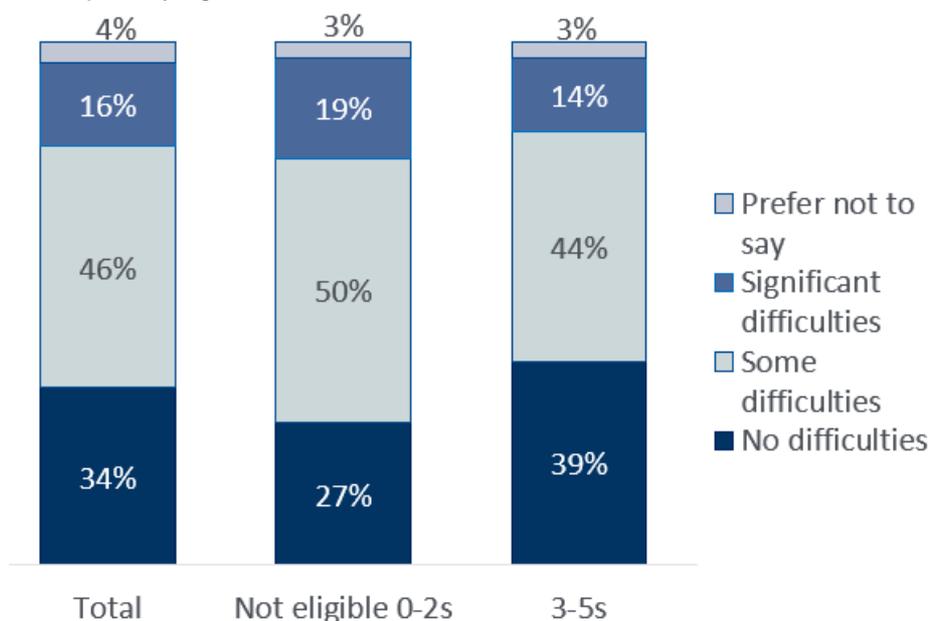
	3-5 yrs	0-2 yrs
Overall average	£293.6	£508.2
Funded + paid + informal	£208.9	£425.4
Funded + paid	£308.1	£572.6
Paid + informal	£397.0	£395.6
Paid-only	£523.5	£625.6

Difficulties affording childcare

Parents were also asked if they had experienced difficulties in affording childcare for their pre-school children. Overall, around a third (34%) had not experienced any difficulties, while three fifths (62%) had experienced some difficulties including 16% who had experienced significant difficulties.

Figure 20: Difficulties affording childcare by eligibility for funded ELC

Q41 Have you experienced any difficulties in the last 12 months affording your childcare costs for children below primary age? Bases: Total 2882, 0-2 1793, 3-5s 1961



Perhaps not surprisingly, given their access to funded ELC, parents of three to five year olds were significantly less likely to have had difficulties than parents of

children aged two years old and younger. The other key sub-groups that reported significant difficulties affording their childcare costs were the following:

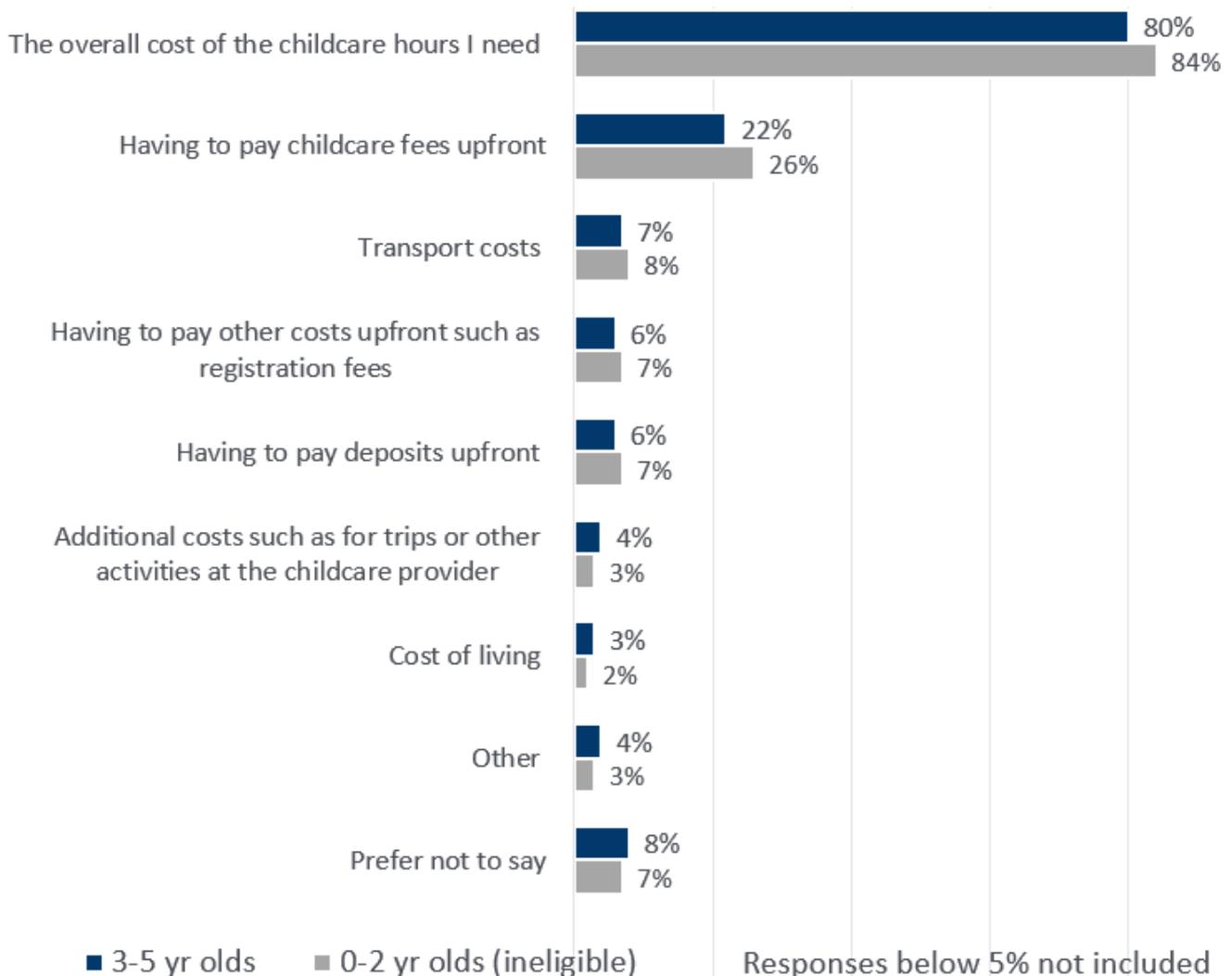
- lone parents compared to couples (30% vs 15%)
- no/single earner compared to two earner households (52%/26% vs 14%)
- parents in deprived areas compared to others (29% vs 14%)
- parents of a child with ASN (25% vs 13%)
- parents with English as an additional or second language (21% vs 15%)

Sources of difficulties

The main difficulties experienced by parents of children in each of the age groups were very similar: simply affording the cost of childcare was the main issue (a difficulty for around four-fifths of those who pay for childcare) and paying for fees in advance (an issue for around a quarter).

Figure 21: Difficulties affording childcare by eligibility for funded ELC

Q42 Have any of the following made it difficult to afford childcare? Bases: ineligible 0-2s = 1240, 3-5s = 1133, Respondents could give multiple answers. Most respondents gave either 1 or 2 responses: 63% of parents of 0-2s gave 1 response, and 16% gave 2, for parents of 3-5 years olds it was 73% and 18% respectively

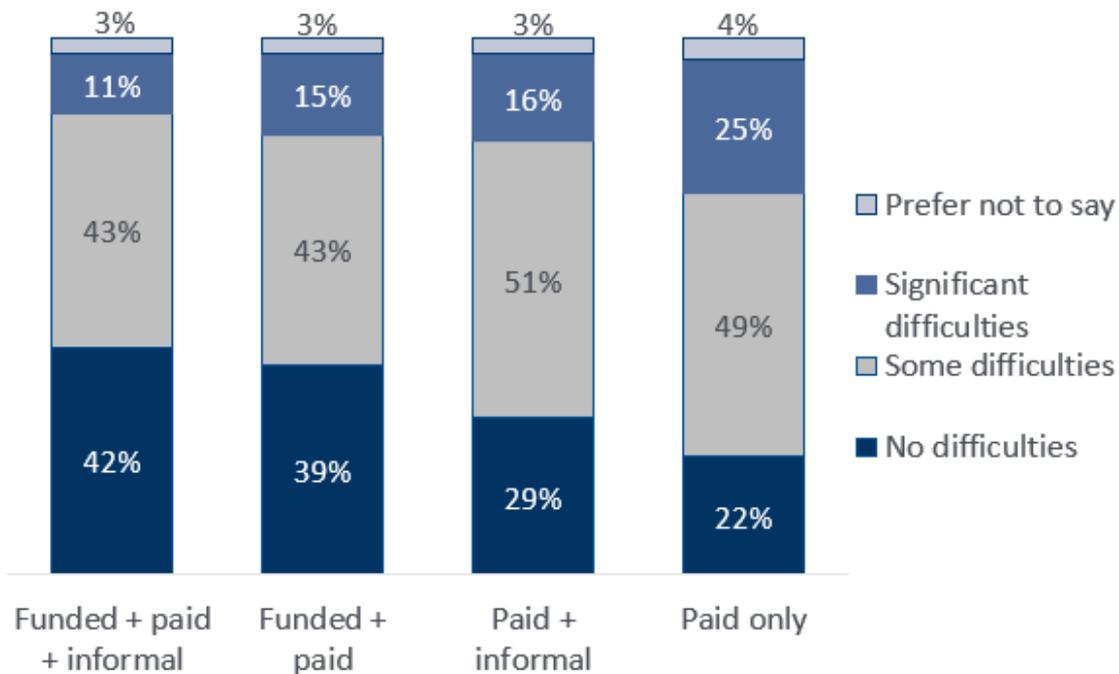


Notably, two parent households, households with two parents in work, and higher income households were more likely to identify the overall cost of childcare as being the main issue, with upfront fees also mentioned by some as a concern. This fits with these households tending to use higher amounts of childcare and spending more on childcare. Single parents, no/single earner households, low income households, and households where English is a second/additional language also raised the overall costs of childcare as the main issue, but were more likely than others to raise concerns about paying fees, deposits and other costs upfront.

Figure 22 below shows a clear relationship between the profile of childcare used and difficulties experienced in affording childcare. Perhaps not surprisingly, parents using only paid-for childcare, and therefore spending most on childcare, were most likely to experience difficulties affording childcare. This group were also most likely to experience significant difficulties, with just 22% saying they experienced no difficulties. As the figure demonstrates, the situation improves for those who use a mix of paid and informal childcare. There is a significant improvement for those using funded ELC, with around two-fifths saying they do not experience difficulties affording their childcare.

Figure 22: Difficulties affording childcare by profile of childcare used

Q41 Have you experienced any difficulties in the last 12 months affording your childcare costs for children below primary age? Bases: Funded+paid+informal 862, Funded+paid 904, Paid+informal 505, Paid only 611



Summary of sub-group analysis: affordability

Deprived areas/low income households

0-2s: Low income households tend to spend less on childcare than others.

Were most likely to report significant difficulties affording childcare costs, and were more likely than others to raise concerns about paying fees, deposits and other costs upfront.

Single earner/lone parent households

0-2s: Single earner households spend less on childcare .

Were most likely to report significant difficulties affording childcare costs and were more likely than others to raise concerns about paying fees, deposits and other costs upfront.

Rural areas

No significant differences.

Parents of children with ASN

Were most likely to report significant difficulties affording childcare costs.

Other sub-group differences

Parents with English as a second/additional language: spending on childcare is higher for all age groups among households where English is a second language, and these parents were most likely than others to report significant difficulties affording their childcare costs.

They were also significantly more likely to raise concerns about paying fees, deposits and other costs upfront.

Older parents generally spent more on childcare than their younger counterparts.

Younger parents were more likely to report significant difficulties affording their childcare costs.

Provision for younger children (one and two olds³¹)

Scottish Government has committed to build the evidence base required to inform the development of a high quality offer of early learning and childcare for one and two year olds, as well as developing wraparound care for school-age children. This section of the report considers the views of parents with a child/children aged under three not receiving funded ELC. It explored if they would be interested in using funded ELC for their young child, and the aspects of ELC settings that would be most important to them. It starts by establishing their current childcare provisions.

Profile of use of childcare

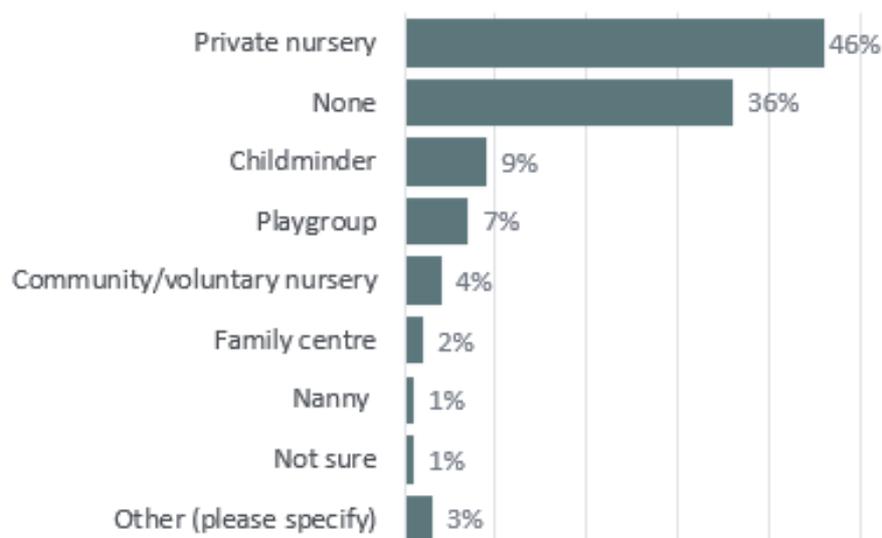
Parents were asked what type of paid-for childcare they use for their child/children under the age of three. The most frequently mentioned was private nursery (46%), with relatively few using other types such as a childminder (9%) or playgroup (7%). A small number mentioned other options, typically family and friends or school nurseries. Over one in three (36%) parents did not pay for any type of childcare or early learning themselves.

The following groups were all more likely to pay for private nursery:

- households with one child who has not yet started school (64%, compared with 36% with two or more children that had not started school)
- households with two working parents (54%, compared with 27% of households with one parent in work and 8% with no parents in work)
- households with a household income of £60,000 or more (64%, compared with 23% of households with an income of less than £16,000).

Figure 23: Use of paid-for childcare

Q26 - What types of childcare or early learning that you pay for yourself has your child attended since August? base: (Ineligible for ELC aged 0-2 yrs in paid-for childcare) 3,116



³¹ In this section of the survey we sought the views of parents with children aged under two and parents with two year olds not currently eligible for funded ELC.

Reasons for not using paid-for childcare

Parents who did not use paid-for childcare for their child/children under the age of three were asked if there were reasons for this. Two principal reasons were given: parents could not afford to pay for childcare (53%), and they wanted to look after the child themselves (47%).

Although two-parent households were more likely to pay for childcare themselves (see above), they were also more likely than single parent households to want to look after their child themselves (49% vs. 36%); and less likely to report they can't afford to pay childcare (52% vs. 62% of single parent households). Together, these findings suggest that two-parent households have greater autonomy over the decision of whether to use paid-for childcare services or not, whereas single parent households are less likely to have the choice.

Table 8: Main reasons for not using paid-for childcare (0-2s (not yet eligible for funded ELC)

Q27 Are there particular reasons that you are not using childcare that you would pay for yourself for your child aged 0-2 years? Base (Parents of children ineligible for funded ELC aged 0-2 years not currently paying for childcare) 1111

0-2 year olds (ineligible for FELC)	
I can't afford to pay for childcare	53%
I want to look after my child myself	47%
I think my child is too young	30%
Prefer a grandparent/ other close relative looks after my child	24%
Child wouldn't like to be separated from myself or my partner for so many hours	11%

* Respondents could give multiple answers: around half (53%) gave 1 response, while 25% gave 2 responses, and 11% gave 3 responses.

Interest in expansion of funded ELC to one and two year olds

Parents of children aged under three and currently ineligible for funded ELC were told that the Scottish Government is committed to extending funded childcare to one and two year olds and asked how interested they would be in using funded childcare or early learning for their child under three years. Almost all (91%) of these parents said they would be interested, with most (80%) saying they would be very interested. Just 7% said they would not be interested.

The groups of parents most likely to be interested in the funding extension included:

- households with two working parents (93%, compared with 87% with one working parent and 86% with no working parents)
- those in urban areas (93%, compared with 89% in rural areas)
- parents who just have a child/children aged under three years compared with parents who have a child/children aged three to five years as well (97% vs 88%)

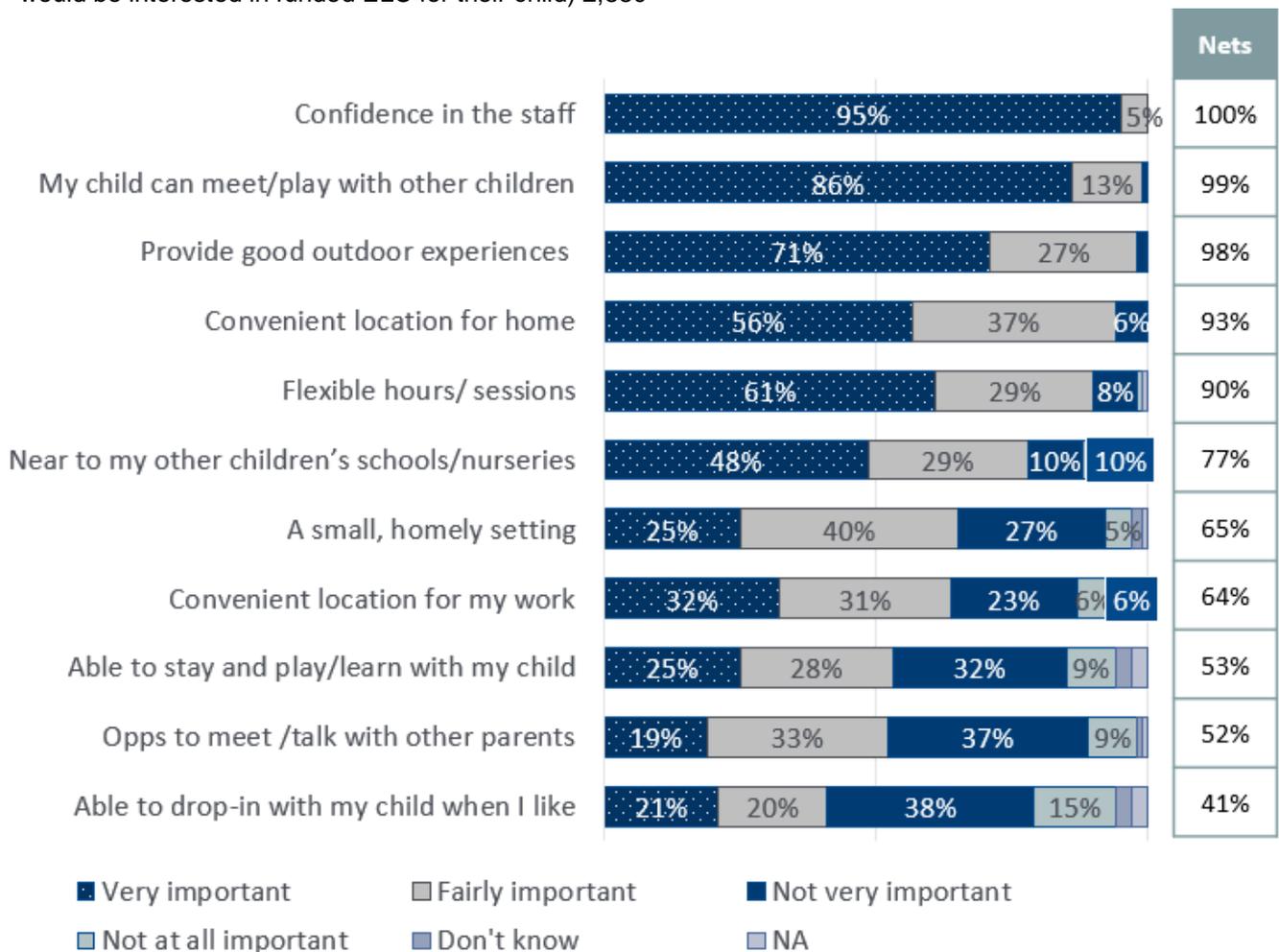
Factors considered when choosing childcare

Parents interested in a Scottish Government funding extension for ELC for children under three years were asked how important a range of factors would be when thinking about this provision. Five factors were considered important by at least 9 in 10 parents. These were:

- confidence in the staff (100% reported this to be important)
- child can meet/play with other children (99%)
- provide good outdoor experiences (98%)
- convenient location for home (93%)
- flexible hours/sessions (90%)

Figure 24: Importance of key funded ELC factors for younger children (under 3s)

Q29 How important or unimportant would each of the following be to you when thinking about funded provision for your child under 3? Base (Parents of children ineligible for funded ELC aged 0-2 years who would be interested in funded ELC for their child) 2,880



There were some sub-group differences, with lone parent, single earner households and parents from deprived areas typically more interested in settings that were easy to get to, and which offered greater opportunities to socialise with their child and with others.

Deprived areas/low income households

More likely than others to be interested in settings where they could stay and play with their child and where they can drop in with their child.

Single earner/lone parent households

More likely than others to be interested in settings where they could stay and play with their child, setting convenient to get to from home, settings near to their other children's nurseries/schools, and settings where they can drop in with their child.

Rural areas

More likely than others to be interested in settings where they can drop in with their child.

Parents of children with ASN

No significant difference noted.

Other sub-group differences

Those **with English as an additional/second language** were more likely than others to be interested in settings where they could stay and play with their child and where they can drop in with their child.

Young parents aged under 25 were more likely than others to be interested in settings where they could stay and play with their child.

Parents with 2+ children under six years were more likely than others to be interested in settings near to their other children's nurseries/schools and settings offering flexible sessions.

Summary and conclusions

This report presents the findings from a survey undertaken to explore use of, and views on, ELC services among parents and other primary carers of children who have not yet started school. This section provides an overview of the key findings and conclusions across the themes addressed by the study.

Use of childcare

The research found that most parents who responded to the survey used some form of childcare for their children, including funded ELC, paid-for and informal childcare. The type, mix and amount of childcare used varied depending on the age of the child, household resources and parental choice.

Use of childcare was significantly higher for children aged two to five years than for children aged under two. Almost all parents used childcare for children aged two to five years compared with around two-thirds of those for children under two years.

Those with greater resources (higher incomes, greater access to employment) were more likely than others to use all forms of childcare. As might be expected these households with greater resources were more likely to use paid-for childcare, but they were also more likely to use informal childcare and, for three to five year olds, funded ELC. Conversely, those with fewer resources were less likely to use paid-for childcare. Those with young children (under twos) were more likely to not use childcare at all.

A similar pattern was observed in the amount of childcare used by parents: the number of paid-for childcare and informal childcare hours used was much higher among parents with greater resources than other parents.

Generally, parents tended to use more paid-for ELC during term-time and slightly less during school holidays. In contrast – or possibly, to compensate – use of informal childcare tended to be higher in holidays than during term-time.

Uptake of funded ELC

Given the recent significant increase in the amount of funded ELC, from 600 hours to 1,140 hours per year for all three to four year olds, the research focused on **funded** ELC. Almost all (97%) of the parents with three to five year olds and most (86%) of those with eligible two year olds had used funded ELC for their child since August 2021.

Uptake of the full entitlement was more likely for three to five year olds than for two year olds: around three-quarters used their full entitlement for their three to five year olds compared to half for their eligible two year olds. Related to this, parents with three to five year olds used more hours of funded ELC per week than parents of eligible two year olds (around 25 hours compared to 21 hours per week during term time).

Parents said the main motivations for using funded ELC were to benefit their child, for example their child's development, confidence/independence and learning, regardless of their child's age (around nine-tenths of parents gave this type of reason). Parents with three to five year olds also said that being able to work was a main reason for using ELC (mentioned by around three-fifths of parents). This was especially the case for parents in more 'advantaged' sub-groups – those with two parents in work, living in non-deprived areas, and so on (typically mentioned by around three-quarters of these parents).

Reasons for not using funded ELC

The variation in uptake of the funded entitlement was due in part to parental choice: many parents said they did not need or want the full entitlement or did not want their child in nursery for so many hours. However, some parents also mentioned barriers to using their full entitlement such as not getting the sessions that they wanted at their preferred setting.

The number of those not using their entitlement at all was small. Reasons given by parents in this group for not using their entitlement varied by the age of the child. The main reasons given by parents of three to five year olds were not being able to get preferred hours at their setting of choice and a lack of flexibility in childcare settings. The main reasons mentioned by parents of two year olds were that their child was still too young, and they preferred to look after their child themselves. Notably, a significant minority of parents of two year olds (25%) gave reasons related to lack of awareness: for example not being aware of the availability of funded ELC or not knowing how to apply for funded ELC.

Experience of funded ELC: quality and accessibility

The main factors that parents considered when choosing a funded ELC provider were location, the staff and provider reputation. Factors such as continuity (for example being the primary school the child will attend) and the opportunities available to the child were also important. However, some parents of children with ASN and some living in rural areas had little or no choice of provider in their local area.

Parents were very positive about funded ELC. Almost all (97%) parents were satisfied with the quality of their funded ELC provider. Most found it easy to travel to their main provider, indeed three-quarters said they found it very easy.

While levels of dissatisfaction with the quality of their provider were extremely low, some groups of parents were less likely to be very satisfied than others. These were parents with older children (three to five year olds), those with working parent(s) in the household; and, notably, parents of children with ASN.

Experience of funded ELC: flexibility

The flexibility of the funded ELC provider was an important factor for parents. Around a third of parents said that flexibility and reliability were important when choosing their provider. This was especially important for those households where both parents were in work and in high income households.

The research found that most parents (around nine-tenths) were generally satisfied with the flexibility to use funded hours. However, those most likely to be dissatisfied compared with others were parents from the more advantaged households (such as those with one or two working parents, on higher incomes and from the least deprived areas) – typically the households that use high levels of funded hours and childcare overall. Not being able to get the preferred setting at the required times was cited across the research as a reason for not using any/all of the funded entitlement, and again households with one or both working parents were most likely to raise these concerns.

Parents dissatisfied with current arrangements were broadly split as to how they would prefer to use their funded hours: a few long sessions each week, several short sessions, and provision outside normal working hours. Often this simply meant they wanted the flexibility to use their funded hours to cover their working hours in a way that minimised the amount of paid-top-up childcare they needed.

Experience of funded ELC: Additional Support Needs

Around a sixth of parents had at least one child eligible for funded ELC with ASN. Most parents (more than four-fifths) were satisfied that funded ELC meets their child's additional support needs. However, just under a third of parents of children with an ASN had experienced barriers accessing suitable funded ELC for their child. The proportion of parents reporting they had experienced barriers has decreased since 2018 (48%). The main difficulties mentioned were lack of staff time to meet children's needs, insufficient information from providers on how they would support children with ASN and staff qualifications, knowledge and experience. Notably, more disadvantaged parents, especially those on lower incomes and from deprived areas, were especially likely to experience these barriers.

The impact of funded ELC

The research demonstrated clear positive benefits from the increase in the funded ELC entitlement. The most common impact, mentioned by almost three-quarters of parents, was being able to work or look for work; with two-earner households and higher income households especially likely to appreciate this benefit. The increased entitlement also provided parents with an opportunity to think about their future. Again, almost three-quarters of parents mentioned this impact; and it was particularly welcomed by parents in more disadvantaged families, for example lone parents, no-earner households and young parents.

However, the increase in funded hours did not only impact on (moves towards) employment. Having more time to think about the future was a benefit mentioned by around three quarters of parents, while wellbeing impacts such as feeling happier, less stressed and being able to look after oneself more, were all mentioned by around half of parents. Parents in disadvantaged circumstances were especially likely to mention these benefits.

The impact of Covid-19

Covid-19 restrictions disrupted ELC provisions throughout most of 2020 and into early 2021. Critically, the pandemic delayed the full statutory implementation of the

expansion of funded ELC by a year until August 2021. The research considered whether Covid-19 continued to impact on parents' use of funded ELC beyond August 2021.

For the majority of parents (around three-quarters) Covid-19 had not had ongoing impacts on their use of ELC. However, around a fifth mentioned they had reduced the amount of ELC they used since August. Often this was because their provider had cut back their hours or had closed for some reason. In some cases, the parents had cut back the hours used, for example to self-isolate, because of illness, or through personal choice.

Some parents mentioned other impacts. Just under 1 in 20 said they had increased their use since August. The main reasons mentioned were increased working commitments, improving availability and a desire to support their child's development and social skills after the pandemic restrictions. Other key impacts that parents highlighted were that some providers had become less flexible, and parents' access to premises was restricted which made it more difficult to settle their children and to engage with staff.

Affordability of childcare

The results show that 36% of parents pay for some of their childcare. Of those that do pay for childcare, parents spend on average £533 per month on their children aged under three years and £306 on their children aged three to five years. This large difference across the age groups appears at least because children aged three to five are entitled to funded ELC and, as discussed above, virtually all children aged three to five years use at least some of their entitlement.

Around three-fifths of parents who use paid-for childcare have experienced affordability difficulties in the last year. This includes a substantial proportion of parents who described these difficulties as significant: two-fifths of parents of children age under three years and a quarter of three to five year olds. This highlights the important role that funded ELC is playing in supporting families, especially those with children aged three to five years.

The most common problem parents experienced (around four-fifths of those having difficulties) was affording the overall cost of all the childcare they needed. Having to pay fees upfront also presented problems for a sizable minority of parents (around a fifth). It is worth bearing in mind that that the fieldwork for this research was completed in May 2022; when concerns about cost of living were very much in the news, but energy price rises and general price inflation were still to feed through.

Expanding provision

Finally, parents of children aged under three years not currently eligible for funded ELC were asked their views on expanding provision to this younger age-group. Most (around two-thirds) of these parents currently use some form of childcare, typically a private nursery. The two main reasons for not using any paid-for childcare were that the parents could not afford to pay for childcare and/or they wanted to look after their child themselves.

The research found that almost all of these parents would be interested in using funded ELC for their child aged under three were it available to them now. Indeed, most (80%) said they would be very interested. Households with working parents and those with older children were especially likely to be interested.

Conclusion

The majority of parents are very positive about funded ELC. The benefits to their child's social, emotional and educational development were regarded as main reasons for using the entitlement by almost all parents. Most parents valued the opportunity to work, look for work, or undertake education and training to improve employment prospects in the future. Linked to these, many parents also mentioned feeling less stressed, with more time for themselves and their family.

However, some challenges remain. There is a need to go further to improve the flexibility of provision so that it meets the needs of more families. Also to continue to address affordability as the cost of childcare for those not entitled to funded ELC or who need to purchase additional hours to meet their childcare needs remains high, with affordability for less advantaged households a particular concern. There were also challenges relating to equalities. First, more advantaged households (higher incomes, two parents in work) are most likely to use their full entitlement and use more funded ELC hours. Further work is needed to maximise take up of funded ELC among those who many benefit most. Second, there is a need to continue to ensure provision meets the needs of all children with ASN.

The survey clearly indicated that the entitlement to 1,140 hours is making a real difference to parents. Not surprisingly, therefore there was a very high level of support for an extension of age-appropriate, funded ELC provision to children aged one and two years.

Summary of sub-group analysis

Use of ELC

Deprived areas/low income households

Were more likely than others to use funded ELC (eligible two year olds only).
Less likely than others to say their reason for using funded ELC was to improve their work opportunities.

Single earner/lone parent households

Were more likely than others to use funded childcare (eligible two year olds only) .
Less likely than others to use all their funded ELC entitlement and less likely to say their reason for using funded ELC is to improve their work opportunities.

Rural areas

Less likely than others to use all their funded ELC.

Parents of children with ASN

Less likely than others to use funded ELC (eligible two year olds only).
More likely than others to say their reason for using funded ELC was to benefit their child's learning/development/etc., and less than others likely to give reasons relating to work opportunities.

Other sub-group differences

No other sub-group differences were noted.

Flexibility of funded ELC (three to fives unless otherwise stated)

Deprived areas/low income households

All more likely to use a LA nursery and less likely to use a private nursery.
Less likely than others to use their funded ELC hours across the whole year.
More likely to be satisfied with the flexibility offered by the funded hours.

Single earner/lone parent households

More likely to use an LA nursery, less likely to use a private nursery; and less likely to spread their funded ELC hours across the whole year than others.
More likely to be satisfied with the flexibility offered by the funded hours .

Rural areas

More likely to use an LA nursery, less likely to use a private nursery, and more likely than others to use their funded ELC hours across the whole year.

Parents of children with ASN

More likely to use an LA nursery, less likely to use a private nursery.

Other sub-group differences

Households with two working parents use more funded ELC hours than those with no working parents throughout the year for both age groups.

Parents with more than one child under six years more likely to use a LA nursery, less likely to use a private nursery; and less likely to spread their funded ELC hours across the whole year than others.

Quality and accessibility of funded ELC

Deprived areas/low income households

Were less likely than others to mention issues relating to continuity for child, location, and flexibility and reliability when choosing their funded ELC provider.

Were more likely to have used funded ELC to think about their future, to study, to care for others, and to have had more time to look after themselves. And less likely to have (looked for) work/increased hours worked.

Single earner/lone parent households

No-earner households more likely to be satisfied with the quality of their provider.

More likely to have been using funded ELC to think about their future, to study, to care for others and have had more time to look after themselves, feel happier and less stressed.

They were less likely to have used funded ELC to work/look for work, to (look for).

work/increased hours worked. Households with no/one earner more likely than others to have taken up voluntary work.

Rural areas

More likely than others to have had restricted choices when choosing their funded ELC provider.

More likely than others to have used their funded ELC hours to increase the hours they are working.

Parents of children with ASN

More likely than others to have had restricted choices when choosing their funded ELC provider, and less likely than others to be satisfied with the quality of their provider.

More likely than others to be using funded ELC to have more time to look after themselves, and to have been feeling happier and less stressed.

Other sub-group differences

Parents with English as a second/additional language were less likely than others to mention continuity for child when choosing their funded ELC provider.

More likely than others to be using funded ELC to think about their future, to study, to care for others, to have undertaken voluntary work, and to have increased hours worked. More likely than others to be using funded ELC to have more time to look after themselves, and to have been feeling happier and less stressed.

Parents with eligible two year olds more likely to be satisfied with the quality of their provider.

Younger parents (under 25) more likely to have used funded ELC to think about their future, to study, to care for others, and have more time to look after themselves. Less likely to have (looked for) work/increased hours worked.

Parents with one child under six years were more likely than others to have used their funded ELC to work/look for work (76% vs 69%) increased hours worked.

Parents with a health condition that reduced their capacity a lot: less likely than those with no health condition to have used their funded ELC hours to work/look for work.

Summary of sub-group analysis: affordability

Deprived areas/low income households

0-2s: as might be expected, low income households tend to spend less on childcare than others.

Were most likely to report significant difficulties affording childcare costs, and were more likely than others to raise concerns about paying fees, deposits and other costs upfront.

Single earner/lone parent households

0-2s: Single earner households spend less on childcare

Were most likely to report significant difficulties affording childcare costs and were more likely than others to raise concerns about paying fees, deposits and other costs upfront.

Rural areas

No significant differences.

Parents of children with ASN

Were most likely to report significant difficulties affording childcare costs.

Other sub-group differences

Parents with English as a second/additional language: spending on childcare is higher for all age groups among households where English is a second language, and these parents were most likely than others to report significant difficulties affording their childcare costs. They were also significantly more likely to raise concerns about paying fees, deposits and other costs upfront.

Older parents generally spent more on childcare than their younger counterparts.

Younger parents were more likely to report significant difficulties affording their childcare costs.

Funded ELC for young children (under three years) – key considerations**Deprived areas/low income households**

More likely than others to be interested in settings where they could stay and play with their child and where they can drop in with their child.

Single earner/lone parent households

More likely than others to be interested in settings where they could stay and play with their child, setting convenient to get to from home, settings near to their other children's nurseries/schools and settings where they can drop in with their child.

Rural areas

More likely than others to be interested in settings where they can drop in with their child.

Parents of children with ASN

No significant difference noted.

Other sub-group differences

Those **with English as an additional/second language** more likely than others to be interested in settings where they could stay and play with their child and where they can drop in with their child.

Young parents aged under 25 more likely than others to be interested in settings where they could stay and play with their child.

Parents with 2+ children more likely than others to be interested in settings near to their other children's nurseries/schools; settings offering flexible sessions.

Appendix A: Methodology

Aims

The 2022 ELC Parent Survey was designed to explore views on early learning and childcare (ELC) services of parents and other primary carers of children who have not yet started school. It was designed to provide up-to-date information on use and barriers to use, experience, perceptions, engagement with ELC and outcomes. Information about socio-economic characteristics, family and household circumstances, characteristics of childcare use was collected. The data collection was structured to facilitate, as far as practical, comparison with the 2018 ELC parents survey.

Overview of approach

The study sought the views of parents with children aged under six years who were not yet in school (referred to as 'pre-school children' in this report). A number of possible options for sampling this population were considered but our scoping concluded none were possible, or possible within the timeframe or budget, of the study.³² However, information from the Scottish Household Survey indicated that 79% of households with a child aged two to five years used some form of childcare in 2019 rising to 88% for those with a three year old³³. More recent data, on registrations for funded ELC among children aged three and four year olds indicate that around 97% are registered³⁴.

It was concluded that accessing parents of pre-school children via childcare settings was a reasonable proposition. It was important, however, to ensure that as broad a mix of parents was contacted, so parents were also contacted via a range of intermediaries and using Scottish Household re-contact data as follows:

- Online survey with parents who have pre-school children. The survey link was primarily promoted to parents through ELC providers. Further promotion of the survey was undertaken by local authority early learning leads and other key stakeholders with a focus on reaching parents who were not using ELC or using childminders.

³² Possible options included using data from the Universal Health Visiting Pathway - as this includes all families - or using NRS birth records as a sample frame, or using re-contact details for families with children under six who had taken part in existing Scottish Government surveys. We were advised that due to pressures on NHS Scotland following the Covid-19 pandemic it would not be appropriate to ask Health Boards to undertake the sampling of parents, while there are disadvantages with using birth records such as the proportion of addresses that may be out of date.

³³ [Scottish Household Survey: childcare topic report - gov.scot \(www.gov.scot\)](https://www.gov.scot/publications/scottish-household-survey-childcare-topics-reports/pages/10.aspx)

³⁴ [Summary Statistics For Schools In Scotland 2021 - gov.scot \(www.gov.scot\)](https://www.gov.scot/publications/summary-statistics-for-schools-in-scotland-2021/pages/1.aspx)

- Telephone interviews with parents who have pre-school children drawn from the re-contacts database of the Scottish Household Survey³⁵.

The main fieldwork took place between 25 April and 29 May 2022

Sampling

The target group for the research was parents and other primary carers (referred to throughout simply as 'parents') with children aged under six who were not yet in school in Scotland. The objective was to cover as wide a mix of parents as possible. In particular, this was to include parents whose children aged two years and children 3 to 5 years who were eligible for funded ELC and who were using, at least some of, the 1,140 hours; but also to include parents of eligible children not using their funded hours, as well parents of younger children not yet entitled to funded ELC.

The sample frame used for the study was Care Inspectorate Datastore³⁶. This contained information on all registered care services operating in Scotland. The study drew on information relating to children's daycare service which included email addresses. The database information covered childcare settings in the public, voluntary and private sector, but does not include contact information for childminders.

Settings across Scotland were asked to share the survey link with the parents who use their service. It was appreciated the resulting sample would be biased towards those using ELC (funded and non-funded) and would not collect information from parents who had no children in ELC. It would also not include those who only used childminders. Distribution was therefore widened to include a range of stakeholders, including local authority early learning leads, Care and Learning Alliance, Scottish Childminding Alliance, National Parent Forum, Enquire, and minority ethnic organisations.

A target sample size was not established. The strategy was to circulate the invitation to all settings and stakeholder contacts and invite all parents to participate. This broadly replicated the approach adopted in 2018. It was noted that in 2018, a sample of 10,526 was achieved (an estimated response of around 11%).

It was assumed that the response for the 2022 survey would be somewhat lower: online survey response rates been generally declining over recent years; parents in particular have a great deal on their minds in the current climate. It is also possible that parents would have been especially motivated to respond to the 2018 survey as they were being given the opportunity to shape the new ELC offer, and there was some discontent with the level of provision at the time.

³⁵ These are respondents who have participated in the Scottish Household Survey and given permission to be contacted to take part in further research. Progressive was given access to these contacts for the purpose of this research study.

³⁶ [Datastore \(careinspectorate.com\)](https://careinspectorate.com)

Questionnaire design

The survey questionnaire was designed in three stages: an initial draft, design workshop, final drafts.

Initial draft questionnaire: Progressive developed a draft questionnaire drawing on the 2018 survey, relevant Scottish Household Survey questions and the parent survey component of the Scottish Study of ELC for the review by the client team. The client team determined which elements of the questionnaire would benefit from further consideration at the questionnaire design workshop.

Questionnaire design workshop: A half-day session, comprising Progressive, Scottish Government and stakeholders, reviewed the overall approach and some key elements of the draft questionnaire. The client team provided in-depth feedback on the draft.

Final draft questionnaire: following the workshop, further work was undertaken to revise and refine the final questionnaires in consultation with the Scottish Government client team.

The questionnaire contained sixty questions, sixteen of which were classification questions which collected information on the respondent's gender, age, working status and socio-economic group, income, where they live, and so on. The general survey questions were mainly closed, using a mix of categorical and interval questions. The multiple choice questions typically included an 'other, please specify' option giving the respondent the opportunity to add their views/experience as required. A small number of open questions were also included. These explored how parents' use of ELC had been impacted by Covid-19 since August 2021 and their overall views on ELC impacts.

Once approved by the client team, two 'versions' of the questionnaire were produced:

- the omnibus: a short (eight questions) which covers usage, type of use by age of child, and reasons for non-use
- the core (online/telephone survey) which contained the full question set

A copy of the questionnaire can be found as a supporting document to this publication.

Data collection

Data were gathered using three methods: an omnibus survey, a full online survey and a telephone survey.

Omnibus survey of parents with children in Scotland. The overall omnibus sample is a targeted quota sample from YouGov's opt-in panel in Scotland. Each wave contains at least 1,000 responses. It was estimated that around 10%-of these responses to be from parents with children under six years. The omnibus was therefore run over two waves, to achieve a reasonable of parents of pre-school children.

The focus of the omnibus was subsequently refined to concentrate on parents of children aged three to five years, with only one question asked of all parents of pre-school age children. As a consequence, the number of valid interviews achieved across the omnibus was considerably lower than anticipated: 162 parents with children aged under six years; 104 with a child/children aged three to five years, and just 82 a child/children aged three to five years in funded ELC.

These samples were not considered sufficient to influence the development of the main survey. The data from the omnibus has however been reviewed and reported as tables within the Data Appendix. It is confirmed that the findings are broadly consistent with those from the main report.

The omnibus fieldwork took place between 23rd and 30th March 2022.

Telephone interviews with parents who have pre-school children drawn from the re-contacts database of the Scottish Household Survey (SHS). These respondents had previously participated in the SHS and had given permission to be re-contacted to take part in further research. Scottish Government analysts reviewed the overall sample set and only provided contacts for those who are eligible to participate in this survey – that is people who are parents of children aged under six years.

In total 271 contacts with a usable phone number were provided by Scottish Government and 78 successful telephone interviews were achieved. While it was appreciated this would be a small number of completed interviews, this was considered a useful opportunity to engage with a broad mix of parents including, potentially, those not using paid-for/funded ELC.

Online survey with parents who have pre-school children. As detailed above, the survey link was primarily promoted to parents through ELC providers. Contacts for suppliers (excluding childminders) were sourced from Care Inspectorate Datastore. This contained some 3,198 contacts with email addresses.

Progressive contacted all the suppliers on the sample frame and requested they disseminate the survey link to parents who use their ELC services, for example via email or through the social media groups (e.g. through their parents' twitter group or WhatsApp group). We provided text that could be forwarded to parents, including the survey link. The purpose of this email/text was to:

- introduce Progressive as an independent, impartial agency
- explain the purposes of the research
- reassure respondents of their anonymity and confidentiality of the survey
- outline the value of their participation
- notify respondents of the fieldwork period is
- include the survey link which was a shortened URL – such as Scottish Government Parent Survey – which was more welcoming than a standard URL

- send thanks from Scottish Government for taking part

The Scottish Government also provided a list of key stakeholders (early learning leads, parents organisations, equalities organisations), to enable the survey link to be circulated to a broad range of parents' organisations.

The survey response was monitored on a daily basis to assess the overall response and the profile of the response. A number of measures were taken to promote a strong response to the survey. These included:

- Scottish Government used their social media to promote the survey among stakeholders and more widely
- reminders were issued during the fieldwork period to prompt providers to share the survey link with parents
- local authority early learning leads were encouraged by Scottish Government to promote the survey (this work had to wait until after the local elections)
- early learning leads in authorities with disproportionately low response rates were contacted by Progressive or Scottish Government and asked to make special efforts to contact providers in their area
- the survey deadline was extended by 10 days to allow for additional responses

The main fieldwork took place between 25th April and 29th May 2022.

Response

The main survey generated 8,224 responses: 43 of these responses were excluded from the analysis as, on inspection, they had duplicate emails and/or telephone numbers. This resulted in 8,181 valid responses: 78 telephone responses and 8,103 online responses. This was considered a strong response to the survey, broadly in line with the 2018 response and sufficient to provide a clear indication of the use and views of parents of young children in Scotland.

We do note however that respondents to the online survey were self-selecting. We cannot therefore provide statistically precise margins of error or significance testing as the sampling type is non-probability. The margins of error outlined below should therefore be treated as indicative, based on an equivalent probability sample. The survey dataset has a margin of error $\pm 1.1\%$, calculated at the 95% confidence level (market research industry standard). This means that if 50% said they were satisfied with their provider, we can be 95% confident that the result lies between 48.9% and 51.1%.

Data processing and analysis

Data analysis has been conducted using SNAP. All analysis uses weighted data (see below), except where discussing the characteristics of the sample. Tables that use unweighted data are clearly marked Tests for statistical significance have been

conducted using z and t tests, and all differences discussed within the text statistically significant, calculated at the 95% confidence level³⁷.

Weighting

Survey data is commonly weighted to help make the achieved sample representative of the population it was drawn from, and to help produce unbiased survey estimates.

The ELC survey produced a differential response across the country, with a proportionately lower responses from large urban areas. This can be seen on Table MA1 below, which compares the profile of children receiving funded ELC (as a proxy for the profile of families of young children) from the ELC Census against the profile of the sample achieved. The response from large urban areas Aberdeen City, Edinburgh, Fife and South Lanarkshire were lower than anticipated, even following mitigations in the field.

The sample was therefore weighted. Weights were calculated to adjust for the population totals of number of children by urban rural 6-fold classification. This has had the effect of adjusting the totals for urban local authorities upwards, and the totals for the more rural areas downwards.

Table MA1: Profile of survey respondents, by local authority (unweighted and weighted)

Local authority	ELC Census ³⁸		Survey respondents		
	%	Unweighted sample #	Unweighted sample %	Weighted sample #	Weighted sample %
Aberdeen City	4%	138	2%	155	2%
Aberdeenshire	5%	407	5%	348	4%
Angus	2%	148	2%	143	2%
Argyll and Bute	1%	173	2%	156	2%
City of Edinburgh	8%	435	5%	490	6%
Clackmannanshire	1%	93	1%	88	1%
Dumfries and Galloway	3%	331	4%	299	4%
Dundee City	3%	314	4%	369	5%
East Ayrshire	2%	155	2%	147	2%

³⁷ Please note that this research method does not use probability sampling, which means that we cannot provide statistically precise margins of error or significance testing. Statistical testing and margins of error should therefore be treated as indicative, based on an equivalent probability sample. This is common practice in market research and is useful in providing an indication of where differences are meaningful.

³⁸ ELC - Summary Statistics for Schools in Scotland 2021; SIMD – Scottish Government SIMD 2020v2; Urban Rural Classification 2020 Scottish Government. Based against children aged 3-4 years.

East Dunbartonshire	2%	180	2%	199	2%
East Lothian	2%	218	3%	210	3%
East Renfrewshire	2%	311	4%	340	4%
Na h-Eileanan Siar	1%	26	0%	21	0%
Falkirk	3%	217	3%	209	3%
Fife	7%	214	3%	196	2%
Glasgow City	11%	832	10%	1011	12%
Highland	5%	384	5%	339	4%
Inverclyde	1%	138	2%	138	2%
Midlothian	2%	90	1%	85	1%
Moray	2%	227	3%	211	3%
North Ayrshire	2%	149	2%	141	2%
North Lanarkshire	6%	690	8%	688	8%
Orkney Islands	0%	10	0%	8	0%
Perth and Kinross	3%	422	5%	393	5%
Renfrewshire	4%	458	6%	513	6%
Scottish Borders	2%	348	4%	293	4%
Shetland Islands	1%	64	1%	56	1%
South Ayrshire	2%	118	1%	108	1%
South Lanarkshire	6%	182	2%	183	2%
Stirling	2%	207	3%	180	2%
West Dunbartonshire	2%	97	1%	95	1%
West Lothian	4%	396	5%	358	4%
Total	91,603	8,181	100%	8,181	100%

Analysis workshop

A client group workshop was held to review the analysis approach. This session agreed a set of themes for the analysis, which formed the broad structure for the report.

Missing data

Input data Some work was undertaken to input postcode data solely for use with the Urban Rural variable. It was noted that of the total 8181 cases, some 626 (7.6%) cases contained either missing or insufficient information to list a postcode for analysis purposes. The following approach was adopted.

- Where parent postcode was missing, the postcode of provider was input, as a proxy as it was considered a reasonable assumption the parent address and provider address were likely to lie within the same urban rural classification.
- Where the parent postcode was missing and no provider postcode was available – for example, no postcode was attached to the provider sample or the respondent replied to the survey using a non-provider link (such as Early Years or a stakeholder), the postcode remained blank.

This approach reduced the number of missing/unrecognisable postcodes by 277 to 352 (4.3%).

It is stressed that the inputted postcode data were ONLY used to populate the Urban Rural variable. They were NOT used for other variables built from postcodes (i.e. SIMD).

Comparisons with 2018 Survey

The 2022 questionnaire was based on the 2018 questionnaire. The 2022 questionnaire was substantially revised to reflect the changes in the funded ELC provisions, current policy interests, and to reflect changes in the use of ELC over recent years, including the impact of the pandemic.

A light touch approach to comparison with the 2018 survey was therefore adopted in the report, with comparisons drawn out as appropriate across the report.

Age cohorts One point to note on the age groups used in the 2018 and 2022 report. Typically, the 2018 report refers to children aged 3-4 years as the core age group eligible for funded ELC. The 2022 refers to children aged three to five years. This reflects the time of year when each survey took place. The fieldwork for the 2018 report was undertaken in August-September 2017, at the start of the school year when eligible children were aged 3 to 4 years. The fieldwork for the 2022 survey took place in April-May 2022 at the end of the school year, extending the relevant age range to three to five years.

Appendix B: Data Tables

Tables referenced in the report are provided in this Annex. A full set of indexed tables setting out all the breakdowns presented within this report is provided in the Excel Supporting data tables file.

Sample - Profile of respondents (unweighted)

Table A1: Profile of survey respondents (unweighted)

	Survey respondents
Gender of parent*	Result 1
Man	6%
Woman	93%
Other	0%
Prefer not to say	1%
Age of parent respondent*	
Under 25	3%
25-29	13%
30-34	30%
35-39	33%
40-44	17%
45+	4%

Notes: * base all respondents: 8181 for gender, 7938 for age

Table A2: Profile of survey respondents (unweighted)

	Survey respondents
Number of earners in household*	
No earners in household	9%
Single earner household	23%
Double earner household	68%
Household type*	
Single parent	16%
Two parents	82%
Other	1%
PNTS	1%
Children's age*	
Under 1	11%
1	14%
2	19%
3	33%
4	41%
5	13%
Parents with children who have additional support needs**	
No	86%
Yes	14%
Types of additional special needs	
Autistic spectrum disorder	4%
English as an additional language	1%
Family circumstances (including bereavement and young carers)	1%
Hearing or visual impairment, or deafblind	1%
Language, speech and communication difficulties	7%
Learning difficulties or dyslexia	1%
Looked after by the local authority	1%
Physical or motor impairment, physical or mental health difficulty	1%
Social, emotional or behavioural difficulty	4%
Other	2%
* Base all respondents: 8181 ** Base all eligible for funded ELC: 7043	

Table A3: Profile of survey respondents (unweighted)

Employment Status*	
Full-time employment	33%
Part-time employment	40%
Self-employed	6%
Unemployed and looking for work	4%
Student	3%
Retired	<1%
Other	4%
Prefer not to say	2%
Household Income*	
Less than £16,000	15%
£16,000 to £29,000	17%
£30,000 to £44,999	18%
£45,000 to £59,999	15%
£60,000 and over	23%
Prefer not to say	11%

Table A4: Profile of survey respondents (unweighted)

Survey respondents	
Urban/Rural*	
Large urban areas	28%
Other urban areas	33%
Accessible small towns	11%
Remote small towns	4%
Accessible rural	14%
Remote rural	7%
No postcode / unrecognised	4%
Ethnicity*	
White	94%
Mixed or multiple ethnic groups	1%
Asian, Scottish Asian or British Asian	2%
African, Scottish African or British African	1%
Caribbean or Black	<1%
Other ethnic group	<1%
Prefer not to say	2%
English as an additional language*	
Yes	18%
No	80%
Prefer not to say	1%
Physical or mental health condition*	
Yes	15%
No	80%
Don't know	1%
Prefer not to say	4%
Notes: * base all respondents: 8181	

Profile of the sample

Profile of survey the respondents

The profile of the survey respondents was reviewed to establish the extent to which the core analysis sub-groups (age, working status, income, household type, etc.) were inter-related. This suggests the sample contained two broad groupings each with a number of common characteristics:

- first, younger, lower income parents, who tend to be a single parent households, disproportionately not working, and disproportionately living in the most deprived areas
- second, older parents, earning towards the higher income brackets, with two parent households, more likely to have two working parents, and less likely to live in deprived areas

Table A5: Profile of survey respondents: all and those aged under 25 and aged 30-34

	All	Aged under 25	Aged 30-34
Household type			
Single parent	17%	58%	16%
Two parent	83%	42%	84%
Base	8007	237	2305
Employment status			
0 parents in work	9%	37%	9%
1 parent in work	24%	46%	23%
2 parents in work	67%	16%	68%
Base	8007	237	2305
Income			
Less than £16,000	16%	53%	16%
£16,000-£29,999	17%	28%	18%
£30,000-£45,999	18%	8%	21%
£45,000-£59,000	15%	2%	17%
£60,000+	23%	0%	19%
Base	8181	245	2344
Deprivation			
Most deprived	18%	42%	20%
Other	82%	58%	80%
Base	7552	224	2176

Age:

- 58% of under 25s are a single parent households, compared to only 10% of those aged 35-39 years old
- 53% of under 25s earn less than £16,000, in contrast this is 10% for the older parents and 16% for the sample as a whole
- the under 25s then make up the largest proportion of the most deprived compared to the older parents taking up the least (42% vs 13%)

Table A6: Age

Age	All	Under 25s	25-29	30-34	35-39
Household type					
Single parent	17%	58%	33%	16%	10%
Two parents	83%	42%	67%	84%	90%
Base	8007	237	1043	2305	2593
Employment status					
0 parents in work	9%	37%	19%	9%	5%
1 parent in work	24%	46%	32%	23%	20%
2 parents in work	67%	16%	49%	68%	75%
Base	8007	237	1043	2305	2593
Income					
Less than £16,000	16%	53%	30%	16%	10%
£16,000-£29,999	17%	28%	25%	18%	14%
£30,000-£44,999	18%	8%	18%	21%	18%
£45,000-£59,999	15%	2%	10%	17%	16%
£60,000+	23%	0%	6%	19%	32%
Base	8181	245	1068	2344	2616
Deprivation (SIMD)					
Most deprived	18%	42%	32%	20%	13%
Other	82%	58%	68%	80%	87%
Base	7552	224	984	2176	2447

Working status:

- only 1% of under 25s households have two parents in work compared to 37% of those aged 35-39 years old
- 32% of the top earners have two parents in work, compared to 4% of the lowest earners
- 49% of the most deprived have no parents working while only 11% have two parents in work

Table A7: Working Status

Working status				
	All	0 parents in work	1 parent in work	2 parents in work
Age				
Under 25s	3%	13%	6%	1%
25-29	14%	27%	18%	10%
30-34	29%	29%	28%	30%
35-39	33%	17%	28%	37%
40-44	17%	10%	16%	19%
45+	4%	4%	4%	3%
Base	7938	706	1823	5282
Household type				
Single parent	17%	76%	42%	0%
Two parents	83%	24%	58%	100%
Base	8007	723	1864	5420
Income				
Less than £16,000	16%	69%	27%	4%
£16,000-£29,999	17%	14%	28%	13%
£30,000-£44,999	18%	2%	17%	20%
£45,000-£59,999	15%	0%	8%	20%
£60,000+	23%	-	9%	32%
Base	8181	723	1864	5420
Deprivation (SIMD)				
Most deprived	18%	49%	27%	11%
Other	82%	51%	73%	89%
Base	7552	669	1728	5019

Households type:

- of those in a two parent household, there are only 2% of under 25s compared to 36% of those aged 35-39 year old
- only 3% of two parent households have no parents in work, unlike 42% of single parent households
- only 1% of highest earners are single parent households compared to 28% for two parent households, with the overall sample sitting at 23%
- 42% of single parent households are in the most deprived category compared with 13% of two parent households

Table A8: Household type

Household type			
	All	Single parent	Two parents
Age			
Under 25s	3%	11%	2%
25-29	14%	26%	11%
30-34	29%	28%	30%
35-39	33%	20%	36%
40-44	17%	12%	19%
45+	4%	3%	4%
Base	7938	1293	6518
Employment status			
0 parents in work	9%	42%	3%
1 parent in work	24%	58%	16%
2 parents in work	67%		81%
Base	8007	1319	6688
Income			
Less than £16,000	16%	59%	7%
£16,000-£29,999	17%	22%	15%
£30,000-£44,999	18%	7%	20%
£45,000-£59,999	15%	2%	18%
£60,000+	23%	1%	28%
Base	8181	1319	6688
Deprivation (SIMD)			
Most deprived	18%	42%	13%
Other	82%	58%	87%
Base	7552	1220	6196

Additional support needs:

- parent aged under 25 years were much less likely to have a child with ASN than parents aged 35-39 years (4% vs 29%)
- parents with a child with ASN are less likely to both be in work compared with other parents (50% compared with 68%)
- possibly linked to this, parents of a child with ASN are more likely to be on a low income (for example 23% earn less than %16K compared to 15% of other parents, whereas 14% earn more than £60,000 compared to 24% of other parents)

Table A9: Additional Support Needs

ASN			
	All	No	Yes
Age			
Under 25s	3%	3%	4%
25-29	14%	13%	15%
30-34	29%	28%	30%
35-39	33%	34%	29%
40-44	17%	18%	17%
45+	4%	4%	5%
Base	7938	5871	974
Household type			
Single parent	17%	17%	24%
Two parents	83%	83%	76%
Base	8007	5921	973
Employment status			
0 parents in work	9%	9%	19%
1 parent in work	24%	23%	31%
2 parents in work	67%	68%	50%
Base	8007	5921	973
Income			
Less than £16,000	16%	15%	23%
£16,000-£29,999	17%	16%	22%
£30,000-£44,999	18%	18%	15%
£45,000-£59,999	15%	15%	11%
£60,000+	23%	24%	14%
Base	8181	6035	1008
Deprivation (SIMD)			
Most deprived	18%	17%	26%
Other	82%	83%	74%
Base	7552	5612	922

Income:

- there is a large disparity of parents earning between £30,000-£44,999, they are more likely to be aged 35-39 years old than under 25 (33% vs 1%)
- single parents comprise most (64%) of those earning less than £16,000, but just 7% of those earning between £30,000-£44,999, whereas 93% of those earning between £30,000-£44,999 are two parents
- of those who are most deprived areas, 42% of those earning less than £16,000 live in deprived areas

Table A10: Income

Income				
	All	Less than £16,000	£16,000- £29,999	£30,000- £44,999
Age				
Under 25s	3%	11%	5%	1%
25-29	14%	25%	21%	14%
30-34	29%	30%	31%	35%
35-39	33%	21%	27%	33%
40-44	17%	10%	13%	15%
45+	4%	3%	3%	3%
Base	7938	1243	1327	1441
Household type				
Single parent	17%	64%	23%	7%
Two parents	83%	36%	77%	93%
Base	8007	1224	1324	1454
Employment status				
0 parents in work	9%	42%	8%	1%
1 parent in work	24%	41%	40%	23%
2 parents in work	67%	17%	52%	76%
Base	8007	1224	1324	1454
Deprivation (SIMD)				
Most deprived	18%	42%	27%	15%
Other	82%	58%	73%	85%
Base	7552	1174	1266	1375

Profile of childcare: use by parents of children aged three to five

Table A11: ELC use (3-5s), by no. of parents in work, income, age of parent, and English as an additional language

Q:SQ3 – Which of the following types of childcare and early learning to you use for your children? Bases 3-5s 6,875

	FELC	Paid-for	Regular informal	Occasional informal
Number of parents in work				
None	94%	3%	3%	4%
One	95%	14%	14%	8%
Two	94%	28%	32%	11%
Income				
Less than £16,000	95%	7%	10%	6%
£16,000-£29,999	93%	17%	18%	8%
£30,000-£44,999	94%	19%	26%	11%
£45,000-£59,999	94%	26%	36%	12%
£60,000+	96%	39%	34%	8%
Age of parent				
Under 25	94%	6%	8%	7%
25-29	94%	14%	16%	9%
30-34	95%	18%	26%	9%
35-39	95%	26%	28%	10%
English as a second language				
Yes	91%	21%	13%	7%
No	95%	22%	28%	10%

Omnibus tables

An omnibus survey of parents with children in Scotland was also undertaken to inform the main survey design. It used a cut-down version of the draft questionnaire and was used to inform the study design and provide context for the analysis. Key tables from the omnibus are provided below.

Table A12: Omnibus data

	Omnibus respondents	
Number of children aged under 6		
Under 1	32	19%
1 year old	29	17%
2 years old	43	26%
3 years old	46	28%
4 years old	53	32%
5 years old	20	12%
Base	162	
Use of funded ELC (all children aged 3-5 years)		
My child is currently attending funded early learning and childcare (or starts in the next few weeks)	82	79%
My child is not currently attending funded early learning and childcare, but has done so since August 2021	3	3%
My child does not currently attend funded early learning and childcare, and has not done so since August 2021	11	11%
Don't know	8	8%
Base	104	
Types of funded ELC used (children who use FELC aged 3-5)		
Local authority nursery class	45	53%
Private nursery	33	39%
Playgroup (i.e. where child attends without parent/ carer)	8	9%
Community/ voluntary nursery	4	5%
Family centre (i.e. where child attends without parent/ carer)	3	4%
Childminder	3	4%
Other	1	1%
Base	85	

Main reasons for using funded ELC (children who use FELC aged 3-5)

It will be/ was good for my child's social, emotional and/ or behavioural development	61	72%
It will be/ was good for my child's learning	57	67%
It will help/ helped build my child's independence/confidence	55	65%
To work or look for work	46	54%
It will be/ was good for my ability to help my child's learning and development at home	31	36%
To reduce the burden on grandparents/ because informal care not available	31	36%
To have more time for household tasks such as cooking, DIY, etc	22	26%
To have more time to look after myself (ourselves): to rest, de-stress, exercise, socialise, etc.	21	25%
To increase the no. of hours that I/ my partner work	17	20%
To study or improve work-related skills	9	11%
To have more time to look after other children	9	11%
Other	1	1%
Don't know	3	4%
Base	85	

How many hours of funded ELC used per week (children who use FELC aged 3-5)

	Term-time		School holidays	
None	1	1%	35	41%
1-5	6	7%	3	4%
6-10	3	4%	2	2%
11-15	8	9%	4	5%
16-20	19	22%	10	12%
21-25	16	19%	11	13%
26-30	17	20%	6	7%
More than 30	13	15%	8	9%
Don't know	2	2%	6	7%
Base	85		85	

Types of childcare used (all with preschool children)

Childcare or early learning that I pay for myself	59	35%
Informal childcare (e.g. grandparent, other relative, friend) on an occasional or irregular basis	58	35%
Informal childcare (e.g. grandparent, other relative, friend) on a regular or frequent basis	53	32%
Other	2	1%
None of these	40	24%
Don't know	9	5%
Base	162	

How to access background or source data

The data collected for this social research publication:

- are available in more detail through Scottish Neighbourhood Statistics
- are available via an alternative route
- may be made available on request, subject to consideration of legal and ethical factors. Please contact socialresearch@gov.scot for further information.
- cannot be made available by Scottish Government for further analysis as Scottish Government is not the data controller.



© Crown copyright 2022

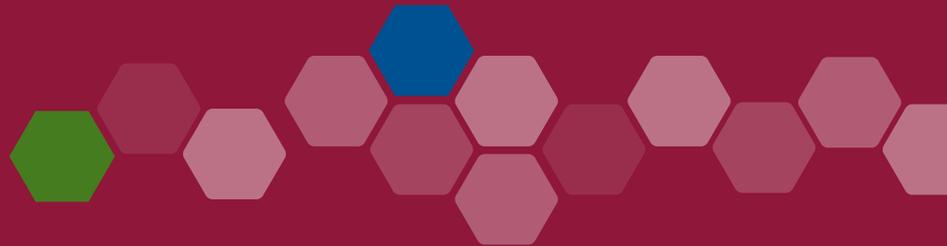
You may re-use this information (excluding logos and images) free of charge in any format or medium, under the terms of the Open Government Licence. To view this licence, visit <http://www.nationalarchives.gov.uk/doc/open-government-licence/> or e-mail: psi@nationalarchives.gsi.gov.uk. Where we have identified any third party copyright information you will need to obtain permission from the copyright holders concerned.

The views expressed in this report are those of the researcher and do not necessarily represent those of the Scottish Government or Scottish Ministers.

This document is also available from our website at www.gov.scot.
ISBN: 978-1-80525-171-2

The Scottish Government
St Andrew's House
Edinburgh
EH1 3DG

Produced for
the Scottish Government
by APS Group Scotland
PPDAS1185722 (12/22)
Published by
the Scottish Government,
December 2022



Social Research series
ISSN 2045-6964
ISBN 978-1-80525-171-2

Web Publication
www.gov.scot/socialresearch

PPDAS1185722 (12/22)