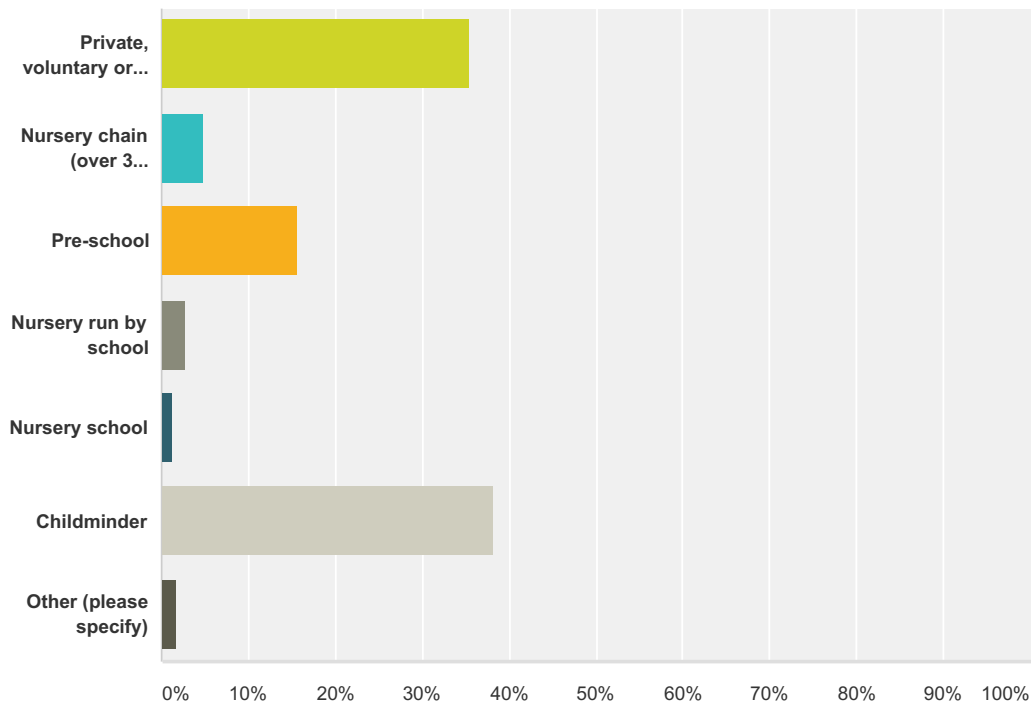


Q1 1. Which part of the country are you based in? (Please give the first part of your postcode e.g. SE23)

Answered: 523 Skipped: 0

Q2 2. What type of setting(s) do you currently work in?

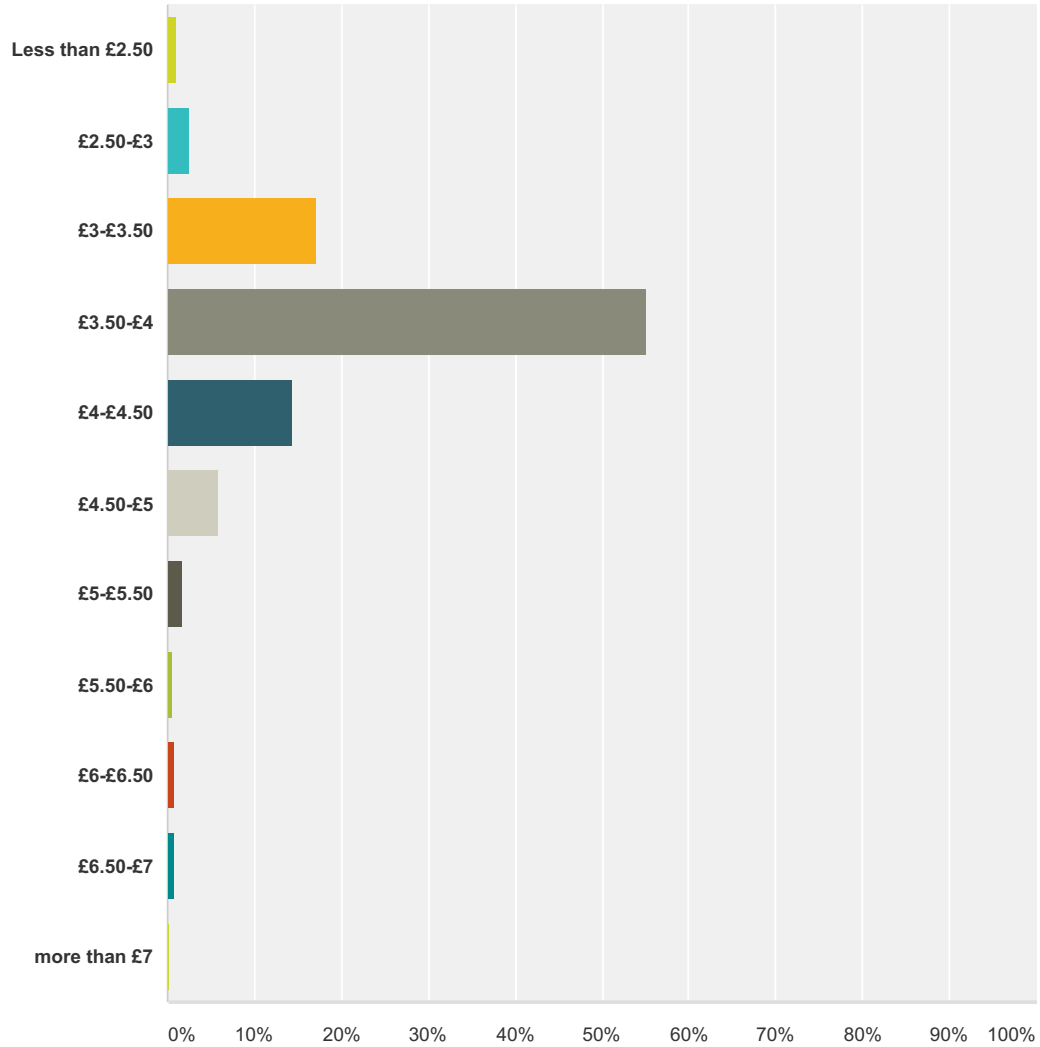
Answered: 523 Skipped: 0



| Answer Choices | Responses |
|---|------------|
| Private, voluntary or independent nursery (single or 2-setting chain) | 35.56% 186 |
| Nursery chain (over 3 settings) Please go to question 5 | 4.78% 25 |
| Pre-school | 15.68% 82 |
| Nursery run by school | 2.68% 14 |
| Nursery school | 1.34% 7 |
| Childminder | 38.24% 200 |
| Other (please specify) | 1.72% 9 |
| Total | 523 |

Q3 3. Which overall rate did your local authority pay per hour per funded 3 and 4-year-old in 2015-16?

Answered: 494 Skipped: 29

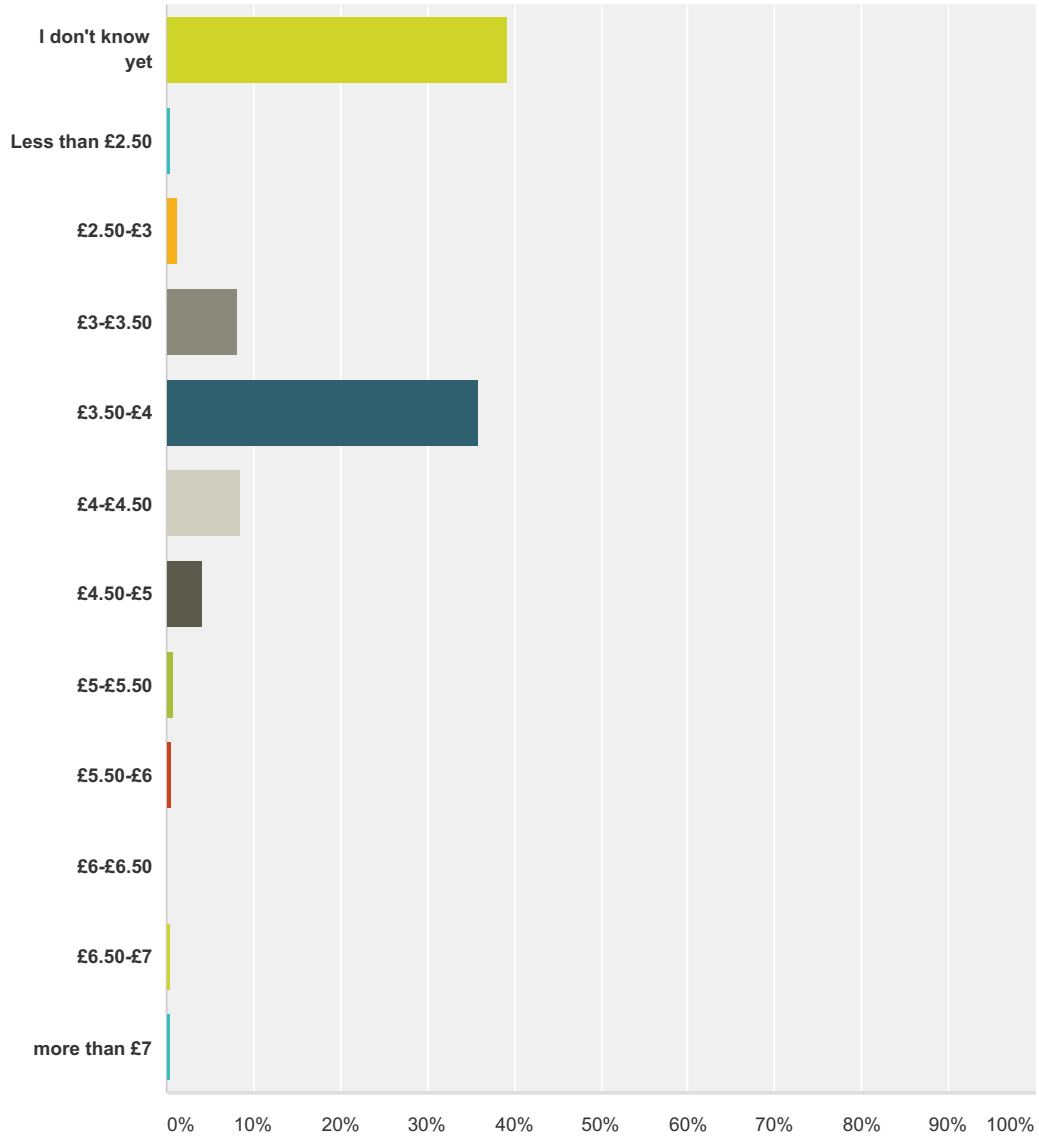


| Answer Choices | Responses |
|-----------------|------------|
| Less than £2.50 | 1.01% 5 |
| £2.50-£3 | 2.43% 12 |
| £3-£3.50 | 17.21% 85 |
| £3.50-£4 | 55.06% 272 |
| £4-£4.50 | 14.37% 71 |
| £4.50-£5 | 5.87% 29 |
| £5-£5.50 | 1.62% 8 |
| £5.50-£6 | 0.61% 3 |

| | | |
|--------------|-------|------------|
| £6-£6.50 | 0.81% | 4 |
| £6.50-£7 | 0.81% | 4 |
| more than £7 | 0.20% | 1 |
| Total | | 494 |

Q4 4. What is your local authority overall hourly rate per funded 3 and 4-year-old in 2016-17?

Answered: 500 Skipped: 23

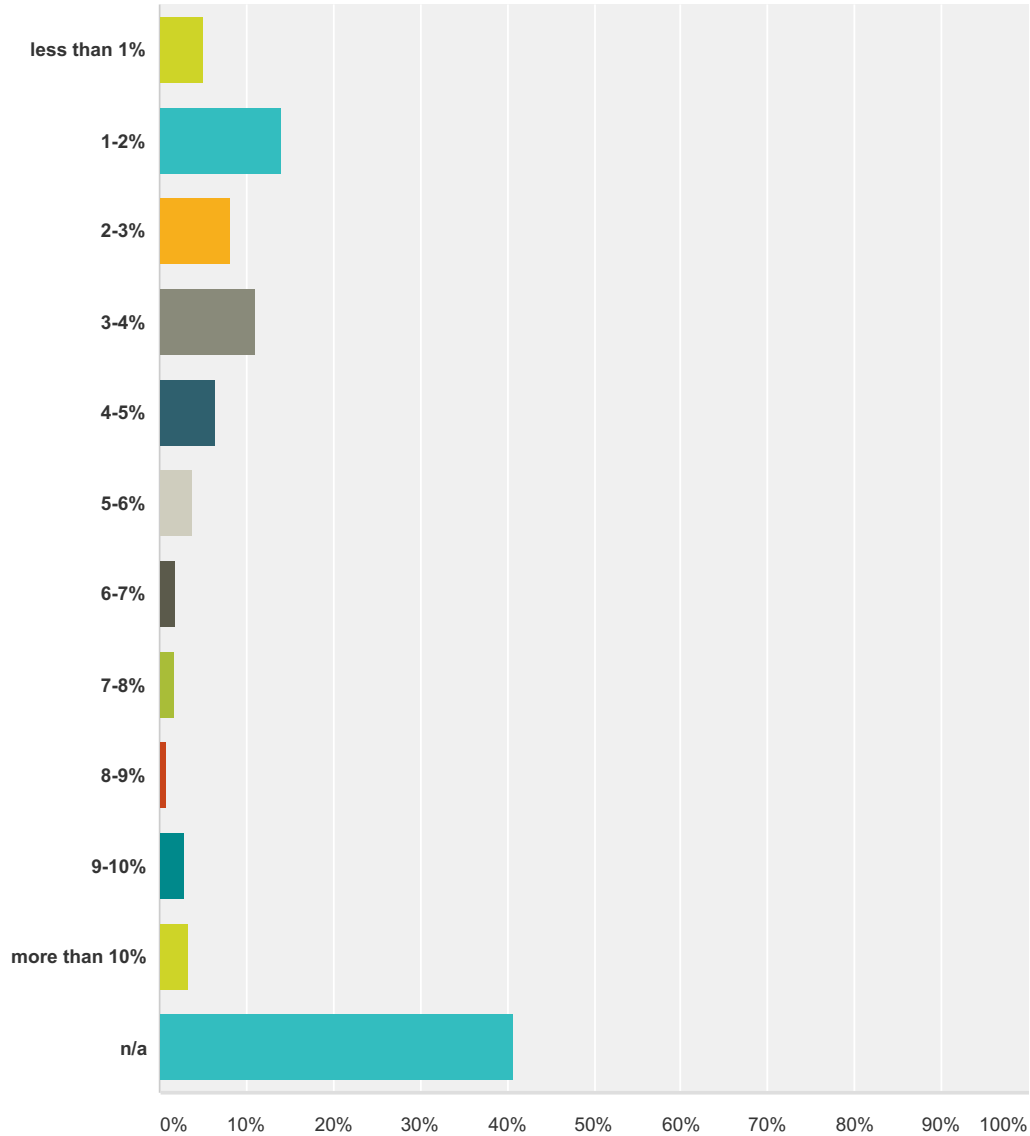


| Answer Choices | Responses | Count |
|------------------|-----------|-------|
| I don't know yet | 39.20% | 196 |
| Less than £2.50 | 0.40% | 2 |
| £2.50-£3 | 1.20% | 6 |
| £3-£3.50 | 8.20% | 41 |
| £3.50-£4 | 36.00% | 180 |
| £4-£4.50 | 8.60% | 43 |

| | | |
|--------------|-------|------------|
| £4.50-£5 | 4.20% | 21 |
| £5-£5.50 | 0.80% | 4 |
| £5.50-£6 | 0.60% | 3 |
| £6-£6.50 | 0.00% | 0 |
| £6.50-£7 | 0.40% | 2 |
| more than £7 | 0.40% | 2 |
| Total | | 500 |

Q5 5. How much will pensions auto-enrolment increase your wages bill by in 2016-7 compared with the most recent financial year (2015-6)

Answered: 523 Skipped: 0

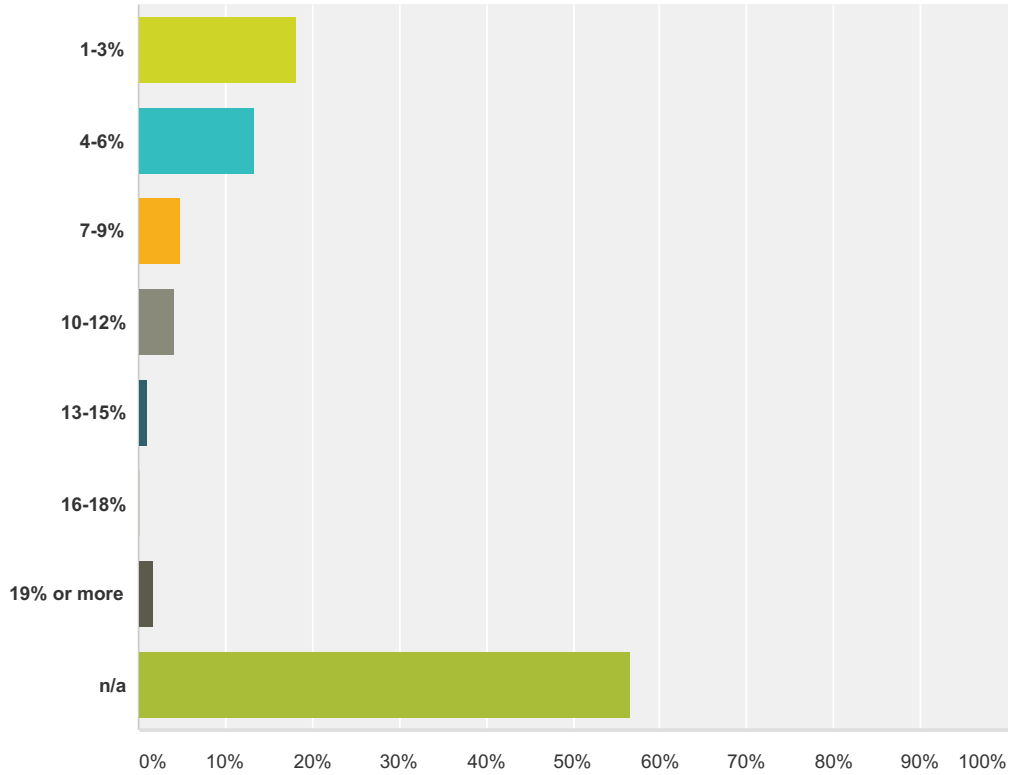


| Answer Choices | Responses |
|----------------|-----------|
| less than 1% | 4.97% 26 |
| 1-2% | 13.96% 73 |
| 2-3% | 8.22% 43 |
| 3-4% | 11.09% 58 |
| 4-5% | 6.50% 34 |

| | | |
|---------------|--------|------------|
| 5-6% | 3.82% | 20 |
| 6-7% | 1.91% | 10 |
| 7-8% | 1.72% | 9 |
| 8-9% | 0.76% | 4 |
| 9-10% | 2.87% | 15 |
| more than 10% | 3.44% | 18 |
| n/a | 40.73% | 213 |
| Total | | 523 |

Q6 6. How much did your business rates bill increase by in 2015-16 (please give average across multiple settings if necessary)

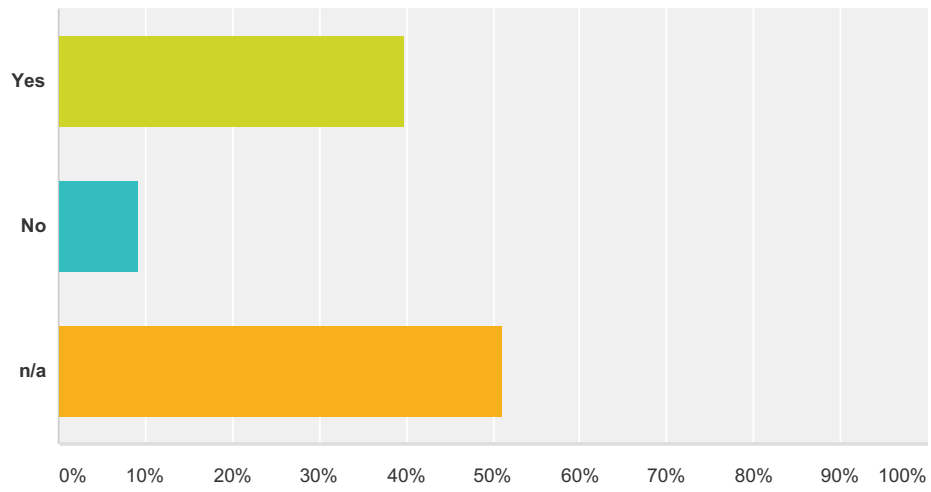
Answered: 523 Skipped: 0



| Answer Choices | Responses | Count |
|----------------|-----------|------------|
| 1-3% | 18.16% | 95 |
| 4-6% | 13.38% | 70 |
| 7-9% | 4.78% | 25 |
| 10-12% | 4.21% | 22 |
| 13-15% | 0.96% | 5 |
| 16-18% | 0.19% | 1 |
| 19% or more | 1.72% | 9 |
| n/a | 56.60% | 296 |
| Total | | 523 |

Q7 7. Do you expect business rates to increase in 2016-17?

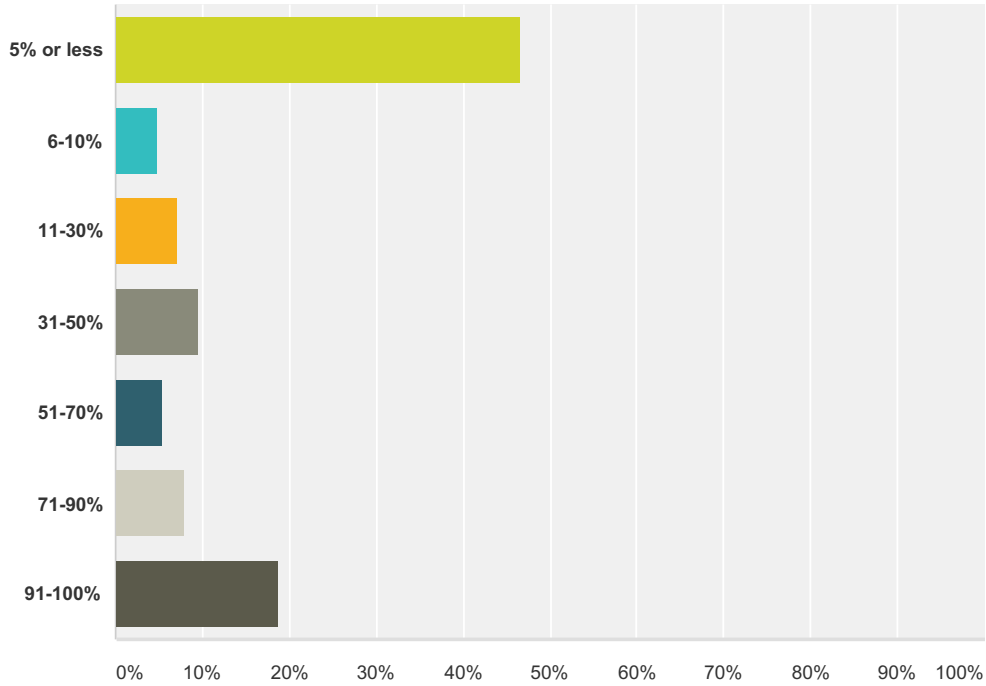
Answered: 523 Skipped: 0



| Answer Choices | Responses |
|----------------|------------|
| Yes | 39.77% 208 |
| No | 9.18% 48 |
| n/a | 51.05% 267 |
| Total | 523 |

Q8 8. What proportion of your staff do you currently pay the National Living Wage (NLW) of £7.20 per hour?

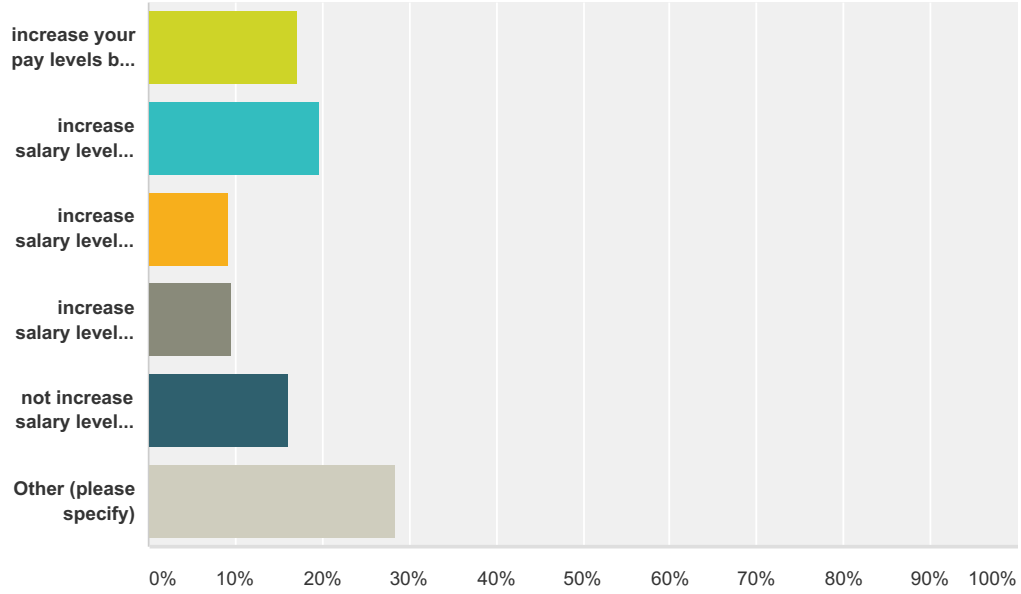
Answered: 523 Skipped: 0



| Answer Choices | Responses |
|----------------|------------|
| 5% or less | 46.65% 244 |
| 6-10% | 4.78% 25 |
| 11-30% | 7.07% 37 |
| 31-50% | 9.56% 50 |
| 51-70% | 5.35% 28 |
| 71-90% | 7.84% 41 |
| 91-100% | 18.74% 98 |
| Total | 523 |

Q9 9. In April, when the National Living Wage becomes a legal requirement, will you:

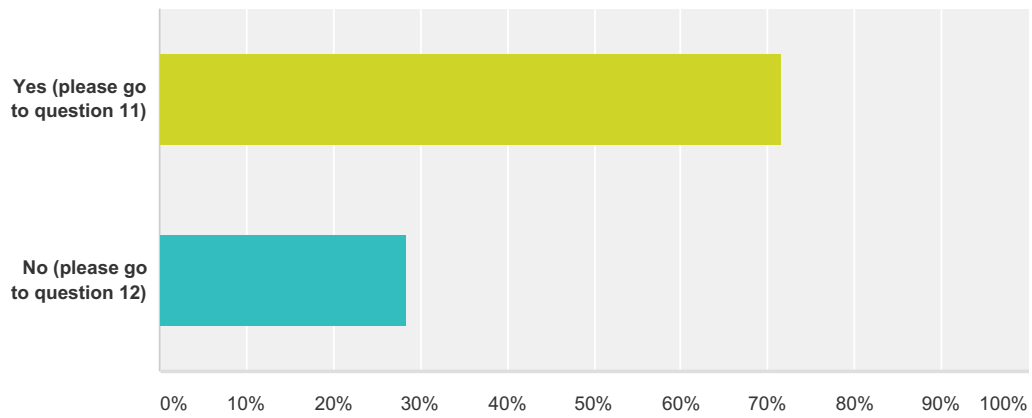
Answered: 523 Skipped: 0



| Answer Choices | Responses |
|--|------------|
| increase your pay levels by the same % for all staff, regardless of salary level | 17.02% 89 |
| increase salary levels for just those who are below the NLW | 19.69% 103 |
| increase salary levels for all staff, but those at NLW would increase by a greater % | 9.18% 48 |
| increase salary levels for those below the NLW, and a proportion of your other staff (i.e. on a selective basis) | 9.56% 50 |
| not increase salary levels: they're all above the NLW anyway | 16.06% 84 |
| Other (please specify) | 28.49% 149 |
| Total | 523 |

Q10 10. Will you/have you put you fees up in 2016?

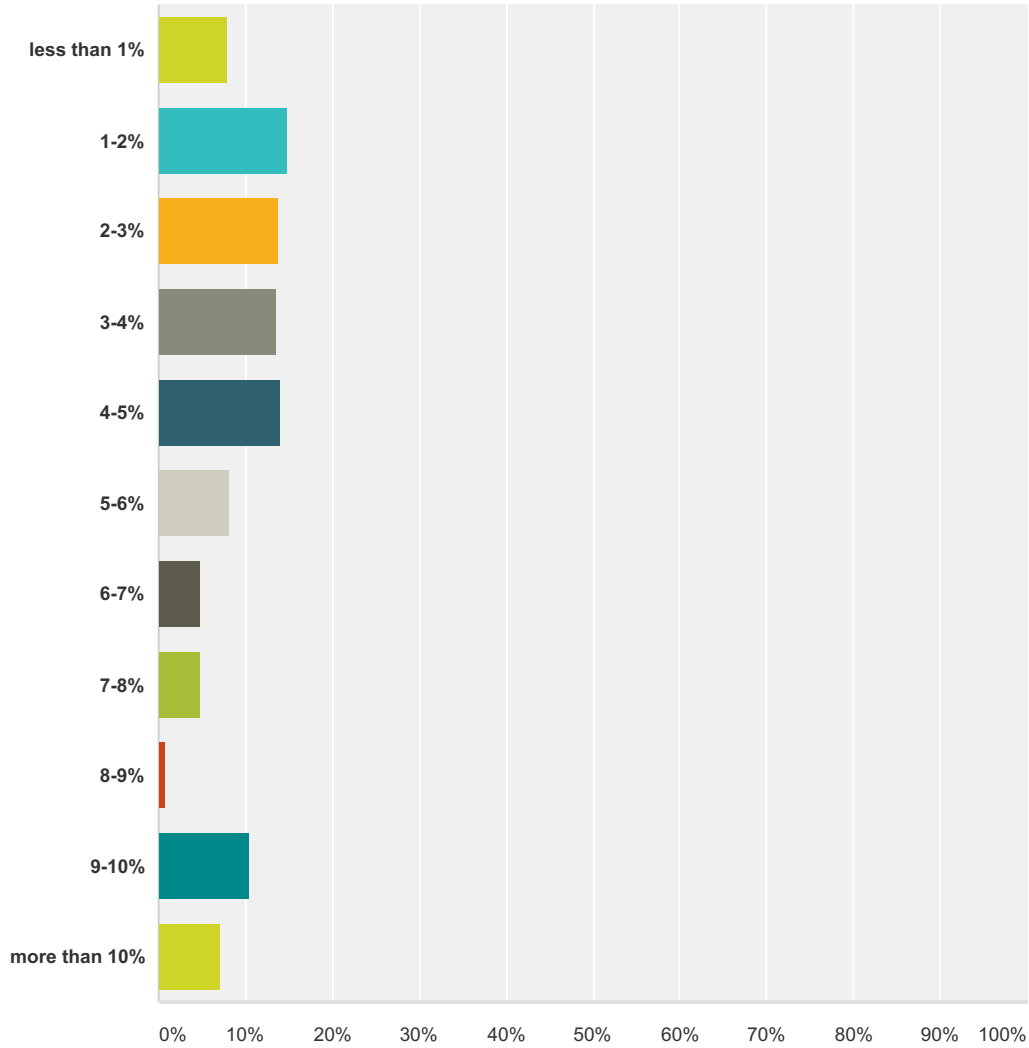
Answered: 523 Skipped: 0



| Answer Choices | Responses | |
|--------------------------------|-----------|------------|
| Yes (please go to question 11) | 71.70% | 375 |
| No (please go to question 12) | 28.30% | 148 |
| Total | | 523 |

Q11 11. How much do you estimate you will put fees up by? (if an incremental increase, please give the overall figure for the year. Please give an average if you are chain)

Answered: 393 Skipped: 130

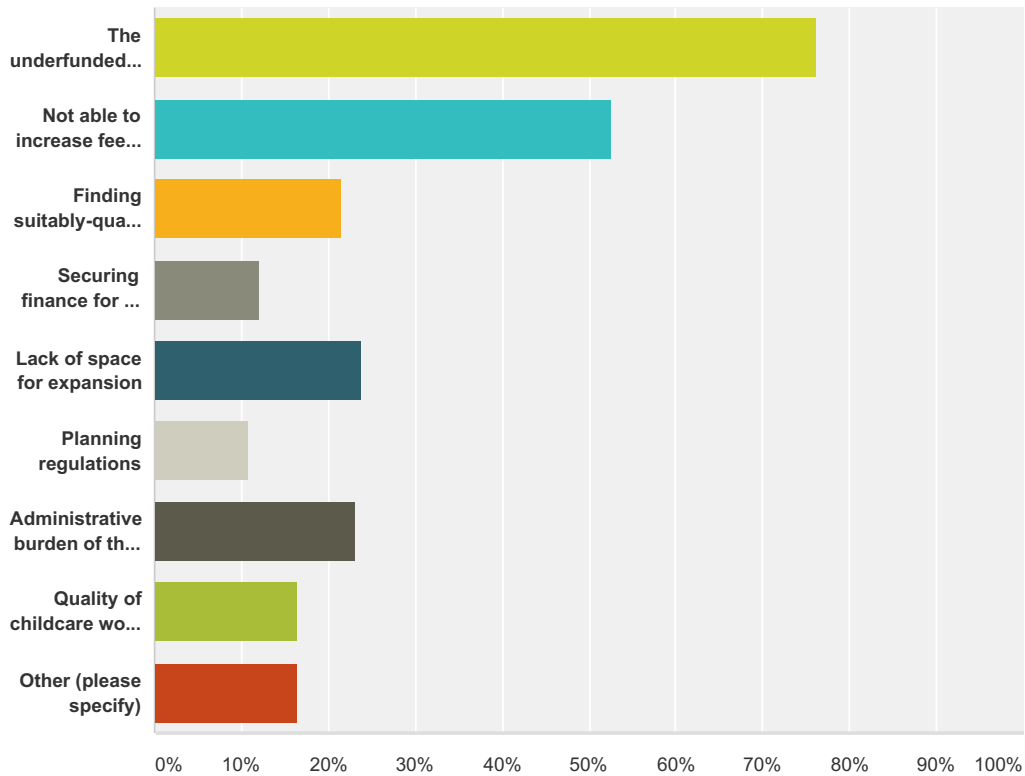


| Answer Choices | Responses | Count |
|----------------|-----------|-------|
| less than 1% | 7.89% | 31 |
| 1-2% | 14.76% | 58 |
| 2-3% | 13.74% | 54 |
| 3-4% | 13.49% | 53 |
| 4-5% | 13.99% | 55 |
| 5-6% | 8.14% | 32 |
| 6-7% | 4.83% | 19 |

| | | |
|---------------|--------|------------|
| 7-8% | 4.83% | 19 |
| 8-9% | 0.76% | 3 |
| 9-10% | 10.43% | 41 |
| more than 10% | 7.12% | 28 |
| Total | | 393 |

Q12 12. What are the key barriers to your offering the 30 hours (please tick all that apply)

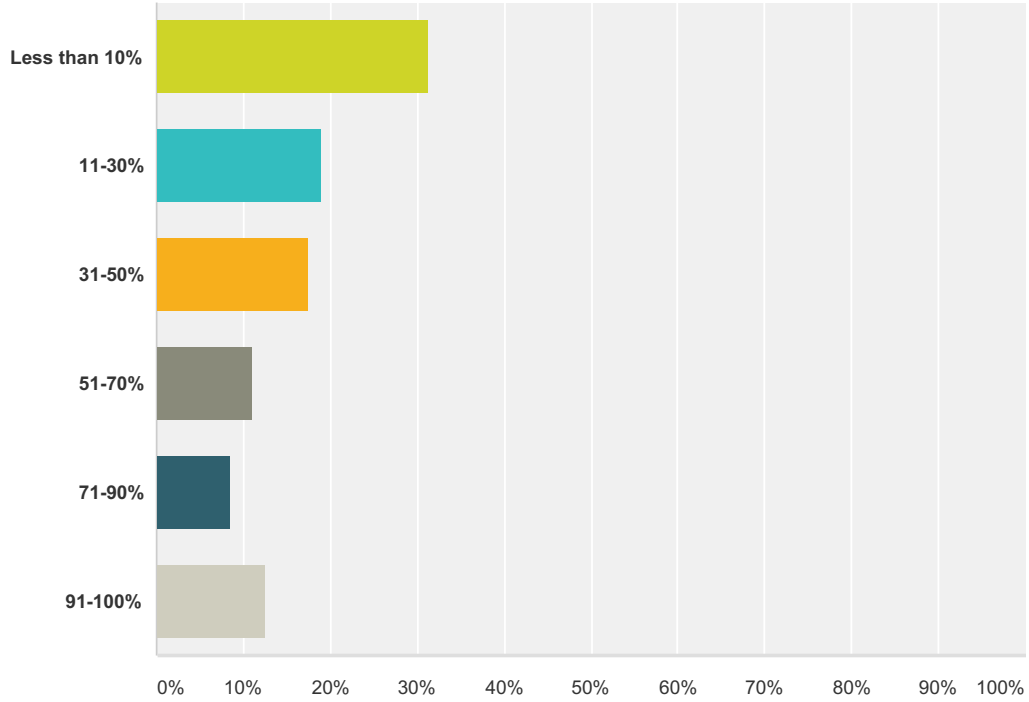
Answered: 479 Skipped: 44



| Answer Choices | Responses |
|---|------------|
| The underfunded rate received combined with a reduced ability to charge for surplus hours | 76.20% 365 |
| Not able to increase fees enough to recoup lost income | 52.61% 252 |
| Finding suitably-qualified staff | 21.50% 103 |
| Securing finance for any expansion of premises | 12.11% 58 |
| Lack of space for expansion | 23.80% 114 |
| Planning regulations | 10.86% 52 |
| Administrative burden of the 30 hours programme | 23.17% 111 |
| Quality of childcare would be compromised | 16.49% 79 |
| Other (please specify) | 16.49% 79 |
| Total Respondents: 479 | |

Q13 13. What percentage of your parents take more than 15 hours (for 3 and 4 year olds) presently? (please estimate)

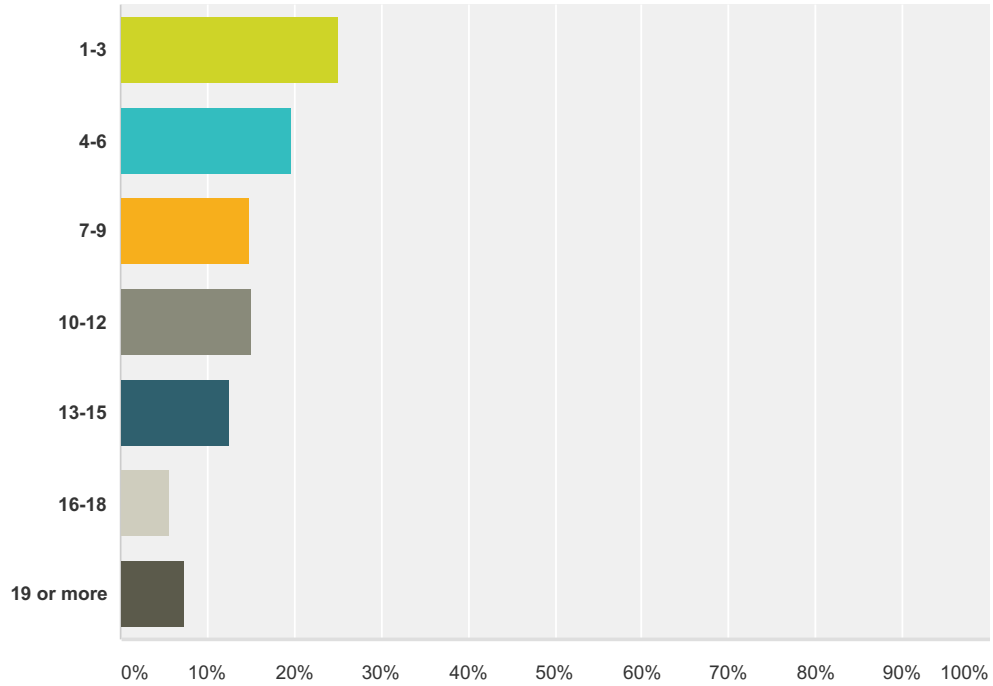
Answered: 479 Skipped: 44



| Answer Choices | Responses |
|----------------|------------|
| Less than 10% | 31.32% 150 |
| 11-30% | 19.00% 91 |
| 31-50% | 17.54% 84 |
| 51-70% | 11.06% 53 |
| 71-90% | 8.56% 41 |
| 91-100% | 12.53% 60 |
| Total | 479 |

Q14 14. How many hours on average do parents' take extra (as an average for all parents)? (please estimate)

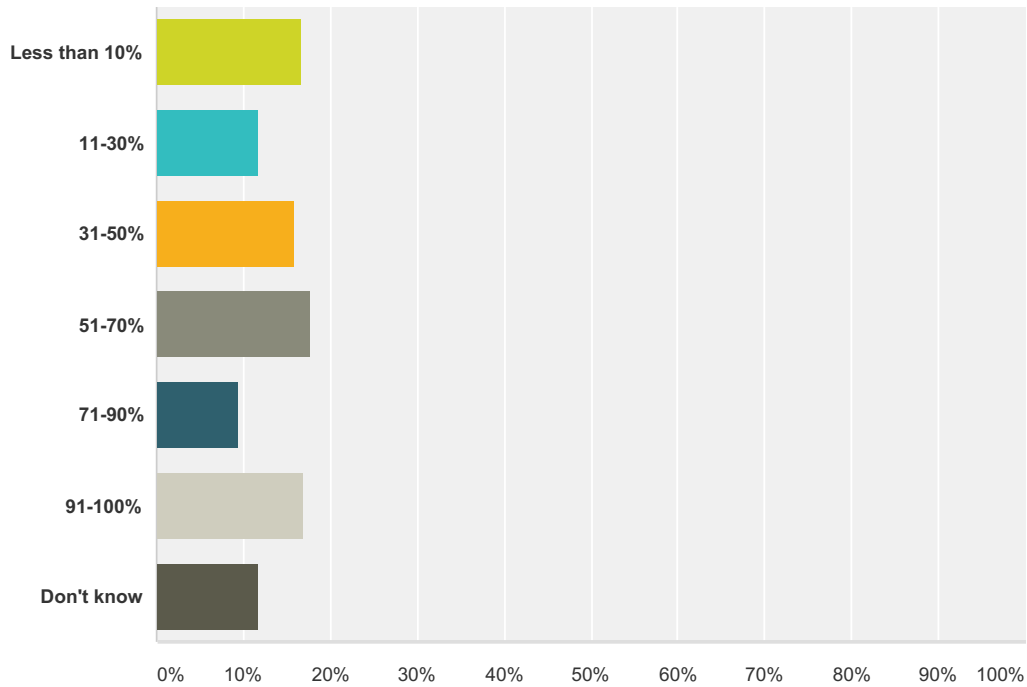
Answered: 479 Skipped: 44



| Answer Choices | Responses |
|----------------|------------|
| 1-3 | 25.05% 120 |
| 4-6 | 19.62% 94 |
| 7-9 | 14.82% 71 |
| 10-12 | 15.03% 72 |
| 13-15 | 12.53% 60 |
| 16-18 | 5.64% 27 |
| 19 or more | 7.31% 35 |
| Total | 479 |

Q15 15. What proportion of your existing parents qualify for the 30 hours? (please estimate)(note: qualifying conditions are that both parents are working, or the sole parent is working in a lone parent family; and each parent earns, on average, a weekly minimum equivalent to 16 hours at national minimum wage or national living wage, and less than £100,000 per year)

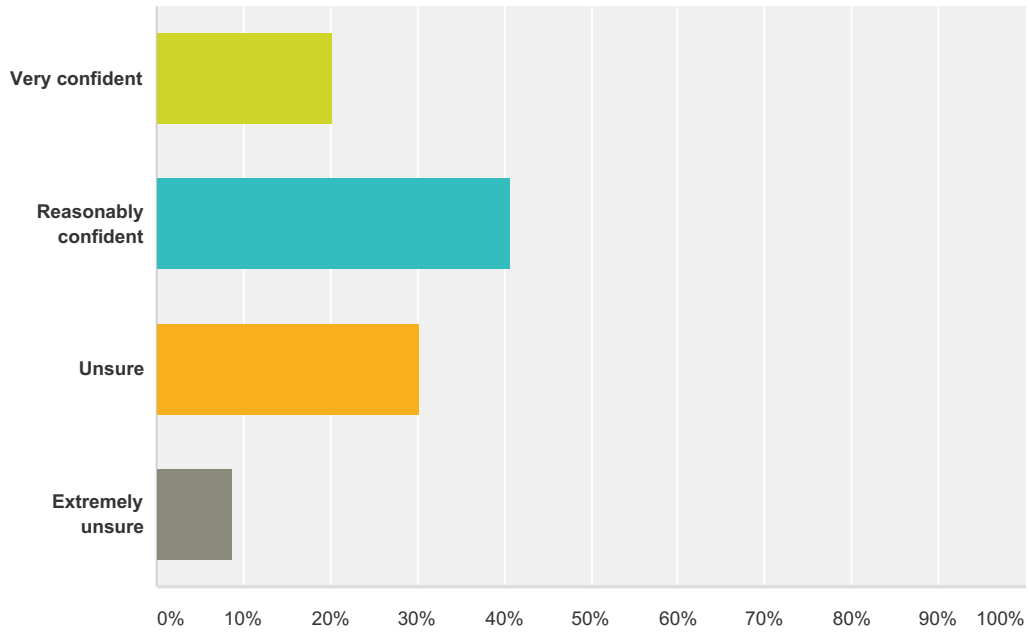
Answered: 479 Skipped: 44



| Answer Choices | Responses |
|----------------|------------|
| Less than 10% | 16.70% 80 |
| 11-30% | 11.69% 56 |
| 31-50% | 15.87% 76 |
| 51-70% | 17.75% 85 |
| 71-90% | 9.39% 45 |
| 91-100% | 16.91% 81 |
| Don't know | 11.69% 56 |
| Total | 479 |

Q16 16. How do you feel about your ability/your team's ability to know if parents are eligible for the 30 hours?Note: Parents will apply for the 30 hour entitlement through an application system being developed by HMRC

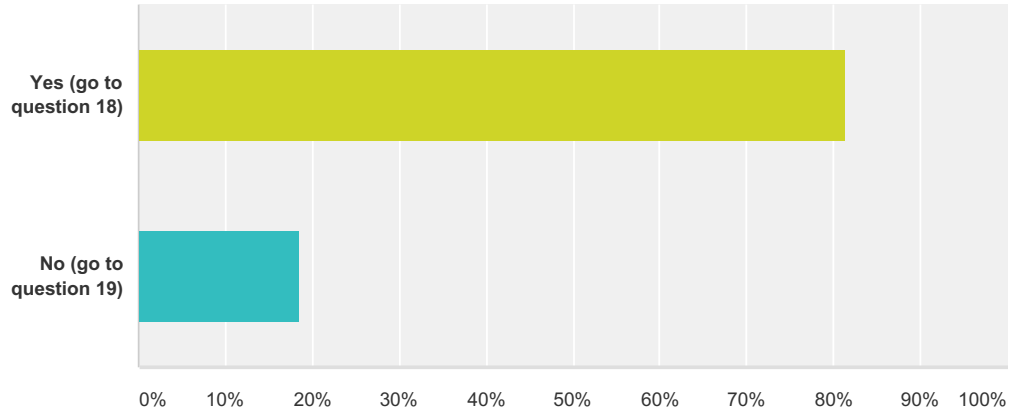
Answered: 479 Skipped: 44



| Answer Choices | Responses |
|----------------------|------------|
| Very confident | 20.25% 97 |
| Reasonably confident | 40.71% 195 |
| Unsure | 30.27% 145 |
| Extremely unsure | 8.77% 42 |
| Total | 479 |

Q17 17. If you offered the 30 hours, might you have to make cuts/changes to services to pay for it?

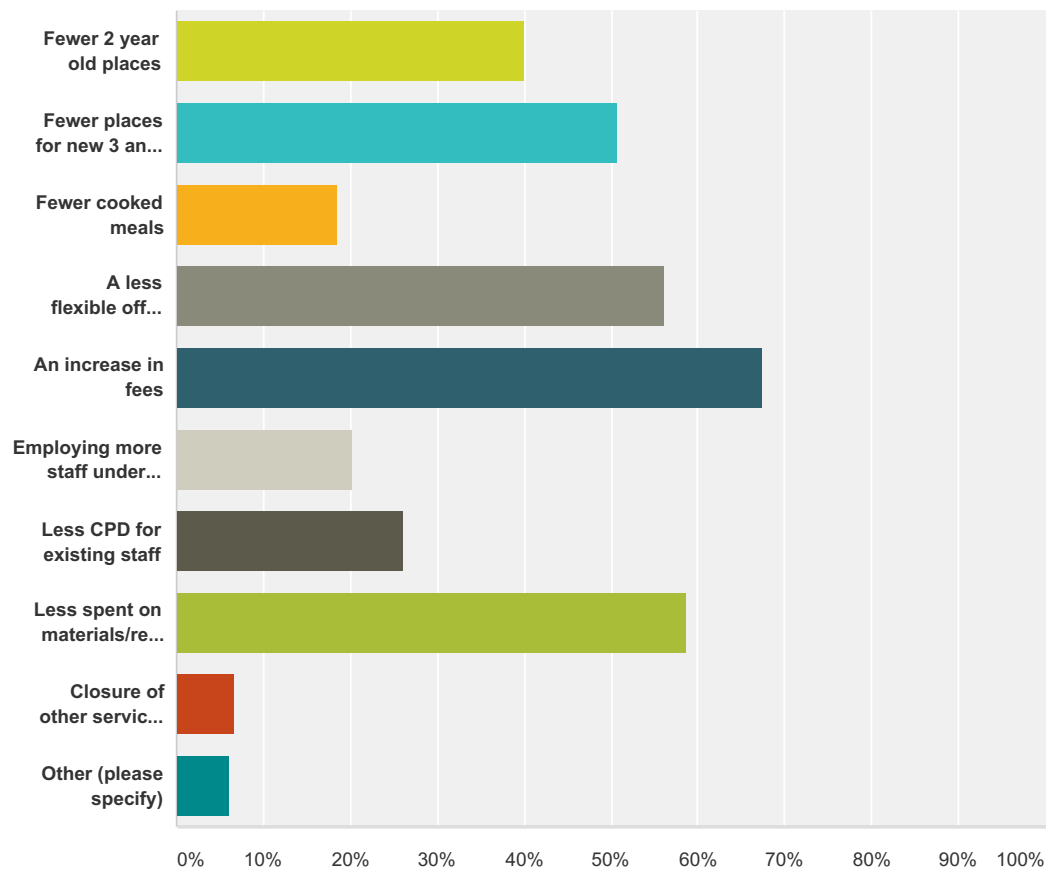
Answered: 479 Skipped: 44



| Answer Choices | Responses |
|-------------------------|------------|
| Yes (go to question 18) | 81.42% 390 |
| No (go to question 19) | 18.58% 89 |
| Total | 479 |

Q18 18. If yes, which would be most likely (please tick all that apply)

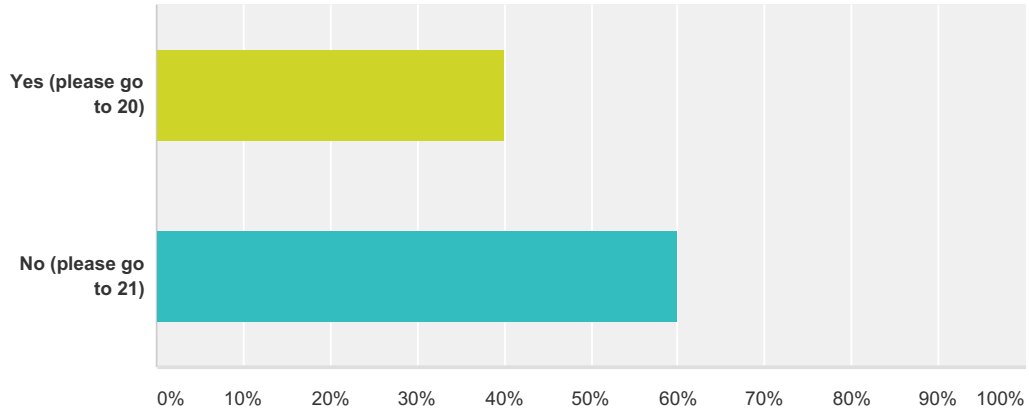
Answered: 399 Skipped: 124



| Answer Choices | Responses |
|---|------------|
| Fewer 2 year old places | 40.10% 160 |
| Fewer places for new 3 and 4 year olds | 50.63% 202 |
| Fewer cooked meals | 18.55% 74 |
| A less flexible offer – e.g. using hours in blocks or on quiet days | 56.14% 224 |
| An increase in fees | 67.42% 269 |
| Employing more staff under level 3 | 20.30% 81 |
| Less CPD for existing staff | 26.07% 104 |
| Less spent on materials/resources | 58.65% 234 |
| Closure of other services e.g. after school clubs | 6.77% 27 |
| Other (please specify) | 6.02% 24 |
| Total Respondents: 399 | |

Q19 19. The government is encouraging settings to make more use of flexible staff contracts. Is this something you would consider/ have considered?

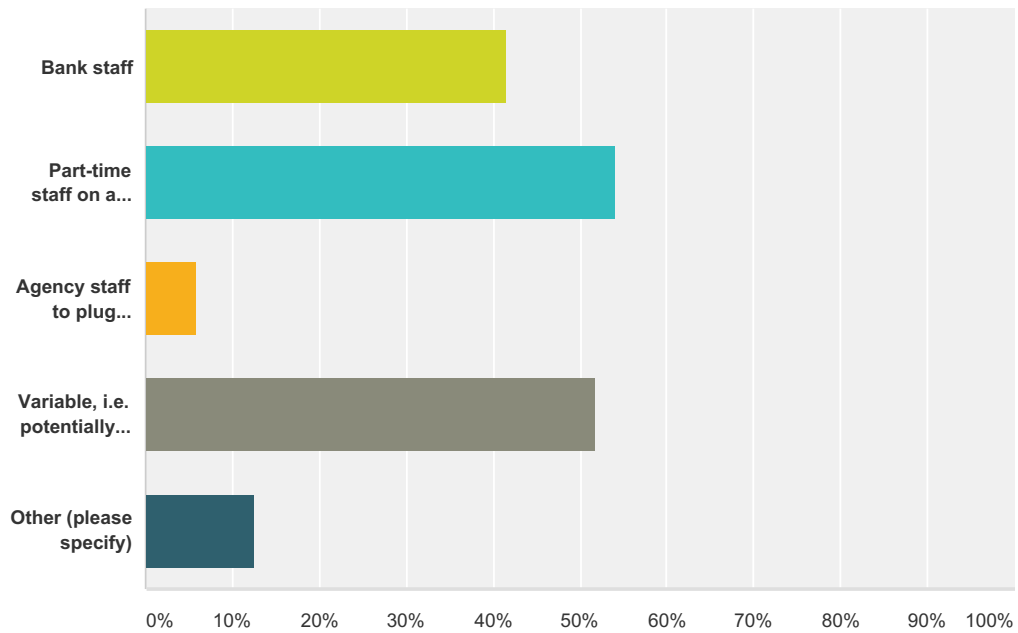
Answered: 479 Skipped: 44



| Answer Choices | Responses | |
|-----------------------|-----------|------------|
| Yes (please go to 20) | 40.08% | 192 |
| No (please go to 21) | 59.92% | 287 |
| Total | | 479 |

Q20 20. If yes, what type? (please tick all that apply)

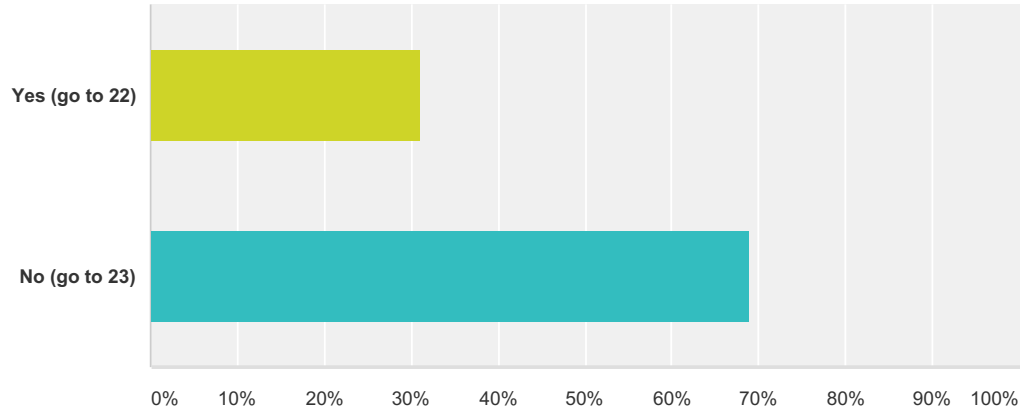
Answered: 209 Skipped: 314



| Answer Choices | Responses |
|---|------------|
| Bank staff | 41.63% 87 |
| Part-time staff on a regular weekly wage | 54.07% 113 |
| Agency staff to plug specific gaps (e.g. holiday) | 5.74% 12 |
| Variable, i.e. potentially zero hours | 51.67% 108 |
| Other (please specify) | 12.44% 26 |
| Total Respondents: 209 | |

Q21 21. The government has said that there are savings to be made by ensuring staff numbers align more closely to the legal ratios. Is this something you would consider?

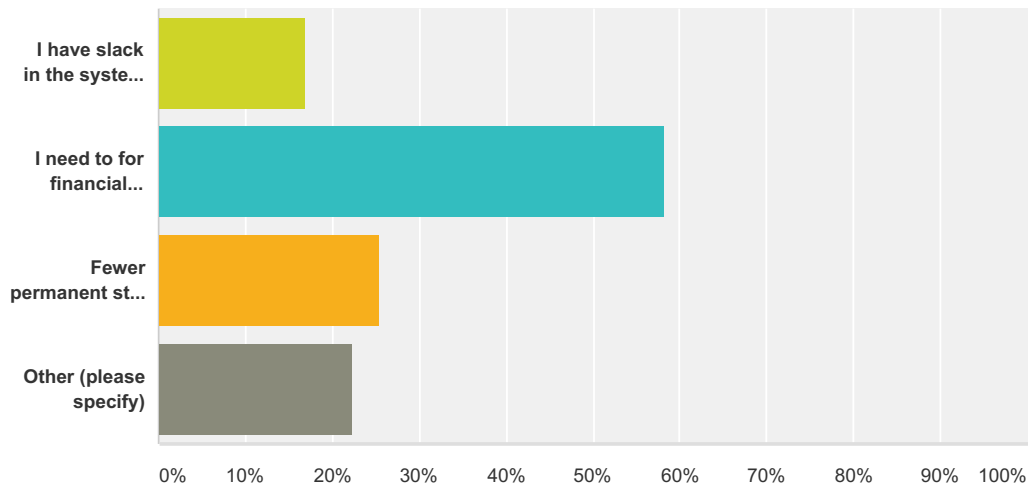
Answered: 479 Skipped: 44



| Answer Choices | Responses | |
|----------------|-----------|------------|
| Yes (go to 22) | 31.11% | 149 |
| No (go to 23) | 68.89% | 330 |
| Total | | 479 |

Q22 22. If yes, is this because (please tick all that apply)

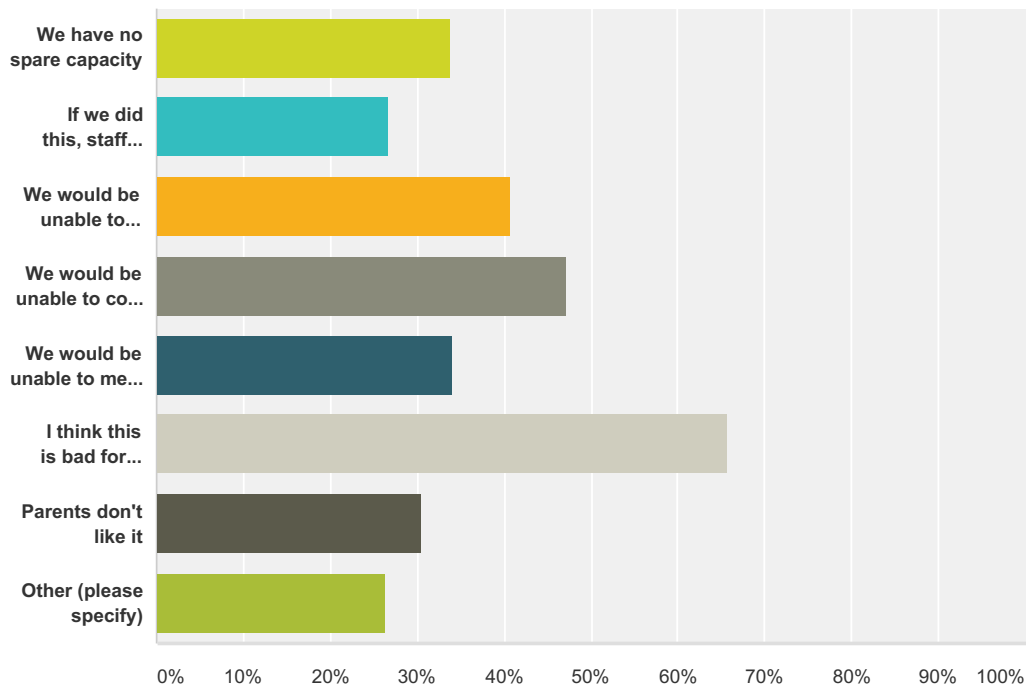
Answered: 165 Skipped: 358



| Answer Choices | Responses | |
|--|-----------|----|
| I have slack in the system available | 16.97% | 28 |
| I need to for financial reasons | 58.18% | 96 |
| Fewer permanent staff and more flexible contracts is going to be the way forward | 25.45% | 42 |
| Other (please specify) | 22.42% | 37 |
| Total Respondents: 165 | | |

Q23 23. If no, is this because (please tick all that apply)

Answered: 347 Skipped: 176



| Answer Choices | Responses |
|---|------------|
| We have no spare capacity | 33.72% 117 |
| If we did this, staff would be locked in the room and unable to leave | 26.80% 93 |
| We would be unable to attend training | 40.63% 141 |
| We would be unable to cover holiday and sick | 47.26% 164 |
| We would be unable to meet colleagues in other services to share information (e.g. for TAC) | 34.01% 118 |
| I think this is bad for quality of practice | 65.71% 228 |
| Parents don't like it | 30.55% 106 |
| Other (please specify) | 26.22% 91 |
| Total Respondents: 347 | |