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Early Learning and Childcare (ELC) – parents' views and use: research findings 2025

Children, Education and Skills

social research

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Key definitions

The definition of ‘early learning and childcare’ (ELC) in the Children and Young People (Scotland) Act 2014 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 1140 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 1140 hours of government funded ELC. A two-year-old will be eligible if they are (or have been since their second birthday) 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 (or ELC)** refers to hours of regulated childcare/ELC purchased by parents from providers. This could either be additional hours of childcare/ELC purchased on top of the entitlement to 1140 hours of funded ELC, or childcare/ELC purchased for children who are not yet eligible for funded ELC (e.g. those aged 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.
- **Nurseries** typically provide daycare facilities for children aged up to five years. Nurseries are normally used by parents and carers on a regular basis rather than a drop-in basis and the service is provided as a minimum during the school term. Nurseries can take several forms, such as a private nursery, a public sector nursery class or nursery school or a nursery that is part of an independent school.
- Additionally, there are **other forms of unregulated early learning and/or childcare**. These include opportunities for parents and children to attend together, for example ‘stay and play’ groups or other ‘family learning’ activities.

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Executive summary

Introduction

In October 2022, the Scottish Government set out plans to evaluate the impact of the expansion of funded early learning and childcare (ELC) from 600 to 1140 hours. The evaluation seeks to assess progress against intermediate outcomes regarding the provision of high quality, flexible, accessible and affordable ELC for all parents and carers, as well as longer term outcomes for children, parents and carers, and families. The evaluation has a number of strands, including this research. The overarching aim of this research was to provide up-to-date information on parents' and carers' use, views and experiences of ELC, with an emphasis on funded ELC. The research explored parents' and carers' perceptions of the flexibility, accessibility, quality and affordability of ELC, drawing out any relevant comparisons with similar data reported in 2022.

Methodology

The research consisted of two phases. The first was an online survey with an achieved sample of 7,589 parents and carers who had children yet to start school. Survey respondents were self-selecting, therefore the survey is not representative of parents and carers of children under the age of six in Scotland. The sample was weighted to address an under-representation of respondents in large urban areas. The second was in-depth interviews with 33 parents and carers who completed the survey. The experiences of parents with children with additional support needs (ASN) and those who were dissatisfied with the flexibility of ELC were of particular interest for this phase. The survey was live from 23 April to 29 May 2025. The interviews took place from 7 May to 30 June 2025.

Key findings

The experiences of funded ELC were largely positive for a majority of parents, though a range of challenges were also described. The key findings on parents' experiences of funded ELC, and wider childcare, are summarised below.

Use of ELC

- There was a high take-up of funded ELC hours for three- to five-year-olds (95%) and eligible two-year-olds (83%) among parents who responded to the survey. Local authority (LA) nurseries were the most common type of funded ELC used, followed by private nurseries, for both age groups.
- The majority of those using funded ELC hours were using the full entitlement, though this was higher for three- to five-year-olds (87%) than for eligible two-year-olds (73%). Parents of three- to five-year-olds most likely to use their full entitlement of funded hours were in households: with one child (91%), with at least one child with ASN (88%), and living in accessible areas (88%).
- The main reasons parents did not use their full entitlement were related to personal choice. However, some did not use their full entitlement because the ELC settings did not provide enough flexibility in terms of the days or hours on offer to enable them to do so.

- About one-half (47%) of parents of three- to five-year-olds only used funded childcare. A similar proportion (48%) used funded ELC as well as childcare they paid-for (24%), informal childcare (17%), or a combination of paid-for and informal childcare (7%). Interviews and open-text survey responses showed that this was largely because funded ELC hours alone did not cover their childcare needs.
- A quarter (25%) of all parents used regular or frequent informal childcare. This was higher for those with two-year-olds or children under two.
- Around half (47%) of all parents used paid-for childcare for their children. Families with two parents in work were more likely to use paid-for childcare (38%) than those with one or no parents in work (17% and 2% respectively). Similarly, two-parent households were more likely to be using paid-for childcare than single-parent households (33% compared with 15%).

Affordability

- Of parents who used paid-for childcare, on average £726 per month was spent on childcare. The amount spent on childcare per month was higher for parents with children aged under three (£733 per month was spent on children under three compared with £635 on children aged three to five).
- Of those who paid for childcare, 56% said they had not experienced difficulties affording childcare in the last 12 months.
- However, around two-fifths of those who paid for childcare had experienced either some (32%) or significant difficulties (10%) affording childcare costs in the last year. The number of paid hours, paying for childcare costs upfront and travel to reach the place of childcare made affording childcare difficult. The cost of childcare limited some parents' ability to work and required some to seek financial support from family.

Accessibility

- Three-fifths (61%) of all respondents had no problems accessing childcare.
- Two-fifths (39%) of all respondents experienced challenges accessing childcare. The most commonly reported challenges were: that there were not enough places available locally (19%); a lack of flexibility in choice of opening hours or sessions (14%); and a lack of provision in school holidays (11%).
- Parents were generally satisfied that funded ELC met their child's ASN: 89% said that they were either satisfied (33%) or very satisfied (56%). The majority of parents of children with ASN also said they had not experienced any difficulties in finding funded ELC that met their child's ASN (65%).
- However, some parents experienced challenges related to provision for their children with ASN. Challenges included: staff not having sufficient training, experience, skills or time to provide sufficient support to children with ASN; not enough staff being available to meet the needs of the child; and ELC environments not being suitable for children with ASN. Some parents felt that staff did not take their concerns seriously which could result in their children's behaviour or distress escalating before action was taken.

Flexibility

- Overall, most parents of eligible two-year-olds (95%) and three- to five-year-olds (90%) were satisfied that they had been offered the flexibility to use funded hours in a way that met their family's needs.
- Seven percent of parents of three- to five-year-olds and 4% of parents of eligible two-year-olds were dissatisfied with the flexibility of funded ELC. Reasons for dissatisfaction included: limited or no choice in the funded ELC providers they could use locally; hours being insufficient to fit in with work schedules, making it difficult for some parents to work full-time or at all; and the hours provided being too long for their children, either due to the child's age or their ASN.
- Some parents wanted more flexibility to use their funded hours as they needed, either within existing provision or by increasing the choice of provision in their local area. This included greater flexibility in when they could use their hours week to week, the ability to use funded ELC throughout the year, and to have ELC sessions during local school hours.

Quality

- The majority of parents (88%) reported that they were satisfied with the overall quality of their main funded ELC provider. This included the quality of indoor and outdoor spaces, meal provision, provision for children with ASN, and communication between staff and parents.
- Parents more likely to report that they were satisfied with the quality of their main funded ELC provider were: single-parent households, households with no or one earner in the household, those living in the 80% least deprived areas, households with two or three children, households with at least one child aged under six with ASN, and households in remote areas.
- The 8% of parents who reported being dissatisfied with the quality of their main funded ELC provider gave a variety of reasons including: poor quality outdoor facilities; crowded indoor spaces; limited staff capacity and facilities to meet children's ASN; poor and infrequent staff communication; unhealthy and small meal portion sizes; and minimal staff supervision during mealtimes.

Impact of funded ELC

The main impacts of funded ELC on parents and their children were:

- Increased opportunities for children to socialise with peers, learn social skills, develop communication abilities and support children's learning in ways that parents could not always replicate at home. The structured environment of ELC helped prepare children for the transition to school. However, longer ELC hours were sometimes viewed as excessive for younger children or those with ASN, leading to fatigue and behavioural issues.
- Increased work opportunities for parents. Three-quarters of parents agreed or strongly agreed that they were able to work or look for work (75%) or consider future opportunities (74%) while 40% agreed or agreed strongly they were able to increase the number of hours they worked and 36% were

able to study or improve work-related skills. Longer ELC hours enabled some parents to move from part- to full-time work and improve their finances. For others, the cost of combining funded hours with additional paid-for childcare negated these benefits.

- A positive impact on parents' wellbeing. About half of the survey respondents agreed or strongly agreed that they felt happier (48%), less stressed (45%), and had more time for self-care (45%). Parents also valued the additional time for practical tasks, bonding with their other children, and personal relaxation.

There is evidence that positive impacts on family wellbeing and opportunities to take up work vary across different groups of parents. For example, 87% of those earning £60,000 and above per year agreed they were able to work or look for work, compared with 65% of respondents earning less than £16,000 per year.

Provision for younger children

- Around half (51%) of parents with a child under three years old who were not eligible for funded ELC were using private nurseries, while 7% used a childminder. Around one-third (37%) did not use any form of paid-for childcare. Those who did so were more likely to be two-parent households or households with two parents in work, households with a higher annual income, or households in the least deprived areas.
- Two-fifths (41%) of those who were not using paid-for childcare stated that this was because they could not afford it. In addition, some parents not using paid-for childcare also reported that this was because they thought their child was too young to attend childcare (39%) or that they wanted to or were able to look after their child themselves most of the time (38%).

Comparisons with 2022

The key findings in 2025 are broadly similar to 2022. Notable differences are:

- The uptake of the full ELC entitlement: 87% of parents of three- to five-year-olds and 73% of parents of two-year-olds said that they use their full entitlement. In 2022 these figures were 73% and 52% respectively.
- The percentage of parents with three- to five-year-olds using paid-for childcare, which was 34% in 2025 and 22% in 2022.
- However, in 2025 56% said they had not experienced difficulties affording childcare in the last 12 months, compared with 34% in 2022.

Conclusions

Overall, parents who participated in this research were largely positive about funded ELC and reported that they and their children were experiencing a range of positive impacts as a result of funded ELC. However, a number of challenges remain regarding affordability, accessibility, flexibility and quality of funded ELC. The findings underscore the need for continued support and flexibility in funded ELC provision, as well as on-going monitoring and evaluation, in order to make improvements to maximise the benefits of funded ELC for all families in Scotland.

1 Introduction

This report outlines findings from early learning and childcare (ELC) research with parents. This research is part of a wider evaluation of the expansion of funded ELC in Scotland. The Evaluation Strategy, published by the Scottish Government in October 2022, set out plans to evaluate the impact of the expansion of funded ELC from 600 to 1140 hours (referred to as "the expansion of funded ELC") on outcomes for children, parents and carers[1], and families.

1.1 The ELC Expansion Programme

Underpinned by the principles of quality, flexibility, accessibility and affordability, the expansion of government funded ELC has been an important strand of Scottish and local Government policy and investment in relation to improving children's outcomes and reducing child poverty over the last decade. From August 2021 the entitlement to funded ELC in Scotland increased from 600 to 1140 hours per year for all three- and four-year-olds, and eligible two-year-olds. Currently, two-year-olds are eligible for funded ELC if they, or their parent, are care-experienced or they have a parent who is in receipt of one or more qualifying benefits. Local authorities (LA) are also able to provide discretionary access to funded ELC for any other child[2]. Since August 2021, families have been able to access up to 30 hours of funded ELC per week per child in term time, or around 22 hours per week spread across the calendar year.

In October 2022, the Strategic Childcare Plan for 2022-2026 was published. The plan set out the Scottish Government's vision for ELC and school age childcare, including planned actions to realise the benefits of the expansion to 1140 hours of funded ELC. Three outcomes for children and families were outlined in the plan: 1) Children's development improves and the poverty-related outcomes gap narrows; 2) Family wellbeing improves; and 3) Parents' opportunities to take up or sustain work, study or training increase.

Key to achieving these outcomes is maximising the take-up of the expanded funded hours. Overall take-up is high among three- and four-year-olds, with LA data estimating that 95% of those eligible were registered for funded ELC in 2024. However, take-up is lower among eligible two-year-olds, with only 59% estimated to be using their entitlement in 2024. The Scottish Government's Strategic Childcare Plan prioritises maximising uptake of ELC among two-year-olds to help realise the benefits of 1140 hours of funded ELC for children and families. Understanding what, if any, barriers exist for parents and carers in taking up funded ELC is important in order to ensure access is extended to those who can benefit most from it.

[1] Throughout this report the term "parents" should be understood to refer to carers also.

[2] More information on the eligibility criteria for funding is available at: Funded early learning and childcare - mygov.scot

1.2 Evaluating the expansion of funded ELC hours

The Strategic Childcare Plan highlights the importance of evaluating the impact of the expansion of funded ELC to 1140 hours on children, parents and families. The evaluation is using data from a range of sources to do this. For example, the Scottish Study of Early Learning and Childcare (SSELC) aims to assess the impact of expanded hours on the high-level outcomes, collecting quantitative data on children aged two- to five-years, including those at particular risk of disadvantage, and their parents. In addition, survey and qualitative research exploring parents' views and use of ELC was undertaken in 2017 and 2022 which captures the experiences of parents before and after the expansion of funded ELC to 1140 hours.

The evaluation of the expansion of funded ELC also seeks to assess progress against 'intermediate outcomes' regarding the provision of high quality, flexible, accessible and affordable ELC for all parents. Whether ELC is accessible, flexible and affordable will influence take-up, while high quality provision is crucial for achieving outcomes for children. Data from the 2017 and 2022 parent surveys show that parents' overall experience of funded ELC was positive but there remained areas for improvement. For example, in 2022 perceived accessibility and flexibility was high – most parents were aware of their entitlement and able to access it in the way they wanted. However, parents of children with additional support needs (ASN) were more likely to experience access issues, albeit in lower proportions than in 2017. Nine percent of parents of children with ASN were dissatisfied with how funded ELC met their child's needs and 31% had experienced difficulties accessing suitable provision. Parental satisfaction with ELC provision was also high – 97% of parents were satisfied with the quality of their main provider. However, 62% of those who paid for childcare experienced difficulties affording ELC, again more common among parents of children with ASN.

Since the previous research with parents in 2022, there continued to be significant changes and challenges across society, some of which may be expected to have affected parents' use, views and experiences of ELC. For example, post-pandemic work patterns have changed for many parents and while flexible, hybrid working arrangements remain common, concern around productivity has meant organisations have increasingly looked to have their workforces return to the office – potentially requiring more flexible childcare arrangements. At the same time, the Employment Relations (Flexible Working) Act, which came into force on 6 April 2025, now means employees have the statutory right to make a flexible working request from their first day of employment. Furthermore, global recovery from the COVID-19 pandemic and the conflict in Ukraine led to a significant rise in the cost of living. Food and energy prices rose markedly. While inflation rates have now slowed, many families continue to feel significant financial pressures which may affect how they perceive the affordability of childcare. For these reasons, an update to the previous research is particularly timely.

2 Methodology

2.1 Research aims and objectives

The overarching aim of this research was to provide up-to-date information on parents' use of, views about, and experiences with, ELC, particularly funded ELC, since the statutory entitlement rose from 600 to 1140 funded hours. The research explored parents' perceptions of the flexibility, accessibility, quality and affordability of ELC. A key aim was to draw out any relevant comparisons with 2022 data, as well as 2018 where possible. The research objectives were to:

- Provide up-to-date information on the current delivery of funded ELC, such as: use and views of different types of ELC; drivers of and barriers to taking up the funded entitlement; views on accessibility, flexibility and quality of funded ELC; affordability/costs of additional childcare.
- Support analysis of differences in use and views of ELC for different groups of parents and carers, including those living in the most deprived communities, in rural areas, with children with ASN, in different family types (e.g. single adult/ couple) and with different characteristics (e.g. protected characteristics).

In addition, the qualitative research was intended to enable a more in-depth understanding of the experiences of families in relation to funded ELC, with a particular focus on parents of children with ASN. The findings from this research will feed into the overall evaluation of the expansion of funded hours, providing understanding in particular of progress on intermediate outcomes that will help identify any issues and support policy development.

2.2 Research design

To address the research aims and objectives, ScotCen conducted an online survey of 7,589 parents who have children who have not yet started school, and in-depth interviews with 33 parents who had completed the survey[3]. The online survey was live between 23 April and 29 May 2025. Parent and carer interviews took place between 7 May and 30 June 2025.

Ethical approval for the research was granted by the National Centre for Social Research (NatCen) Research Ethics Committee on 4 March 2025.

2.3 Survey of parents and carers

To enable comparisons with earlier data, the survey questionnaire was largely based on the one used in 2022. However, it also included several new and amended questions to improve questions where relevant and address the aims and objectives of this research. The survey was designed to take around 20 minutes to complete.

[3] Participant demographics can be found in Appendix A.

2.3.1 Sampling and recruitment

In line with the approach taken in 2022, a non-probability sampling approach was used which involved contacting parents through ELC settings and a range of intermediaries such as the Scottish Childminding Association[4]. Multiple communications were shared with all eligible childcare providers and with an agreed list of third sector/intermediaries with the aim of maximising the reach of the survey to as many parents as possible, including those who were not accessing ELC. At the end of the survey respondents could opt-in to a prize draw to win one of eight £100 vouchers. They could also opt-in to be contacted to take part in a qualitative interview.

In line with responses to the 2022 survey, respondents in large urban areas were under-represented in this survey. To address this, calibration weighting was applied to make the responding sample more representative of the population. Since the survey used non-probability sampling, the weighting procedure involved adjusting ('calibrating') the sample estimates to align with the proportionate spread of children by urban-rural groupings for 'day care of children' services according to the latest data from the Care Inspectorate records.

2.4 Interviews with parents and carers

Interview participants were recruited via the survey. Respondents were asked to provide their contact details if they consented to take part in a follow-up. Due to the large response to the survey and significant interest in taking part in a qualitative interview, it was possible to sample on several key criteria of interest including: children with ASN; number of parents in the household; child age; use of funded ELC; level of satisfaction with ELC provision in terms of flexibility, ASN support, and quality; ethnicity; SIMD; and family size. The experience of parents with children with ASN and those who were dissatisfied with the flexibility of ELC provision was of particular interest to the Scottish Government.

Fifteen of the 33 interview participants lived in an area of Scotland classed as remote or rural. Nearly half (n=16) of qualitative participants lived in the 40% most deprived areas of Scotland. Three quarters (n=26) of participants had at least one child with ASN. Around one-half (n=16) of participants also had a child who did not have ASN. Full participant demographics can be found in Appendix B.

Selected individuals were sent an email to invite them to participate in an interview. Those interested in proceeding were given the choice of a telephone or video interview. All participants were given a £30 Love2Shop voucher as a thank you for their time. With the consent of participants, interviews were audio recorded and transcribed.

2.5 Analysis

All analysis of the survey data was undertaken in SPSS using the weighted data. Results have been run for specific subgroups allowing comparison between them.

[4] A list of intermediaries can be found in the full methodology in Appendix A.

As the sample were self-selecting it was not possible to provide statistically precise margins of error or significance testing. Therefore, although apparent differences by household demographics have been reported where relevant throughout, they have not been tested for statistical significance.

All figures mentioned in the text of this report can be found in a set of supplementary Excel tables in the Supporting documents. These also contain some additional data not discussed in this report. Comments regarding the data analysis above and the potential limitations below are applicable to these tables.

The following characteristics were explored in subgroup analysis: household composition (e.g. single- or two-parent), parental employment, household income, age of respondent, Scottish Index of Multiple Deprivation (SIMD)[5], English as an additional language, number of children in the household, children with ASN, remote-accessible classification of place of residence, and parent long-term health conditions.

The transcribed qualitative interview data were managed and analysed using NVivo. All qualitative data were anonymised for analysis and reporting. An analytical framework was set up and piloted in NVivo. Once the framework was finalised, each transcript was coded, so that all the data on a particular theme could be viewed together.

2.6 Strengths and limitations

The key strengths of this study were its mixed method design and a large achieved survey sample size, which enabled analysis by a variety of participant characteristics. The main limitation to this study is the non-probability sampling approach which does not allow for calculation of sampling errors. This limits understanding of sample bias and representativeness and undermines the ability to generalise findings to the broader population of interest. The strengths and limitations of this study are outlined in full in Appendix A along with a more in-depth methodology, including participant demographics.

[5] The Scottish Index of Multiple Deprivation is a tool for identifying geographical areas with relatively high levels of deprivation. For more information, see: Scottish Index of Multiple Deprivation 2020 - gov.scot

3 Use of early learning and childcare (ELC)

This chapter explores the use of early learning and childcare (ELC) for children who have not yet started school. It discusses the types and hours of childcare used for different age groups of children.

3.1 Use of childcare

The majority of parents (98%) in the survey used some form of childcare for their pre-school children. Table 3.1 shows the types of childcare used by the age of the child and indicates that the use of childcare increased with the child's age, from 63% for children under two years old to 98% of three- to five-year-olds. A similar pattern was observed in 2022.

Table 3.1: Childcare used, by age of child

	All	3-5-year-olds[6]	2-year-olds	Under 2-year-olds
Households with children under six				
Total using any childcare	98%	98%	91%	63%
Total not using any childcare	2%	2%	9%	37%
Childcare usage				
Funded early learning and childcare	80%	95%	19%	3%
Childcare or early learning that I pay for myself	47%	34%	66%	47%
Informal childcare: regular or frequent	25%	19%	31%	31%
Informal childcare: occasional or infrequent	9%	8%	9%	6%
Unweighted base (Households with children under 6 using childcare)	7,552	6,270	1,321	1,728
Unweighted base (Childcare usage)	7,589	6,303	1,321	1,775

Base: Households with children aged under six includes all parent respondents. Childcare usage combines all children aged under six years old in the household therefore parents could be using more than one type of childcare. This excludes the % using 'None of these' (which can be seen in Supplementary Table B1a-B3d) as this is shown at household-level under 'Total not using any childcare.'

The type(s) of childcare used also varied by the age of child. Almost all three- to five-year-olds in Scotland are entitled to funded ELC, so it is not surprising that 95% of this age group in the sample were using this. A smaller proportion of two-year-olds are entitled to funded ELC, and one-fifth (19%) of the sample were using this. Around one-third (34%) of three- to five-year-olds used paid-for childcare compared with two-thirds (66%) of two-year-olds. Only 3% of children under two-years-old were in funded ELC[7].

[6] These figures include 40 parents who later in the survey said under 'reasons for not using funded ELC' that their child aged 3-5 had started school. Removing these from these figures increases the proportion using funded ELC to 96% and does not alter the other figures.

[7] Generally, children under two are not entitled to funded ELC, although local authorities can exercise their discretion.

These findings are largely similar to 2022, except for the percentage of parents across all age groups using paid-for childcare has increased. For example, the proportion of three- to five-year-olds using paid-for childcare was 22% in 2022 and 34% in 2025. The increase was smaller for the other age groups.

Table 3.2 shows the combinations of types of childcare that parents used for their pre-school children. The most common type of childcare used by three- to five-year-olds was funded ELC only (47%), followed by a mix of funded ELC and paid-for childcare (24%) and a mix of funded ELC and informal childcare (17%).

The most common types of childcare used for two-year-olds was paid-for childcare only (37%) followed by a combination of paid-for and informal childcare (28%). Fifteen percent used funded ELC only, which reflects the fact that around a quarter of two-year-olds in Scotland are entitled to it[8].

Table 3.2: Profile of childcare used per household by age of child

	All	3-5-year-olds	2-year-olds	Under 2-year-olds
Funded ELC only	33%	47%	15%	2%
Funded ELC + informal childcare	15%	17%	2%	1%
Funded ELC + paid-for childcare	23%	24%	1%	0%
Funded ELC + paid-for + informal childcare	9%	7%	0%	0%
Paid-for childcare only	10%	2%	37%	28%
Paid-for + informal childcare	7%	1%	28%	19%
Informal childcare only	1%	0%	8%	15%
No childcare	1%	1%	9%	35%
Unweighted base	6,739	6,147	1,320	1,712

Base: Parent respondents excluding those who used a combination of no childcare for one child and another form of childcare for another child within their household

3.1.1 Use of childcare for three- to five-year-olds

As in 2022, households with two parents in work were more likely to use paid-for childcare or informal childcare and less likely to rely solely on funded ELC than those with one or no parents in work. For example, 39% of households with two parents in work used only funded ELC compared with 68% with one parent and 92% with no parents in work. The figures can be seen in Supplementary Table B4a. Two-parent households were also more likely to use paid-for childcare in addition to funded ELC compared with those in single-parent households (33% compared with 15%).

While there was no difference in use of funded ELC alone by area deprivation, those in the 20% most deprived areas were more likely to use funded ELC in combination with paid-for childcare (35%, compared with 17% in other areas) and less likely to use funded ELC in combination with informal childcare (8% compared with 20% in other areas).

[8] Early learning and childcare (ELC) - Summary statistics for schools in Scotland 2024 - gov.scot

3.1.2 Use of childcare for two-year-olds

Similarly, parents of two-year-olds more likely to use funded ELC only were:

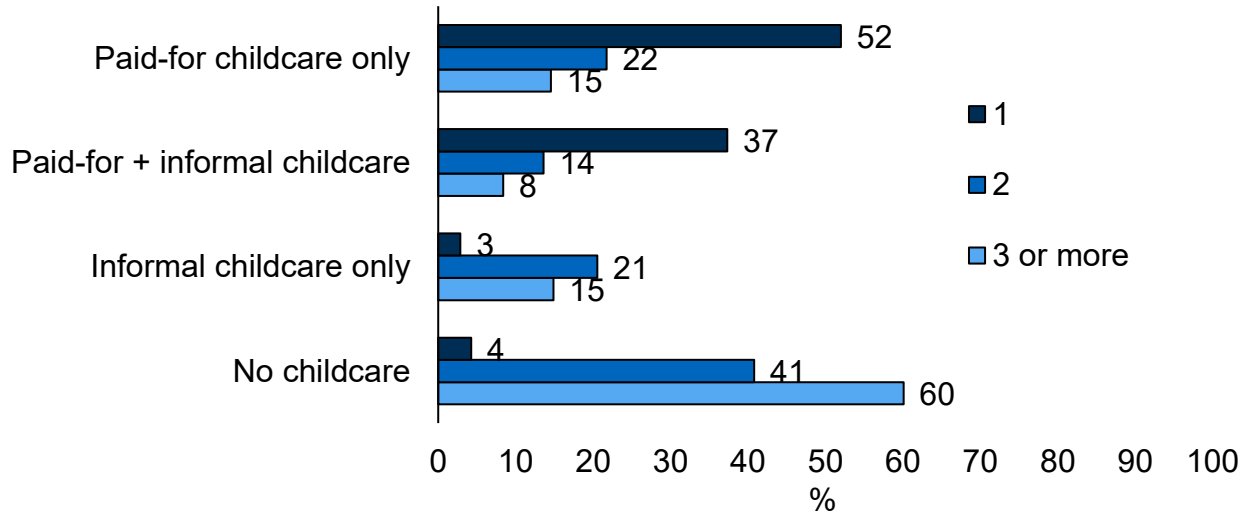
- Single-parents (50%, compared with 7% of two-parent households).
- Households with no parents in work (76%, compared with 25% of households with one parent in work and only 2% of households with two parents in work).
- Households in the 20% most deprived areas (41%, compared with 10% in other areas).

Similar patterns were seen in 2022. These patterns are to be expected given the eligibility criteria for access to ELC when a child is aged two and data on the characteristics of households of eligible two-year-olds accessing funded ELC[9].

3.1.3 Use of childcare for under-two-year-olds

Children aged under two years are not eligible for funded ELC although may access a place at the discretion of the local authority[10]. Similarly to 2022, around one-third (35%) of parents did not use any childcare for their child aged under two years, and 28% only used paid-for childcare. As observed in 2022, households with only one child were more likely to use paid-for childcare only (52% compared with 36% of households with two or more children) or a combination of paid-for and informal childcare (37%, compared with 22% of households with two or more children). Meanwhile parents with two or more children were most likely not to use any childcare compared with those with one child, as shown in Figure 3.1.

Figure 3.1: Use of childcare for children aged under two, by number of children under the age of 18 in the household



Base: Households with a child under the age of two, n=1,712

Similar variations in use of childcare for under-two-year-olds by household employment and income were seen as in 2022. Households with no parents in work

[9] Scottish Study of Early Learning and Childcare: phase 4 report - gov.scot

[10] Less than 1% of children aged under two were estimated to be registered for funded ELC in 2024, see Summary statistics for schools in Scotland 2024 - gov.scot

and those on the lowest incomes were least likely to use any form of childcare. For example, 81% of those with no parent in work did not use any childcare, compared with 55% of households with one parent in work and 25% with two parents in work. Sixty-one per cent of households on an annual income of less than £16,000 did not use any childcare compared with 25% of those with incomes over £60,000.

3.2 Hours of childcare use

In the survey, parents who used paid-for childcare were asked how many hours they used in an average week (Table 3.3).

Table 3.3: Average number of hours per week of paid-for childcare by age of child using paid-for childcare

	3-5-year-olds	2-year-olds	Under 2-year-olds
Term time	22.0	24.4	25.2
School holidays	24.6	25.4	24.8
Unweighted base – Term time	2,108	784	723
Unweighted base – School holidays	1,928	641	675

Base: Parents who use paid-for childcare

The average number of hours used per week during term time was higher for children under three years old. This is to be expected as three- to five-year-olds are more likely to be using funded ELC during term time. There was little difference between term time and school holiday use of paid-for childcare for children under three, but use of paid-for childcare for three- to five-year-olds increased from 22.0 hours during term time to 24.6 hours during the school holidays[11].

Similarly, hours of informal childcare did not differ for children under three between term time and school holidays, but informal childcare was also used more frequently for three- to five-year-olds during school holidays (Table 3.4)[12].

Table 3.4: Average number of hours per week of informal childcare by age of child using informal childcare

	3-5-year-olds	2-year-olds	Under 2-year-olds
Term time	11.6	15.0	16.2
School holidays	18.2	15.8	16.5
Unweighted base – Term time	1,466	501	650
Unweighted base – School holidays	1,299	421	553

Base: Parents who use informal childcare

[11] The number of hours spent per week may not be comparable with the equivalent 2022 findings due to changes to the questionnaire in 2025 to ask this of every child and then derive an average.

[12] Full data can be found in Supplementary Tables B13a-B13d and B16a-B16d

4 Use of funded ELC

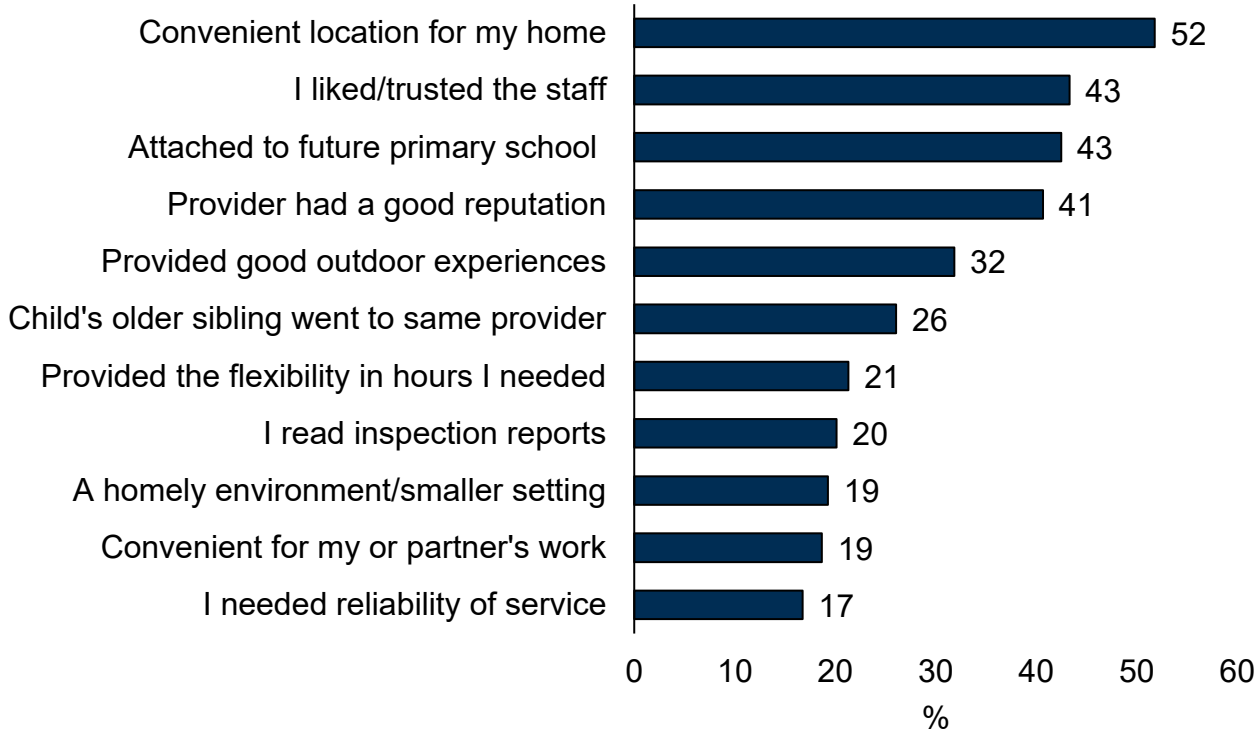
This chapter further explores the choice and use of funded ELC for three- to five-year-olds and eligible two-year-olds. It covers hours of funded ELC used, reasons for using or not using funded ELC, and reasons why some parents do not use their full entitlement of funded ELC.

4.1 Choosing a funded ELC provider

In the survey, parents whose children[13] were using funded ELC were asked how they decided upon their child's ELC provider. Parents were presented with a list of 16 factors to choose from, as well as 'other', and could select as many as applied.

As Figure 4.1 shows, parents were most likely to consider the provider's location (52%), whether they liked and trusted the staff (43%), continuity (being attached to their child's future school) (43%), and the provider's reputation (41%) when choosing an ELC provider. These were also the most cited factors in 2022.

Figure 4.1: How parents chose their child's funded ELC provider[14]



Base: All eligible for funded ELC who answered this question, n=6,157. (Don't knows and Prefer not to answers (PNTAs) excluded).

There were some notable differences by household characteristics in the reasons parents cited for choosing their child's ELC provider (see Supplementary Tables

[13] Parents could only answer this in relation to one of their children therefore if they have more than one child who was at the time using funded ELC they were asked this for one of their 3-5-year-olds. The question was also applicable for those using funded ELC for eligible 2-year-olds.

[14] Factors that were chosen by 10% or less of respondents are not included in Figure 4.1. The full results can be found in Supplementary Tables C11a-c.

C11a-c). Households in which two parents or one parent were in work were more likely to consider flexibility in hours offered when choosing an ELC provider (23% and 20% compared with 13% in which no parents were in work).

Reasons relating to accessibility were particularly considered by those living in remote areas (compared with accessible areas); the 20% most deprived areas (compared with the 80% least deprived areas), those who had a long-standing health condition (compared with those without a long-standing health condition), those with more than one child (compared with those with one child) and parents with a child (aged under six) with ASN (compared with those with no children aged under six with ASN). For example, those with a long-standing health condition that reduces their capacity a lot or a little were more likely to choose an ELC provider in a convenient location for home (60-63%, compared with 53% of those with no long-standing condition).

Those living in the most deprived areas and in remote areas appear to have had less choice of provider. For example, 19% of those living in remote areas said their ELC setting was the only one where they were offered a place (compared with 7% of those living in accessible areas).

Parents with a long-standing health condition or with a child with ASN were more likely to consider reasons relating to quality of the provider. For example, parents with a child with ASN were more likely to consider a setting with staff they liked/trusted (49% compared with 42% of parents without a child with ASN). Parents with a long-standing health condition which reduces their capacity a lot were more likely to consider settings which provide good outdoor experiences (41%, compared to 31% of those without a long-standing health condition).

Factors considered by parents in interviews and open text responses were similar to those reported in the survey. These included choosing providers based on their flexibility; accessibility (e.g. proximity to home, work or school); quality (e.g. of the staff and environment); and ability to meet children's ASN.

Interview participants shared that they wanted a provider that fit with their work schedules as well as school timings for older children. When applying for an ELC placement, some were able to get their first choice of ELC setting, while others were offered a place that did not meet their family's needs. Some participants stated that they had no choice in ELC providers or hours offered by settings. This was either due to a lack of ELC providers in the local area or lack of availability within ELC settings (see Chapters 8 and 10).

Along with challenges in getting a placement, participants said they had little choice in the types of ELC available. They highlighted that the most common ELC in their local area were private and LA nurseries. Similar to the survey's findings, this was particularly highlighted by participants living in rural and remote areas, who reported having only one ELC provider in their local area.

Participants also highlighted the importance of the proximity of ELC providers to work, home or school to help with drop-off and pick-up times, transport and

accommodating employment and school schedules for older children. There was also consideration of proximity to other types of childcare they used, such as choosing ELC settings in areas which were more accessible to family members and childminders.

Consistent with the survey's findings and open text responses, interview participants discussed taking the following factors into consideration: Care Inspectorate reports; experiences and recommendations from friends, family, co-workers and health professionals; availability of outdoor spaces and opportunities for children to explore nature; ELC settings which align with their family's religious beliefs; wanting their children to attend the same ELC setting; and schedules of settings that aligned with their family's needs. In open text responses, parents reported that the quality of outdoor and meal provision were also key deciding factors. For example, some reported choosing completely outdoor settings or settings which offered healthy meals and accommodated dietary requirements.

In open text responses, some parents said they considered culture and language when choosing a provider. They chose settings that had 'ethnic diversity' or supported Gaelic medium education. Choosing to remain with the same provider their child had attended prior to becoming eligible for funded ELC was mentioned by others.

The suitability of providers to meet their children's ASN was also an important factor raised in interviews. Some participants reported that they chose smaller settings with fewer children, as they thought this would allow staff to offer more individualised support for their children. Another deciding factor was that settings were perceived to have the funding and resources, were receptive to accommodating ASN, and staff had the appropriate training, skills and qualifications. This sometimes meant choosing providers in locations that were less convenient.

> We are very lucky that there is quite a lot of nurseries to choose from around here. I chose one that is a wee bit further away from where I live but that is for personal reasons because like the consensus was they were very good with children who have Additional Support Needs and two of my children are on the [Autistic] spectrum. So that's why I chose that nursery. (Parent of a two-year-old and a three- to five-year-old)

Additionally, there were participants who highlighted that there was insufficient information on whether settings were equipped or trained to support children with ASN when applying for funded ELC.

It was common for participants to raise the need for routine and stability for their children with ASN. They discussed choosing not to have split placements with different ELC providers and picked nurseries that were attached to the primary schools that they intended their children would attend in the future. There were also participants who felt their current ELC setting did not meet their needs and were looking for an ELC provider which specialised in supporting children with ASN.

In interviews, parents also discussed their reasons for choosing different types of ELC. There was a perception that nursery settings would most benefit their

children's social development. They wanted their children to interact with other children of a similar age and in an environment similar to school. This was why some participants said they sent their child to a larger ELC setting such as a nursery, rather than a smaller ELC setting such as a childminder. This was also linked to ASN, as participants with children who had speech delay thought it would be beneficial for them to socialise with more children than would be the case receiving ELC from a childminder. They also chose local nurseries to ensure their children could make friends who lived in the local area.

> Everybody is on first name basis because it's so small so that's the advantage of a small [nursery] school and that's exactly why we wanted it. […] Everybody knows who [name of child] is, everybody knows how to treat him and what's going on with him. But again that's the reason we moved out here or one of the reasons we moved out here. It was for his benefit as well as ours. (Parent of a three- to five-year-old)

However, smaller ELC providers were often chosen by participants because they wanted their children to interact and play with other children but in a quieter, less busy environment. This was particularly the case for those with children with ASN who felt larger settings could be too noisy for their child and a smaller setting could better meet their child's needs with more one-to-one time with ELC staff. One participant moved from an urban to a rural location to ensure their child with ASN would get more individual support in a quieter setting.

Finally, there was a preference among some participants to split their funded hours across different settings, but this was limited by their child's ASN and the availability and flexibility of ELC providers in their local area. Additionally, there were participants who were unaware that they could apply to other ELC providers, such as childminders or playgroups, or that they could split their funded hours across different types of ELC settings.

4.2 Use of funded ELC

As noted in Chapter 3, almost all (95%) survey respondents with a three- to five-year-old and most (83%) with eligible two-year-olds were using funded ELC for their child at the time of the survey. These figures are shown in Supplementary Tables C1a and C1b. This is similar to the findings in 2022 (97% and 86% respectively).

While there were no differences in the use of funded ELC by subgroups for three- to five-year-olds, there were differences for two-year-olds. Respondents more likely to use funded ELC for their two-year olds were one-parent households (91%, compared with 74% of two-parent households) and households with no or one parent in work (89% and 88%, compared with 67% of households with two parents in work). These differences were also highlighted in 2022, and are likely to be linked to the eligibility criteria for funded ELC for two-year-olds (see Section 3.1.2).

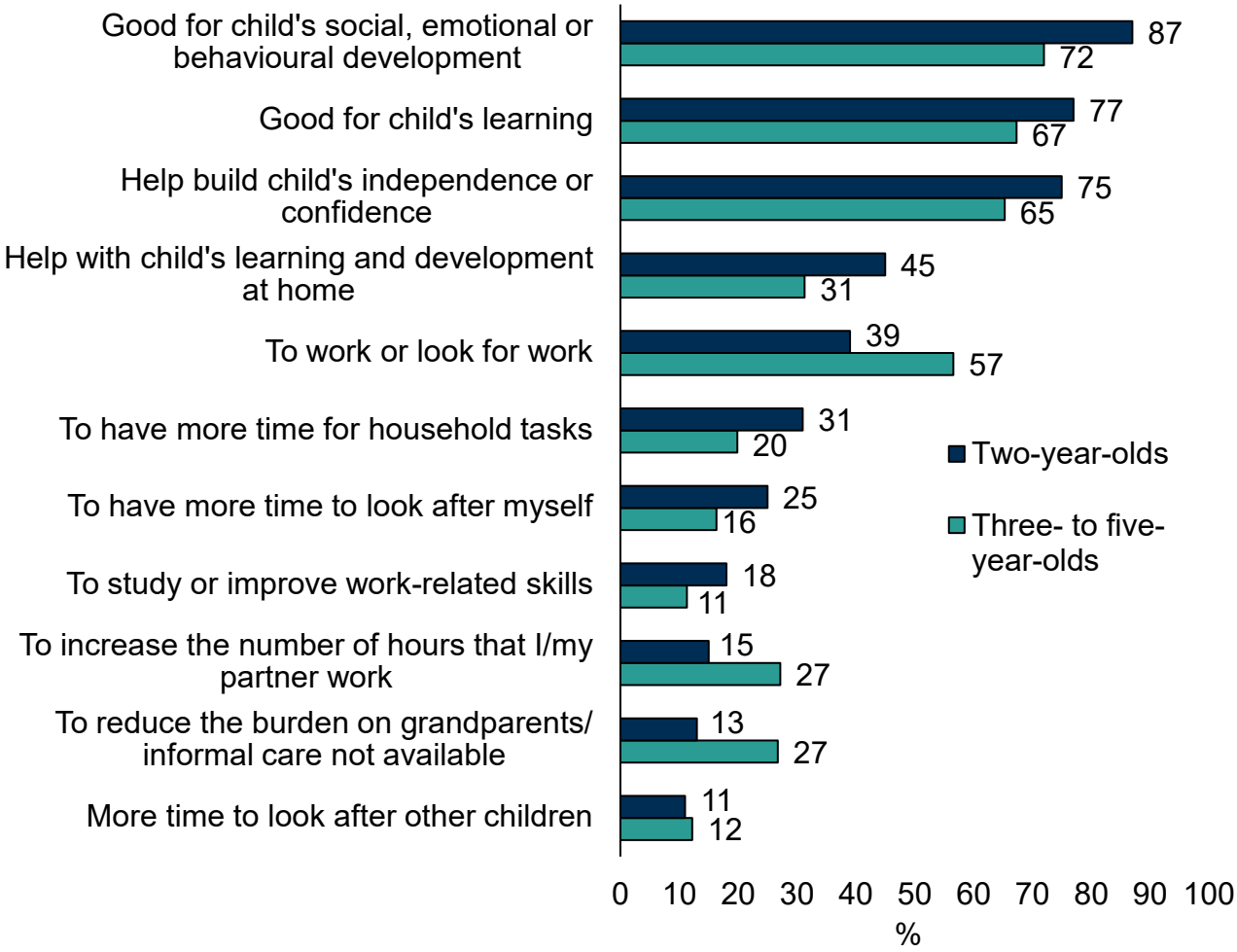
In interviews, there was confusion among some participants regarding the eligibility criteria. For example, some parents of two-year-olds said they only became aware of funded ELC for their child when speaking to professionals, such as their health visitors, who supported them to apply for a placement. Participants also observed that the availability of funded ELC for two-year-olds varied by local authority (LA).

It's not accessible and it's not signposted enough and it's limited spaces apparently and limited funds again. So that's another thing that kind of puts you off, because will your child get it? (Parent of a two-year-old)

4.3 Reasons for using funded ELC

In the survey, parents were asked what their main reasons were for using funded ELC for their child (Figure 4.2).

Figure 4.2: Reasons for using funded ELC for three- to five-year-olds and two-year-olds[15]



Base: Parent respondents who are using funded ELC (unweighted base for three- to five-year-olds, n=6,084; unweighted base for two-year-olds, n=197)

For both two-year-olds and three- to five-year-olds, parents most commonly stated they enrolled them because:

- It will be good for their child's social, emotional or behavioural development including mixing with other children (87% and 72%)
- It will be good for their child's learning (e.g. speech and language skills, counting, creativity etc.) (77% and 67%)

[15] The option of 'Other' is not displayed in Figure 4.2. The statements in Figure 4.2 have also been shortened – please see Supplementary Tables C3a-C4c for the full results.

- It will help build their child's independence/confidence (75% and 65%)
- They could work or look for work (39% and 57%).

These were also the most common reasons given by parents in 2022.

There were some notable subgroup differences concerning the reasons for using funded ELC for three- to five-year-olds. For example, those most likely to report that they used funded ELC to help their child's confidence/independence, learning, or social, emotional or behavioural development were households: with at least one child under six years old with ASN; with no or one parent in work; or with two or more children (see Supplementary Tables C3a-c).

However, those most likely to report that they used funded ELC to work or look for work were households: with two parents in work; earning £60,000 and over per annum; in the 80% least deprived areas; with no children under six-years-old with ASN; and with parents without long-standing health conditions. Single parents were more likely than two-parent households to report that they used funded ELC to study or improve work related skills.

In interviews and open-text survey responses, parents further discussed their reasons for using funded ELC. Participants reiterated that improving their child's learning and development were key reasons why they chose to use ELC.

Improving children's development was also discussed within the context of ASN. Some participants had professionals, such as health visitors, recommend placing their children in ELC settings to benefit their child's development. For example, some children who were non-verbal or had language and communication difficulties were able to receive specialised or one-to-one support within ELC settings. See Chapter 10 for more detail on the perceived impact of ELC on children's wellbeing.

School readiness and opportunities for learning were other reasons that participants used funded ELC for their child(ren). There was a desire among some for their children to start their learning journey from a young age and to prepare older nursery-aged children for primary school. Placing children in LA nurseries attached to schools was viewed as a way of ensuring children would have continuity in their schooling when transitioning from nursery to Primary 1 alongside the same peers. Additionally, participants shared that there was an expectation for their children to attend ELC. Some said that they wanted their child to fit in with the culture and community, while others thought it was mandatory for children to attend.

Another reason participants used funded ELC was to support their own mental and physical health. For example, disabled participants said that they were able to attend appointments, or have recovery time, while their child attended ELC. There were participants who said it allowed time for their caring responsibilities (see Chapter 10).

> I am a carer for my disabled mum so the hours also help for me to provide this care. (Open text response)

Other reasons for using funded ELC that were shared in interviews and open text responses were the need for childcare whilst working and the lack of affordability of paid childcare. Both single-parents and households where both parents were in work, described challenges with navigating work schedules and managing childcare. This was particularly difficult for those who had no other support for childcare, such as family support. Therefore, funded ELC was valued because parents would have otherwise been unable to afford childcare for their children (more detail on impact on work/education in Chapter 10).

4.4 Reasons for not using funded ELC

Parents of three- to five-year-olds who were not using any funded ELC (n=203) were asked why they were not using funded ELC. They were given a list of 13 options (including other) to select all that applied to them[16]. Among those who were eligible for funded ELC at the time of the research, the most common reasons for not using funded ELC (excluding 'other' reasons) were that they thought that their child was too young (43%), they wanted and were able to look after their child themselves most of the time (16%), and they were not aware of the availability of funded ELC (15%)[17]. See Supplementary Tables C9a-C9c for the full findings.

In interviews and open text responses, it was common for parents whose three-year-old only had a place in an ELC setting from August to express frustration that their child could not receive funded ELC as soon as they turned three. They observed that start dates for ELC settings varied by LA with some children being able to start as soon as they turned three years old[18].

Some participants with eligible two-year-olds were not using funded ELC because a place was not available and they were on a waiting list. For some, they reported this was because the deadlines for requesting a space were not clear. As stated in section 4.1, there was also a perceived lack of clarity on the eligibility criteria. While some parents did not know if their two-year-old was eligible, others understood the criteria but they felt it was unfair. They thought the eligibility criteria should not be based on low income given the high costs of childcare and the benefits ELC can have for younger children. Participants with eligible two-year-olds would like other parents to receive the benefits they have from funded ELC. Parents of two-year-olds with ASN who were not eligible for funded ELC felt their child would benefit from starting ELC sooner.

Finally, some parents of two-year-olds relied on family members, co-workers, health professionals and friends to inform them of their entitlement to funded ELC. Participants also discussed not being aware if they were eligible for funded ELC

[16] Only 36 respondents with a two-year-old were not using funded ELC. This data is not discussed in the report but can be found in Supplementary Tables C10a-c.

[17] Parents who selected 'Other' as a reason for not using funded ELC for their three- to five-year-old were excluded from these figures. This included respondents who stated that their child had already started school and has answered these questions despite their child not being eligible for funded ELC and also included those who stated that their child will be shortly starting funded ELC.

[18] There is some variation by LA in three-year-old eligibility criteria: some LAs use 'term after 3rd birthday' or 'month after 3rd birthday', while others use 'at 3rd birthday'.

due to not having access to public funds. In these cases, there was a sense of confusion among parents about whether using funded ELC could impact their right to stay in the UK.

> My husband and I weren't so keen in accessing local spends because any time you go forward, go through all the processes in the end they will tell you 'well you're not eligible for public funds,' so we just leave it. (Parent of a three- to five-year-old)

4.5 Use of full entitlement of funded ELC

Since August 2021, all eligible children have been entitled to 1140 hours of funded ELC. This equates to 30 hours per week during term time or 22 hours per week over the full year. In the survey, parents who used funded ELC for their children were asked if they use the full entitlement. The majority of parents of three- to five-year-olds (87%) and around three-quarters (73%) of parents of two-year-olds said that they use their full entitlement (Table 4.1). In 2022 these figures were 73% and 52%, suggesting an increase in parents using all their funded hours. In 2025, 11% of parents of three- to five-year-olds did not use their full entitlement, while in 2022 the figure was 19% and 8% said they don't know.

Table 4.1: Proportion of funded ELC entitlement used

	3-5 year olds	Eligible 2-year-olds
Full entitlement used	87%	73%
Full entitlement not used	11%	22%
Don't know	2%	5%
Unweighted base	6,084	197

Base: Parents who used funded ELC

Parents of three- to five-year-olds most likely to use their full entitlement of funded hours were in households:

- With one child (91%, compared with 86% of households with two children and 82% with three or more children).
- With at least one child with ASN (88%, compared with 82% without a child with ASN).
- In accessible areas (88%, compared with 76% in remote areas).

In the interviews, participants described their experiences and views of using the full entitlement of funded ELC. This included those who used all of the funded hours for some of their children but not others.

The main reason participants used their full entitlement of funded hours was because they needed them to meet their and their family's needs. However, the extent to which the full entitlement of funded hours met these needs varied. While there were participants who viewed the full entitlement of funded hours as sufficient in meeting their needs in terms of work, caring responsibilities and child development, others said they needed more funded hours, or greater flexibility for using the hours, to better meet their needs. Some parents with children with ASN

described the value of ELC for their children and would like more hours to further benefit their child.

> Like the autism and things like that, nursery has actually made a massive impact on our family life. Like my little girl I've noticed so much improvement with her behaviour and things like that. I think the social aspect and the routine aspect and everything has completely been beneficial to her. (Parent of a two-year-old)

Whether participants were able to use their full entitlement of funded hours was often dependent on whether the hours offered by ELC settings accommodated school schedules of older children, work commitments and children's ASN. To best meet their work commitments, some participants had to split their funded hours across two settings, such as a school nursery offering childcare 9am-3pm, and a childminder at the start and end of the day to provide wraparound care. One parent stated that the full entitlement only suited them because they were not currently in employment. See Chapter 8 for more detail on how flexibility affects parents' use of their full entitlement of funded ELC.

> Their [nursery's] offer was that we could have two full days half past eight till half past four which was fine because […] we were quite happy to use the other days at the playgroup. (Parent of a three- to five-year-old)

4.6 Reasons for not using full entitlement

Parents who did not use the full entitlement of funded ELC (11%) were asked what their reasons were for this. Parents were provided with a list of 13 potential reasons to select from (and 'other') and asked to select all that applied to them.

Similarly to 2022, parents of three- to five-year-olds who did not use their full entitlement primarily did so out of choice. The most common reasons were: that they did not need to use childcare for so many hours (35%), that they did not want childcare for so many hours (22%), and that they felt children should not be in nursery for that long (27%). However, 15% said they could not get the days or hours they wanted at the setting of their choice. Three in ten (30%) chose 'other', and the most common reasons provided were:

- They were building up their child's hours gradually – because their child was too tired from full days or they felt their child was too young for all the hours
- Their child attended extracurricular activities during nursery hours
- They did not work, worked part-time, or were on maternity leave so they could look after their child the rest of the time
- They wanted to spend time with their child before they start primary school
- The hours that they used worked around parents' working hours

Parents gave similar reasons for not using their full entitlement for eligible 2-year-olds. The most common reasons related to not needing childcare for so many hours (23%) and that their child wouldn't like to be separated from them for so many hours (21%). Among those who selected 'Other' (45%) most of the responses were also related to either of these same reasons. The full breakdown of reasons cited

can be seen in Supplementary Tables C7a-C7c for 3-5 year olds and C8a-C8c for eligible 2-year-olds.

In interviews and open text responses parents also shared their reasons for not using their full entitlement of funded ELC. Similarly to the survey, there were participants who stated that they did not use the full entitlement because they did not need them. There were, however, participants who expressed a desire to use more of their funded hours in the future as their child adapts to being in ELC.

It was common for participants with eligible two-year-olds to report they did not use their full entitlement because their ELC provider did not offer enough hours or days to enable them to do so. Those parents were not able to split their funded hours across ELC providers, either because there were no other providers available locally, or other providers did not meet their or their child's needs. Parents in both interviews and open text responses shared that they had no other choice but to accept the hours offered to them with limited availability. Participants attributed being offered fewer hours either to limited funding for ELC settings or they believed that the entitlement for two-year-olds was less than for three- to five-year-olds. In these cases, participants expressed a desire to use the full entitlement of funded ELC once their child turns three years old.

Having children with ASN also affected whether some participants used the full entitlement of funded ELC for their children. They were concerned about how their children would cope if they used their full entitlement, highlighting the time taken to settle their child and have them adjust to a new environment. As a result, some participants opted to gradually increase their children's attendance with the support of the ELC setting (see Chapter 8 on flexibility).

> One of the things about him with being on the [autism] spectrum is that he thrives on routine [...] he was just obviously a bit overwhelmed with it and so what we've had to do is, we've had to kind of build up the amount of time that he spends at nursery in a day and we're still working on that. He's only there at the moment for 2 hours a day, but that started off being 15 minutes that he was able to do. (Parent of a three- to five-year-old)

Other reasons participants were not using their full entitlement included a lack of flexibility and awareness of childcare options and hours available, a lack of childcare options, particularly in more rural areas, and a preference to have children at home or looked after by family members. Furthermore, some participants had negative experiences with their ELC setting which resulted in them not using all of their funded hours.

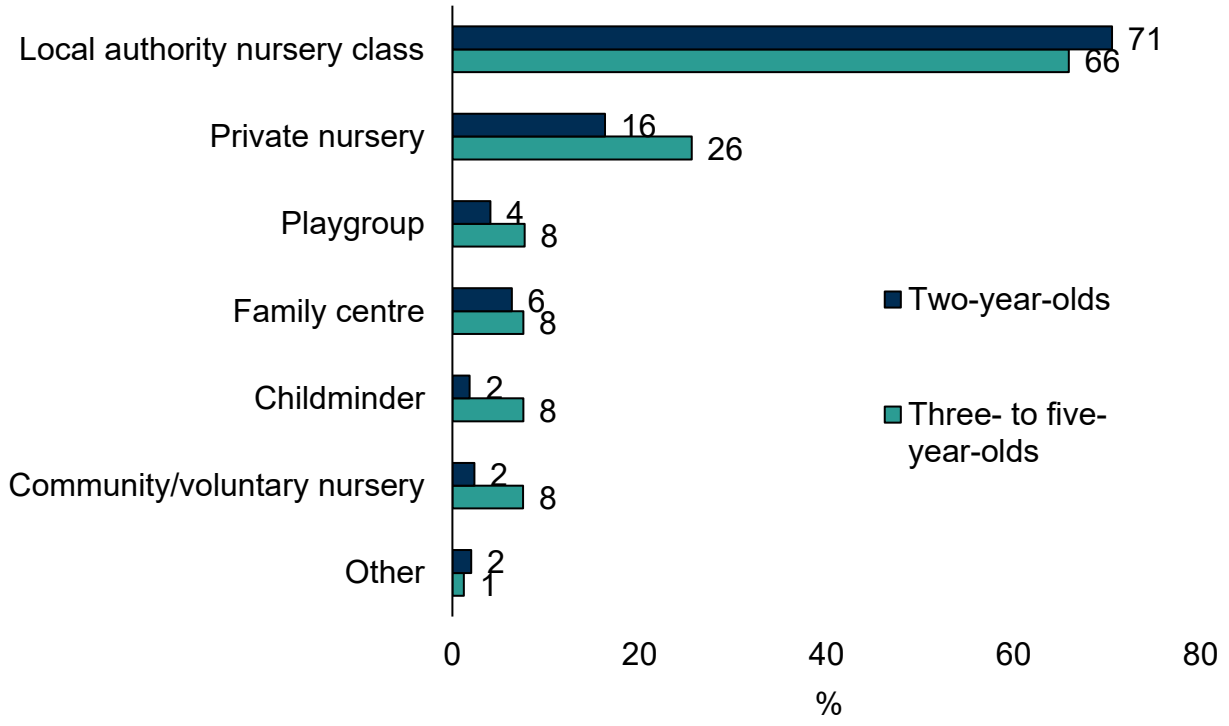
4.7 Profile of funded ELC use

4.7.1 Types of funded ELC

All survey respondents who had eligible two- and three- to five-year-olds were asked what types of funded ELC their children had attended since August 2024 (Figure 4.3).

For those who used funded ELC, a local authority nursery was the most common setting used for both two-year-olds (71%) and three- to five-year-olds (66%). Private nursery was the next most common type of funded ELC for both three- to five-year-olds (26%) and two-year-olds (16%). This is similar to the 2022 findings. In 2025 the proportion of parents of three- to five-year-olds using childminders and community nurseries was 8% for each and in 2022 was 3% and 2%.

Figure 4.3: Types of funded ELC attended since August 2024



Base: parents who use funded ELC for their child (unweighted base, n=6,804 three- to five-year-olds, n=197 two-year-olds)

Consistent with 2022 findings, households with three- to five-year-olds more likely to use funded hours at a local authority nursery were:

- Single-parents (73%, compared with 67% of two-parent households).
- Those with no parents in work (80%, compared with 71% of households with one parent in work and 65% of households with two parents in work).
- Those with child(ren) aged under 6 with ASN (75%, compared with 64% of those without children aged under 6 with ASN).
- Living in remote areas (84%, compared with 65% living in accessible areas).

4.7.2 Year-round and term-time use of funded ELC

Survey respondents were also asked how the funded ELC hours that they used were spread over the year. They could select during term-time only, year-round, other or don't know. For three- to five-year-olds, an equal proportion of respondents used funded ELC year-round, including school holidays (49%) or school term time

only (49%). This differs from 2022 results in which a higher proportion used funded ELC term time only (57%, compared with 41%).

Respondents with three- to five-year-olds more likely to have used funded ELC year-round in 2025 lived in two-parent households (48%, compared with 38% of single-parent households) and households with two parents in work (51%, compared with 39% with one and 31% with no parent in work).

Parents of two-year olds were more likely to use funded ELC during term-time only (52%, compared with 40% who used funded ELC year-round). In 2022 49% made use of funded ELC during term-time only and 47% did so year-round. Those more likely to have used funded ELC term-time only in 2025 were households with no children with ASN (59%, compared with 43% of respondents with at least one child with ASN)[19] and those with two or more children (55-58% compared with 44% with one child)[20].

In interviews, parents explained their reasons for using year-round or term-time only ELC. It was common for participants to report that they did not actively choose the ELC hours they used for their child, and that instead it was what was available at their preferred setting or the setting which had space for their child.

For those who opted for year-round ELC hours, this helped them to work or increase their hours at work; helped children, particularly those with ASN, to keep a routine; it helped prepare children for the routine of school hours in the summer before starting school; and it provided parents with time for themselves or to spend more time with other children in their household on a one-to-one basis year-round (see Chapter 10 for more details on the impact of funded ELC).

> [Year-round ELC]: I think it's a lot more beneficial […] when she is off nursery it can be quite challenging because she does like that set routine and her set days and she loves nursery. (Parent of a two-year-old)

Interview participants who opted for term-time only ELC did so primarily because they did not need ELC year-round. Often these were parents who had older children at school who were able to use school holidays for family holidays and/or it was more affordable to have younger children at home during these periods too.

Other participants used term-time only childcare because they did not have any other choice. For some, this was because the ELC offered to them was term-time only or they did not have enough funded hours to cover year-round provision and could not afford to pay for additional hours. There were participants who worked part-time to enable them to fit this around ELC. Additionally, there were participants with a child with ASN who reported only using term-time ELC because their provider did not offer holiday hours and they could not find alternative ELC which met their child's needs.

[19] Please note the base sizes for this subgroup ranged from 85-111 which is relatively low and should be viewed with caution.

[20] Please note the base sizes for this subgroup ranged from 53-74 which is relatively low and should be viewed with caution.

> Over the six weeks summer holidays we don't have any kind of nursery provider or anything like that and it would be completely inappropriate to place him with a short-term childminder due to his needs. He needs to be somewhere where they know him, if there was going to be any kind of assistance it would have to be in his regular placement. (Parent of a three- to five-year-old)

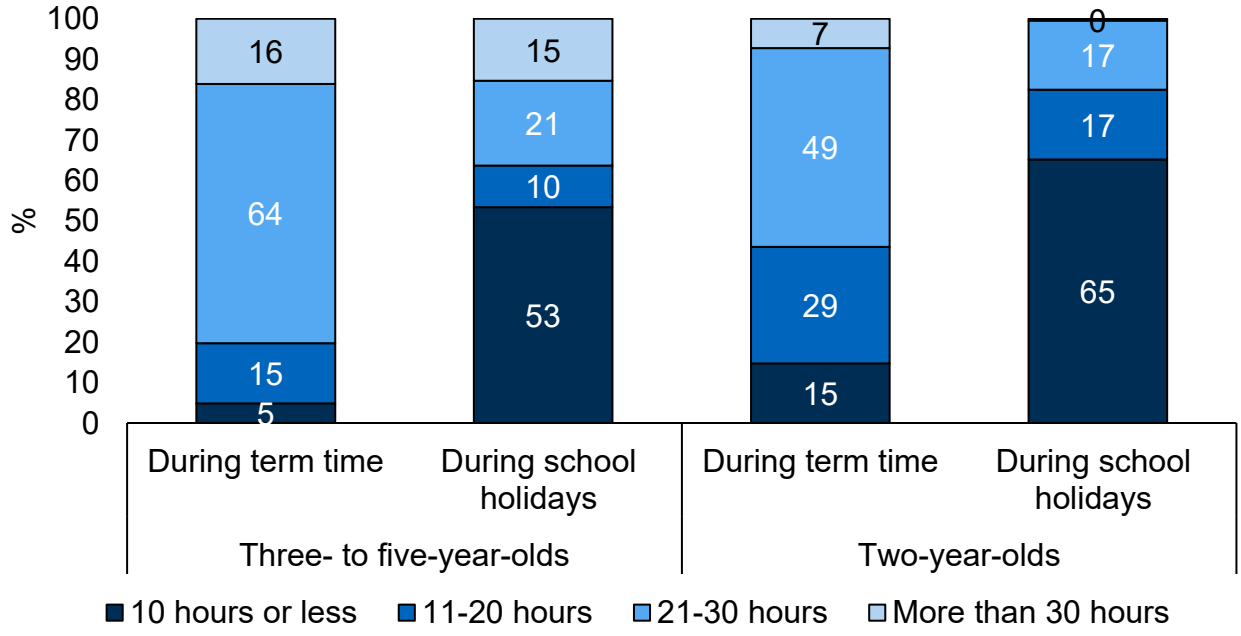
4.7.3 Hours spent at funded ELC during term time and school holidays

Respondents were also asked, in a typical week, roughly how many hours their child spent at funded ELC. Overall, three- to five-year-olds spent longer in funded ELC during term-time compared with two-year-olds (26.2 and 22.2 hours per week respectively). Three- to five-year-olds also spent longer than two-year-olds in funded ELC during the school holidays (13.0 and 7.4 hours per week respectively).

Households with two parents in work used more hours of funded ELC per week compared with households with either one or no parent in work both during term time (26.5 hours compared with 24.5 and 24.8 hours) and during school holidays (13.6 hours compared with 8.3 and 5.6 hours).

Figure 4.4 illustrates the hours spent in funded ELC across the year. In 2025, three- to five-year-olds spent longer in funded ELC than two-year-olds. For example, 80% of three- to five-year-olds attended funded ELC for more than 20 hours per week during term time, compared with 56% of two-year-olds. Differences by subgroup can be found in Supplementary Tables C24a-C29c and C36a-C41b.

Figure 4.4: Number of hours per week spent at funded ELC (banded) during term time and school holidays



Base: parents who used funded ELC (unweighted base, n=6,084 three- to five-year-olds, n=197 two-year-olds)

5 Affordability of childcare

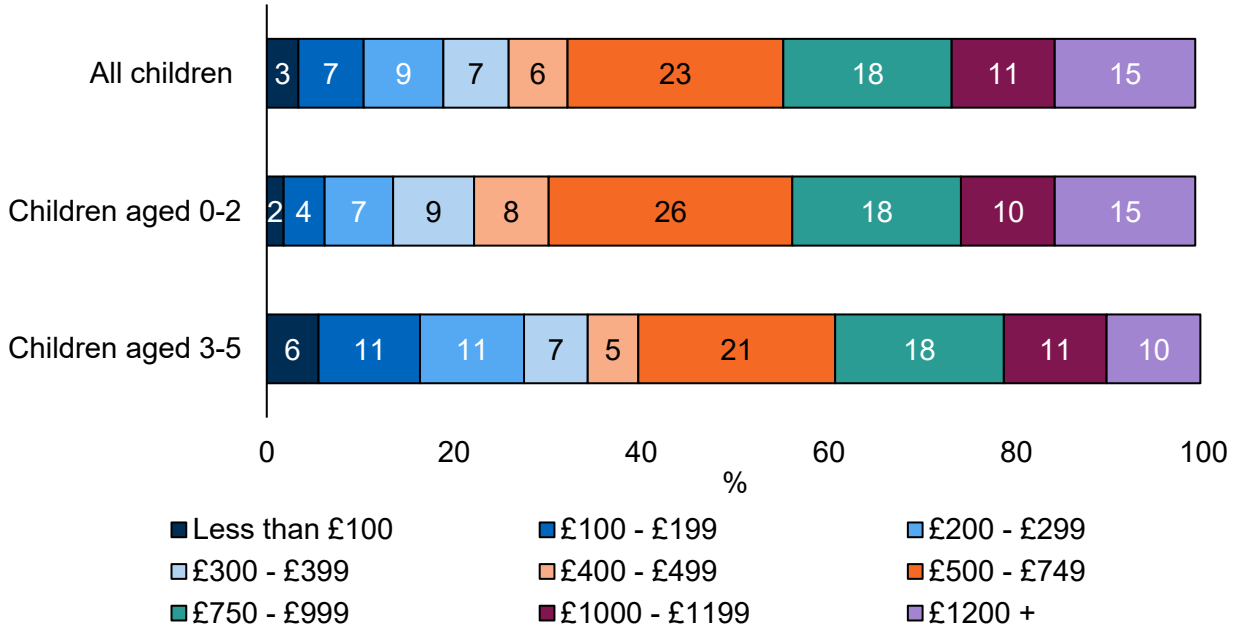
This chapter looks at the affordability of childcare for children aged under six, exploring the amount spent on childcare per month by age and difficulties faced in affording childcare.

5.1 Amount spent on childcare by age

Around half (47%) of all survey respondents used paid-for childcare. On average, these parents spent £726 per month. The average cost per month was £733 on children under three and £635 on children aged three to five. In 2022 the equivalent figures were £533 on children aged under three and £306 on children aged three to five, therefore this appears to have increased however these figures are not directly comparable[21].

It is not surprising that the average cost was higher for children aged under three than for three- to five-year-olds given eligibility for funded ELC. As shown in Figure 5.1, a greater majority of parents with children aged under three were spending over £500 per month on childcare compared with parents of three- to five-year-olds.

Figure 5.1: Amount spent per month on childcare, by age of the child



Base: Parents of children using paid-for childcare (unweighted base; all children, n=3,564; children aged 0-2, n=1,641, children aged 3-5, n=2,161).

For parents of children aged under three who paid for childcare, the mean amount spent on childcare increased as income rose, from £546 per month for households on incomes under £16,000 per annum, to £832 for those earning over £60,000. Those living in the 80% least deprived areas spent more on average per month

[21] It should be noted that these figures are not directly comparable because in 2025 the amounts spent on childcare was collected for each child and then averaged whereas in 2022 respondents were asked to total this across age groups.

compared with those living in the 20% most deprived areas (£753 compared with £544), and those who spoke English as an additional language spent more monthly than those with English as a first language (£825 compared with £715).

For parents of three- to five-year-olds, households more likely to spend more per month on childcare were those:

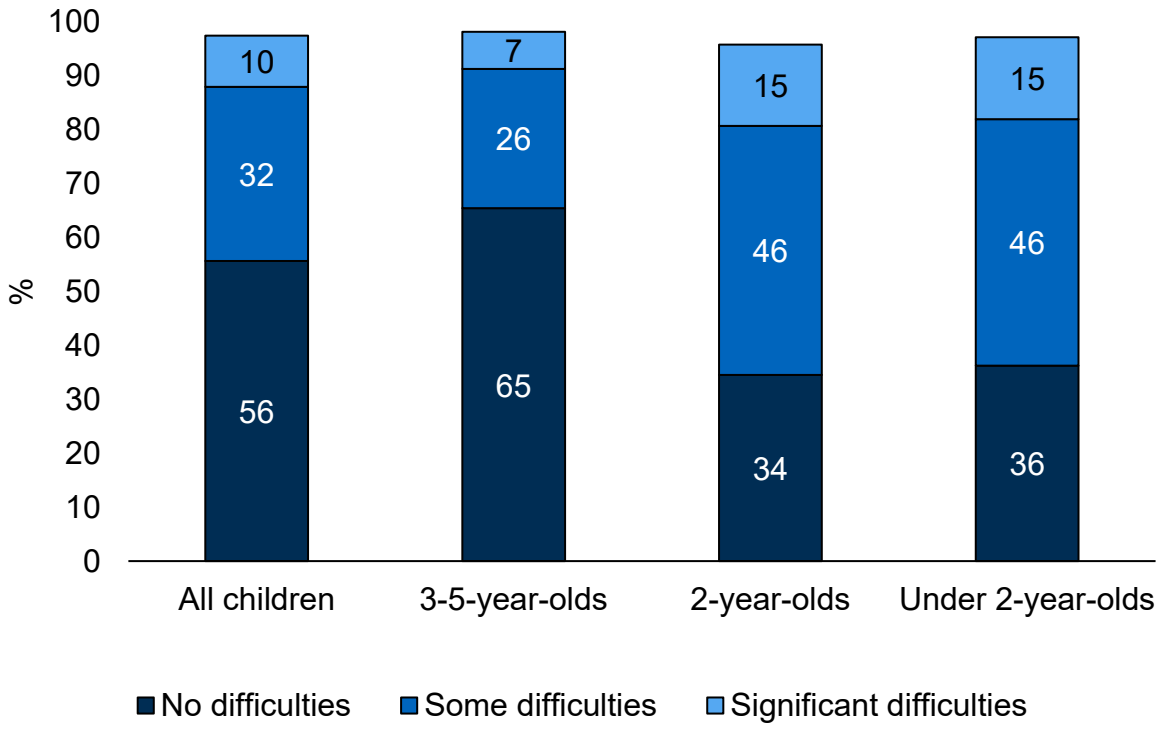
- With two-parents (£579 compared with £447 for single-parent households).
- With two parents in work (£587, compared with £424 for those with one parent in work).
- Living in the 80% least deprived areas (£819, compared with £494 for those living in the 20% most deprived areas).
- With one child (£780, compared with £415 for those with two children and £391 for those with three or more children).

Supplementary Tables D7a-D18d outline the average cost of childcare according to the combination of types of childcare used. Across the different combinations of childcare, the cost was greater for children aged under three, with those using paid-for childcare only spending the most across these age groups and overall.

5.2 Difficulties affording childcare

Survey respondents who paid for childcare were asked if they had experienced any difficulties affording their childcare costs for children below primary school age in the last 12 months (Figure 5.2).

Figure 5.2: Difficulties experienced in affording childcare in the last 12 months, by age of child



Base: Parents of children using paid-for childcare (unweighted base; all children, n=3,567; children aged 0-1, n=968, children aged 2, n=866, children aged 3-5, n=2,547).

Fifty-six per cent of respondents said they had not experienced difficulties affording childcare in the last 12 months. This figure was 34% in 2022. However, 42% had experienced either some difficulties (32%) or significant difficulties (10%) affording their childcare costs. In 2022 these figures were 46% and 16% respectively.

Parents of children aged under three were more likely to have faced difficulties in affording childcare in the last 12 months compared to parents of three- to five-year-olds. Around two-thirds of parents of under-three-year-olds had faced some (46%) or significant (15%) difficulties, whereas around a third of parents of three- to five-year-olds had experienced some (26%) or significant (7%) difficulties.

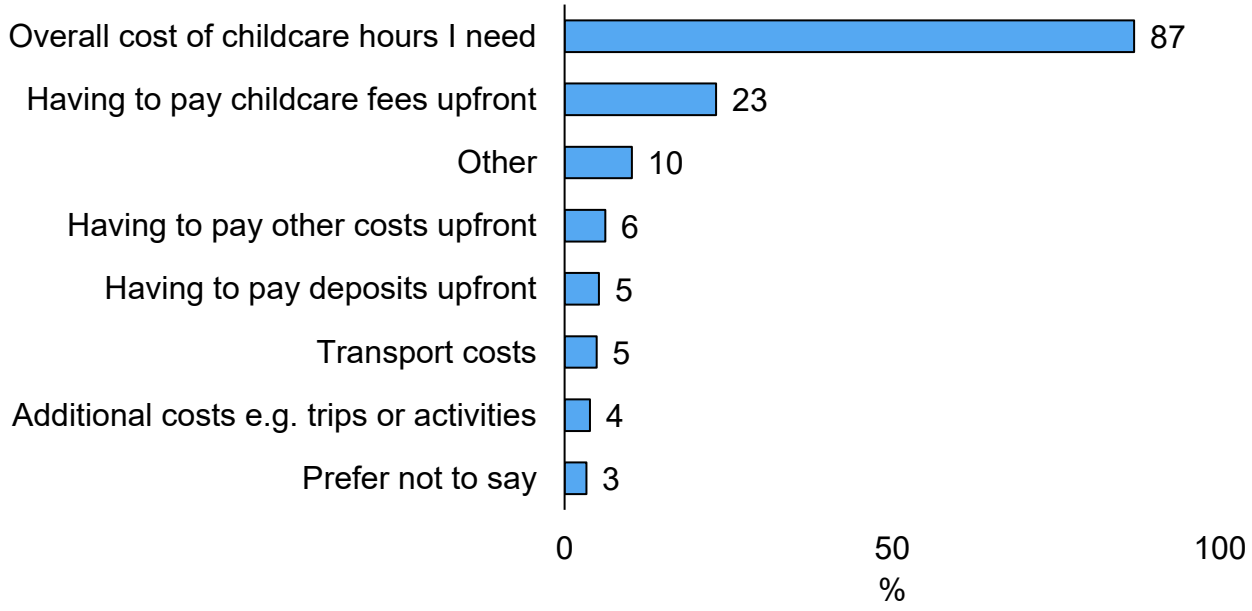
Respondents who were more likely to report having experienced no difficulties affording childcare costs in the last 12 months were from households with:

- Two-parents (53%, compared with 28% of single-parent households).
- Two parents in work (53%, compared with 32% with one or no parents in work).
- One child (66%, compared with 42% of households with two or 39% three or more children).
- No children under six-years-old with ASN (57%, compared with 41% of households with a least one child under six years olds with ASN).
- Living in the 20% most deprived areas (75%, compared with 46% of those in the 80% least deprived areas).

5.3 Sources of difficulties

Those who had experienced difficulties in affording childcare were asked what factors contributed to this (Figure 5.3). They were provided with a list of options and were able to select all that were applicable.

Figure 5.3: Factors making it difficult to afford childcare



Base: Respondents who had experienced difficulties in affording childcare in the last 12 months (unweighted base, n=1,416)

The majority of respondents (87%) said that the overall cost of the childcare hours they needed made it difficult for them to afford childcare. Around one-quarter (23%) said that having to pay childcare fees upfront made it difficult for them to afford. Factors that made it difficult to afford childcare did not vary between parents of children of different ages.

Those in two-parent households were more likely to say that the overall cost of the childcare hours they needed made it difficult to afford childcare (88% compared with 76% of single-parent households). Single-parent households were more likely to say that having to pay childcare fees upfront made it difficult to afford childcare (44% compared with 20% of two-parent households).

5.4 Affordability of additional funded ELC costs

In interviews, parents were asked whether there were any additional costs associated with their funded ELC hours. In Scotland, Funding Follows the Child guidance states that 'Settings delivering the funded entitlement must ensure that access to the funded hours are free at the point of access […] [that] additional charges to parents and carers relating to the funded hours must be optional' and that 'Every child receiving a funded ELC session will receive a free meal'[22].

Interview participants reported paying for extra supplies for their child, including nappies, wipes, suncream, and providing clothes or shoes. Some also described the cost of packed lunches or snacks as free meals were not available to children aged two- to five-years, or snacks were not provided by the ELC provider. These costs were generally described as manageable, and in many cases if participants could not afford these items the ELC provider would be able to supply these. Participants reported that providers often used money from fundraising or donations to be able to supply these items. Fundraising or donations were voluntary and generally seen as important for providers to be able to provide additional supplies to children from more disadvantaged backgrounds. However, participants did feel that providers should not have to fundraise in this way, and that the government should be providing more funding to cover these costs.

> They'll do like sponsored walks to try and raise money […] we understand why they do it but I think it's wrong when it's a government funded nursery […] There's an awful lot of kids that probably get sent to nursery and don't have a spare pair of clothes. (Parent of a two-year-old and a three- to five-year-old)

Some participants noted that the cost of travel to and from their ELC provider was a cause of financial difficulty, especially if the ELC setting was not within walking distance. This was particularly difficult for those who did not have a car as they relied on buses (where available) or taxis. Participants' travel costs were often higher due to limited availability of funded ELC provision in the local area. For example, one participant reported having to move area mid-year for personal reasons. In their new area, there was no space available at their local ELC provider for their child therefore, they had to take a space at an ELC provider that was

[22] Funding Follows the Child and the National Standard for Early Learning and Childcare Providers: Operating Guidance - gov.scot

further away which required travel by bus or car. Managing the cost of this travel was made more difficult because their partner could not travel or work due to a health condition. Therefore, they also were not able to work as they were needed to manage drop-off and pick-ups.

> There was no assistance on those costs at any point but they were well aware that we were sometimes during the winter we were paying a hefty amount of cash on the cabs. […] When you're going five days to the nursery it will be £200 [a week] easily just for the cab. (Parent of a three- to five-year-old)

> If there's a day where we just don't have the money, we don't have the fuel we just can't put her in and that makes us feel a bit bad as parents sometimes. But I mean at the same time they have gave her somewhere that's a bit too far away. (Parent of a two-year-old and a three- to five-year-old)

5.5 Paying for childcare

Interview participants were paying for childcare for a number of reasons.

5.5.1 Paying for childcare in addition to funded ELC

Some participants were paying for childcare as well as receiving funded ELC because the funded hours did not cover the hours they needed, for example because they did not cover their working hours. While paying for additional hours enabled them to work, the cost of the additional childcare was sometimes a similar amount to the hourly wage of the parent, and this was therefore a consideration when transitioning from part-time to full-time work. Some participants were not working, or were working part-time, because they could not afford to pay for any additional childcare. Participants said it felt as though they were being penalised for working due to the cost of childcare and restrictions around opening times of ELC providers.

> I earn £12.50 per hour and the hours at the nursery cost the same. […] You have to consider if it's worth to work more to only pay the nursery. (Parent of a three- to five-year-old)

> With wraparound childcare […] the compromise is either we do that or we don't work. […] if either myself or my husband decided we weren't working, we would then perhaps be looking at having some help and support financially from the government. […] It does feel like you are penalised because I don't know anybody that works a full-time job whereby they could perhaps start work at around about half past nine and finish at half past two. (Parent of a three- to five-year-old)

Top-up hours were not always available, dependent on the ELC provider. However, participants who did not have this option available to them said they would pay for extra time if it were available. Some were using alternative private childcare hours to meet this need. One parent described having to pay for half an hour of unfunded time in the middle of the day during their funded hours[23], and that they believed this

[23] The National Standard Operating Guidance states that 'settings delivering the funded entitlement must ensure that access to the funded hours are free at the point of access to the child and that parents are not required to purchase additional hours beyond the funded ELC entitlement in order to access their child's funded early learning and childcare entitlement'.

was a way for private providers to generate additional income due to insufficient government funding for the proportion of funded places they offered. Some participants stated that they would not be able to afford to top up their funded hours, or that they were having to reduce their paid childcare hours as they could no longer afford them.

> Financially I can't afford that when I'm not on placement […] I'll be changing it to half days come next week when I'm off just to save some money because, like I say, it's very hard to get that kind of money together quickly to then pay them. (Parent of a two-year-old)

Among participants who were paying for additional hours, there were those who said this was made affordable by a number of discount schemes available both term-term and during summer. For example, some said that having tax free childcare or Universal Credit childcare payments available to them made their childcare more affordable. It was also noted that providers offered discounts to parents who worked in the NHS, which parents said eased financial pressure. Participants noted that they would not be able to afford to pay for these hours without these discounts.

5.5.2 Paying for childcare as families' main provision

In interviews, some parents discussed paying for private childcare hours for eligible children as their main source of childcare. This was either because no funded spaces were available locally or because the funded hours offered by a provider were not sufficient to enable parents to work. Some participants also reported that their local funded ELC providers did not offer childcare for eligible two-year-olds, therefore they were using private ELC for their younger children. Participants paying for ELC, generally felt the cost for private childcare was very high, with some ELC providers increasing prices significantly or regularly.

> When we first started using the nursery it was like the cheapest one in the area. A couple of years ago it got bought over by a larger organisation who seemed to be buying up loads of nurseries in the area and I would say that we're pretty unhappy with the nursery since then, like the prices have gone up a lot and they put the prices up really regularly. They moved the way that they charge you from in arrears to in advance and they did that in December, at Christmastime. (Parent of a three- to five-year-old)

Some participants were receiving financial help from family members in order to afford private childcare. Participants primarily paying for private childcare also discussed the impact of multiple births on their childcare needs. They were advised by funded ELC providers and other parents with twins or triplets, that it would be difficult to place multiple children in a single funded provider due to a lack of spaces. This resulted in them opting for private ELC because the logistics of having children in different ELC settings would be challenging.

> The Head of the Nursery was very much like oh it's going to be really difficult to kind of find you a place because there's two of them […] it felt very like doom and gloom […] Our impression was that we weren't very likely to get a place. (Parent of a three- to five-year-old)

Having to pay for childcare in these circumstances caused financial strain. Some participants had to give up work to look after their children because the cost of childcare was too high, or was the same as what they would have made working.

> We did financial planning before we had children, we knew that we could afford two children. We had our second sooner than we'd planned but then when that turned out to be twins that's financially been extremely difficult. […] I was quite surprised that there was no government support at all for funding childcare for multiples and I did say if we'd have had triplets we just wouldn't have been able to cope. […] I've also had two interviews, like job interviews recently that I just can't take because I can't financially, I can't make it work with childcare. (Parent of a two-year-old and a three- to five-year-old)

5.6 Improving the affordability of childcare

As reported above, 42% of survey respondents had experienced difficulty affording childcare costs in the previous 12 months. The main challenge for parents for three- to five-year-olds was that the number of funded ELC hours available did not meet parents' needs, particularly for those who worked full-time. Therefore, some interview participants, particularly those in work, would like to see the number of funded ELC hours extended further.

To improve affordability within the current provision of 1140 funded hours participants would like there to be more funded ELC providers so they can choose a provider that offers the hours they need to fit around work and other commitments rather than pay for additional childcare. Participants would also like greater flexibility in how hours can be used at these providers so funded hours are only deducted for the hours a child is in a setting. This would allow parents to make use of all 1140 hours and stop or limit the number of hours of ELC they pay for. Participants perceived that the way ELC providers receive funding from the government for funded hours made this difficult. Participants who also worked in ELC settings said the funding provided to ELC providers per hour per child did not reflect the actual cost of the childcare. Therefore, it was not always financially viable for ELC providers to offer funded hours, further restricting the funded ELC provision available.

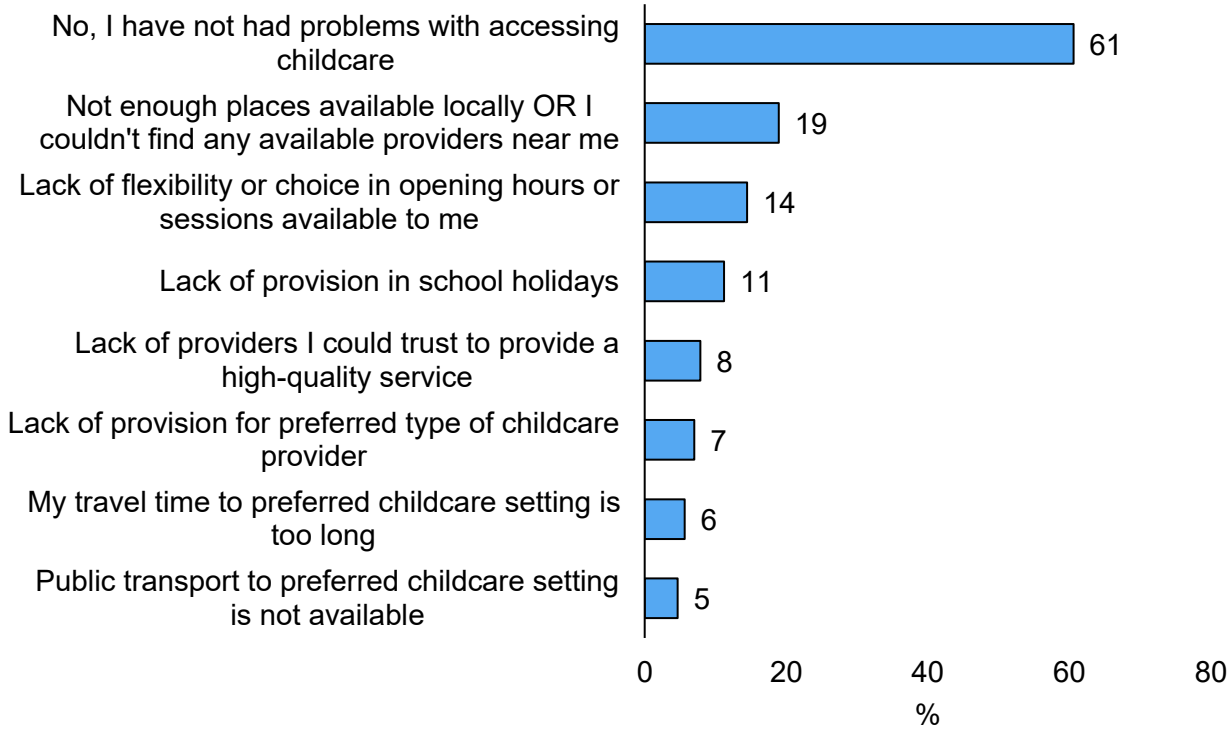
6 Accessibility of ELC

This chapter discusses parents' views and experiences of the accessibility of ELC, both funded ELC and paid-for childcare.

6.1 Accessing ELC

All survey respondents were asked if they had experienced any issues in 'accessing childcare that meets their family's needs'[24]. They were provided with a list of 10 responses (plus 'Other') and asked to select all that applied to them. Around three-fifths of respondents (61%) said they had not experienced any issues in accessing childcare (Figure 6.1). Subgroup differences can be viewed in Supplementary Tables E1a-c.

Figure 6.1: Respondent experiences of accessing childcare[25]



Base: All parent respondents (unweighted base, n=7,167)

For those who had experienced challenges accessing childcare (39%), the most common issues mentioned were that there were not enough places available locally or they couldn't find any available providers near to them (19%), there was a lack of flexibility or choice in opening hours or sessions available to them (14%), and there was a lack of provision in school holidays (11%) (Figure 6.1).

Those living in remote areas were more likely than those living in accessible areas to say that there were 'not enough places available locally or they couldn't find any

[24] This was a new question for 2025. It was intended to focus on wider childcare rather than just funded ELC.

[25] In Figure 6.1 options where less than 5% answered are not shown.

available providers near me' (25%, compared with 19%) and that there was a 'lack of provision in school holidays' (18%, compared with 11%).

Those in households with two parents in work were more likely than those with one or no parents in work to say that there was a 'lack of flexibility or choice in opening hours or sessions available to them' (17% compared with 12% and 3% respectively) and a 'lack of provision in school holidays' (13% compared with 8% and 5% respectively).

6.1.1 Factors that made accessing ELC easier

In interviews, parents spoke about their experiences of accessing ELC and what helped them to do so. Participants commonly mentioned that having their children at an ELC setting close to home was a factor that made accessing ELC easier. An ELC setting within walking distance made drop-offs and pick-ups more straightforward and less disruptive to daily lives, particularly for those who could work from home, were not working, or experienced long-term health conditions that affected their energy levels or mobility. Having their children at an ELC setting within walking distance also meant parents did not need to rely on having a car or public transport to get to and from the setting. This was particularly beneficial for those on low incomes and for families who lived in areas where public transport was limited, infrequent and/or expensive. Living or working near the ELC setting was also beneficial for participants with children with ASN who wanted to be in close proximity in case they were needed for support.

> I have to leave work a lot to go and calm down both of the kids, so like where my work is, it's literally not even a 5 minute walk from the school and nursery because the school and nursery are combined. […] I wouldn't have been able to put them anywhere else really. (Parent of a three- to five-year-old)

Factors that helped participants to access ELC included: having a child in an ELC setting which is on the way to a parent's employment; attending a setting which offers hours that fit well around working hours (particularly where ELC opens before 9am and closes after 3pm); and attending a setting which is in the same location as a school where older children attend, and offers similar hours to the ELC setting. Having support from others with drop-offs and pick-ups was another factor that made accessing funded ELC easier. Some participants had partners, family members, friends or childminders that could help which enabled parents to work or take older children to school. Further information on parents' experiences of accessing funded ELC can be found in Chapter 8.

6.1.2 Factors that made accessing ELC more difficult

In interviews and open-text responses, parents also spoke about the factors that made accessing ELC more difficult. The availability of funded ELC placements was central to challenges faced by families. Participants reported that they were not able to access ELC close to home because there were no spaces available. For some, this was because they had moved house after ELC spaces had been originally allocated so often local provision was not available. There were also participants who had more than one ELC-aged child and their children were placed at different ELC settings because there was insufficient space to place children

together. As a result, they had to travel to multiple ELC settings. For those who had to rely on public transport, the journey could take over an hour, which had an impact on the parents' ability to work.

> I'm okay because I drive, but I don't know how like if someone else was in the situation that doesn't drive, where you've got a three year old with a full government placement at one end of the town and then your two year old has been allocated a place at the bottom of the town, there's no way someone that does'nae drive would be able to do that. (Parent of a two-year-old and a three- to five-year-old)

Public transport was also not a viable option for all families, which made accessing ELC difficult. For some, public transport to settings was not available, particularly but not exclusively in rural locations. Some children with ASN found crowds distressing which made travelling by bus at peak times to ELC impossible.

> I couldn't use public transport with [name of child] as her autism got worse and more prevalent, she wasn't able to be on a bus when it was busy. So with her 9 to 3 placement there's no way that we could be on a bus with lots of other school children and if they were being loud or you know wild she wouldn't cope with that. So I had to learn to drive to make sure that I could take them and go and pick her up if she needs picked up. (Parent of a two-year-old and a three- to five-year-old)

There were also participants who reported a lack of choice of ELC settings in their local area. In interviews it was common for parents to say that they did not have a choice of ELC settings for their children because only one setting was available. This could be challenging for families because the hours offered may not meet the needs of the family, affecting the parents' ability to work or the number of hours they can work, either because of the hours on offer or whether term time only or year-round provision is available.

6.2 Improving the accessibility of ELC

As highlighted above, the most common challenge parents faced in accessing funded ELC was a lack of local provision. This meant some parents had to travel to access funded ELC, relying on cars, taxis or public transport. To address this challenge, parents in interviews and open-text survey responses would like to see more funded ELC provision made available locally.

7 Supporting children with ASN

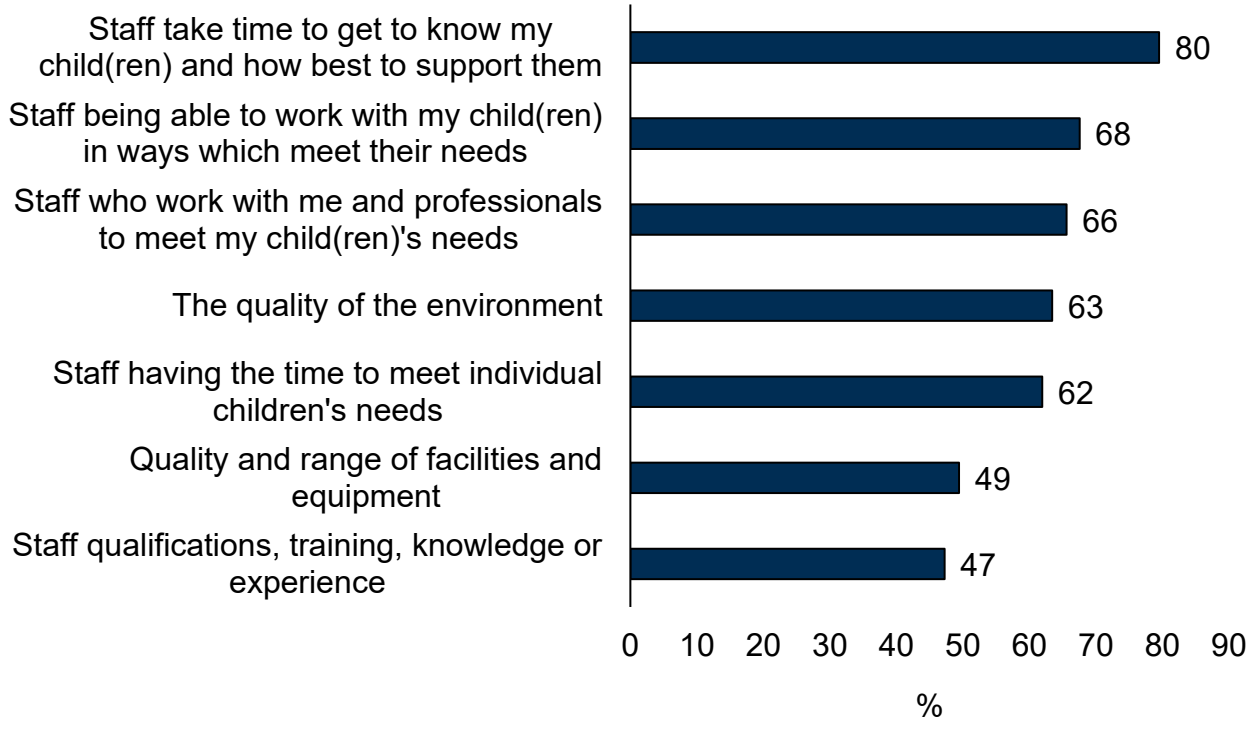
This chapter explores the experiences of families with children with ASN, including their experiences of finding and choosing ELC to meet their child's ASN, their level of satisfaction with their ELC provider and any reasons for dissatisfaction.

Parents with children eligible for funded ELC were asked if any of their eligible children had ASN. In total, 18% of parents said at least one of their eligible children had additional needs. They were given a list of 11 ASN to choose from and could also select 'other'. The most common types of ASN mentioned were language, speech and communication difficulties (7%), autistic spectrum disorder (6%) and social, emotional or behavioural difficulty (5%). This is consistent with findings in 2022. It is important to note that a number of parents reported that their children had multiple ASN, with the most common ASN often selected together.

7.1 Choosing a funded ELC provider

In the survey, parents of all children with ASN were asked how they chose an ELC provider to meet the ASN of their child, based on a list of nine options (plus 'Other') (Figure 7.1).

Figure 7.1: Basis of choosing ELC provider to meet child's ASN[26]



Base: Parent respondents of children under 6 with ASN (unweighted base, n=1,297)

Staff were important in parents' decision making. Four in five parents (80%) reported that they wanted staff who took time to get to know their child well and how best to support them. Around two-thirds wanted staff to be able to work with

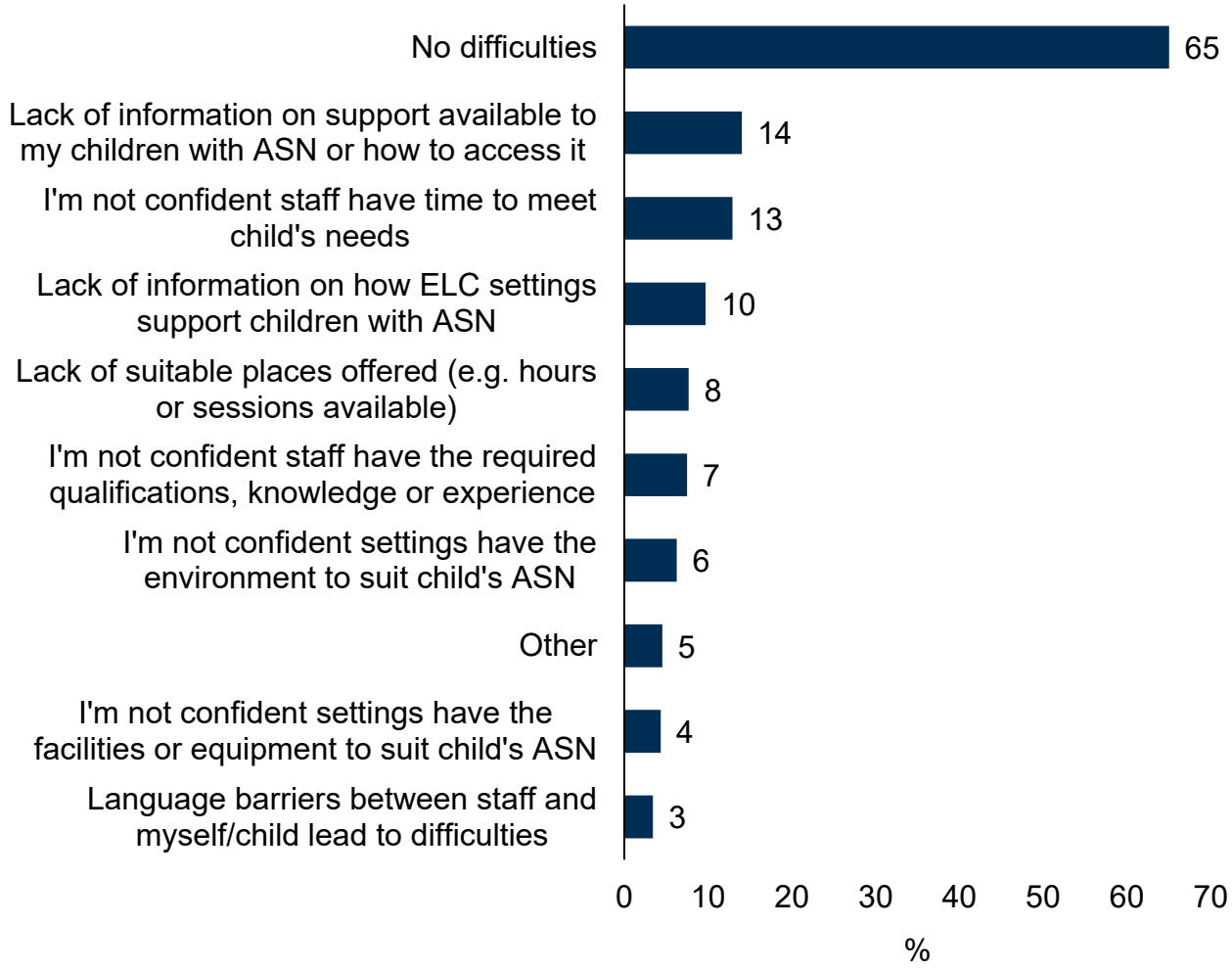
[26] Response options that less than 10% of respondents chose, have not been included in Figure 7.1. The full results can be found in Supplementary Tables E6a-c.

their child in ways which meet their needs (68%) and staff who work with them and other professionals to make sure that their child's needs are met (66%). These findings are similar to the findings in 2022.

7.2 Difficulties finding funded ELC that meets additional needs

Survey respondents were also asked if they faced any difficulties in finding funded ELC that met their child's ASN (Figure 7.2). Respondents were provided with a list of nine potential difficulties to choose from or could select 'Other'. Around two-thirds (65%) of parents said they had no difficulties in finding funded ELC that meets their child's ASN. This was consistent with 2022 (69%), compared with 52% in 2018.

Figure 7.2: Difficulties faced in finding funded ELC that meets child's additional support needs



Base: Parent respondents of child under 6 with ASN (unweighted base, n=1,297)

Households with no parent in work were more likely to have experienced no difficulties in finding ELC that meets their child's ASN (73%, compared with 63% of households with one parent in work and 62% with two parents in work). In 2022 there were differences by income and SIMD; this was not the case in 2025.

Around one-third (35%) of respondents experienced difficulties in finding funded ELC that met their child's ASN. The most common difficulties were: a lack of information on what support was available to their children with ASN or how they

can access support (14%), low confidence that staff had time to meet their child's needs (13%), and a lack of information on how ELC settings support children with ASN (10%).

There were few notable differences between subgroups by type of difficulty. An exception was that respondents in households in which English was an additional language were more likely to report language barriers between staff and either themselves or their child, leading to communication difficulties (7%, compared with 2% for households with English as a first language). In interviews, parents with children with ASN also mentioned communication difficulties with staff (Chapter 9).

7.3 Satisfaction with funded ELC provision for children with ASN

Respondents who said that they had a child aged under six with ASN and were eligible for funded ELC were asked how satisfied they were that their funded ELC met their children's ASN. The majority (89%) of parents said that they were either satisfied (33%) or very satisfied (56%) and only 6% were dissatisfied or very dissatisfied. This was similar to the findings in 2022 where 85% were satisfied or very satisfied. There were no notable differences by subgroups in 2025.

In interviews, parents shared why they were satisfied with funded ELC provision for their children with ASN. The understanding, experience and skills of staff were central. Participants stated that their children's ASN were well met when the ELC setting had staff who understood the ASN of their children and had the knowledge, experience and access to materials and tools to support these needs.

> [Child's] autism meant that she needed a lot more extra support especially with like transitioning to school and things. But the nursery they were really good, they arranged a lot of additional support for her. So she got extra visits to the school, visits to her new teacher, things like that. They made a lot of adjustments for her in the nursery as well. […] she's really really sensitive to noises. She could also wear her ear defenders whenever she needed them and they were really really good at giving her quiet time when she needed it. (Parent of a two-year-old and a three- to five-year-old)

Participants emphasised the importance of staff taking time to get to know their children and their needs to ensure that they could put the right support in place. In some instances, staff took it upon themselves to learn more about the needs of children and the tools that could support them. In others, they adopted strategies and tools parents used successfully at home. This was sometimes reciprocated, with ELC staff giving advice on tools or strategies for parents to try at home.

> They've been great to be fair […] they've even given me tips to try at home with her that I feel are really beneficial. So, I think they handle her kind of outbursts quite well but they're also positively impacting her in the home as well. (Parent of a two-year-old)

Participants said they felt confident that their child's ASN were being met when ELC staff took time to communicate with parents about what activities they have been doing with their child, and how the child was developing. ELC settings communicated in a range of ways, including online journals, 'stay and play' parental visits to the ELC setting, and meetings with parents.

> They try their best to give support to the child. […] They have something called a Learning Journal which is an online page. […] They occasionally record things about our child, like what he did today, what exceptionally he did, something like that just to encourage the child, like okay he has written this word today or he came for lunch today. So that really keeps us informed on his progress at the nursery. (Parent of a three- to five-year-old)

Finally, participants were satisfied when ELC providers were willing and able to work with external support to meet the child's needs, for example, providing space in the ELC setting for appointments with external support staff, instead of the child being taken out of ELC to attend appointments. This helped to minimise disruption for both the child and the parent. It was also well received by participants when ELC providers adopted techniques in the nursery setting that were recommended by specialists to help a child's development. A parent shared that staff developed this learning into a group activity which meant their child was not singled out.

7.4 Dissatisfaction with funded ELC provision for children with ASN

Respondents who reported they were dissatisfied with their child's ELC meeting their ASN (n=71, 6%), were asked why this was. They were given a list of 11 reasons to choose from (selecting all that were applicable) or could select 'other'. Some of the most commonly selected reasons for being dissatisfied were in relation to staff: there were not enough staff at the setting to meet their child's ASN (e.g. lack of 1 to 1 support) (53%); staff did not have the time to meet their child's needs (49%); and staff did not have the right training, knowledge or experience to meet their child's needs (45%). Other reasons related to aspects of ELC settings: the playrooms were too busy and noisy for their child (57%), there was a lack of appropriate planning to meet their child's needs (32%), a lack of activities for their child's development (e.g. speech and language or sensory activities) (31%) and there were not the right facilities or equipment to meet their child's needs (17%).

Parents expanded on all of these issues in interviews. Interview participants were dissatisfied primarily because they felt ELC staff did not have sufficient understanding, training and skills to support their children's ASN. They reported that this could delay their child's development or could put their child at risk. It was felt that it was the responsibility of local authorities to provide this training to staff.

> I don't think they [nursery] had a lot of knowledge on children with Additional Support Needs. It often felt like they maybe didn't know what they were doing. […] We went to pick [name of child] up one day and they didn't know where he'd gone and he was in a room on his own […] So we did take him out that day and didn't put him back in after that. […] We needed to be 100% sure that we knew he was safe. (Parent of a three- to five-year-old)

> If you're working with a child with Additional Support Needs you should get training on what neurodiversity is and there should be resources to help you cope with that. (Parent of a three- to five-year-old)

Participants said that they talked to ELC staff to inform them of their child's needs and shared tools they implemented at home that assisted their child to

communicate, engage and moderate their emotions. Despite this, some participants voiced their frustration that support tools were being implemented inconsistently or not at all. This led to children getting upset or their behaviour escalated which resulted in parents being called into the ELC setting to intervene. Not only did this cause distress to the child and disrupt their learning, but it could also disrupt parents' work. While some participants reported that their employers were understanding and supportive when this happened, other employers were not, which caused additional stress for parents.

> If they're not doing it [implementing support] then it's a massive impact on them [child] and could be the difference between them having meltdowns and not. […] I don't think there's enough information for the staff there to be able to deal with and cope with the children that are coming in with Additional Support Needs. (Parent of a three- to five-year-old)

Participants said that when ELC staff did not implement support tools consistently, or at all, they felt that they were not being taken seriously. As a result, some submitted complaints to their LA or sought official diagnoses for their child in order that their child's ASN was taken more seriously. Participants were frustrated that this course of action was needed to ensure appropriate support was made available.

> We've actually had to involve our local Health Visitor who has came to different meetings and everything. The school nursery has failed [child] really because they just weren't paying attention to his needs. […] It's took us pushing at them to actually work with [name of child] and do what they need to do to get him ready for school. (Parent of a three- to five-year-old)

Participants were also dissatisfied with the staff-to-child ratio in some ELC settings[27]. They felt that even if ELC staff had the skills and training to support children's ASN, the number of children in a setting made it difficult for staff to implement tailored support, particularly where one-to-one support was needed. There were families who chose their ELC setting because it was smaller and could therefore provide more focused support to children with ASN.

> I've noticed in busier settings it's very difficult to have that communication and that level of quality anymore with the parents. […] So I do think the quality of care has decreased with these higher number of children in the setting […] So it is putting a demand on for staff and staff are feeling more the stress and pressure of the job now I've noticed. (Parent of a three- to five-year-old)

Finally, some participants were dissatisfied with their ELC setting's communication. They argued that ELC staff were not proactive in giving feedback on how their child was coping and what they were doing to support their child's ASN.

> I will ask [staff] how has their day went, what were they struggling with today, things like that, so that I can help at home by working on things at home. […] With the nursery I don't really feel I get much back […] You'll go to a meeting and it's like oh well she's been struggling with this for so long […] I feel sometimes I'm kind of pulling teeth and it's like you're coming to me with all

[27] The Care Inspectorate publishes guidance on expected staff-to-child ratios for children's daycare services: Guidance on adult to child ratios in early learning and childcare settings

> the problems and I'm trying to help you but you need to come to me sooner. (Parent of a three- to five-year-old)

7.5 Improving provision for children with ASN

To address the range of challenges faced by parents with children with ASN, interview participants suggested a wide range of improvements to existing funded ELC provision to make it more accessible for children with ASN. These included:

- More ASN training for ELC staff to increase their understanding of a range of ASN and how best to support these needs.
- More specialised ASN support staff within all funded ELC settings.
- Improvements to ELC settings to better meet the needs of children with ASN including: reduced class sizes to improve staff to child ratio, provision of quiet spaces, and appropriate toys and activities to meet a range of ASN.
- Increased number of funded hours available for children with ASN.
- More education about ASN for children within ELC settings to help other children understand the behaviour of children with ASN.

Within existing funded ELC providers, participants emphasised the need for increased ASN training for staff, noting the wide range of ways that additional support needs present, and the importance of thorough training to properly equip practitioners to provide the correct care for these needs. Some also suggested there should be more specialised funded ELC providers exclusively for children with ASN.

> It would be handy if in mainstream nurseries there was something in the curriculum to explain to other children why children might be acting the way that they are or just an openness to it. (Parent of a three- to five-year-old)

Finally, participants would like to see improvements to the information available about funded ELC. There were those who were not aware what ELC provision was available in their area, and those which provided funded ELC spaces. This was particularly the case for parents who were new to an area. Participants wanted information about funded ELC to be made more accessible to parents, including information about which providers in their local area offer funded ELC hours, and which providers currently have spaces available. A parent suggested a website with an interactive map to help parents find this information. Participants also said they would like more transparent information about how spaces are allocated within ELC providers.

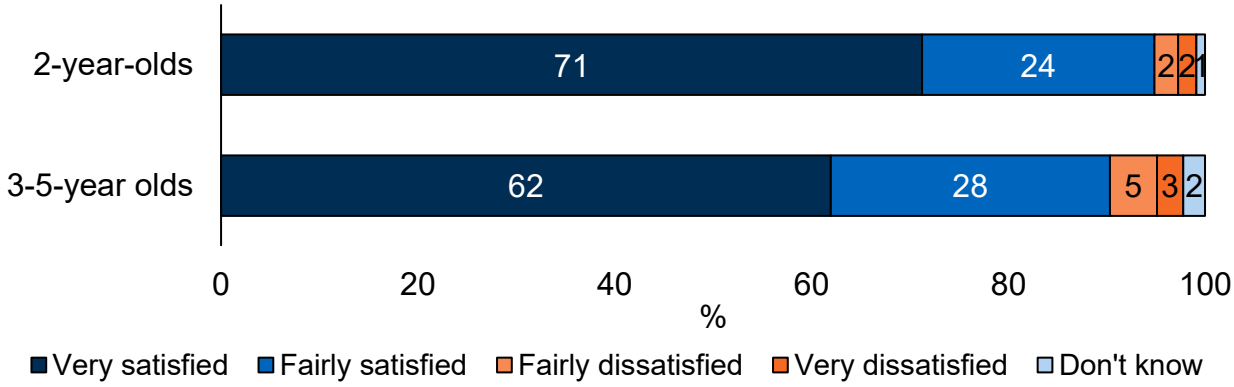
8 Flexibility of funded ELC

This chapter explores respondents' experiences of the flexibility of funded ELC, including how dissatisfied respondents would prefer to use their funded hours.

All survey respondents who used funded ELC were asked how satisfied or dissatisfied they were that they had been offered the flexibility to use funded ELC hours in a way that met their family's needs (Figure 8.1).

The majority (90%) of respondents with three- to five-year-olds who used funded hours were either very (62%) or fairly satisfied (28%) that they had been offered the flexibility to use funded ELC hours in a way that met their family's needs. Similarly, the majority (95%) of respondents with two-year-olds who used funded hours were either very (71%) or fairly satisfied (24%). A small proportion of respondents with three- to five-year-olds (8%) and two-year-olds (4%) reported they were dissatisfied with the flexibility offered. These findings are similar to those from 2022.

Figure 8.1: Satisfaction with flexibility of use of funded ELC hours



Base: unweighted base, n=6,084 for 3-5-year-olds, n=197 for 2-year-olds

8.1 Satisfaction with flexibility of funded ELC

In interviews, parents explained why they were satisfied or dissatisfied with the flexibility of funded ELC they were offered.

One reason parents were satisfied with the flexibility of funded ELC hours was that the hours fitted well around their family life. For some participants, this was because the ELC setting's drop-off and pick-up times corresponded with the times for older school age children. This saved them from making multiple trips and helped prepare ELC-aged children for school hours. These factors also made accessing funded ELC easier for parents (see 6.1.1.).

For other participants, the ELC hours fitted well around their working or studying hours. ELC settings which offered wraparound childcare that started from 7-8 am and allowed pick-ups from 4-6 pm enabled participants to work full-time, without relying on family support. Some of those who were satisfied with the flexibility of ELC said this was in part facilitated by having an employer or manager at work who was flexible and understanding, which allowed them to fit work around ELC hours.

> Because we dinnae have any family support and in reality the cost of nursery is absolutely ridiculous, I could'nae go back to work to have set days or times and actually the nursery was quite…trying to get it to work in the nursery as well was quite difficult. So I was'nae able to return back to work, to my main job that I did previously. However, the local authority offered me a relief position […] so I'm still working like part-time but I have no set days or times so I can just work when my husband is not working. (Parent of a three- to five-year-old)

Finally, there were participants who were satisfied because the ELC settings offered flexibility for their children with ASN. This included providing some flexibility around drop-off and pick-up times so children who find busy crowds and noise distressing could avoid the rush. Other ways ELC settings provided flexibility for children, particularly with ASN, included providing space in the ELC setting for a child to attend appointments with external support workers, and allowing children to build up their ELC hours slowly over time so they can adjust to the environment.

Participants gave a range of examples which illustrated how ELC settings offered flexibility around the personal circumstances and needs of both parents and children. These included recognising that parents had distances to travel, or family commitments to juggle, to get their children to ELC, and offering flexibility in drop-off times to enable the children to participate in funded ELC.

8.2 Dissatisfaction with flexibility of funded ELC

In interviews and open text responses, one of the main reasons parents gave for their dissatisfaction with the flexibility of funded ELC hours was that the hours did not fit well around their family life and their ELC providers could not offer flexibility to accommodate this. For example, there were families who had multiple ELC-aged children who were placed at different ELC settings with the same hours which made coordinating drop-offs and pick-ups challenging. Children could be placed at different ELC settings due to availability of ELC placements, or due to the needs of the child. Regardless of the reasons, transporting children to numerous settings was time-consuming and costly and impacted on parents' ability to work, or the hours they could work. This was also a challenge for families with ELC-aged and school-aged children who were based in different locations and for parents who did not have access to a car, or regular and reliable public transport options.

There were also participants who said the hours offered to them did not meet the needs of their child. For example, there were participants with two- or three-year-olds who thought 8am-6pm was too long a day for their young children. Therefore, they picked up their children earlier which meant they lost out on funded hours.

> I find 6 o'clock is far too late for a 3-4 year old. So they get picked up at 4 o'clock. […] They need to look at those hours and the flexibility and making sure that it's based on the needs of the child and not the needs of the parents. (Parent of a three- to five-year-old)

Participants were also dissatisfied with the flexibility of funded ELC where the hours offered did not fit around their working hours. It was common for participants to say that they had limited or no choice of ELC setting, and therefore they were limited to

the hours offered by the only ELC setting(s) available. Where this was an LA nursery, the hours on offer were often 9am-3pm. In other circumstances, participants were only offered either a morning or afternoon placement for their child, when they wanted either full-time hours or would have preferred the opposite session. It was common for participants to say that these times did not fit around full-time working hours and employers were not always able, or willing, to offer flexibility with working hours. Therefore, some participants had to rely on family to help with drop-off/pick-up to enable them to work full-time.

> It puts myself and my husband under a complete strain and a disadvantage really to be able to work a full-time job. You almost feel like you're kind of being penalised and not be able to work full-time hours because the hours available are completely inflexible at her childcare provider. (Parent of a three- to five-year-old)

> Because I work out of town, I can't obviously do all the drop offs and pickups because of the times that are offered. […] I have to rely on family members to be able to do a pickup or a drop off every single week. (Parent of a three- to five-year-old)

However, not everyone had access to family members nearby who were able to help, so they either had to work fewer hours to fit around childcare, not work at all, or pay for additional childcare so they could work. Some participants changed their jobs to fit around ELC hours.

> I was on a full-time 37.5 hour contract. […] There's no flexibility when you're seeing patients, you've got a start time and an end time and I just felt I really could'nae do that with two wee ones still at nursery so I've kind of dropped to 2 days. […] I'm going to have to do that on a permanent basis just now. (Parent of a two-year-old and a three- to five-year-old)

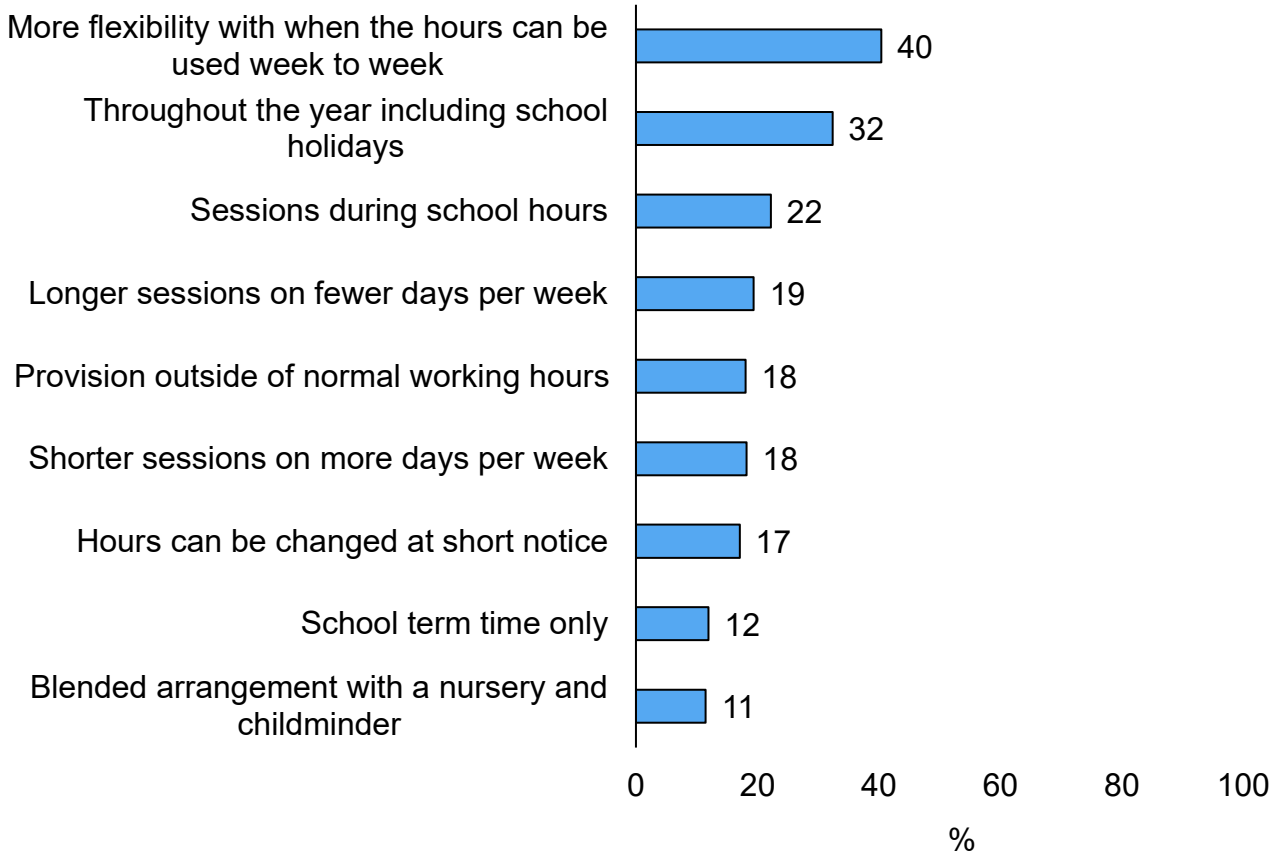
> The only way that we are able to complete our jobs is by paying an external childcare provider. So that is a bit of a difficulty and it's a financial strain. (Parent of a three- to five-year-old)

8.3 Improving the flexibility of funded ELC

Survey respondents who said they were dissatisfied with the flexibility of the funded ELC they had been offered were asked how they would prefer to use their funded hours (Figure 8.2). Parents were provided with a list of nine potential options (plus 'Other') for how they would prefer to use their funded hours and could select all that were applicable. The number of respondents with eligible two-year-olds who said they were dissatisfied with the flexibility of the funded ELC is too low to report to report this breakdown. Details can be found in Supplementary Tables G1a-G6b.

As shown in Figure 8.2, dissatisfied respondents with children aged three to five most commonly wanted greater flexibility with how hours could be used week to week (40%), to use hours throughout the year (32%), or for sessions to be within school hours (22%). These are different from the findings in 2022 where the most common responses were longer sessions on fewer days per week (27%), throughout the school holidays (24%) and shorter sessions on more days per week (23%). In 2018 the most common response (65%) was parents would prefer longer funded sessions on fewer days of the week.

Figure 8.2: How dissatisfied respondents with 3-5-year-olds would prefer to use funded ELC hours[28]



Base: Parents with a 3-5-year-old, unweighted base, n=452

Survey respondents who selected they wanted hours during school holidays (22%), longer sessions on fewer days per week (19%), and shorter sessions on more days (18%), were given the option to provide more detail on how they would prefer to use the funded hours. In interviews, parents who were dissatisfied with the flexibility of funded hours were also asked this question. The same themes were highlighted in both the open text survey responses and the interviews.

Participants with school-aged children would prefer funded ELC hours to be similar to school hours so they could drop-off and pick-up children at the same time. However, there were working parents who found school hours too restrictive and would prefer ELC hours to accommodate typical full-time working hours. There were also participants who would like the option for year-round provision at their ELC setting to better accommodate their work as well as helping maintain routines for children. Some participants said they would be willing to pay for this additional provision though they recognised that not every parent could afford to pay for additional childcare. For these parents, extending funded ELC hours further would be their preference.

Overall, participants wanted more flexibility to choose hours that met their and their children's needs. It was common for participants to share that they felt they were

[28] Answer options of 'Other (please specify)' and 'Don't know' are not shown in Figure 8.2. Please see Supplementary Tables G4a-GBb. for the full results.

losing out on funded hours if they could not, or did not want to, use the times allocated to them. For a range of reasons, parents had to drop off a child later than the ELC opening time or pick them up earlier than the ELC closing time but their allocated funded hours would be counted as the full session. Participants would prefer that their funded hours were calculated on the times they actually used so they could better meet their needs and the needs of their child. For some this was longer hours on fewer days, and for others it was shorter hours on more days. Some also wished to use their funded hours across multiple providers but they were not sure whether this was available in their local authority.

> We don't use the full day we are entitled to (we use about 7 hours per day compared to the 9 we are entitled to). We'd like to be able to bank these and use towards a day as it feels wasted. (Survey open text response)

There were participants who felt that current funded ELC provision was not flexible enough to sufficiently meet their needs or the needs of their children. This affected participants' ability to work, their mental health and wellbeing, their relationships with their children and their children's development. Participants suggested a number of changes to the general model of ELC provision in Scotland which could make funded ELC more flexible, and therefore more accessible, to a wide range of families. These modifications included increasing the number and types of funded ELC providers available, and/or the number of funded spaces available at existing ELC providers. Participants thought that greater local ELC provision would enable more children to be placed at ELC settings closer to home, making pick-ups and drop-offs easier for some parents. Furthermore, having access to a range of different ELC settings close by, some of which offered extended hours, could also make it easier for parents to choose a provider with hours that met their needs.

Participants also suggested increasing the number of funded spaces available with childminders specifically, as childminders were perceived to offer more flexibility with ELC hours and more tailored support for ASN. However, participants acknowledged that government funding of ELC provision may need to change to make this feasible. It was also noted that childminders are restricted in relation to the number of children with ASN they can provide care for at any one time[29]. Participants suggested providing special or greater funding for childminders to be able to provide care for children with ASN and therefore increase the options available to parents. Finally, there were participants who would like greater flexibility to use funded ELC hours across different local authorities to allow children to stay in an ELC setting even if the family moves local authority, to minimise disruption to their children.

[29] The Care Inspectorate publishes guidance on expected staff-to-child ratios for children's daycare services: Guidance on adult to child ratios in early learning and childcare settings

9 Quality of funded ELC

This section explores how parents perceived the quality of provision offered by their child's funded ELC provider.

9.1 Quality of funded ELC provision

9.1.1 Overall quality of main provider

Survey respondents were asked how satisfied they were with the quality of the provision from their main provider of funded ELC. The majority (88%) were either very (62%) or fairly (26%) satisfied with the overall quality of their provider. This compared to 97% in 2022. Only 8% of respondents were dissatisfied or very dissatisfied with the overall quality of their provider.

Those more likely to report that they were very or fairly satisfied were households:

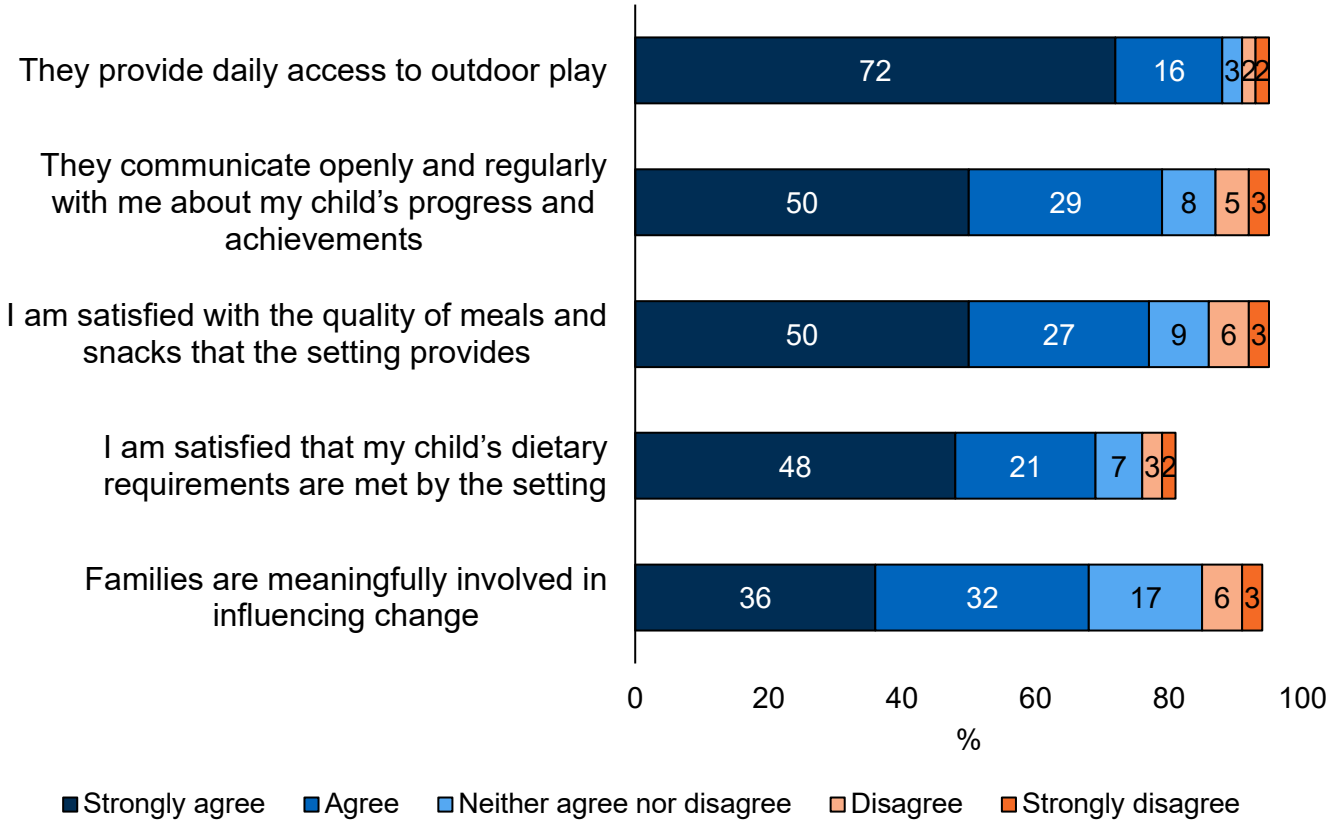
- With single-parents (97%, compared with 90% of two-parent households).
- With no or one parent in work (97%, compared with 89% of households with two parents in work).
- In the 80% least deprived areas (94%, compared with 79% of those in the 20% most deprived areas (see the full breakdown in Figure 7.3).
- With two or three children (97%, compared with 75% of households with one child).
- With at least one child aged under six with ASN (96%, compared with 87% of households with no child with ASN).
- Living in remote areas (97%, compared with accessible areas 90%).

9.1.2 Quality of main provider across specific areas

In the survey, parents were asked the extent to which they agreed or disagreed with a series of statements to assess perceptions of quality of provision across a few key areas. The statements are shown in Figure 9.1 along with the proportions of parents who agreed, neither agreed nor disagreed, or disagreed with each. These questions were asked for the first time in 2025.

As shown in Figure 9.1, the majority (over two-thirds of respondents) agreed or strongly agreed with each of the positive statements regarding the quality of their ELC provider. Subgroup differences can be found in Supplementary Tables H2a-H7c.

Figure 9.1: Extent to which parents agreed or disagreed with specific statements in relation to the quality of their ELC provider[30]



Base: unweighted base, n=6,167 (except for 6,166 for the last two statements), weighted base, n=6,056.

9.1.3 Meeting the needs of children from diverse backgrounds

In interviews, parents were asked about the extent to which they think ELC settings meet the needs of children from diverse backgrounds and cultures. It was common for participants to not be aware of what, if anything, ELC settings did to support the cultural or religious needs of children. However, some said they were aware that the ELC setting organised activities to help all children learn about different cultural or religious holidays and practices.

> My husband is Indian so I know they did Holi once or twice, the children are made aware of different festivals from different cultures like Ramadan or Eid. (Parent of a three- to five-year-old)

There were participants who gave examples of positive personal experiences where they felt their ELC provider had been helpful and respectful of their religious or cultural needs. These included parents who said the nursery asked about and were respectful of their religious needs, ensuring that appropriate food was made available and that clothing was respected.

> Before he started going [to nursery] they asked for meal and stuff because we belong to Asian community so they said do we have any preference in religion

[30] Bars in Figure 9.1 do not add up to 100% as the chart does not include the non-applicable responses which accounted for 2% for each statement (except 19% for the second to last statement).

> and we told some of the religious beliefs – that we want [name of child] have that turban on and although he is in a different community we want our religion to be there. […] They respect our religion and they said we can make 100% our responsibility that he don't take the turban off. (Parent of a two-year-old)

A number of the parents who participated in an interview had English as an additional language. For some, their ELC-aged children did not speak English, and some parents shared that their ELC setting was helping their child to learn.

9.1.4 Parents' views and experiences of staff

In interviews, parents shared mixed experiences and views of the quality of staff within different ELC settings. Participants who were satisfied with their experience of ELC staff described the qualities they valued in the staff looking after their children, such as the ability to build positive relationships with their children and ensure they felt comfortable and safe. This also factored into parents' decisions to have their children remain in their ELC settings.

> I feel like our kids are in this very sort of homey environment where […] they're with these people that they know really well and feel comfortable with and at the end of the day that's the most important thing for me for the kids. (Parent of a three- to five-year-old)

Participants highlighted the importance of staff who were nurturing, approachable and professional. They were appreciative of staff who would take the time to get to know their children and were invested in supporting their learning and development.

> I think they do brilliant with her. She's completely thriving and she's learning so well and she's developing as she should be. I think I couldn't really ask for any more. I think they go over and above for all the children in that nursery. (Parent of a two-year-old)

Parental satisfaction with the quality of ELC staff was also related to the staff's ability to support their children's ASN. Participants valued ELC staff who had the knowledge and awareness to support their children effectively. This included cases of staff drawing on their own training or experience to implement support for children or implementing approaches shared by parents themselves.

However, there were also participants who were dissatisfied with the quality of ELC staff. A key challenge was limited staff capacity to accommodate and support the needs of children. Participants perceived that staff to child ratios affected the quality of provision. In some settings parents were concerned about whether there were enough staff to enable them to get to know and individually support their children. They felt the opportunities for one-to-one learning and support were limited and the number of children could be overwhelming for staff.

Some participants expressed dissatisfaction when they felt staff were not encouraging early learning within ELC settings. There were participants who felt the settings were more focused on childcare and managing the number of children rather than offering support to improve their children's learning and development. Participants therefore would like more activities that support their children's learning journey.

Participants' experiences of staff were sometimes mixed. While some participants' overall experiences were positive, they shared difficult interactions with particular staff members within settings. These included examples in which staff discussed private information about a child in an open setting with other parents present, were less supportive of their child's development or were viewed by parents as inattentive or neglectful of their child's needs which could jeopardise their child's safety. Participants attributed this to a variation in staff's skills and experience, resulting in some staff being more involved in supporting the children than others. An example of this was where a child was assigned a key worker to help meet their ASN, but when that worker was not available, their needs were not met by other staff.

> I would say it's very varied, there are some staff members in there that are very highly skilled, very motivated to do their job and very enthusiastic and then there's other staff members that are maybe…could do with upskilling. They've maybe been in the job for so long and they're just very set in their ways of doing things. But actually childcare is evolving all the time and it's important to take on new guidance, new information […] And there's also a few practitioners that have not long been in the role so they're quite new into the career. (Parent of a three- to five-year-old)

As highlighted in Chapter 7, a lack of understanding of and experience in supporting children with ASN could lead to escalation in children's behaviour. In these instances, participants did not fault the staff and instead emphasised the need for staff to receive training on a range of needs and suggested that settings should have at least one ASN trained staff member that could focus on children who require additional support.

Satisfaction with the quality of staff was sometimes dependent on the wider ELC setting. Participants described differences in the attentiveness of staff in different ELC settings and attributed this to staff capacity. There were participants who viewed settings with fewer children as more organised and structured, allowing staff to better oversee and support children, compared with larger settings with more children and that parents felt there were not enough staff.

9.1.5 Outdoor provision

In the survey, the majority (88%) of parents agreed or agreed strongly that their main ELC setting provided daily access to outdoor play. In interviews, parents expressed mixed views on the quality of the outdoor spaces provided in ELC settings. Good quality outdoor provision was described as spacious, safe, including large green spaces and a wide range of high-quality equipment and activities.

Interview participants also appreciated ELC settings which had unrestricted access to outdoor spaces for their children. Participants liked these "free flow" settings because they allowed their children to choose which environments they wanted to play and learn in. Free flow environments were facilitated by having enough staff to supervise both inside and outside spaces.

> I've got one child that would want to be outside all the time and one child that would never want to be outside. So both of them are pretty good in that no

> child has to go out but no child has to stay in. They can kind of do what they want, they can go out in the rain and things as well. Yeah so really good with that. (Parent of a three- to five-year-old)

The role of staff also contributed to parents' satisfaction with the quality of outdoor provision. Participants appreciated staff being involved in outdoor play and settings making considerations for children with ASN. For example, children that needed more support to ensure safety were closely supervised by staff when outdoors.

Some settings facilitated visits to outdoor spaces outwith the ELC setting, such as a local park or wooded area. There were also participants who used childminders and appreciated that they would take children outside and engage in different outdoor activities. In nurseries where outdoor access was restricted to only nursery grounds, participants expressed disappointment that their children were unable to experience new surroundings, nature or learn about road safety.

Although there were participants who viewed the outdoor spaces positively, they shared their disappointment that children did not spend as much or any time outdoors in poorer weather conditions. Participants valued their children spending time outside and would like ELC settings to accommodate this more routinely, if deemed safe.

The size of outdoor spaces also affected satisfaction with ELC provision. Participants described spaces as too small for the number of children within the setting. Participants therefore expressed concerns that these crowded spaces could potentially overwhelm children and lead to additional anxiety and stress. Some, but not all settings, staggered access to outdoor spaces to try and accommodate the number of children in the setting. Participants criticised outdoor spaces as being divorced from nature, such as only having spaces with fake grass or concrete, and limited facilities and equipment for children to play.

> Again, that's all kind of plastic grass and like fake plants so there's no kind of nature aspect to it. It's either flagstones or fake plants. (Parent of a three- to five-year-old)

> I think that the building could [be] better and the garden could be better. They don't have a lot of space outside. Like just a tiny garden and they don't have like a playground. (Parent of a three- to five-year-old)

Suggested improvements to the outdoor spaces in ELC settings included making spaces larger, with updated equipment and facilities. Participants appreciated where ELC settings had improved the quality of their outdoor spaces which gave their children more space to play outside.

9.1.6 Indoor provision

In interviews, parental satisfaction with the quality of indoor provision in ELC settings also varied. Space and capacity played a key role in whether parents found the indoor provision and facilities suitable for their children's needs.

> The inside classroom is quite small but again it's only for half a dozen pupils really. So I think it's still adequate, it's still got little play areas, it's still got a

> little kitchen and bathroom. Yeah I think for the size of it, it certainly has everything it needs. (Parent of a three- to five-year-old)

There were participants who shared positive changes made to the indoor provision at their ELC setting because of the extension of hours of funded ELC. For example, participants referenced settings expanding the area available for children to accommodate the increased number of children.

The layout of ELC settings varied, with some being open plan and others divided into separate rooms. Participants reported positive elements of both types of layouts. Separating children into different rooms allowed for smaller group activities and more individual time for each child with staff. However, open plan environments allowed children to socialise with children of different ages which parents felt supported their children's development.

> There is pros and cons to it all. There's pros to having them all in the same group and all developing together. At [nursery name] because you've got ones that have just turned three and then you've got ones that are five so they're kind of all learning off each other which I think is really good for their development. But then I quite like the idea of [other nursery name] too when they're in their individual rooms because I feel then there's more time allocated to their development because there is only so many kids. But there's more of a staff ratio. (Parent of a two-year-old and a three- to five-year-old)

Finally, participants were satisfied with ELC settings which provided a variety of activities and toys to help their children play and learn. Parents with children with ASN particularly valued ELC settings with specific facilities, such as sensory rooms, since crowded and loud spaces were often described as environments that could overwhelm children with a range of ASN.

> So it's [sensory room] like up the other end of the nursery so it's nice and quiet and it's dark and the kids really enjoy going up there and they only put up a few kids at a time like maybe one or two kids at a time so they don't get overwhelmed. (Parent of a three- to five-year-old)

Participants who were dissatisfied with the quality of indoor provision had contrasting experiences of their ELC settings. They expressed concerns about the number of staff in their ELC settings as they did not feel there were sufficient staff to provide enough one-to-one support for their children, particularly those with ASN.

> I think they could be doing with more people [staff] in the rooms especially with the fact that obviously, the first five years of their life is the most important and it's the foundation for the rest of their life. So the fact that the classroom sizes and things like that are so big and there isn't as many opportunities for them [staff] to have the kind of one-to-one with the children I think that could possibly be looked at to be able to help, especially with neurodivergent children and things like that because obviously they need a bit more support in regulating emotions and navigating social situations and things which obviously is a big part of helping them towards going to primary school. (Parent of a three- to five-year-old)

Additionally, participants who were dissatisfied highlighted a lack of quiet spaces and spaces for children with ASN to play and learn effectively and safely. In terms

of the layout and size, some parents reported that the ELC settings had insufficient space for equipment or the number of children in attendance. Others found the open plan design of the ELC setting disorganised with no designated spaces for play, learning, rest and food. When comparing experiences of different types of ELC, the setting participants preferred was not a specific type, but the one that balanced opportunities for socialising with one-to-one support, offered suitable environments and activities to support play and learning.

9.1.7 Meal provision

In the survey, over three-quarters of parents reported they were satisfied with the quality of meals and snacks that the setting provided (77%). In interviews, parents' satisfaction with meal provision was dependent on the availability, choice and variety of foods, particularly around healthy meals and snacks.

Participants appreciated when settings had multiple meal options to choose from. They also liked ELC settings which provided a variety of healthy meals and snacks. This sometimes led to their children trying new foods, which could increase the range of food they were willing to eat at home. Participants thought that trying new foods was encouraged both by staff and by children seeing other children eating the same food. Being in an environment with other children also helped in improving their children's table manners and in establishing mealtime routines.

> It has opened up a wider variety of things that she'll eat and I think because she's in that environment where she's with her friends and they're all sitting down together, they're all eating, it encourages her to actually eat and try these things. (Parent of a two-year-old)

Participants appreciated ELC settings being willing to accommodate food preferences and dietary restrictions. Whether children were fussy eaters, had requirements based on ASN, or had intolerances or allergies, participants shared that staff would do their best to accommodate them. Additionally, as noted in Chapter 7, there were cases of ELC settings accommodating cultural and religious needs.

> Their food choices are really really good actually, [child's name] has a gluten free diet at the moment, a wheat free diet so they changed his diet to everything…they were really really quick as well at responding. (Parent of a two-year-old and a three- to five-year-old)

> He goes up there [ELC setting] every morning for breakfast and all this food is actually blended because he can't eat full food. […] He gets the same food as everybody else but they actually blend it for him. (Parent of a three- to five-year-old)

In cases where it was more challenging to accommodate dietary needs, some ELC settings allowed packed lunches. This allowed participants to pack foods they knew their children were able to and would like to eat. However, the allowance of packed lunches varied across different ELC settings, though parents were understanding of this due to the risk to children with allergies.

Parental dissatisfaction was mostly due to a lack of variety and healthy options in the meals provided, as it didn't allow for children to explore and try different foods. Additionally, small portion sizes and a lack of alternative meal options were viewed as challenging, as it could lead to children not eating much, or at all, while attending ELC and coming home hungry.

> The nursery has one meal a day, like one option, and I don't agree with that. I think we are at a critical stage where they should be allowed to kind of explore foods and explore different things and make choices about what they want to try and I feel like they're very limited. (Parent of a two-year-old and a three- to five-year-old)

Staff also played a role in parental satisfaction with the quality of meal provision. Although there were settings with staff who were more involved during mealtimes and ensured children were eating, this was not always the case. Some participants felt that there was not enough staff supervision during lunchtimes, which they felt contributed to their children not eating or finishing their meals.

> Whenever I pick [child's name] up she's absolutely starving […] They [ELC setting] have so many [children] it's really hard for them to fit mealtimes in. She's also said, 'oh I didn't have time to eat my packed lunch because we had to be moved on out of lunch' and they hadn't finished [...] I felt quite frustrated about [it] because obviously they need enough fuel in them to keep them going for the day. (Parent of a two-year-old and a three- to five-year-old)

Participants described cases of ELC settings attempting to make accommodations after concerns were raised by parents, but that this would taper off or suddenly stop. There were participants who sympathised with ELC staff who were also frustrated with the quality of meal provision, sharing instances of staff using their own money to provide snacks that they know the children would eat.

9.1.8 Parental involvement

The majority of parents in the survey agreed or agreed strongly that their ELC setting(s) communicated openly and regularly with them about their child's progress and achievements (79%) and that families are meaningfully involved in influencing change at the ELC setting (68%). However, the extent to which parents in interviews were satisfied with the level of parental involvement varied.

Interview participants who were satisfied with the level of communication with their ELC provider stated that they were able to discuss their children's development with staff both in person and through online platforms. Participants were appreciative of the detailed information, photos and videos shared, such as daily updates on children's activities, learning, meals eaten and any challenges experienced. In turn, participants could also share information and updates with settings, allowing parents to keep staff informed of their children's learning and development at home.

> There is a Learning Journal that we have, that has the parents contribution as well so I can add in photos like he did this at home today and they can add in photos from the nursery. That's kind of a good interaction too just to see how he's behaving at nursery, how he's behaving at home, it's very helpful. (Parent of a three- to five-year-old)

Parents who were satisfied with their ELC provider's communication also tended to report having a good relationship with staff. Participants reported that staff were supportive and encouraging of feedback and made them feel comfortable sharing their opinions and concerns. In these instances, staff responded by making changes to their approach or how they communicated with parents. This could entail support being sought from external professionals to best meet the needs of their children (see Chapter 6). Participants with children with ASN said when this happened it made them feel involved in every aspect of decision making about their child and helped them to feel that their child was safe and looked after.

Parents who were dissatisfied with the communication with ELC settings argued that they received limited or generic information on their child's participation in activities and the progress of their learning and development. Some participants expressed difficulties with not knowing what their child is doing, how they are feeling and if they are being appropriately supported by staff. A lack of communication could be difficult for any parent, but parents of children with ASN particularly expressed concern for their child's safety and wellbeing (see Chapter 6). Participants wanted more detailed information specifically related to their children. Additional information that participants stated that they would like was meal monitoring to ensure their children were eating whilst attending ELC settings.

> I sometimes wonder if they are doing loads more Early Learning activities and that's not being communicated to me. I don't think I get copious amounts of good quality communication, a lot of it is quite tertiary or surface level stuff that I'm getting told. It's not actually that specific to my child. (Parent of a three- to five-year-old)

Some participants who used multiple ELC settings shared there was variation in the quality of communication. For example, one parent described receiving detailed and daily feedback from their childminder, whilst the nursery would only inform them of problems that occurred.

Parents who were dissatisfied with their level of involvement and communication with ELC settings said they found it difficult to raise this with staff. Participants shared that there were few opportunities to approach staff to discuss concerns due to limited capacity within settings. When participants were able to raise difficulties, the response from staff varied.

Finally, participants reported difficulties in understanding the information provided to them by ELC settings. A parent gave an example of receiving feedback that related to the GIRFEC framework. The language used was not familiar to them so they struggled to understand whether their children were learning and developing as they should. Participants thought it was important that any communication was meaningful and understandable to all parents.

> I think it's called Getting It Right For Every Child, like the Scottish Government framework. So it will say like they're using this skill and this skill but again there's no context as to what the skills are and what that means. [...] Does that mean that they're at the level they should be or they're below? (Parent of a three- to five-year-old)

9.2 Improving the quality of funded ELC provision

Challenges faced concerning the quality of funded ELC provision included poor quality outdoor spaces or lack of equipment, the indoor facilities not being suitable for the number of children, not having healthy meal options or alternative meals, and a lack of consistent or detailed communication from funded ELC settings.

Suggested improvements to outdoor provision included making spaces larger to accommodate the number of children at the setting and having additional and better quality toys, equipment and activities. However, participants did recognise the difficulty in improving outdoor provision in funded ELC settings with limited funding. Participants would also like funded ELC settings to offer more opportunities for children to spend time in local green spaces and experience nature.

Proposed improvements to indoor provision included having indoor spaces which were suitable for the number of children in funded ELC settings, smaller class sizes, and more staff to improve their ability to offer one-to-one support. Participants suggested that having fewer children per staff member within funded ELC settings would improve the quality of care provided to the children, particularly for children with more complex ASN. Participants also thought that distinct rooms with fewer children would reduce pressure on staff who were overwhelmed in larger open plan funded ELC settings and improve tailored support for their child. Parents of children with ASN suggested that it would benefit their children to have specific facilities such as sensory rooms, and smaller spaces to reduce potential anxiety or stress due to crowded and noisy environments.

> The class sizes are huge so they could really be doing with being smaller […] I think it would be really really beneficial for the children. They would have more one-to-one so they would obviously be able to kind of regulate a little bit more easily. (Parent of a three- to five-year-old)

> I definitely think there needs to be consideration for children's Additional Needs and I think the ratio needs to be adjusted depending on that level of need that child requires. (Parent of a three- to five-year-old)

Suggested improvements to meal provision included providing healthier foods, more variety to allow children to explore different foods and having more choice or alternative meal options to accommodate children's needs.

Participants also proposed ways in which communication with funded ELC settings could be improved. Participants wanted clearer and more consistent communication from their funded ELC provider about their child's learning and development, daily activities, what they have eaten, and their overall behaviour. Participants believed this would help them support their child's learning and behavioural development more positively at home. Participants would also like to see funded ELC settings respond more effectively to concerns raised about meeting their child's needs.

10 Impacts and benefits of funded ELC

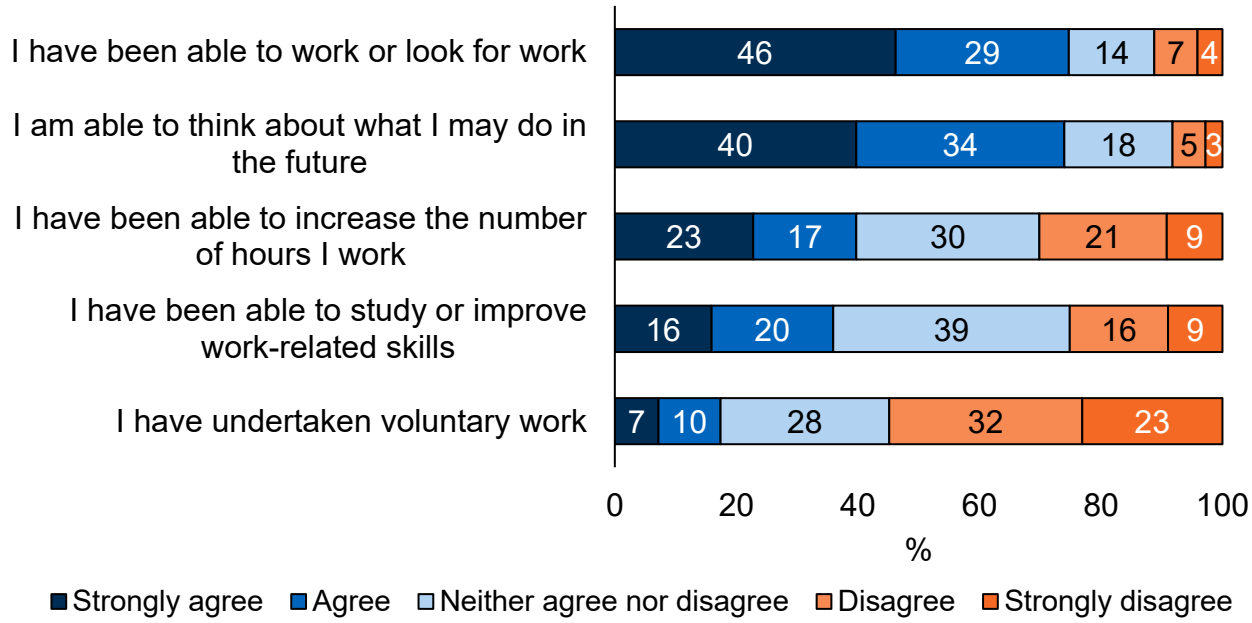
This chapter explores parents' perceptions of the impact that funded ELC has had on their and their children's lives. This includes the activities both parents and children have been able to undertake because of access to funded hours, and the contribution to their wellbeing.

All survey respondents who were using, or had used ELC since August 2024, were asked about the impact funded ELC had on them. They were asked the extent to which they agreed with nine statements about work, volunteering, education, caring for themselves and family, and their wellbeing. Interview participants were also asked what impact, if any, funded ELC had on them, their children and family.

10.1 Work and education

From the survey, the most commonly reported impact of funded ELC hours was on employment and thinking about future opportunities (Figure 10.1).

Figure 10.1 Impact of funded ELC hours on work and education



Base: Parents who had used funded ELC for one or more of their children since August 2024, unweighted base, n=5,754

The majority of respondents agreed or strongly agreed that they were able to work or look for work (75%) and/or think about what they may do in the future (74%) as a result of funded ELC. This is similar to the findings in 2022 (74% and 71% respectively). A smaller proportion agreed or strongly agreed that as a result of funded ELC they had been able to increase the number of hours they work (40%), study or improve work-related skills (36%) or undertake voluntary work (17%).

These findings were reflected in the interviews. Participants noted that funded ELC hours enabled them to look for work, start work, or work more hours. For example, where the ELC provider was able to offer longer hours, respondents were able to

move from part-time to full-time work, and for those with consistent ELC hours, they were able to schedule their work around these hours.

For some participants, being able to work, or work more, improved their financial position, enabling them to buy better quality food, to do more family activities or go on days out or on holiday, or to put money into their child's savings account. This was particularly noticeable for participants who had previously been using private childcare and were now able to access funded ELC.

> With the funded hours I'm obviously able to do more work from what I was able to do before. My husband is obviously able to take up more shifts because we're less reliant on family members from what we used to be because we're able to use the 30 hours. We have more money now for meaningful family days out, holidays, to put into savings, to help renovate our house, you know, just for a variety of different things. We're able to…our food shopping is actually a lot better quality food because we've got more money to put into our food shopping now. […] Overall I would say it's had a positive impact on everything you know. (Parent of a three- to five-year-old)

For other participants, while funded ELC helped them to work, they were not financially better off because they had to supplement funded hours with paid childcare, which in some instances cost the same as what they were making by working (see Chapter 9 on affordability for more information).

As evidenced in the survey, funded ELC hours did not enable all parents to work or work more hours. Some participants were unable to work due to other circumstances, for example disability or caring responsibilities. For those who were in a position to take up work, the opening hours of their ELC provider, a lack of extended hours or 'wraparound' hours provision, and inflexibility surrounding drop-off and pick-up times, meant that they were unable to work full-time. Some participants stated that they felt they were missing out on opportunities at work because they could only work part-time.

> You miss out on stuff at work being part-time for sure, and I've not been able to take other jobs that I would have…I basically had one that was like 'well we would like to employ you if you're full-time but if you're part-time we just can't make that work' and around childcare we couldn't make that work. (Parent of a two-year-old and a three- to five-year-old)

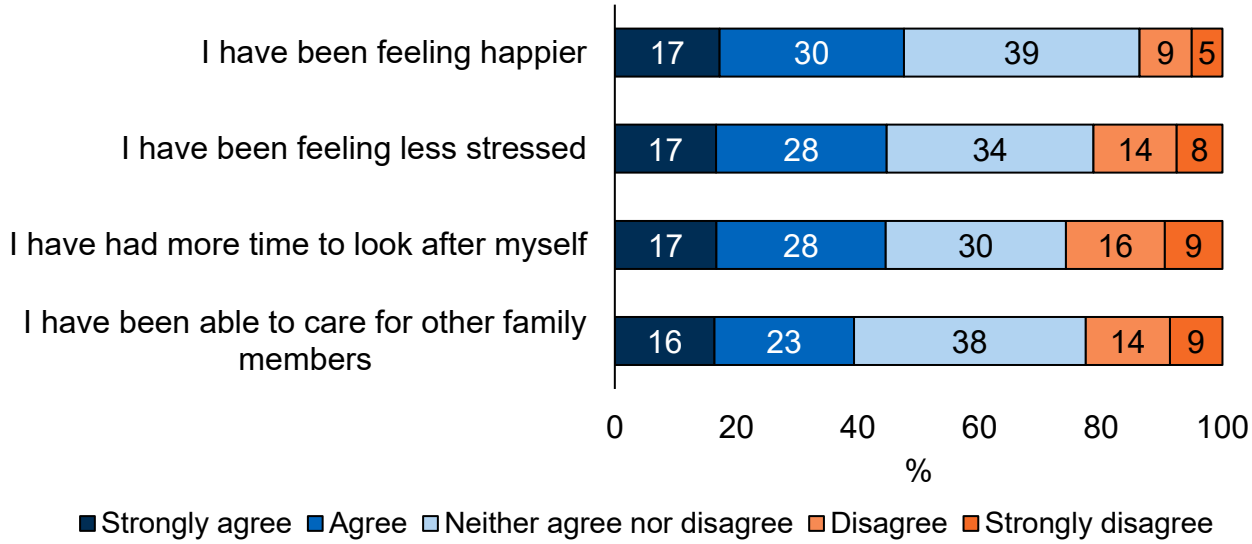
Funded ELC hours also enabled participants to further their education, for example through online courses to help with their career, for personal development, or to help with learning English as an additional language.

In interviews, parents were asked what the impact would be if they were not able to access funded ELC. Participants said they would not be able to afford childcare if it was not funded, and in most cases this would mean they would have to reduce or stop work in order to look after their children. Some participants discussed that they would be able to afford reduced hours of childcare and therefore would need to reduce their working hours to cover the remaining childcare. Some participants reported that this would negatively impact their career.

10.2 Wellbeing and caring for self and others

Parents also reported that funded ELC hours had an impact on their wellbeing and their ability to care for themselves and others (Figure 10.2).

Figure 10.2: Impact of funded ELC hours on wellbeing



Base: Parents who currently use funded ELC for one or more of their children since August 2024, unweighted base n=5,754

Around one-half of survey respondents agreed or strongly agreed that they have been feeling happier (48%), have been feeling less stressed (45%) and/or they had more time to look after themselves (45%). Around two-fifths agreed or strongly agreed that they have been able to care for other family members (39%).

In interviews, parents particularly emphasised the importance of having more time as a result of funded ELC hours. Participants used the time their children were in funded ELC for a wide range of activities. Some used this time for practical tasks such as catching up on things around the home, like housework, or their own work, which had a positive impact on their mental health.

> A huge impact in particular, especially being able to access the 2-year-old placement. It's helped me have more structure and routine at home, it's helped me being able to work and hugely in particular it's helped with my mental health. […] So just having the likes of a few hours to be able to breathe and have a coffee and do what's needed to get done about the house and obviously being able to work more means there's more money coming into the family house too. (Parent of a two-year-old and a three- to five-year-old)

Participants also used the time a child was in funded ELC to spend time with their children who were not in ELC. They stated that this quality time improved their relationships with their other children and was important for bonding with younger children. For example, one participant explained that one of their children has ASN which restricts the activities they can do as a family, and with the child with ASN in ELC it enabled them to carry out these activities with their other children.

> For my youngest daughter it also gives me a chance to have one on one time with her which I might not get otherwise. It is difficult to kind of juggle the attention between the kids but on the days that [younger child] is at nursery and if I've got nothing on it gives me a chance to attend baby groups and things like that where I've been able to focus on bonding and bringing on the development and stuff for the younger [child]. (Parent of a two-year-old)

Finally, participants reported that funded ELC gave them a break from childcare responsibilities and enabled them to have more time for themselves. Parents said that they felt less stressed and as if they had a better balance in their life.

> I get time to actually take care of myself, take a shower that's longer than 10 minutes and be able to maybe go and get my haircut, which he never sits long for that, or just to do normal things. […] I feel like I'm my own person and I like being able to listen to music and just kind of relax and unwind and then normally about the time he would normally be home I start to miss him a lot. (Parent of a two-year-old)

Some participants discussed the importance of having this time for themselves in terms of the positive impact that it had on their mental health. For those who had been struggling with their mental health and were feeling overwhelmed, they emphasised that having this time for themselves had improved their mental health.

> It's just been me taking care of him pretty much, and having another person come in and help for when I was kind of lacking a bit, I was just shutting down, it really kind of saved me and him I would say. […] When you're with your baby you can't focus on yourself or anyone else. You're simply just orbiting around them constantly and when he's with someone that I trust, like the childminder, I just feel like my brain goes silent all of a sudden and it's like a complete relief. (Parent of a two-year-old)

While the benefits of ELC described above were experienced by a range of different parents, for some groups these benefits were particularly pronounced. For example, for single-parents and for parents who were carers. A participants who was caring for their partner full-time reported that funded ELC reduced the pressure on them, provided an environment where their child was happy and able to learn and socialise, while enabling them to better manage their caring and household responsibilities.

> Because I'm a full-time carer, I feel very spread thin at times […] I try my best to provide activities in the house that are stimulating…a learning environment for both of the kids […] But obviously, that can be challenging depending on my partner's health if he has a day where his mobility is totally shot, I'm doing everything for him. But I think the nursery, it's provided more education than I could possibly give her myself […] It takes a massive weight off my shoulders in terms of being able to have her go to nursery. I know she's happy, I know she's learning and she's thriving and I can deal with some things in the home. (Parent of a two-year-old)

10.3 Variation in impacts by family characteristics

There is evidence that the impact of funded ELC hours varied by a wide range of participant characteristics. Consistent with the findings in 2022, survey respondents

more likely to agree or strongly agree they were able to work or look for work, included parents in households:

- With two parents (77%, compared with 66% of households with one parent).
- With two parents in work (82% compared with 70% of households with one parent/carer in work and 46% of households with no parent/carer in work).
- Earning £60,000 and above per year (87%, compared with 65% of respondents earning less than £16,000 per year).

Households without children with ASN were also more likely than those with at least one child with ASN to report being able to work or look for work (77% compared with 66%).

However, the reverse was true for most of the other impacts. For impacts around wellbeing, caring for family and for themselves, studying and thinking about the future, those more likely to report a positive impact were parents with English as an additional language (compared with those with English as a first language), with children aged under 6 with ASN (compared with those whose children did not have ASN), single-parents (compared with two-parent households), households with no parents in work (compared with those with one or two parents in work), and those living in the 20% most deprived areas (compared with those living in the 80% least deprived areas). A full list of subgroup differences can be found in the Supplementary Tables I1a-I9c.

From the perspective of parents, funded ELC has clearly had a notable positive impact on family wellbeing and parents' opportunities to take up work – two key intended outcomes of the ELC expansion programme. However, as the figures above note, this impact differs across different subgroups of parents. While more affluent and couple households were more likely to be able to work, it is notable that the majority of single-parents and parents in lower income households do also report that ELC has helped them work or look for work.

10.4 Impact of funded ELC on children

In interviews, parents discussed a range of impacts that access to funded ELC had on their children. It is important to note that all these impacts were also experienced by participants receiving paid-for childcare. However, without funded ELC not all households could afford to send their children to ELC; therefore, these children could miss out on the positive influence of ELC on their development.

Participants discussed the importance of funded ELC providing a chance for children of all ages to socialise with other children of a similar age. This was seen as particularly important for children without siblings, who may not have had as much opportunity to socialise with other children, for families where the parents did not have friends with children of similar ages, or families who lived in areas where there were fewer activities for young children.

> [Funded ELC] providing that social kind of aspect for my daughter so she can spend some time with children a similar age to her. She's also an only child so

> I think that's quite important too for her development. (Parent of a three- to five-year-old)

In some cases, children had shown improvements in their social development, including children with ASN, as a result of attending ELC. For example, a participant reported that their previously non-verbal child was now speaking and interacting with others and was socialising more since starting ELC.

> He was non-verbal to now speaking, it is amazing how much he has come on you know and that's just interacting with others, socialising with others, being in a different environment and it's just so amazing how I've seen him, he has blossomed. (Parent of a three- to five-year-old)

In addition to socialisation, funded ELC also helped children to learn key social skills such as sharing, making friends and playing well with other children, for example 'taking turns' with toys and activities. This in turn helped children develop their communication and behaviour moderation skills.

> It's doing his social and communication skills a big favour I think, he seems to really be coming on now, he's paying attention to what other people are doing rather than just getting sort of stuck in his own little world. (Parent of a three- to five-year-old)

> He is learning coping strategies on how to calm himself down and how to resolve difficulties with other children. So yeah, I definitely think it's had a positive impact on him socially and emotionally and it will continue to do so as he gets older. (Parent of a three- to five-year-old)

Participants also discussed the value of funded ELC for their children's learning. Participants felt funded ELC providers were able to offer a learning environment which they would not be able to provide at home and could support their child's learning and a younger age.

> I think it's helping them learn as well, like they're learning from a young age whereas I think if they were at home all day they wouldn't really be learning much. (Parent of a two-year-old and a three- to five-year-old)

> I feel like they've learnt new things that I maybe wouldn't know like how to support them to learn. (Parent of a two-year-old and a three- to five-year-old)

Funded ELC was also important for children who were learning English as an additional language with parents reporting that it had improved their child's English language skills.

> I think it helps like to have that, to learn English, like when we were 6 months in the house or only going to toddler groups he didn't speak any English at all and I think it's part of adapting here to the UK. (Parent of a three- to five-year-old)

Participants also reported that funded ELC provided a routine for both the child and the family, which was important preparation for the transition to school. They said ELC helped their child get used to longer days, structure and rules.

> They've been fantastic in helping him to accept routine and he's learning to write his name just now and I think they're just fantastic in helping him to

> understand social environments which for him is a huge thing. […] I think getting him used to routines and lunchtimes, sitting with other children, I think it's fantastic. (Parent of a three- to five-year-old)

> I think on the whole it is good for them to be able to socialise and get used to going to school and things like that, for them to be able to get used to the long days and interacting with different people when obviously their parents and stuff aren't there with them. (Parent of a three- to five-year-old)

As illustrated by the survey findings above, some participants did not consider funded ELC to have had a positive impact on their children. Parents spoke of increased anxiety in their child, difficulties in sleeping, regression in toilet training and in more general behaviour. This applied to children with and without ASN and was primarily about how well ELC settings were able to meet the needs of children. For example, as in Chapter 7, participants talked about busy funded ELC settings and thought there were not enough staff members to cater to every child's need.

> We've seen a real real big change in her over the past couple of months [since starting funded ELC]. She is quite a worried kind of child now, she does get a little bit anxious in new situations or going to new places. Her sleeping was affected; she then was having multiple accidents at nursery whereby she never had had that before. […] Usually she asks the question what are we doing today and if you say it's a nursery day today she quite often still gets upset. (Parent of a three- to five-year-old)

As highlighted in Chapter 4, longer days were not seen as beneficial for some children, particularly those aged two- to four-years-old. Some participants said that their children were tired after longer days at the nursery and felt the hours they were offered were too much for their child, particularly for children with ASN. Some participants would have liked to pick up their child earlier but could not because of their working hours.

10.5 Impact of funded ELC on wider family

When asked about the impact funded ELC had had on their wider family, responses varied. For some participants, the availability of funded ELC reduced dependency on family, particularly grandparents, to provide childcare for children not yet in school. This had a positive impact on parents who often felt guilty asking family members to help with childcare. However, even with funded ELC there were participants who still relied on family to help with childcare, most frequently with drop-offs and pick-ups at the funded ELC setting. This was often because funded ELC hours did not fit in with their working hours and employers were not able to offer flexibility with working patterns. Participants sometimes had no other option than to ask for help from family otherwise they would have to reduce their working hours to accommodate funded ELC, which had a financial implication.

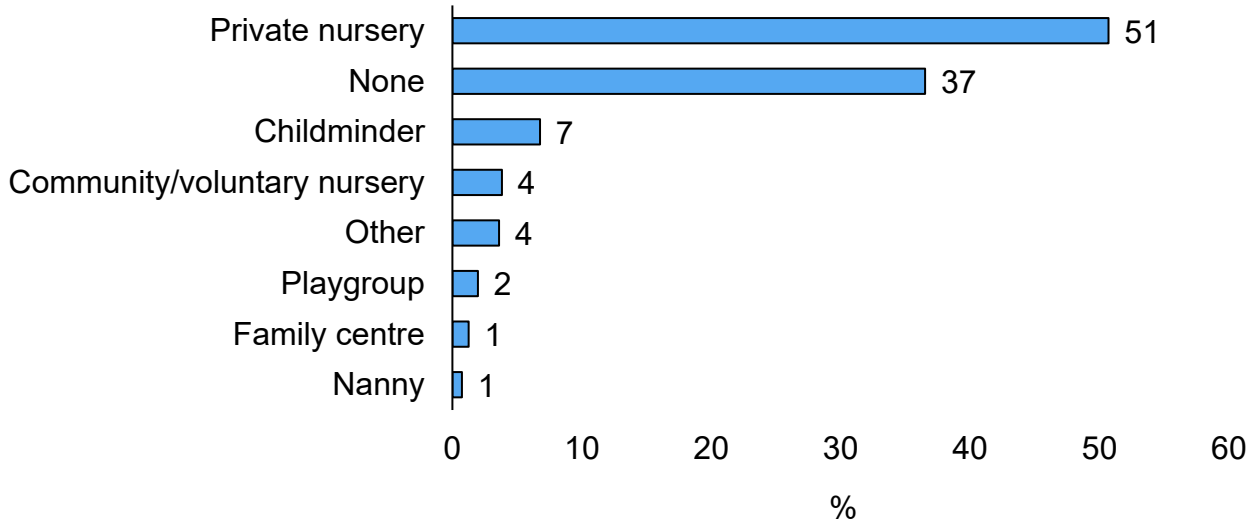
11 Provision for younger children

This chapter considers the views of parents of children under the age of three who are not yet receiving funded ELC[31]. It explores the use of paid-for childcare and parents' views of funded ELC being available for these children, and the aspects of ELC that would be most important if funded ELC were available for them.

11.1 Profile of use of paid-for childcare

Parents were asked what type of paid-for childcare (if any) they currently used for their children under three who were not eligible for funded ELC (Figure 11.1). Around one-third (37%) did not use any childcare. The most common type of childcare mentioned was a private nursery (51%). Only a small percentage used other forms of paid-for childcare, such as a childminder (7%) or a community/voluntary nursery (4%). These findings are consistent with 2022.

Figure 11.1: Use of paid-for childcare



Base: Parents with a child under three years old (unweighted base: n=2,358)

There were some notable differences in the use of paid-for childcare for this age group by household composition. Respondents more likely to pay for private nursery for their under-threes were from households with:

- Two-parents (54%) compared with 35% of single-parent households.
- Two parents in work (59%, compared with 41% with one parent in work and 5% with no parent in work).
- An income of £60,000 or more per annum (68%, compared with 21% of households with an income of less than £16,000 per annum).
- Those living in the 80% least deprived areas (55%, compared with 29% of households in the 20% most deprived areas).

[31] Although these questions were intended for parents of children aged under three years who are not eligible for funded ELC, some parents who answered these may also have been unsure if their child is eligible or have not heard of funded ELC. This was also the approach taken in 2022.

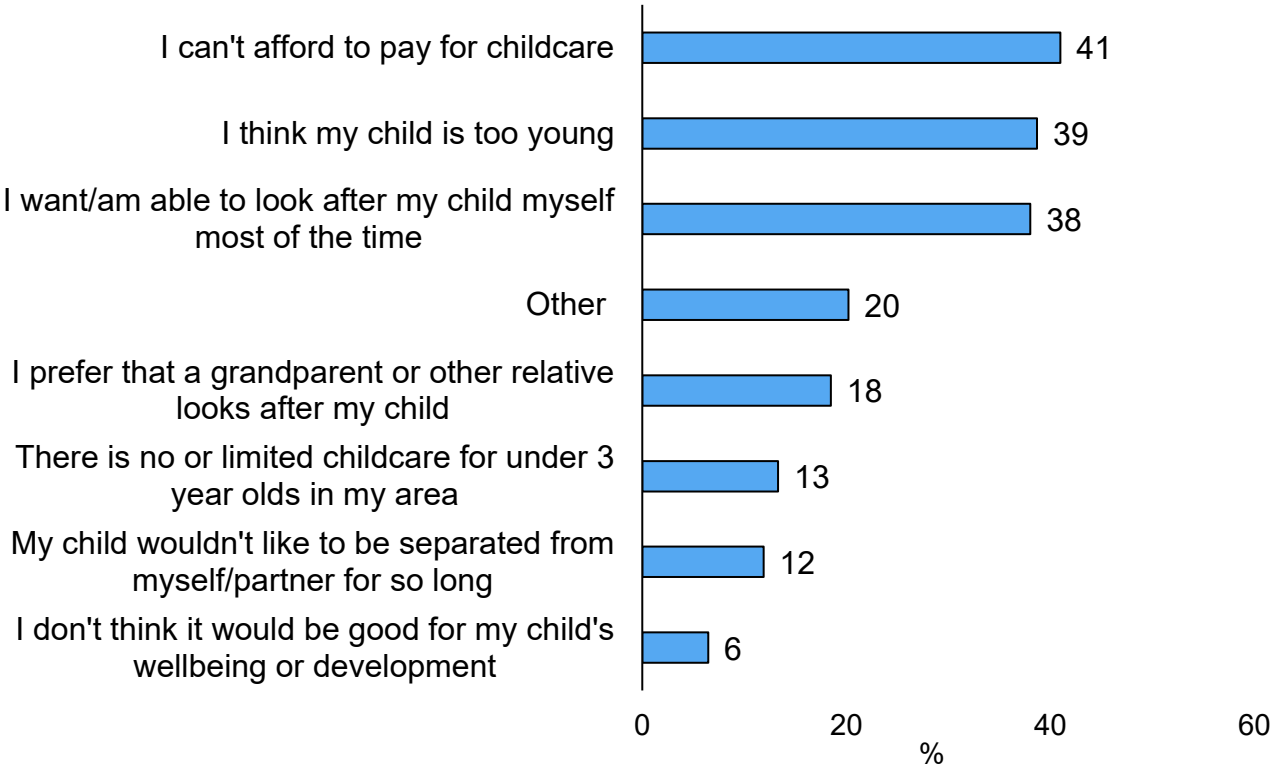
- No child aged under six with ASN (55%, compared with 28% of households with at least one child aged under six with ASN).

The first two subgroups were also highlighted in 2022.

11.2 Reasons for not using paid-for childcare

Parents who did not use paid-for childcare for their child aged under three were asked why this was the case (Figure 11.2). This was most commonly because they could not afford to pay for childcare (41%), they thought their child was too young to attend paid-for childcare (39%), and they wanted or were able to look after their child themselves most of the time (38%). These were also the three most common reasons highlighted in 2022. Of those who selected the 'Other' option (20%), the most common reasons that parents were not using paid-for childcare were that they were currently on maternity leave or that their child was only born recently.

Figure 11.2: Reasons for not using paid-for childcare for children under three years old[32]



Base: Parents of a child under three years old who do not use paid-for childcare (unweighted base, n=883)

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

In the survey, parents of children aged under three and currently ineligible for funded ELC were asked how interested they would be in using this if it was made available. The majority of respondents (91%) said they would be interested, with 80% saying they would be very interested in using funded ELC for their child under three years. This is consistent with the findings in 2022.

[32] Reasons where less than 5% of parents answered are not shown in Figure 11.2.

Respondents most likely to be interested in funded ELC for their child aged under three were households with two parents in work (94%, compared with 83% with one parent and 87% with no parent in work); households with only one child (97%, compared with 88% with two and 81% with three or more children); and households in accessible areas (92% compared with those in remote areas (82%). This is consistent with the findings in 2022.

In interviews, some parents felt that the eligibility criteria for funded ELC provision for two-year-olds was too restrictive and that a lot of two-year-olds, particularly those with ASN, could benefit from funded ELC at a younger age. Some participants did not feel it was right that those who were earning more, or not in receipt of specific benefits, were ineligible for funded ELC for two-year-olds, and this was a disincentive for parents to work.

Overall, participants would like to see the eligibility for funded ELC extended to all two-year-olds. Participants also proposed that provision for eligible two-year-olds should be better advertised to improve awareness. Participants also drew comparisons with the funded ELC provision available in England, suggesting that Scottish provision should also be available from when the child is one year old. Participants reported that more support earlier on was important for those who do not have access to other forms of childcare.

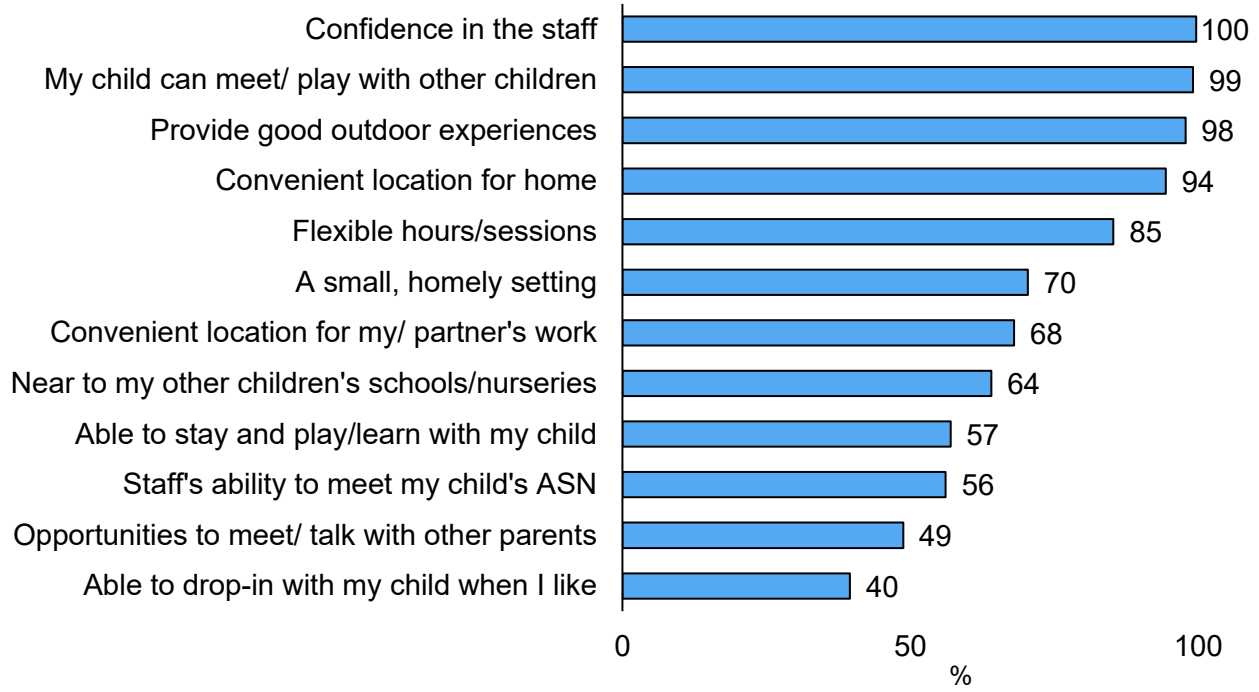
> In England people are able to access support from much earlier than in Scotland. So maybe like trying to match for that. […] ideally from one year old because I was on one year's Maternity Leave so my daughter she started nursery when she was like 13 months old. (Parent of a three- to five-year-old)

11.4 Factors considered when choosing childcare

Respondents who were interested in funded ELC for children aged under three were asked what factors they would consider when choosing childcare (Figure 11.3).

Factors that were considered important or very important by at least 8 in 10 parents were: confidence in the staff (100%); opportunity for my child to meet and play with other children (99%); provide good outdoor experiences (98%); convenient location for home (94%); and flexible hours/sessions (85%). This is consistent with findings in 2022.

Figure 11.3: Factors parents would consider when choosing childcare for their child aged under three



Base: Parents with a child under three years old (unweighted base, n=2,164)

There were a number of subgroup differences, including that single-parent households were more likely than two-parent households to consider settings with flexible hours (91%, compared with 84%) and where they would be able to drop-in with their child when they like/not having to book ahead (51% compared with 37%), as well as staff's ability to meet their child's ASN (71%, compared with 53%). For a full list of subgroup differences, please see Supplementary Tables J3a-J14c.

12 Conclusions

The overarching aim of this research was to provide up-to-date information on parents' and carers' use, views and experiences of ELC, particularly funded ELC. The research explored parents' perceptions of the flexibility, accessibility, quality and affordability of ELC, drawing out any relevant comparisons with 2022 data. For the majority of parents, their experiences of funded ELC were largely positive. However, a range of challenges and some suggested improvements were also described.

12.1 Use of funded ELC

This research indicates that in 2025 there was a high take-up of funded ELC hours for three- to five-year-olds (95% among survey respondents) and eligible two-year-olds (83%). Local authority nurseries were the most common type of funded ELC used, followed by private nurseries, for both three- to five-year-olds and two-year-olds. The majority of those using funded ELC hours were using their full entitlement, though this was higher for three- to five-year-olds (87%) than for eligible two-year-olds (73%).

The main reason parents did not use their full entitlement was that they did not need to use all the hours or did not think it would be the best thing for their child. However, other parents did not use their full entitlement because their funded ELC provider did not provide enough flexibility in the days or hours on offer. About half (47%) of parents of three- to five-year-olds only used funded ELC. A similar proportion (48%) used funded ELC as well as ELC they paid-for (24%), informal childcare (17%), or a combination of paid-for and informal childcare (7%). Interviews and open-text responses showed that this was largely because funded ELC hours alone did not cover their childcare needs.

12.2 Accessibility

While 61% of respondents reported they did not experience challenges accessing childcare, 39% stated that they had. The most common challenges experienced by parents were: that there were not enough places available locally; a lack of flexibility in opening hours or sessions; and a lack of provision in school holidays.

Around two-thirds (65%) of parents of eligible children with ASN said they had no difficulties in finding funded ELC to meet their child's ASN. The majority (89%) of parents using funded ELC for their children with ASN said that they were either satisfied or very satisfied that their funded ELC setting met their children's ASN. Parents who were dissatisfied stated that in some ELC settings, staff did not have sufficient training, experience, skills or time to provide support to their children with ASN. In some instances, parents felt there were not enough staff to meet the needs of children, particularly those who required more one-to-one support. In addition, some ELC environments were not suitable for children with ASN, either in terms of access to quiet or private spaces, or to appropriate learning and communication tools. Parents who were dissatisfied with the support provided for their children with

ASN felt that staff did not take their concerns seriously which could result in their children's behaviour or distress escalating before action was taken.

12.3 Flexibility

Overall, the majority of parents of eligible two-year-olds (95%) and three- to five-year-olds (90%) were satisfied that they had been offered the flexibility to use funded hours in a way that met their family's needs. Parents who were satisfied said their funded ELC providers offered hours that fitted around their work or study, and/or around school hours of older children. This was sometimes aided by understanding and flexible employers who were happy to work around parents' childcare needs or helped by ELC providers who could be flexible around drop-off and pick-up times. Some parents were also satisfied with their ELC settings' flexibility because this helped support the needs of children with ASN.

Those who were dissatisfied with the flexibility of funded ELC for their eligible two-year-olds (4%) and three- to five-year-olds (8%) reported that there was limited or no choice in the funded ELC providers they could use locally, which meant that the hours offered did not always meet their needs. On occasion the hours were not sufficient to fit in with work schedules, which made it difficult for some parents to work full-time or at all. This was particularly the case for single-parents or those without nearby family support. Other parents felt the hours provided were too long for their children, either due to the child's age or their ASN. Parents would like more flexibility to use their funded hours as they needed, either within existing provision or by increasing the choice of provision in their local area.

12.4 Quality

The majority of parents (88%) reported that they were satisfied with the overall quality of their main funded ELC provider. Outdoor and indoor spaces at ELC settings, the food on offer to children, the training and experience of staff, the staff to child ratios and communication with staff all influenced parents' views of the quality of ELC settings. However, staff to child ratios were of particular concern to parents with ASN in terms of their children receiving sufficient support to learn and develop. Good quality ELC settings were said to provide:

- Regular access to green spaces (with staff involvement in outdoor activities).
- Indoor spaces that were a suitable size for the number of children, offered a variety of activities, and had specific facilities to support children with ASN.
- A choice of healthy food which accommodated dietary restrictions and requirements based on ASN.
- Well trained staff who forged positive relationships with children, were skilled and invested in supporting children's learning, development and ASN.
- Regular and detailed communication about children's development and staff who would listen and respond positively to parents' concerns.

12.5 Affordability

Around half (47%) of parents used paid-for childcare. Of these, 56% said they had not experienced difficulties affording childcare in the last 12 months. In interviews, parents said they were mainly paying for 'wraparound' additional hours to enable them to work. However, 42% of parents who paid for childcare had experienced difficulties affording childcare costs in the last year. This was mainly due to the number of hours they needed to pay to meet their childcare needs. Having to pay for childcare and associated costs upfront, as well as travel costs to reach the setting also made affording childcare difficult. Interview respondents who were paying primarily for private ELC reported that this had a significant financial impact, limiting their ability to work and requiring them to seek financial support from family members as they could not afford to pay for it.

12.6 Impact of funded ELC

This research is part of a larger evaluation of the expansion of funded ELC to 1140 hours. The evaluation seeks to understand the impact of the expansion of funded ELC on children and families in Scotland. The evaluation also explores whether the expansion of funded hours has improved children's development (narrowing the poverty-related outcomes gap); improved family wellbeing; and increased parents' opportunities to take up or sustain work, study or training. This research suggests that progress is being made towards each of these outcomes.

12.6.1 Opportunities take up or sustain work, study or training

Parents most commonly reported that funded ELC hours impacted their employment and future opportunities. Three-quarters (75%) of survey respondents agreed or strongly agreed that they were able to work or look for work, or consider future opportunities (74%) while 40% were able to increase the number of hours they worked and 36% were able to study or improve work-related skills. These figures were similar in 2022.

Qualitative interviews supported these findings. Respondents noted that longer ELC hours (e.g. 8am to 6pm) enabled them to move from part-time to full-time work and schedule their work around regular ELC hours. Some respondents reported improved financial positions, enabling them to buy better quality food, engage in more family activities, go on days out or holidays, or save money for their children. For other respondents, the cost of supplementing funded hours with additional paid-for childcare negated financial benefits from increased employment.

The research also highlighted limitations with ELC provision. For some parents, restrictive opening hours, lack of extended or wraparound hours, and inflexible drop-off and pick-up times hindered their capacity for full-time work, meaning that they were missing out on opportunities at work because of their part-time status.

12.6.2 Improved children's development and family wellbeing

Parents reported positive impacts of ELC on their children's socialisation and learning. ELC provided opportunities for children to socialise with peers, learn social skills and develop communication abilities. ELC was also thought to support

children's learning in ways that parents could not replicate at home, including aiding children learning English as an additional language. The structured environment of ELC helped prepare children for the transition to school. However, longer ELC hours were sometimes viewed as excessive for younger children or those with ASN, leading to fatigue and behavioural issues.

Funded ELC hours also influenced parents' wellbeing. Approximately half of the survey respondents agreed or strongly agreed that they felt happier (48%), less stressed (45%), and had more time for self-care (45%). Around 39% felt they could better care for other family members. Interviewees echoed these sentiments, with parents valuing the additional time for practical tasks, bonding with other children, and personal relaxation, which positively impacted on their mental health and life balance. Certain groups experienced pronounced benefits, particularly single-parents and those with caregiving responsibilities, who often perceived that funded ELC reduced pressure and provided a supportive environment for their children. However, it is also important to acknowledge that around one-quarter of respondents disagreed that funded ELC had resulted in these impacts.

12.6.3 Subgroup differences

There is evidence that positive impacts on family wellbeing and opportunities to take up work varied across different groups of parents. More affluent and two-parent households were more likely to report improved opportunities to take up work. It is notable, though, that the majority of single-parents and parents in lower income households also reported that ELC had helped them work or seek work.

12.7 Comparisons with 2022 data

The key findings in 2025 are broadly similar to 2022. The key differences are:

- The uptake of full ELC entitlement: 87% of parents of three- to five-year-olds and 73% of parents of two-year-olds said that they use their full entitlement. In 2022 these figures were 73% and 52% respectively.
- The percentage of parents with three- to five-year-olds using paid-for childcare, which was 34% in 2025 and 22% in 2022.
- In 2025, 56% said they had not experienced difficulties affording childcare in the last 12 months, compared with 34% in 2022.

12.8 In conclusion

Overall, parents who participated in this research were largely positive about funded ELC and reported a range of positive impacts they and their children are experiencing as a result of funded ELC. However, a number of challenges remain regarding affordability, accessibility, flexibility and quality of funded ELC. These included a lack of funded ELC provision available locally, challenges understanding eligibility criteria, and difficulties ensuring ELC provision met the additional support needs of their children. The findings underscore the need for continued support and flexibility in funded ELC provision, as well as on-going monitoring and evaluation, in order to make improvements to maximise the benefits of funded ELC for all families in Scotland.

Appendix A: Methodology

Research aims and objectives

The overarching aim of this research was to provide up-to-date information on parents'[33] use of, views about, and experiences with ELC, particularly funded ELC, in the fourth year since the statutory entitlement rose from 600 to 1140 funded hours. The research explored parents' perceptions of the flexibility, accessibility, quality and affordability of ELC, drawing out any relevant comparisons with 2022 data. The research objectives were to:

- Provide up-to-date information on aspects essential for understanding the current status of delivery of the 1140 expansion, such as: use and views of different types of ELC; drivers of and barriers to taking up the funded entitlement; views on accessibility, flexibility and quality of funded ELC; and affordability/costs of additional childcare.
- Support analysis of differences in use and views of ELC for different groups of parents and carers, including those living in the most deprived communities, in rural areas, with children with ASN, in different family types (e.g. single adult/ couple) and with different characteristics (e.g. protected characteristics).

The data from this research feeds into the overall evaluation of the expansion of funded hours, providing understanding of the achievement of both intermediate and long-term outcomes that will help identify any issues and support policy development.

Research design

To address the research aims and objectives, ScotCen conducted both an online survey of parents who have children who have not yet started school, and in-depth interviews with parents who had completed the survey[34]. The online survey was conducted between 23 April and 29 May 2025 and received 7,589[35] responses. Interviews with 33 parents and carers took place between 7 May and 30 June 2025.

To ensure the research was designed and implemented in an ethical manner, an application was submitted to the National Centre for Social Research (NatCen) Research Ethics Committee (REC). This included setting out the steps taken to ensure the research was accessible to participants with a range of needs. The NatCen REC adheres to the Scottish Government's social research ethical guidance, as well as those held by the Social Research Association (SRA) and the

[33] Throughout the report 'parents' is used to refer to both parents and carers.

[34] Participant demographics can be found in Appendix A.

[35] This is the number of valid responses used for analysis. Where someone completed the survey twice, or dropped out of the survey before completing the section on Additional Support Needs, responses were removed.

Market Research Society (MRS). Ethical approval for the research was granted by the NatCen REC on 4th March 2025.

Survey of parents and carers

Questionnaire

The web questionnaire was developed in collaboration with the Scottish Government. To enable comparisons with earlier data, the survey questionnaire was largely based on the one used in 2022. However, it also included several new and amended questions to improve questions where relevant and address the specific aims and objectives of this research. The survey took around 20 minutes to complete. At the end of the survey respondents could opt-in to a prize draw to win one of eight £100 vouchers. They could also opt-in to be contacted to take part in a qualitative interview.

Sampling and recruitment

Scoping for the 2022 ELC parent survey concluded that there was no readily accessible sampling frame with contact details available of parents eligible to take part, which is required for random probability sampling. It was therefore agreed that, in line with the approach taken in 2022, a non-probability sampling approach should be used again in 2025. This involved contacting parents and carers through ELC settings and a range of other intermediaries. Unlike with random probability samples, potential respondents to non-probability surveys are not all equally likely to take part. The characteristics of parents and carers who participated in the survey can be found in Appendix B. Multiple communications about the survey were shared with all eligible[36] childcare providers and with an agreed list of third sector intermediaries with the aim of maximising the reach of the survey to as many parents as possible.

An email with Scottish Government endorsement was sent to the ELC lead in each local authority (LA) in March 2025 to introduce the research and to ask for their support in promoting the survey to all local ELC providers. LA leads were asked to contact the ELC providers in their area so that they were aware of the research in advance of ScotCen contacting providers directly with more detail on the project. All ELC providers were sent an email with hyperlinks to text to share with parents, inviting them to take part in the survey. The text provided an overview of the study, the web survey hyperlink and a hyperlink to a participant information page. ELC providers were asked to share the invitation from 23 April. The survey took place during a similar time period as the 2022 survey[37].

[36] Eligible providers included all daycare providers of childcare from the most up-to-date Care Inspectorate records (MDSF) excluding crèches and services identified as exclusively out-of-school or after-school clubs.

[37] The timing of the 2025 survey was intended to mirror the timing of the 2022 survey to maximise comparability. In the 2017-18 parent research, the survey took place in late August to the end of September. Scottish Government changed the timing in 2022 as it was considered better for the survey to take place towards the end of the academic year when the highest proportion of children are in funded ELC.

To reach parents who may be less likely to be reached via LA providers, ScotCen also distributed the survey via intermediaries and third sector organisations who work directly with families with pre-school-age children. These included: Care and Learning Alliance, National Day Nurseries Association, the Scottish Childminding Association and the Craighalbert Centre.

One week after the first invitation was issued, ELC providers, intermediaries and third sector organisations were sent a first reminder email. After a further eight days, a second reminder email was issued. To increase response, fieldwork was extended by a week from the originally planned dates and a final reminder was sent out one week after the second reminder to inform parents of the new survey closing date and to further encourage participation. The survey closed at midnight on 29 May 2025.

Weighting

While non-probability sampling helps to reach as many respondents as possible, it can also lead to some groups being over- or under-represented. As observed in 2022, responses were again lower from families in large urban areas. Therefore, as with the previous survey in 2022, a single calibration was applied to make the responding sample more representative of the population based on urban-rural groupings. The population urban-rural groupings were derived from Care Inspectorate records (MDSF). These records were filtered to align as closely as possible with the survey's sampling frame. Each childcare setting's postcode was matched to its urban-rural classification and weighted by the number of childcare places available. These were then aggregated to produce a population estimate. This estimate was based on the location of childcare settings, rather than parents' home addresses, as the latter was not available for the whole population of interest[38]. The population and responding sample profile were subsequently used to calculate the calibration factors (see Table A1). About 15% of cases were missing urban-rural classification and since no auxiliary information was available to support more complex imputation, the mean weight of 1 was assigned to each of these cases.

Table A1: Calibration of survey responses by urban/rural classification

Urban/Rural Classification	Population Share (%)	Unweighted Response (%)	Calibration factor	Weighted Response (%)
Large urban	38.7	25.4	1.52	38.7
Other urban	30.6	38.8	0.79	30.6
Accessible small town	8.8	8.7	1.02	8.8
Remote small town	3.8	3.9	0.98	3.8
Accessible rural	12.6	15.6	0.81	12.6
Remote rural	5.5	7.6	0.72	5.5

Note: the unweighted response is based on the urban/rural classification derived from the respondent's home postcode provided in the survey. The population share is based on the

[38] Some children may travel from accessible rural areas into larger settlements in order to access childcare, but on the whole data from another recent survey (the Scottish Study of Early Learning and Childcare, Phase 5, May-June 2024) show that this is fairly minimal.

urban/rural classification derived from the postcode of childcare providers that were invited to take part in the survey.

In this study, the total number of respondents was 7,589. After the necessary weighting adjustments were applied, the effective sample size – which reflects the statistical power of the data[39] – was calculated to be approximately 7,002. This indicates a weighting efficiency of 92%, which is considered high. This suggests that the weighting process helped correct for imbalances in the sample without significantly compromising the overall reliability or precision of the results.

Interviews with parents and carers

Sampling and recruitment

The mode of recruitment for the in-depth interviews with parents was asking those who had completed the survey to provide their contact details if they consented to take part in a follow-up interview about their experiences of ELC. Due to the large response to the survey and significant interest in taking part in a qualitative interview, it was possible to sample on several key criteria of interest, including: family composition (number of parents in the household); child age; use of funded ELC (using full-entitlement, partial-use of entitlement and no use of entitlement); level of satisfaction with ELC provision in terms of flexibility, ASN support, and quality; ethnicity; SIMD; and family size. The experience of parents with children with ASN and those who were dissatisfied with the flexibility of ASN was of particular interest to the Scottish Government and, therefore, a particular focus for sampling. Participant demographics can be found in Appendix B.

Selected individuals who provided their contact details were sent an email to invite them to participate in an interview. A list of organisations who offer a range of support was also attached to the invitation. Those interested in proceeding to interview agreed a suitable time and date for the interview to take place. Parents who took part in an interview were given the choice of a telephone or video interview. All participants were given a £30 Love2Shop voucher as a thank you for their time and for sharing their experiences with the study. With the consent of participants, interviews were audio recorded and transcribed for ease of analysis.

Research materials

The interview participant information sheet and topic guide were developed in consultation with and agreed with the Scottish Government. All participant materials were designed and formatted to be accessible to a wide range of participants. The interview topic guide covered a range of subjects, including use of childcare, awareness and use of funded hours, experience of ELC providers (both funded and paid-for) in terms of flexibility, accessibility, quality and affordability, impact of use of funded hours, and suggested improvements to ELC provision. The interviews aimed to provide context to survey findings and explore the impact of funded ELC on families in more detail.

[39] This is an estimate of the sample size that would be required to achieve the same precision if it was a simple random sample.

Analysis

All analysis of the survey data was undertaken in SPSS using the weighted data. Frequencies and crosstabulations were conducted, with the crosstabulations displaying overall results for key measures and for specific subgroups, allowing comparison between them. As the sample were self-selecting it was not possible to provide statistically precise margins of error or significance testing. Apparent differences between subgroups have been reported where noteworthy throughout but have not been tested for statistical significance[40]. For the interpretation of subgroup differences it is useful to refer to the accompanying Supplementary Tables which are referenced throughout the report. The following subgroups were explored:

- **Household composition** (single-parent or two-parent household)
- **Parental employment** (two parents, one parent or no parent in work)
- **Household income** (five income categories, excluding prefer not to say)
- **Age of respondent** (under 25, 25-29, 30-34, 35-39, 40+)
- **SIMD** (20% most deprived areas compared with 80% least deprived areas)
- **English language** (parents with English as an additional language compared with parents with English as a first language)
- **Number of children (aged under 18)** (one, two or three or more children)
- **Parent long-term health condition** (parents with or without long-term health conditions)
- **Child with additional support needs (ASN)** (households with or without at least one child under the age of six with ASN)
- **Urban-rural classification** (Accessible and remote binary)

Other subgroup analysis is possible but was out of scope for this project.

This report includes tables and charts to display survey data. Not applicable (n/a) responses are not set out in the data included in the report. A full set of data tables are available that include these responses where applicable. Figures presented within the report on responses to individual questions, or within sub-groups, may sometimes add up to 99% or 101% due to rounding. The 2025 figures including decimal places are presented in the Supplementary Tables.

The transcribed qualitative interview data were managed and analysed using qualitative analysis software NVivo. All qualitative data were anonymised for analysis and reporting. An analytical framework was set up and piloted in NVivo. Once the framework was finalised, each transcript was coded, so that all the data on a particular theme could be viewed together. Multiple researchers were involved

[40] For non-probability surveys it is not feasible to assess the statistical significance of any differences. Apparent differences between sub-groups have been reported where the difference in percentage points was sufficient in respect of the base sizes of the sub-groups. Base sizes have been referred to throughout and can be seen in the Supplementary Tables as these are particularly important for interpreting apparent differences.

in coding and regular meetings were held to cross-check analyses. Through reviewing the coded data, the full range of views were systematically mapped, and the accounts of different participants compared and contrasted.

Strengths and limitations

A key strength of this study was its mixed method design. Combining a survey with follow-up qualitative research enabled this project to capture more nuanced and in-depth information on parental experiences and views of ELC. The survey provided high-level data from parents across Scotland, while the interviews captured rich, in-depth data which provide insights into parents' experiences. Furthermore, a large achieved sample size from the survey enabled analysis by a variety of subgroups. The recruitment approach, particularly engaging support from third sector organisations and intermediaries, helped achieve a diverse sample. This allowed a deeper exploration of the experiences of, and impact on, specific subgroups of interest. This also enabled further exploration of a range of experiences and perspectives in the qualitative interviews.

The main limitation to this study is the non-probability sampling approach that was used due to the absence of a sample frame for all eligible parents. Unlike probability sampling, non-probability approaches do not allow for calculation of sampling errors. This limits understanding of sample bias and representativeness and undermines the ability to generalise findings to the broader population of interest. Whilst this approach was consistent with the 2022 survey and thus allowed changes over time to be explored, we cannot calculate whether apparent differences between subgroups or changes since 2022 are statistically significant. In other words, it is not possible to assess the extent to which the differences observed are likely to reflect real differences in the population of eligible parents rather than simply among those who took part in the surveys each time.

Appendix B: Participant demographics

Survey participants compared with the population

A total of 7,589 valid responses were received from the online survey.

The survey findings are discussed in relation to three age groups: three-five-year-olds, two-year-olds, and under-two-year-olds to reflect variations in eligibility for funded ELC[41].

Most households who participated in the survey had a child aged between three and five years old (83%). Around a quarter (23%) of households had a child under two years old and 17% had a 2-year-old child.

Table B1: Age of children (unweighted)

Proportion of children in funded ELC	Survey respondents	Scottish Population[42]
2-year-olds	19%	13%
3–5-year-olds	95%	95%

Table B2: Urban/rural 6-category (unweighted)

Urban rural classification[43]	Survey respondents	Scottish Population
Large urban areas	25%	38%
Other urban areas	39%	34%
Accessible small towns	9%	9%
Remote small towns	4%	3%
Accessible rural areas	16%	12%
Remote rural areas	8%	6%

Table B3: Scottish Index of Multiple Deprivation (SIMD) (unweighted)

Scottish Index of Multiple Deprivation	Survey respondents	Scottish Population
1 - Most deprived	20%	20%
2	19%	20%
3	20%	20%
4	24%	20%
5 - Least deprived	17%	20%

[41] All children aged three and four years old are entitled to 1140 hours of funded ELC in Scotland. Some two-year-olds are also eligible for funded ELC in Scotland. To be eligible for funded ELC at two years olds, the child must either be care experienced or have a parent who is or live in a household in receipt of certain state benefits. Children under the age of two are not entitled to receive funded ELC. Due to these differing entitlements to ELC by age, it is important we look at the use of funded ELC and other childcare within these age groups.

[42] Supporting documents - Summary statistics for schools in Scotland 2024 - gov.scot

[43] Urban Rural Classification 2020 Scottish Government

Survey participants: Key characteristics

The following tables (B4-B15) provide the demographics and key profile data on the participating sample.

Table B4: Household composition (unweighted)

Which best describes their household	Proportion of survey respondents
Single-parent/carer household	13%
Two parent/carer household	85%
Other	1%
Prefer not to say	1%
Unweighted base	7,066

Table B5: Employment of all parents/carers in the household (unweighted)

Number of parents or carers in employment / earners	Proportion of survey respondents
0 earners	5%
1 earner	17%
2 earners	74%
Other	3%
Prefer not to say	1%
Unweighted base	6,992

Table B6: Household income (unweighted)

Total household income per year before tax	Proportion of survey respondents
Less than £16,000 (up to £1,332 per month)	9%
£16,000 to £29,999 (between £1,333 and £2,499 per month)	16%
£30,000 to £44,999 (between £2,500 and £3,749 per month)	17%
£45,000 to £59,999 (between £3,750 and £4,999 per month)	19%
£60,000 and over (£5,000 per month or over)	29%
Prefer not to say	9%
Unweighted base	7,027

Table B7: Parent/carer age (unweighted)

Age of responding parent (banded)	Proportion of survey respondents
Under 25	2%
25-29	14%
30-34	30%
35-39	34%
40+	20%
Unweighted base	7,018

Table B8: Scottish Index of Multiple Deprivation (SIMD) binary (unweighted)

SIMD 20% most deprived and other (binary)	Proportion of survey respondents
20% most deprived	20%
Other	80%
Unweighted base	6,453

Base: All respondents who provided a home postcode. SIMD was derived from the parent/carer's home postcode which was provided in the survey

Table B9: Scottish Index of Multiple Deprivation (SIMD) quintiles (unweighted)

SIMD quintiles	Proportion of survey respondents
1 - Most deprived	20%
2	19%
3	20%
4	24%
5 - least deprived	17%
Unweighted base	6,453

Base: All respondents who provided a home postcode. SIMD was derived from the parent/carer's home postcode which was provided in the survey

Table B10: English as an additional language (unweighted)

Is English an additional language for any parent or carer in the household?	Proportion of survey respondents
Yes	15%
No	84%
Prefer not to say	1%
Unweighted base	6,985

Table B11: Number of children in the household (unweighted)

Number of children aged under 18 in the household	Proportion of survey respondents
1	44%
2	42%
3 or more	14%
Unweighted base	7,589

Table B12: Parent/carer long-term health conditions (unweighted)

Whether respondent has a long-standing condition and how much it impacts their capacity if so	Proportion of survey respondents
Yes, reduces capacity a lot	4%
Yes, reduces capacity a little	7%
Yes, but does not reduce capacity	3%
No	82%
Prefer not to say	4%
Unweighted base	6921

Not applicable = respondent did not make it to this point in the survey or stopped at this question

Table B13: Any children in the household under the age of 6 with any Additional Support Needs (unweighted)

Any children under 6 years old with Additional Support Needs	Proportion of survey respondents
No	83%
Yes	17%
Don't know	0%
Prefer not to answer	0%
Unweighted base	7,589

Table B14: Geography (Urban/rural binary) (unweighted)

Urban / Rural 2-fold 2020 classification (derived from 6-fold matched to home postcode)	Proportion of survey respondents
Accessible	89%
Remote	11%
Unweighted base	6,453

Base: All respondents who provided a home postcode. Urban/Rural 2-fold grouping was derived from the parent/carer's home postcode which was provided in the survey

Table B15: Geography (Urban/rural 6-fold classification from PHS) (unweighted)

Urban / Rural 6-fold matched to home postcode	Proportion of survey respondents
Large urban areas	25%
Other urban areas	39%
Accessible small towns	9%
Remote small towns	4%
Accessible rural areas	16%
Remote rural areas	8%
Unweighted base	6,453

Base: All respondents who provided a home postcode. Urban/Rural 6-fold grouping was derived from the parent/carer's home postcode which was provided in the survey

The key characteristics of those who took part in the survey in 2025 and 2022 are broadly similar. There were relatively small differences such as:

- The proportion reporting that any of children had Additional Support Needs (ASN) which was 14% in 2022 and 17% in 2025. Apparent differences may be, at least in part, due to increased education around and recognition of ASN during this time.
- Those with English as and additional language which was 18% in 2022 and 15% in 2025.

Qualitative participants

To ensure that a breadth of experience was represented in the qualitative research, parents were purposively sampled from the survey to recruit a diverse range of participants in terms of: household composition; parental disability; ethnicity; use of funded and paid-for childcare; childcare type; SIMD; and area of residence. As part of the research, the Scottish Government also identified specific groups of interest, including a mix of parents with children aged two and three to five, children with ASN and varied use of funded ELC entitlement. The experience of parents with children with ASN and those who were dissatisfied with the flexibility of ELC was of particular interest to the Scottish Government. These groups were, therefore, a particular focus for the purposive sampling.

Thirty-three parents and carers took part in an interview about their experiences and views of funded ELC. Participants lived in a range of locations across Scotland, in both urban and rural areas. Fifteen participants lived in an area of Scotland classed as remote or rural.

Nearly half (n=16) of qualitative participants lived in the 40% most deprived areas of Scotland. Seven participants were from a minority ethnic background and 26 were from a white ethnic background, which included participants who were not British or Scottish.

Most participants (n=24) lived in a two-parent household. Nearly a quarter (n=8) of participants reported that they had a long-term health condition. The majority (n=27) of participants had at least one child aged three to five, and less than half (n=13) had a child aged two. Eight participants had three or more children in their household.

Reflecting the interest of the Scottish Government, 26 participants had at least one child with ASN.

Other key groups of interest were families that did not use any funded ELC (n=6) and families that did not use their full entitlement of funded ELC. Twelve participants did not use their full entitlement, nine of which had a child with ASN. Some qualitative participants who used their full entitlement of funded ELC for one of their children but not for another. Over a quarter (n=9) of the participants reported paying for childcare, four of which reported that they found it difficult to afford.

Table B16: Profile of interview participants

Household composition	**Interview participants**
Single-parent/carer household	9
Two parent/carer household	24
Household size	**Interview participants**
Three or more children	8
One or two children	25
Child age	**Interview participants***
2-year-olds	13
3–5-year-olds	27
Use of funded ELC	**Interview participants****
Using full entitlement of funded ELC	20
Not using full entitlement of funded ELC	12
Not using funded ELC	6
Households with a child(ren) with ASN	**Interview participants**
Child with ASN	26
Child without ASN	7
Types of ASN	**Interview participants*****
Autism	10
Child with ESL	7
Social, emotional, behavioural difficulties	10
Learning disabilities	3
Multiple ASN	20
Satisfaction with funded ELC meeting child's ASN	**Interview participants**
Satisfied with ASN	14
Dissatisfied with ASN/Don't know	12
Satisfaction with the flexibility of funded ELC	**Interview participants**
Satisfied with flexibility	18
Dissatisfied with flexibility	12
Not using funded ELC	3
Ethnicity	**Interview participants**
Minority ethnic	7
White	26
Scottish Index of Multiple Deprivation	**Interview participants**
SIMD 1 and 2	16
SIMD 3, 4 and 5	17
Urban rural classification	**Interview participants**
Remote/rural	15
Urban	18
Health condition	**Interview participants**
Parent with long-term health condition	8
Parent without long-term health condition	25
Gender	**Interview participants**
Female	31

Male	2
Age	**Interview participants**
Under 25	1
25-29	6
30-34	11
35-39	11
40+	4

* Some participants had both children aged two and three to five, so numbers will not add up to 33

** Some participants had both children aged 2 and 3-5 and a mixture of full and partial use of funded ELC for different ages so numbers will not add up to 33.

*** Some participants had multiple children with ASN or children with more than one type of ASN, so numbers will not add up to 33.

Related publications

The following documents are part of the suite of publications related to Expansion of Funded Early Learning and Childcare (ELC) to 1140 hours: 2018-2025 National Outcomes Evaluation:

- Expansion of Funded Early Learning and Childcare to 1140 hours: 2018-2025 National Outcomes Evaluation – this is the overarching report that aims to synthesise and present the main findings relating to the outcomes of the expansion of funded ELC to 1140 hours over the period 2018 to 2025.
  - Easy Read summary of the 2018-2025 National Outcomes Evaluation
  - a Visual Summary of the 2018-2025 National Outcomes Evaluation can be found in the Supporting documents for this report
  - a set of Excel supporting tables can be found in the Supporting documents for this report

Individual reports presenting detailed findings from two key data sources are published alongside the National Outcomes Evaluation:

- Scottish Study of Early Learning and Childcare: Final Report – this report brings together data from across the six phases of the Scottish Study of Early Learning and Childcare (SSELC) to consider some key questions about the impact of the expansion of funded ELC in Scotland.
  - a set of supplementary Excel tables for the SSELC Final Report can be found in the Supporting documents for this report
- The Expansion of Early Learning and Childcare (ELC): Parent Research 2025 – this report outlines findings from research carried out with parents and carers in 2025 about their views and experiences of ELC.
  - a Visual Summary of the Expansion of ELC Parent Research 2025 can be found in the Supporting documents for this report
  - a set of supplementary Excel tables can be found in the Supporting documents for this report

All the reports published as part of the evaluation of the ELC expansion to 1140 hours can found in the Early learning and childcare expansion evaluation collection.

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